

# COGNOS<sup>(R)</sup> ENTERPRISE BI SERIES

## COGNOS POWERPLAY<sup>(R)</sup>

POWERPLAY WEB USER'S  
GUIDE

**COGNOS**<sup>®</sup>  
THE NEXT LEVEL  
OF PERFORMANCE<sup>™</sup>



## Product Information

This document applies to Cognos PowerPlay<sup>(R)</sup> Web Version 7.3 and may also apply to subsequent releases. To check for newer versions of this document, visit the Cognos support Web site (<http://support.cognos.com>).

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# Welcome

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## What Is in This Document

The PowerPlay Web documentation is HTML-based help that shows you how to view, explore, format, and distribute PowerPlay reports using your Web browser. You need have only a Web browser and Adobe Acrobat Reader installed on your computer to open data from PowerPlay Enterprise Server.

Use Cognos PowerPlay Web to:

- view reports and multidimensional cube data
- add calculations to your data
- choose from a variety of graphical display formats
- create your own reports
- send email notification of changes occurring in your data
- publish your reports to the portal for your colleagues to view

From within the PowerPlay Web online help, you can click the following link to open a printable version of this document (PDF).

## What You Need to Know to Use This Product Effectively

If you are new to PowerPlay Web, we recommend that you take the PowerPlay Web Quick Tour.

## Other Information

Our documentation includes user guides, tutorial guides, reference books, and other pieces to meet the needs of our varied audience.

All information is available in online help. Online help is available from the Help button in a Web browser, or the Help menu and Help button in Windows products.

The information in each online help system is available in online book format (PDF). However, the information from a given help system may be divided into more than one online book. Use online books when you want a printed version of a document or when you want to search the whole document. You can print selected pages, a section, or the whole book. Cognos grants you a non-exclusive, non-transferable license to use, copy, and reproduce the copyright materials, in printed or electronic format, solely for the purpose of providing internal training on, operating, and maintaining the Cognos software.

In Windows products, online books are available from the Windows Start menu (Cognos) and from the product Help menu (Books for Printing). In a Web browser, online books may be available from the Welcome section of the help system, or from within the Cognos Web portal. All online books are available on the Cognos documentation CD.

You can also read the product readme files and the installation guides directly from the Cognos product CDs.

Only the installation guides are available as printed documents.

## Questions or Comments?

For additional technical information about using PowerPlay Web, visit the Cognos support Web site (<http://support.cognos.com>).

Welcome

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# Chapter 1: Get Started

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Use PowerPlay Web to view and explore reports using your Web browser. Within PowerPlay Web, you can open reports in PowerPlay Web Viewer in PDF format or PowerPlay Web Explorer in an interactive format, depending on how the report was created. These reports can be opened from the Cognos portal (either Upfront or Cognos Connection) and from the PowerPlay Web Table of Contents. Upfront is the Web interface for Cognos enterprise applications and other Web data. Cognos Connection is the portal to Cognos ReportNet, the Web-based reporting solution.

For information about using Upfront, see the Upfront online help. For information about Cognos ReportNet, see the Cognos ReportNet *User Guide*.

Reports created in other PowerPlay client applications open in PowerPlay Web Viewer and give you a fast way to view and analyze data. With PowerPlay Web Viewer, you can see information that is important to you. Then, you can either print the information or further explore the report by opening it in PowerPlay Web Explorer.

Other reports or cubes that are Web accessible open in PowerPlay Web Explorer so you can explore the data, change the information in the report, add calculations, and change how the information appears. You can also save the results for other PowerPlay Web users.

## The PowerPlay Web Table of Contents



The PowerPlay Web Table of Contents lists the cubes and reports that you can open. When you click a report, identified by the report icon, PowerPlay Web Viewer opens and shows a report that was created in another PowerPlay client application. You can print the report and you can also open it in PowerPlay Web Explorer if you want to explore the report further. When you click a cube, identified by the cube icon, PowerPlay Web Explorer opens; you can explore the data by choosing dimensions, performing calculations, and other activities.



Reports and cubes can also be organized into folders in the PowerPlay Web Table of Contents by your administrator.

If your administrator has made the PowerPlay Web Table of Contents available to you, you access it from your Web browser. If you are opening reports from your Cognos portal (either Upfront or Cognos Connection), you will have a different URL and you will not see the PowerPlay Web Table of Contents. For more information about opening items from Upfront, see the Upfront online help. For information about Cognos ReportNet, see the Cognos ReportNet *User Guide*.

## Open a Report

Reports you open are created by report authors using another PowerPlay client application. The reports can be published to your Cognos portal and added to PowerPlay Enterprise Server by your administrator.

### Steps



- From the PowerPlay Web Table of Contents, click an entry identified by the report icon. The reports opens in PowerPlay Web Viewer (p. 11) in PDF format. If the report author has defined prompts for the report, the Modify Reports page (p. 12) opens so you can select the information you want to see in the report.

## Open a Cube

A cube is a multidimensional data source that contains measures (data) organized into dimensions. Cubes are created by your administrator and added to PowerPlay Enterprise Server or your Cognos portal.

### Steps



- From the PowerPlay Web Table of Contents, click an entry identified by the cube icon. The cube opens in PowerPlay Web Explorer (p. 18) and shows the first two dimensions as the rows and columns.

## Set Preferences

You can specify regional settings, such as a time zone and currency, and select languages if your PowerPlay administrator has enabled these settings.

### Select Regional Settings

You can format the numeric values of your query results using the settings of a specific country or region. For example, some regions of Europe use a period (.) as the thousands separator. The Locale box contains many different regions. If the region you want is not in the list, your PowerPlay administrator can add it for you. The availability of this feature and the individual regions shown in the Locale box are controlled by your PowerPlay administrator.

**Note:** PowerPlay Web uses a data format configuration file named cerlocale.xml. For more information, see "[Default Data Formats](#)" (p. 8).

### Steps

1. From the PowerPlay Web Table of Contents, click the Preferences tab.



If you opened a cube or report from the PowerPlay Web Table of Contents, you can click the Return to Source button to go to the Table of Contents page. If you opened a report from Upfront, contact your administrator.

2. In the Locale box, select the region you want to use.

### Select a Language

You can select the language to use in the PowerPlay Web interface. This selection overrides the language specified in your Web browser. When you change your selection, all elements change, including the help.

For information about setting language preferences, see the help for your Web browser.

### Steps

1. From the PowerPlay Web Table of Contents, click the Preferences tab.



If you opened a cube or report from the PowerPlay Web Table of Contents, you can click the Return to Source button to go to the Table of Contents page. If you opened a report from Upfront, contact your administrator.

2. In the Language box, select the language you want to use.

### Default Data Formats

Data formats depend on the locale configuration settings for your Cognos Series 7 Version 3 product. By default, Cognos Series 7 Version 3 server products and Cognos Impromptu use a data format configuration file named cerlocale.xml. Cognos Architect, Cognos Visualizer, Cognos PowerPlay for Windows, and Cognos Transformer use Windows Regional Settings for locale settings and data format information. However, these products can also be configured to use the data format configuration file.

Some default formats in the cerlocale.xml file are different from the defaults in previous Series 7 releases. You may notice minor changes to some data formats when you open a report that was created using a previous version of your Cognos product. Depending on the nature of the change, you may need to modify the format of the report data item and re-save the report, or modify the setting in the data format configuration file. For example, you may need to modify the report column widths or font sizes.

The following are some examples of changes to data formats.

| <b>Format</b>   | <b>Previous Series 7 format</b> | <b>Series 7 Version 3 format</b> |
|-----------------|---------------------------------|----------------------------------|
| Short date      | 30.03.04 or 30/03/04            | 30.03.2004 or 30/03/2004         |
| Negative number | 1.1-                            | -1.1                             |
| Time            | 06:34                           | 6:34                             |

If your data formats changed and you prefer the data formats from the previous release, you can run an upgrade tool to copy the data format information from the locale.tab file in previous releases to the cerlocale.xml file. If you want to use only some data format information from a previous release, you must edit the cerlocale.xml file to make the changes.

For information about managing data formats, copying data format information, or editing the data format configuration file, see the Configuration Manager *User Guide*, or contact your administrator.



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# Chapter 2: PowerPlay Web Viewer

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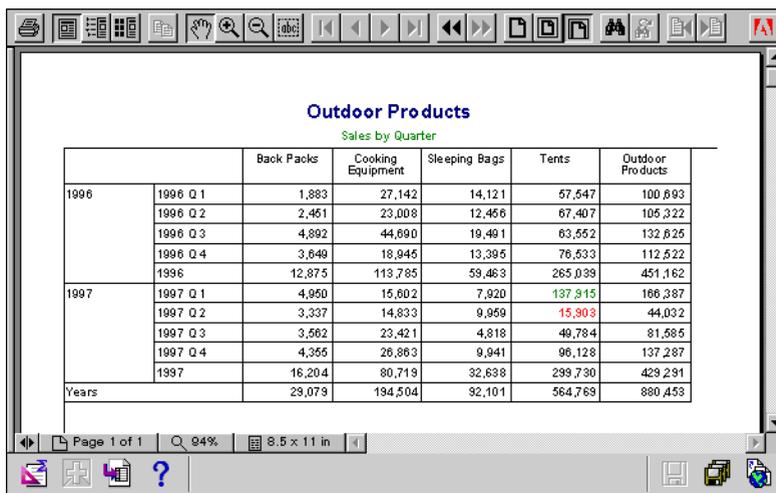
PowerPlay Web Viewer allows you to view and analyze reports created by report authors in PowerPlay for Windows. With high resolution formatting, PowerPlay Web Viewer provides high quality reports on the Web.

Depending how the report was published, you can customize the report to show the information you want to see in PowerPlay Web Viewer. Prompts can be added by the report author when they publish the report to the portal. Prompts allow report consumers to select dimensions and filters, and change other settings in the report such as currency, long or short names, and row and column alignment at the time they view the report.

You can either print the information or open the report in PowerPlay Web Explorer if you want to explore the report further.

## The PowerPlay Web Viewer Interface

Reports appear as PDF files in the Adobe Acrobat Reader in your Web browser, as shown below, or in a separate window, depending on how the reader was installed. You can use any of the available Adobe Acrobat Reader commands to view and print (p. 67) the report.



The screenshot shows the Adobe Acrobat Reader interface with a report titled "Outdoor Products" displayed. The report content includes a table of sales data by quarter for 1996 and 1997. The table has columns for "Back Packs", "Cooking Equipment", "Sleeping Bags", "Tents", and "Outdoor Products". The 1997 Q2 value for "Outdoor Products" is highlighted in red.

|       |          | Back Packs | Cooking Equipment | Sleeping Bags | Tents   | Outdoor Products |
|-------|----------|------------|-------------------|---------------|---------|------------------|
| 1996  | 1996 Q 1 | 1,883      | 27,142            | 14,121        | 57,547  | 100,693          |
|       | 1996 Q 2 | 2,451      | 23,008            | 12,466        | 67,407  | 105,322          |
|       | 1996 Q 3 | 4,892      | 44,690            | 19,491        | 63,552  | 132,625          |
|       | 1996 Q 4 | 3,649      | 18,946            | 13,395        | 76,533  | 112,522          |
| 1996  |          | 12,875     | 113,785           | 59,463        | 265,039 | 451,162          |
| 1997  | 1997 Q 1 | 4,950      | 15,602            | 7,820         | 137,915 | 166,387          |
|       | 1997 Q 2 | 3,337      | 14,833            | 9,959         | 15,903  | 44,032           |
|       | 1997 Q 3 | 3,562      | 23,421            | 4,818         | 49,784  | 81,585           |
|       | 1997 Q 4 | 4,355      | 26,863            | 9,941         | 96,128  | 137,287          |
| 1997  |          | 16,204     | 80,719            | 32,638        | 299,730 | 429,291          |
| Years |          | 29,079     | 194,504           | 92,101        | 564,769 | 880,453          |

The PowerPlay Web Viewer commands are available by using the buttons on the toolbar at the bottom of your Web browser. If you want to open other reports, you can click the Return to Source button to take you back to the portal or the PowerPlay Web Table of Contents. For more information about saving reports, see "[Publish Reports to the Portal](#)" (p. 61) or "[Replace Reports in the Portal](#)" (p. 61).



Reports created in other PowerPlay client applications may include different categories of information by using layers. In PowerPlay Web Viewer, each layer in a report appears on a separate page. To change layers, scroll to the next page in the report. You can show layer views when you export the report in PDF format (p. 65). As well, when enabled by your administrator, you can view explanations about each category in the report (p. 38) or drill through the report to reveal more information (p. 39).

## Return to the Filtered HTML View of the Report

You can return directly from the PDF to the filtered HTML view of the report. This makes it easier to switch between PowerPlay Web Viewer and PowerPlay Web Explorer. You can then create the PDF view that you want without having to repeat some steps in your analysis.

### Steps



- Click the Return to Source button in the lower-right corner of the exported PDF report window.

## Change the Report Filters and Settings

Depending on how the report was created, you may be able to choose what information you see when you open the report. For example, the report author has included prompts to let you choose years and products for the report. When you open the report, the Modify Report page appears where you can specify the years and products you want to see in the report. After you make your selections, the report appears with the information you selected.

If you want to change your selections, you can return to the Modify Report page, make your changes, and view the report again. Each time you change the settings, the report is refreshed and the new information is shown. The Modify Report page is only available if the report author has included prompts in the report.

The filters and settings from which you can select are set by the report author. You may not have access to all of the filters and settings described.

- dimensions and filters

Dimensions are a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or markets. Dimensions are represented by the rows and columns in a report. Each dimension appears on the dimension line of the Modify Report page, and you can select the dimensions you want to see in the report. For example, selecting Camping Equipment from the Products menu narrows the scope of the report to the information for that product.

Choose dimensions to change the information in your report. If you choose a dimension associated with the rows or columns in the report, you can drill down and drill up by selecting other categories in the folder.

You can also choose dimensions to filter information in the report. If you choose a dimension that is not associated with the rows or columns in the report, the data in the report changes to reflect the new filter.

The dimension line is shown in the following illustration. The report author settings determine how the dimensions appear in the dimension line.



- row and column content

You can swap the categories that currently appear in one area, such as the column area, with those in another area, such as the row area. For example, you may want products, which appear in the row area, to appear in the column area instead. Swapping the rows and columns allows you to change the perspective of the report or make the report fit better in the display.

- zero suppression

You can suppress unnecessary information such as zeros, missing values that appear as 'na' or zeros, and the result of dividing by zero. For example, if a row contains all zeros, you may want to suppress that row. You can do this for rows, columns, or both.

- short headings  
Headings apply to the category names used in the cube from which the report was created. You can select whether you want to view the long or short headings in your report.
- currency and currency format  
You can set the currency that is used in the report, and how the currency is formatted, if the cube was built with that information. The settings you choose will be used in the report, even if the report was created using another currency.

### Steps



1. From the PowerPlay Web Viewer toolbar, click the Change Report Settings button.

**Tip:** The Modify Report page also appears when you first open the report from the PowerPlay Web Table of Contents or from the portal.

2. Select the information you want in the report, and click OK.



**Tip:** To remove all filters from all dimensions, click the Reset Dimensions button on the dimension line.

## Explore Reports

PowerPlay Web Viewer allows you to view reports created in other PowerPlay client applications. If you want to further explore the data or change the report, you can open the report in PowerPlay Web Explorer.

### Steps



- From the PowerPlay Web Viewer toolbar, click the Explore button.

The report opens in PowerPlay Web Explorer (p. 18) in your Web browser. You can change the report by selecting measures and dimensions, or by drilling down or drilling up to change the focus of the report.

## Accessible Reports

Cognos is committed to assisting people with disabilities, and promotes initiatives that make workplaces and technologies accessible. For example, Cognos Series 7 provides a report-reading solution for accessibility.

Using PowerPlay Web Viewer, you can open PowerPlay Web reports using screen reading technology. When accessibility is enabled in PowerPlay Enterprise - Server Administration, PowerPlay reports are published with markup tags that screen readers can read if the reports are in PDF format.

Using screen reading technology, you have full access to

- the Modify Report page

From the Modify Report page, you can modify the PowerPlay Web Viewer report settings. For information about modifying PowerPlay Web Viewer reports, see "[Change the Report Filters and Settings](#)" (p. 12)

- PowerPlay Web Viewer reports

Although the PowerPlay Web Viewer reports are accessible, the links from within these reports are not. For example, if you click the Explore button in PowerPlay Web Viewer, the report opens in PowerPlay Web Explorer but is not accessible to screen readers.

**Tip:** To return to PowerPlay Web Viewer reports from Web pages that are not accessible to screen reader technology, click the Back button in your Web browser.

## Using the Accessible Modify Report Page

There are a number of ways you can access information and make selections in the Modify Report page. For example, you can use quick access keys to move to a specific area in the page, and then use different key combinations to make selections.

### Quick Access Keys

You can use the quick access keys listed in the table below to move the screen reader to specific areas in the Modify Report page. You will have access to these areas of the Modify Report page only if your PowerPlay Web administrator has made them available to you.

| Quick Access Keys | Description   |
|-------------------|---|
| Alt + M           | Moves the screen reader to the dimension line section.      |
| Alt + Z           | Moves the screen reader to the Options section.             |
| Alt + R           | Moves the screen reader to the Currency and Format section. |
| Alt + O           | Activates the OK button.                                    |
| Alt + C           | Activates the Cancel button.                                |

### Note

- All other accessibility tags conform to the Microsoft standard for accessibility.

### Dimension Line Section

Use the following keys or key combinations to access information and make selections in the dimension line section of the Modify Report page.

| Keys                            | Description  |
|---------------------------------|--|
| Tab                             | Accesses the first control in the dimension line section, or to moves from one drop-down list box to the next. |
| Alt + 1, 2, 3, 4, 5, 6, 7, 8, 9 | Moves to individual drop-down list boxes.  |
| Alt + 0                         | Moves to the last drop-down list box.  |
| Shift + Tab                     | Moves backward among the drop-down list boxes.   |
| Alt + Down Arrow                | Expands the items in a drop-down list box.   |
| Down Arrow                      | Moves down through the items in a drop-down list box.  |
| Up Arrow                        | Moves up through the items in a drop-down list box.  |
| Enter                           | Makes a selection.   |

### Note

- Each time the Enter key is pressed to make a selection, the Modify Report page refreshes and the screen reader returns to the beginning of the page.

### Options Section

Use the following keys or key combinations to access information and make selections in the Options section of the Modify Report page.

| Keys             | Description  |
|------------------|--|
| Tab              | Accesses the first control in the Options section, or to moves from one Option control to the next.  |
| Space Bar        | Toggles the state of the check box.  |
| Alt + Down Arrow | Expands the items in a drop-down list box.   |
| Down Arrow       | Moves down through the items in a drop-down list box.  |
| Up Arrow         | Moves up through the items in a drop-down list box.  |
| Enter            | Makes a selection.   |
|                  | <b>Note</b>  |
|                  | <ul style="list-style-type: none"> <li>Each time the Enter key is pressed to make a selection, the Modify Report page refreshes and the screen reader returns to the beginning of the page.</li> </ul> |

### Currency and Format Section

Use the following keys or key combinations to access information and make selections in the Currency and Format section of the Modify Report page.

| Keys             | Description  |
|------------------|--|
| Tab              | Accesses the first control in the Options section, or to moves from one Option control to the next.  |
| Space Bar        | Toggles the state of the check box.  |
| Alt + Down Arrow | Expands the items in a drop-down list box.   |
| Down Arrow       | Moves down through the items in a drop-down list box.  |
| Up Arrow         | Moves up through the items in a drop-down list box.  |
| Enter            | Makes a selection.   |
|                  | <b>Note</b>  |
|                  | <ul style="list-style-type: none"> <li>Each time the Enter key is pressed to make a selection, the Modify Report page refreshes and the screen reader returns to the beginning of the page.</li> </ul> |

## Using the Accessible PowerPlay Web Viewer Report Page

There are a number of ways you can access information and make selections in the PowerPlay Web Viewer report page. For example, you can use quick access keys to move to a specific area in the page, and then use different key combinations to make selections.

### Quick Access Keys

You can use the quick access keys listed in the table below to move the screen reader to specific areas in the PowerPlay Web Viewer report page. You will have access to these areas only if your PowerPlay Web administrator has made them available to you.

| <b>Quick Access Keys</b> | <b>Description</b>  |
|--------------------------|---|
| Alt + Y                  | Moves to the toolbar.<br><b>Note</b> <ul style="list-style-type: none"><li>To use this quick access key, your Web browser must be the active window (not Adobe Acrobat Reader). To toggle between your Web browser and Adobe Acrobat Reader, press <b>Ctrl + Tab</b>.</li></ul> |

### PowerPlay Web Viewer Report Page

Use the following keys or key combinations to access information in the PowerPlay Web Viewer report page.

| <b>Keys</b> | <b>Description</b>  |
|-------------|---|
| Tab         | Accesses the first control in the report, or moves from one report control to the next. |

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# Chapter 3: PowerPlay Web Explorer

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PowerPlay Web Explorer gives you a multidimensional approach to business analysis. It brings together the key dimensions of your business and lets you explore any combination of data: up, down, and across the critical dimensions. You can look at the impact that each area of your business has on overall results and compare that with other dimensions as you explore further. For example, you can examine sales in South America during 1998, then filter your analysis for a specific product line and a specific sales channel.

PowerPlay Web uses multidimensional data sources called cubes. A cube structures information so that you can explore the interactions between different dimensions of your business. For example, a Sales cube might structure information into dimensions such as Product Line, Sales Representatives, Channels, and Locations.

Your PowerPlay Web administrator creates and publishes the cubes that you use.

From your Web browser, you can

- explore information, either one dimension at a time or using multiple levels from the same or different dimensions (these are called nested categories)
- compare data using quantitative measures such as revenue and profit margin
- add your own calculations to the results
- show information as actual values, as percentages, or as different currencies
- filter data
- suppress, highlight, and sort values
- choose the type of display, such as crosstab, pie chart, or bar chart, and the amount of data shown
- swap rows and columns, limit the number of rows and columns in the display, reorder the measures for your data
- drill down to lower-level categories
- drill through to details in Cognos Query, Impromptu Web Reports, Cognos ReportNet, or another PowerPlay cube
- send a notification of a defined event occurring in your data
- publish, export, print, or bookmark reports

## The PowerPlay Web Explorer Interface

When you open a cube in PowerPlay Web Explorer, the data appears in one of these interfaces:

- **Generic interface**  
The Generic interface is based on a generic HTML style and is recommended if you use a dial-in Web connection or are accessing larger cubes. This interface is available in all Web browsers.
- **Enhanced interface**  
The Enhanced interface is based on enhanced Web Technology support and is available if you use Internet Explorer 5.5 or higher, or Netscape 7.1 (Windows only), as your Web browser.

Your PowerPlay Web administrator establishes the interface setting for your PowerPlay Web Explorer reports.

## PowerPlay Reports

PowerPlay Web Explorer lets you view and work with cube data in a Web browser. A PowerPlay report shows the query results generated in HTML format by the PowerPlay server. A report contains

- a dimension line that you use to filter the data from each dimension in the cube
- a display, which shows the data from the cube
- a dimension viewer that shows the hierarchical structure of the data

You can also use the dimension viewer to filter the data from each dimension in the cube.

- a display toolbar that you use to select different displays, apply suppression, and export or save your report

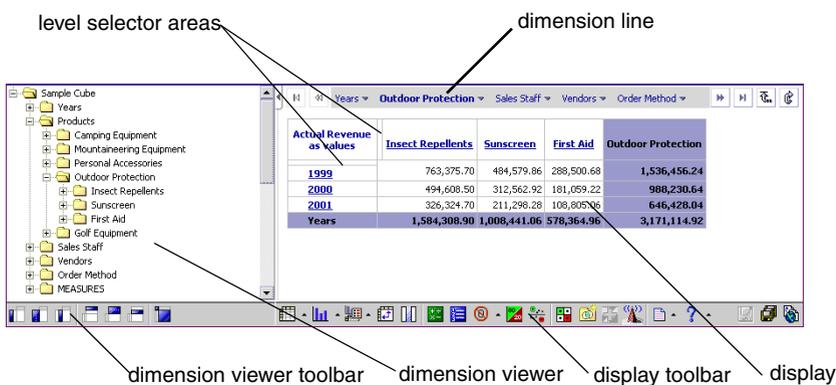
Your administrator decides which buttons are available to you in the PowerPlay Web toolbar. No PowerPlay Web Explorer controls appear in the menus and toolbars of your Web browser.

- if enabled, a dimension viewer toolbar

If you use Netscape as your Web Browser, the dimension viewer toolbar is enabled by default.

The dimension line appears at the top, the display is in the middle, and the toolbars are across the bottom of your Web browser window. The dimension viewer appears on the left of your Web browser window.

The PowerPlay Web Enhanced interface is shown in the following illustration.



## Exploring Reports

When you explore reports, there are a number of ways you can view information and perform actions on the data. For example, you can drag and drop and right-click throughout the interface.

### Dimension Viewer

The dimension viewer shows a full tree view of the dimensions and measures in a cube. This view helps you understand the data structure and find the items you require. In the dimension viewer, you see an organized view of all dimensions, levels, and categories in a selected cube in a Windows folder-like presentation. You can drag items from the dimension viewer to add categories to rows and columns, perform filtering, and reorganize the dimension line on either a crosstab or a chart. You can also right-click the categories to perform actions on the data.

In the dimension viewer, the following actions can be accomplished using drag and drop or right-clicking:

- change a row or column
- change a measure or add new measures to your report
- create a nested crosstab or chart
- filter



If you prefer to use the full browser window for the display, you can close the dimension viewer by clicking the Hide/Show Dimension Viewer button.

### Dimension Line

You can use the dimension line to add categories to rows and columns, and filter the data in the cube. You can drag items from the dimension line to the crosstab or chart, or you can right-click the categories to view information about the data.

### Display

In the PowerPlay Web display, you can right-click to perform actions that are associated with individual data elements. When you right-click the row and column headings, or data cells, the available actions appear in a flyout menu.

### Level Selector Toolbar

You can left-click the row and column level selector areas to open the level selector toolbar. The level selector toolbar contains the following toolbar buttons:



- Expand button  
Expands the category to show the next level of data.



- Delete button  
Deletes the level of data shown.



- Swap Left button  
The selected row category becomes the parent of the nested level.



- Swap Right button  
The selected row category becomes the nested level.



- Swap Up button  
The selected column category becomes the parent of the nested level.



- Swap Down button  
The selected column category becomes the nested level.



- Down a Level button  
The data changes to show the next-lower level of data in the category.



- Up a Level button  
The data changes to show the next-higher level of data in the category.



- Explain button  
Shows an explanation of the information you are exploring.

### Display Toolbar

Many of the controls in the Enhanced interface are available from menus or dialog boxes that you open from the display toolbar.



For example, to open the Calculations dialog box, you would click the Calculation button on the toolbar.

For information about where to find specific controls, see the steps for the action you want to perform.

**Note:** In this document, the display toolbar is referred to as the toolbar.

### Dimension Viewer Toolbar

You can use the dimension viewer toolbar buttons to complete the same tasks as when you drag items from the dimension viewer.

If you use Netscape as your Web Browser, you must use the dimension viewer toolbar for tasks which also can be completed in Internet Explorer using drag-and-drop. When you use Netscape, the dimension viewer toolbar is enabled by default.

For example, to add a category as the nested top level in columns, click the Insert Before the Columns button on the toolbar.



## View a Chart and Table Together

You can improve your presentation and analytical capabilities by viewing a crosstab and a chart together in one browser window. In the split view, both displays use the same data and remain synchronized if you drill or filter in one view.

You can save split views with PDF exports and bookmarks created in PowerPlay Web Explorer. You can also save split views by publishing your report to the portal.

### Steps



1. With the report open, click the Display Options button on the PowerPlay Web toolbar.
2. From the Display Options menu, click Split View.

By default, a bar chart and a crosstab appear. You can use the crosstab and chart flyout menus on the toolbar to change the crosstab or the chart display.

**Tip:** To return to a single view of the data, repeat the previous steps.

## Choose Categories

When you open a new report, the categories from the first two dimensions on the dimension line appear as the rows and columns. To explore the categories from other dimensions, choose categories to replace the current categories or add nested categories ([p. 27](#)) to the report.

A category is a set aspect of your business, represented by a row or column in a crosstab. Your PowerPlay administrator organizes categories into the dimensions of a cube. Each dimension appears as a folder in the dimension viewer, and on the dimension line of your report. For example, the dimensions in a cube may include Years, Locations, Products, and Channels. The intersection of all the categories on the dimension line are calculated to give you the values for your report.

Categories appear as hyperlinks in the report. When you click a category, its child categories replace the categories in the report. When you click a summary category, the parent categories replace the child categories in the report.

You can also add any calculated categories that your PowerPlay Web administrator may have defined in a cube so you can analyze specific combinations of data.

You can choose categories using drag-and-drop or using the dimension viewer toolbar. If you use Netscape as your Web browser, you must use the dimension viewer toolbar to switch categories.

### Steps Using Drag and Drop

1. In the dimension viewer, expand the dimensions to locate the category you want to show in the display.
2. Click the category, and then drag it to the column heading area or the row heading area.

### Steps Using Right-clicking

1. Right-click the category in the dimension viewer.
2. Click either Replace Rows or Replace Columns.

### Steps Using the Dimension Line

1. Click the dimension in the dimension line.
2. Click the category you want to show in the display.

## Steps Using the Dimension Viewer Toolbar

1. If the dimension viewer toolbar does not appear under the dimension viewer, right-click the area under the dimension viewer and click Show Toolbar.
2. In the dimension viewer, expand and then click the category that you want to appear as a row or column on your crosstab.
3. In the dimension viewer toolbar, choose where to add the category you selected to the crosstab.



- To add the category as the nested top level in the columns, click the Insert Before the Columns button.
- To add the category as the nested sublevel in the columns, click the Insert After the Columns button.
- To replace the category in the columns, click the Replace Columns button.
- To add the category as the nested top level in the rows, click the Insert Before the Rows button.
- To add the category as the nested sublevel in the rows, click the Insert After the Rows button.
- To replace the category in the rows, click the Replace Rows button.

## Choose Measures

A measure is a quantifiable amount built into a cube. It is often used to gauge how a business is operating, such as in identifying performance indicators.

A measure may be

- a simple summary of available information such as number of units shipped, revenue, expenses, inventory levels, or quotas
- a calculated value such as revenue variance (forecast revenue minus actual revenue)

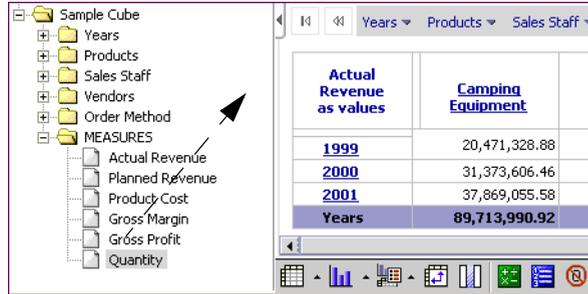
By default, PowerPlay Web uses the first measure in the list of measures. You can change the default order of the list (p. 49). You can change the measure used or you can use other measures defined by your administrator. For example, you use the Revenue measure to show the data for each product line. You can compare the product lines using the Cost measure instead, or you can change the measures in the report to compare the two as in the following illustration.

| Actual Revenue<br>as values              | Actual Revenue | Product Cost  | MEASURES |
|--|----------------|---------------|----------|
| <a href="#">Camping Equipment</a>        | 89,713,990.92  | 68,039,326.62 | NA       |
| <a href="#">Mountaineering Equipment</a> | 20,891,350.60  | 13,914,433.04 | NA       |
| <a href="#">Personal Accessories</a>     | 31,894,465.86  | 20,181,923.08 | NA       |
| <a href="#">Outdoor Protection</a>       | 3,171,114.92   | 1,382,952.08  | NA       |
| <a href="#">Golf Equipment</a>           | 25,905,465.58  | 14,223,940.80 | NA       |

If you use Netscape as your Web browser, you must use the dimension viewer toolbar to change the measure. For more information, see "[Steps Using the Dimension Viewer Toolbar](#)" (p. 22).

### Steps Using Drag and Drop

1. In the dimension viewer, expand the Measures folder to locate the measure you want to show in the display.
2. Choose whether you want to view one measure or multiple measures:
  - To view one measure, click the measure, and then drag it to the Measure heading area in the display.



- To view, on the crosstab, multiple measures from the same parent, click and drag each measure to a highlighted area between two column headings in the display.  
**Tip:** You can use this method to reorder measures.

### Steps Using the Dimension Line

1. Click Measures in the dimension line.  
**Tip:** To view all measures, drag the Measures to the row heading area or the column heading area.
2. Click the measure you want to show in the display.  
**Tip:** You can also drag the measure to the Measure heading area in the display.

### Steps Using the Dimension Viewer Toolbar

1. If the dimension viewer toolbar does not appear under the dimension viewer, right-click under the dimension viewer and click Show Toolbar.
2. In the dimension viewer, expand the Measures category and then click the measure that you want to appear on your crosstab.
3. In the dimension viewer toolbar, click the Replace Measures button.



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# Chapter 4: Explore Data

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Use PowerPlay Web Explorer find specific categories or measures for your analysis, or to explore data by drilling down for more specific details or drilling up for a more general picture. You can also filter data to get the information you want. For example, if you only require sales information for Central Europe, you can filter the report so that only values for Central European sales appear. To further explore, you can nest child categories under a parent category or add calculations to show you the exact information you require. Depending on how the cube was created, you can even drill through the current cube to another cube, report, or data source.

## Find Specific Dimensions or Measures

You can search the current report or cube to find specific dimensions or measures in your data. Finding specific items in highly complex and large dimensions can significantly speed up your analysis time.

When you search the current report, PowerPlay Web searches the data in the current display. When you search the cube, PowerPlay Web searches all the data in the cube.

You can search for text in a category or measure based on the following criteria:

- contains
- begins with
- ends with

The search results provide the category name and full path. For example, searching in the Sample cube for Star Lite shows the following results:

| Category  | Path                             |
|-----------|----------------------------------|
| Star Lite | Products/Camping Equipment/Tents |

### Steps



1. With the PowerPlay Web Explorer report open, click the arrow to the right of the help button on the toolbar, and then click Find.

The Find window opens in the lower half of your browser window.

2. In the Search String box, select the search criteria you want to use, and in the adjacent box, type the text to search for.
3. In the Find Text In box, choose whether to search a report or a cube.
4. In the Position box, choose whether to search Rows, Columns, or Rows and Columns.

**Tip:** The Position box changes to a Dimension box when you select a Cube search. You can then limit the search to a particular dimension.

5. Click Find.

The search results appear to the right of the Find box.

6. To view the data you were searching for in your PowerPlay Web Explorer report, select the category in the Results list and choose one of the following options:
  - If the category appears in the current report, click the Go To link to isolate the data in the report.
  - To filter the report on the returned category, click Filter.
  - To show the returned category in the report rows, click Replace Rows.
  - To show the returned category in the report columns, click Replace Columns.

**Tip**

- To find a specific item in your data, you can also right-click a category in the dimension viewer, and then click Find.

## Scenario Dimensions

A scenario dimension is a dimension in which categories are used to represent different scenarios. Scenario dimensions do not roll up to a single root category because that value would not be useful.

Scenario dimensions are useful when you are analyzing financial data. Instead of analyzing just one set of values, you can analyze several sets of values. Each set of values presents a scenario. Each scenario is based on different assumptions, such as planned, budget, or actual values, or best and worst case values.

Scenario dimensions are defined in Transformer. If default categories are defined for the dimension, when you open the cube in PowerPlay, the initial view is filtered on the default category.



In a cube or report that contains a scenario dimension, the scenario dimension is distinguished from other dimensions by the scenario dimension icon. If the cube modeler identified a default category for the scenario dimension, the default category appears as a default filter in the dimension line.

## Drill Down and Drill Up

You can drill down and drill up to explore different aspects of your business and move between levels of information. For example, you can examine revenue for an entire product line and then drill down to see revenue for each individual product in the line. When you finish viewing individual product revenue, you can drill back up. After you familiarize yourself with the hierarchy, you can drill down and drill up multiple levels at a time. If you want to examine the impact of a single aspect of your business on the whole, you can drill down to the lowest-level category in a dimension.

When you drill down on a nested category, some information may be removed. For example, a report shows Years in the rows and Quarters as nested categories. If you drill down on a Quarter, the redundant Years level is removed. The available drill-down and drill-up features depend on the display type you choose.

## Different Paths to a Category

Your PowerPlay administrator can define multiple paths in a dimension that lead to the same categories. A primary drill-down path is the main path in a dimension. An alternate drill-down path is another path in the same dimension leading to the same categories. For example, the main path of the Years dimension is by year and one of its alternate paths is by Current Month. Both of these paths drill down to the product categories.



## Restricted Data Values

Your PowerPlay administrator can build security rules into cubes where data is sensitive, for example in financial applications. When PowerPlay shows a category level for which you do not have the correct security access, you will see the word "denied" instead of a data value. When you drill down on a category, you cannot view a lower level of a restricted data value. PowerPlay Web also shows the word denied for summary totals of a category that include this restricted data value.

## Steps to Drill Down

- To drill down a level within one category in the PowerPlay Web display, click the column heading link.

The next level categories replace the column headings in the display.

## Tips

- To drill down using the dimension viewer, choose one of the following options:
  - Right-click the next level category in the dimension viewer, and then click either Replace Rows or Replace Columns.
  - In the dimension viewer, expand the dimension to locate the next level category in the dimension, click the next level category, and then drag it to the column heading area or the row heading area.
- To choose a category level from the dimension line, click the dimension, and then click the lower-level category you want to show in the display.
- To drill down a level across all categories in the PowerPlay Web display, right-click the column or row level selector area, and then click Down a Level.

**Note:** The column level selector area is located to the immediate right of the first column heading area. The row level selector area is located immediately above the first row heading area.

## Steps to Drill Down Multiple Levels

- In the dimension viewer, expand the dimensions to locate the category level you want to show in the display.
- Click the category level, and then drag it to the column heading area or the row heading area.

## Tips

- You can also right-click the category level in the dimension viewer, and then click either Replace Rows or Replace Columns.
- To drill down multiple levels from the dimension line, click the dimension, and then pause the pointer on the next category level to expose the next level of categories. Continue to expose the lower-level categories, and then click the category level you want to show in the display.

- To drill down multiple levels in the PowerPlay Web display, click the column heading links until you reach the category level you want to show in the display.
- In crosstab displays, you can double-click a data value to drill down directly to the categories associated with the value.

### Steps to Drill Up

1. In the dimension viewer, locate the category level you want to show in the display.
2. Click the category level, and then drag it to the column heading area or the row heading area.

### Tips

- You can also right-click the category level in the dimension viewer, and then click either Replace Rows or Replace Columns.
- To drill up from the dimension line, click the dimension, and then click the category level you want to drill up to.
- To drill up a level in the PowerPlay Web display, right-click the column or row level selector area, and then click Up a Level.

**Note:** The column level selector area is located to the immediate right of the first column heading area. The row level selector area is located immediately above the first row heading area.

- To drill up to parent row and column categories, double-click the data value where the row and column intersect.

## Filter Data

A filter changes the focus of a report by limiting information to a level of a dimension and emphasizing only the information you choose. If you want to examine the impact of a single aspect of your business on the whole, you can filter to the lowest-level category in that dimension.

For example, a report shows revenue in all locations for all product lines. You filter the report to show revenue for only Americas product lines. The following illustration shows a report with revenue for all product lines sold in all locations.

| Years Products Sales Staff Vendors Order Method MEASURES |                   |                      |                    |                |               |
|--|-------------------|----------------------|--------------------|----------------|---------------|
| Actual Revenue as values                                 | Camping Equipment | Personal Accessories | Outdoor Protection | Golf Equipment | Products      |
| 1999   | 20,471,328.88     | 7,144,797.52         | 1,536,456.24       | 5,597,980.86   | 34,750,563.50 |
| 2000   | 31,373,606.46     | 10,955,708.04        | 988,230.64         | 9,598,268.88   | 62,558,488.56 |

The following illustration shows the same report filtered on Americas in the Sales Staff dimension. The revenue changes to show values for Americas only, even though Sales Staff is not currently set as the rows or columns of the crosstab. In the dimension line, Americas has replaced Sales Staff.

| Years Products Americas Vendors Order Method MEASURES |                   |                      |                    |                |               |
|---|-------------------|----------------------|--------------------|----------------|---------------|
| Actual Revenue as values                              | Camping Equipment | Personal Accessories | Outdoor Protection | Golf Equipment | Products      |
| 1999  | 10,437,996.60     | 2,504,156.96         | 492,499.26         | 1,978,245.94   | 15,412,898.76 |
| 2000  | 11,776,754.50     | 2,887,110.38         | 261,716.62         | 2,429,298.30   | 19,473,578.30 |

### Steps

1. In the dimension viewer, locate the category you want to filter on.
2. Right-click the category, and then click Filter.

The filtered category appears bolded in the dimension line and, in the display, the values change to reflect the filtered category.

## Tips

- To add a filter from the dimension line, click the dimension, and then click the category you want to filter on.
- To remove a filter, click the filtered category in the dimension line, and then click the dimension level.
- To remove all filters from all dimensions, click the Reset Dimensions button on the dimension line.
- To page through layers filtered on each sibling of the filtered category, click the highlighted area over or under the name of the filter. You can use layers to create a different perspective of your data when you export to .pdf file (p. 65).



## Nest Categories

When you open a report, the categories from the first two dimensions of the dimension line appear in the rows and columns. To view more detail in the report, you can add nested categories from the current dimension, different dimensions, and measures. For example, a report shows Products categories in the columns and Years categories in the rows. You can add the quarters as nested categories in the rows beside the Years categories as shown in the following illustration.

| Actual Revenue<br>as values |          | Camping Equipment | Outdoor Protection | Golf Equipment | Products       |
|-----------------------------|----------|-------------------|--------------------|----------------|----------------|
| 1999                        | 1999 Q 1 | 3,984,224.50      | 321,983.90         | 975,181.00     | 6,595,468.14   |
|                             | 1999 Q 2 | 5,075,177.96      | 611,615.92         | 1,871,413.20   | 9,236,520.84   |
|                             | 1999 Q 3 | 4,645,255.82      | 477,277.94         | 1,169,527.46   | 7,996,510.68   |
|                             | 1999 Q 4 | 6,766,670.60      | 125,578.48         | 1,581,859.20   | 10,922,063.84  |
|                             | 1999     | 20,471,328.88     | 1,536,456.24       | 5,597,980.86   | 34,750,563.50  |
| 2000                        | 2000 Q 1 | 5,638,050.96      | 212,782.46         | 1,553,249.68   | 10,604,831.04  |
|                             | 2000 Q 2 | 8,479,008.16      | 343,938.86         | 3,763,377.96   | 18,711,762.28  |
|                             | 2000 Q 3 | 7,760,772.76      | 316,900.86         | 1,485,202.42   | 14,495,315.04  |
|                             | 2000 Q 4 | 9,495,774.58      | 114,608.46         | 2,796,438.82   | 18,746,580.20  |
|                             | 2000     | 31,373,606.46     | 988,230.64         | 9,598,268.88   | 62,558,488.56  |
| 2001                        | 2001 Q 1 | 8,162,650.72      | 121,930.90         | 1,796,219.58   | 14,208,416.32  |
|                             | 2001 Q 2 | 9,449,464.76      | 232,016.54         | 3,559,611.16   | 20,291,472.74  |
|                             | 2001 Q 3 | 7,370,377.14      | 192,489.80         | 2,152,470.24   | 15,182,187.26  |
|                             | 2001 Q 4 | 12,886,562.96     | 99,990.80          | 3,200,914.86   | 24,585,259.50  |
|                             | 2001     | 37,869,055.58     | 646,428.04         | 10,709,215.84  | 74,267,335.82  |
| Years                       |          | 89,713,990.92     | 3,171,114.92       | 25,905,465.58  | 171,576,387.88 |

A nested report includes summary information for nested categories. For example, the summary for each year and each location is shown in the illustration.

## Steps to Nest Categories

1. In the dimension viewer, locate the category you want to nest in the display.
2. Right-click the category, and then click either Nest Rows or Nest Columns.

The nested category appears in the display as sublevels within the row or column category.

## Tips

- You can also click the category you want to nest in the dimension viewer, and then drag it to the row nest level area or the column nest level area.

As you drag the category over the nest level area, the area becomes highlighted.

**Note:** The row nest level area is located in the far right of the row heading area. The column nest level area is located at the bottom of the column heading area.

- To nest a category from the dimension line, click the dimension, locate the category you want to nest, and then drag it to the row nest level area or the column nest level area.

### Steps to Remove Nested Categories

- In the PowerPlay Web display, right-click the level selector area for the nested category, and then click Delete.

level selector area - nested level

| Camping Equipment        |               |              |                 |                |                 |               |
|--------------------------|---------------|--------------|-----------------|----------------|-----------------|---------------|
| Actual Revenue as values | Americas      | Asia Pacific | Northern Europe | Central Europe | Southern Europe | Sales Staff   |
| 1999                     | 10,437,996.60 | 99,813.98    | 1,624,787.36    | 5,860,261.78   | 2,448,469.16    | 20,471,328.88 |
| 2000                     | 11,776,754.50 | 1,684,035.12 | 5,229,559.60    | 9,879,910.10   | 2,803,347.14    | 31,373,606.46 |
| 2001                     | 15,037,083.06 | 1,964,103.48 | 6,216,805.58    | 11,315,114.20  | 3,335,949.26    | 37,869,055.58 |
| Years                    | 37,251,834.16 | 3,747,952.58 | 13,071,152.54   | 27,055,286.08  | 8,587,765.56    | 89,713,990.92 |

### Note

- For nested categories, the level selector area is located to the immediate left of nested column categories and immediately above nested row categories.

### Tip



- To use the level selector toolbar to remove a nested category, click the level selector area for the nested category. On the level selector toolbar, click the Delete button.

## Replace Nested Categories

You can replace a nested level with the parent category or all the child categories. For example, you nest Years with the next level down, Quarters. Then you want the report to show Months instead of Quarters. You can replace the nested level with Months.

### Steps

1. In the dimension viewer, locate the category you want to show as the new nested level.
2. Right-click the category, and then click Nest Rows or Nest Columns.

This category is now the nested level in the display.

### Tips

- You can also click the new category you want to nest in the dimension viewer, and then drag it to the row nest level area or the column nest level area of the parent category.

As you drag the category over the nest level area, the area becomes highlighted.

**Note:** The row nest level area is located in the far right of the row heading area. The column nest level area is located at the bottom of the column heading area.

- To nest a new category from the dimension line, click the dimension, locate the category you want to nest, and then drag it to the row nest level area or the column nest level area.
- You can replace a nested category by dragging and dropping another nested category in your crosstab (p. 28).

## Move Rows, Columns, and Nesting Levels

In the Enhanced interface, you can drag and drop rows, columns, and nesting levels within your crosstab. You can also reorder measures in your crosstab using drag-and-drop (p. 49). This helps you to quickly change the view of your data.

To drag and drop within a crosstab, you must use Internet Explorer as your Web browser.

## Steps

1. Specify to move or copy a particular level:
  - To move a level, click the level selector area of the nested level you want to move.
  - To copy a level, press Ctrl and click the level selector area of the nested level you want to copy.
2. Choose where you want to drag the level:
  - To change the order of levels in an axis, drag the level to a target level area in the axis.  
**Note:** The target level area appears highlighted on the outer edge of an axis.
  - To move or copy a level to the other axis, drag the level to a target level area in the other axis.
  - To remove the level, drag it outside the crosstab.
  - To swap rows or columns, drag the level to the row or column you are swapping with.
  - To nest a category quickly, drag the level to the target level area of the level you selected.

## Create a Subset of Categories

You can define subsets of categories in PowerPlay Web Explorer based on specified criteria. When you create custom subsets of your data, you can isolate, explore, and analyze specific elements of your data.

Subsets can be dynamic, meaning that they can be updated whenever a change in the cube data affects the categories in the subset. For example, you are a regional manager for a company that sells outdoor products. You want to analyze the sales in your region of the products that are environmentally-friendly. You create a category subset defined by search criteria that all products contain the text "Enviro". As more products are added to the cube that meet the search criteria, they are added to the subset dynamically.

You can create subsets of categories by [search criteria](#), by [measure value](#), or by individual [category selection](#). You can also create a category subset for a dimension directly from the crosstab in a PowerPlay Web Explorer [displayed report](#).

When you create a category subset by search criteria, PowerPlay Web searches the cube for all categories that meet the search criteria and returns that information.

When you create a category subset by measure value, PowerPlay Web compares measure values and returns the categories within the defined range.

When you create a category subset by individual category selection, PowerPlay Web returns the categories you selected.

The custom subset of categories must contain only categories in the same dimension. You cannot nest a subset within the dimension from which it was derived. Also, you cannot nest a subset within a subset if they are both from the same dimension.

When you create a new category subset, the subset appears in the dimension viewer.

You can create, edit, and delete category subsets only in PowerPlay Web Explorer. In PowerPlay Web Viewer, PowerPlay for Windows, and PowerPlay for Excel, you can open, but not edit, PowerPlay Web Explorer reports that include category subsets.

### Steps Using Search Criteria



1. On the PowerPlay Web toolbar, click the Custom Subsets button.
2. In the Custom Subset Name box, enter a name for the category subset.  
This name will appear as an alternate drill-down path in the dimension viewer.
3. In the Dimension list, select the dimension on which you want to create the category subset.
4. Click Define Rule by Search Criteria, and click Next.

5. In the Create Custom Subset by Name Search dialog box, click Add.
6. In the Search String list, click Contains, Begins with, or Ends with to define the appropriate search criteria, and then type the text you want to search for.  
**Tip:** The search string is not case sensitive.
7. In the Choose a Starting Point for Your Search box, click the category you want to search.
8. In the Select a Scoping Option for Your Search list, choose the scope of category levels you want to search, and click OK.
9. If you want enter additional search strings, repeat steps 5-8.
10. In the Create Custom Subset by Name Search dialog box, click Next.
11. In the Result Set box, review the search results.

**Tip:** To remove a search result from the category subset, click the result and then click Remove. To return the search result to the category subset, click the result and click Re-enable.

Categories that are returned in the result set based on the search criteria are dynamic. If there are changes in the data source, the returned result set reflects those changes, and they are identified by a binocular icon.



12. If you want to add categories that were not returned in the result set, in the Available Categories list, select the categories and then click the Add to Custom Subset button.



These categories are static. If you modify the subset search criteria or if there are changes in the data source and a different result set is returned, these additional categories are still included in the subset and remain until you delete them.

13. Click Finish.

The PowerPlay Web Explorer report shows the category subset. In the dimension viewer, the subset appears as a new category.



### Steps Using Measure Value



1. On the PowerPlay Web toolbar, click the Custom Subsets button.
2. In the Custom Subset Name box, enter a name for the category subset.  
This name will appear as a new report category in the dimension viewer.
3. In the Dimension list, select the dimension on which you want to create the category subset.
4. Click Define Rule by Measure Value, and click Next.
5. In the Select the Measure on Which to Base the Rule list, select the measure you want.
6. Under Include Categories with Values Within Range click Lowest or Highest or enter a value for the lowest or highest value you want returned.
7. In the Choose a Starting Point for Your Search box, select the category you want.
8. In the Select a Scoping Option for Your Search list box, choose the scope of category levels you want to search.
9. Under Choose the Filtering That You Would Like to Apply to the Data, apply dimension filters as appropriate, and click Next.  
For example, click the Years category and filter on YTD, click the Locations category and filter on Germany, and click Next.
10. In the Result Set box, review the search results.

**Tip:** To remove a search result from the category subset, click the result and then click Remove. To return the search result to the category subset, click the result and click Re-enable.

Categories that are returned in the result set based on a measure value are dynamic. If there are changes in the data source, the returned result set reflects those changes, and they are identified by a binocular icon.





11. If you want to add categories that were not returned in the result set, in the Available Categories list, select the categories and then click the Add to Custom Subset button.

These categories are static. If you modify the subset measure value or if there are changes in the data source and a different result set is returned, these additional categories are still included in the subset and remain until you delete them.

12. Click Finish.

The PowerPlay Web Explorer report shows the category subset. In the dimension viewer, the subset appears as a new category.



### Steps Using Category Selection



1. On the PowerPlay Web toolbar, click the Custom Subsets button.

2. In the Custom Subset Name box, enter a name for the category subset.

This name will appear as a new report category in the dimension viewer.

3. In the Dimension list, select the dimension on which you want to create the category subset.

4. Click Select Categories, and click Next.

5. In the Available Categories list, expand the categories, and then select the categories you want to appear in the subset.



6. Click the Add to Custom Subset button to move the selected categories to the Result Set list.

When you create a category subset by selecting individual categories, the categories are static and remain in the subset until you delete them.

**Tip:** To remove a category from the Result Set list, select the category and click the Remove from Custom Subset button.



7. Click Finish.

The PowerPlay Web Explorer report shows the category subset. In the dimension viewer, the subset appears as a new category.



### Steps for a Dimension in a Displayed Report

1. In the PowerPlay Web Explorer report, right-click the rows or columns you want to include in the subset, and then click Create Custom Subset.

The new custom subset appears in the report.

2. If you want to change the default category subset name, do the following:

- In the dimension viewer, right-click the category subset.
- Click Rename Subset.
- In the Custom Subset Name box, type the new subset name.
- Click Finish.

#### Tips:

- The rows or columns you choose to include in the subset can be from multiple levels. However, they must be from the same dimension.
- To delete a category subset, in the dimension viewer, right-click the category subset, and then click Delete Subset.

## Modify a Subset of Categories

You can modify a subset of categories if the criteria you want to search for changes.

#### Steps

1. In the dimension viewer, right-click the category subset and then click Edit Subset.

2. In the Edit Custom Subset dialog box, edit the fields as appropriate and then click Next.

3. In the Result Set box, review the search results.
4. When you are satisfied with the search results, click Finish.

## Hide Totals or Subtotals

Each report using a crosstab display shows a row and column with the total value of each category. If you do not want this summary row or column in the report, you can hide the summaries.

When you add nested categories to a report using a crosstab display, PowerPlay Web adds a subtotal summary row or column for each level of child categories so that you can see how each level of categories rolls up to the next level. If you do not want the subtotal summary row or column visible in your report, you can hide the summaries.

Hiding totals or subtotals affects only reports using a crosstab or indented crosstab display.

### Steps to Hide Totals

1. In the PowerPlay Web display, right-click a total summary row or a total summary column, and then click Hide/Show.
2. In the Hide/Show dialog box, clear the Show Summaries check box and click OK.

The total summary row or column is no longer visible in the display.

### Steps to Hide Subtotals

1. In the PowerPlay Web display, right-click one subtotal summary row or one subtotal summary column, and then click Hide/Show.
2. In the Hide/Show dialog box, clear the Show Summaries check box and click OK.

The subtotal summary rows or columns are no longer visible in the display.

## Perform Calculations

You can combine rows or columns to obtain a new item based on a custom calculation. For example, your report shows quarters for the year. You can add new items showing the cumulative percentage each quarter contributes. After a new calculated category is added, you can add other calculations using an existing one.

You can perform the following calculations in PowerPlay Web:

- add
- subtract
- multiply
- divide
- percent
- percent of base
- cumulative percent
- rollup
- exponentiate
- accumulate
- forecast

### Steps

1. In the PowerPlay Web display, right-click the row heading or column heading for which you want to perform a calculation, and then click Insert Calculation.
2. In the Operation box, select the calculation you want to perform.
3. In the Calculation Name box, type a name for the calculation.  
This name will appear as the row or column heading for the new calculation.
4. In the Includes Categories box, select the categories you want to include in the calculation.
5. If you want to use a constant in the calculation, select the check box beside Number and enter the constant in the box.
6. Click OK.

The new calculated category appears in italicized text in the display.

### Tip



- You can also use the Calculation button on the PowerPlay Web toolbar to insert a calculation.

## Edit Calculations

Calculations that you have inserted as columns or rows in a PowerPlay Web Explorer report can be edited or added to. For example, you have created calculations for the cumulative percentage that each quarter's sales contribute to the year. You can change the calculation to show each month's contribution if you want more specific details for your report. You can also change the name of the calculation.

### Steps

1. In the PowerPlay Web display, right-click the calculation row heading or the calculation column heading, and then click Edit Calculation.
2. In the Calculations dialog box, edit the items in the calculation as required and click OK.

The edited category appears in italicized text in the display.

## Create a Forecast

You can make predictions about the future performance of your business based on past data by using one of these time series forecasting methods: Trend, Growth, or Autoregression.

### TERMS OF USE

The forecasting methods utilized in the Forecasting Function are based on the statistical analysis of historical information drawn from underlying data sources. The accuracy of the forecasted values is subject to many variables, including the accuracy of the underlying historical data and external events which could affect the validity of that underlying historical data for forecasting purposes. The Forecasting Function is to be used only as a guide of the future values for the measures being forecasted and is not intended to be used as the basis for complex financial or business decisions.

Cognos makes no representations as to the accuracy of the actual future values and does not guarantee any specific results. You use the Forecasting Function and the data it generates at your own risk. The Forecasting Function may contain errors or produce inaccurate calculations. You accept the Forecasting Function and the documentation "AS IS". IN NO EVENT SHALL COGNOS BE LIABLE FOR DAMAGES OF ANY KIND INCLUDING, WITHOUT LIMITATION, DIRECT, INDIRECT, INCIDENTAL, PUNITIVE OR CONSEQUENTIAL DAMAGES, RESULTING FROM THE USE OF THE FORECASTING FUNCTION OR THE INTERPRETATION OF THE DATA RESULTING THEREFROM.

For more information about the formula for each forecast method, see "[Forecast Formulae](#)" (p. 69).

## Trend (Linear or Straight Line)



The trend forecasting method is based on the linear regression technique of time series forecasting. Trend forecasting gives the best forecasting reliability when the driving factors of your business affect your measures in a linear fashion. For example, when your historic revenue increases or decreases at a constant rate, you are seeing a linear effect.

A multiline plot of historic data should look linear or close to linear for greatest reliability. For example, if you are forecasting revenue for the next two quarters based on revenue for the past four quarters, and if the multiline plot of past quarterly revenue is linear or close to linear, then the Trend method gives you the best forecasting reliability.

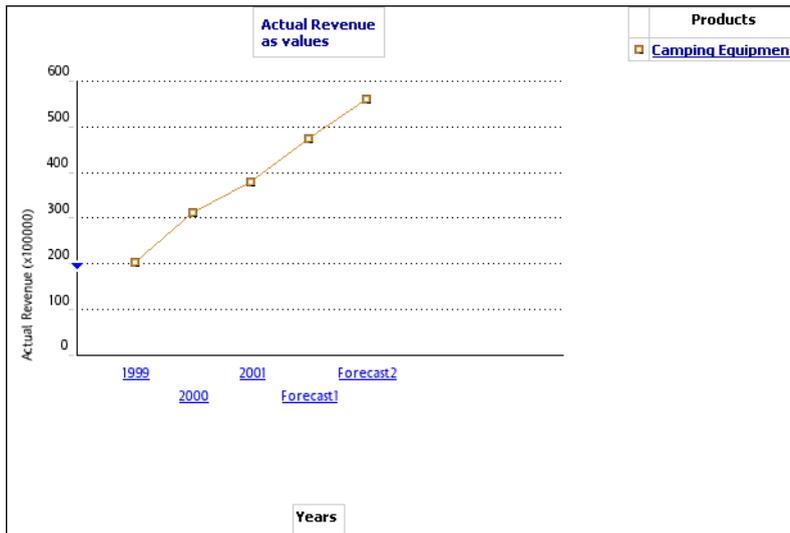
Use the Trend forecasting method, for example, when you have only two data values representing two time periods in your historic data.

### Example

You are the sales manager for your company. You want to see what the overall revenue trend for the next two years is for Camping Equipment.

This report shows you that in the Camping Equipment line, the trend for the next two years is increasing revenues.

| Actual Revenue as values | 1999          | 2000          | 2001          | Forecast1     | Forecast2     |
|--------------------------|---------------|---------------|---------------|---------------|---------------|
| Camping Equipment        | 20,471,328.88 | 31,373,606.46 | 37,869,056.58 | 47,302,390.34 | 56,001,253.69 |



## Growth (Curved or Curved Line)



The Growth forecasting method is based on the exponential regression technique of time series forecasting. Growth forecasting gives you the best forecasting reliability when the driving factors of your business affect your measures exponentially. For example, when your historic revenue increases or decreases at an increasingly higher rate, you are seeing an exponential effect.

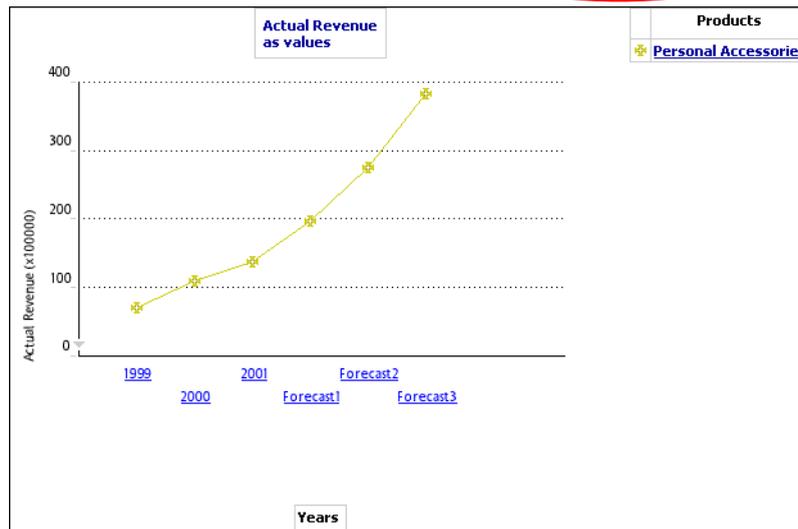
A multiline plot of historic data should look exponential for best accuracy. For example, if your revenues are growing exponentially due to the introduction of a best selling product, then Growth forecasting will provide a more reliable forecast than the Trend method.

### Example

You have hired two additional sales representatives for your company. To allocate your new resources effectively, you want to know which product line has the greatest growth potential.

This report shows you that your new resources would best be assigned to the Personal Accessories line, which has the greatest revenue growth potential.

| Actual Revenue as values | 1999         | 2000          | 2001          | Forecast1     | Forecast2     | Forecast3     |
|--------------------------|--------------|---------------|---------------|---------------|---------------|---------------|
| Personal Accessories     | 7,144,797.52 | 10,955,708.04 | 13,793,960.30 | 19,806,397.71 | 27,520,417.51 | 38,238,825.22 |



## Autoregression (Seasonal)



The Autoregression forecasting method is based on the auto-correlational approach to time series forecasting. Autoregression forecasting detects the linear, nonlinear, and seasonal fluctuations in historic data and projects these trends into the future. Autoregression provides the best forecasting reliability when the driving factors underlying your business are affected by seasonal fluctuations.

A multiline plot of time and revenue will show up-and-down fluctuations that may reflect seasonal variations. For example, if your revenues are growing exponentially due to the introduction of a best selling product, but sales of that product are also seasonal, then Autoregression forecasting will provide a more reliable forecast than the Growth method.

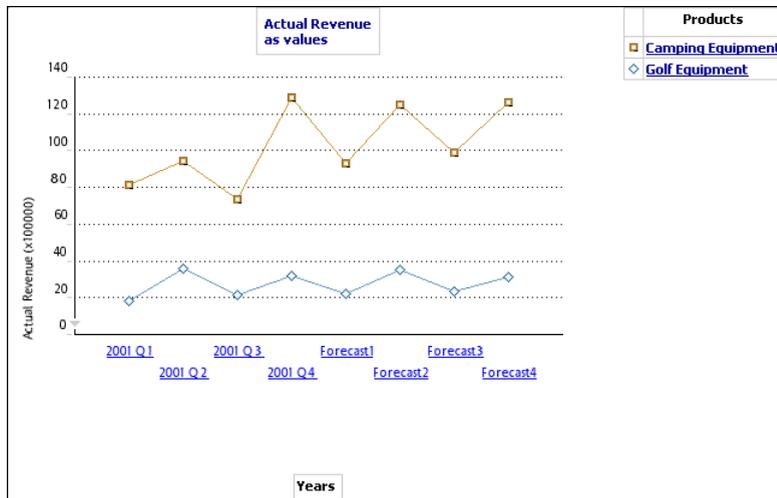
Use the Autoregression method when you have historic data representing a large number of time periods (for example, more than 24 monthly periods) and when seasonal variations may occur in it.

### Example

You are concerned about the Camping Equipment and Golf Equipment forecasts for the next two years. You want to know the forecasted revenues, adjusted for seasonal fluctuation, for each of the next four quarters.

This report shows that the forecast for both lines, when adjusted for seasonal fluctuation, continues to follow the same pattern and maintain revenue totals.

| Actual Revenue as values | 2001 Q 1     | 2001 Q 2     | 2001 Q 3     | 2001 Q 4      | Forecast1    | Forecast2     | Forecast3    | Forecast4     |
|--------------------------|--------------|--------------|--------------|---------------|--------------|---------------|--------------|---------------|
| Camping Equipment        | 8,162,650.72 | 9,449,464.76 | 7,370,377.14 | 12,886,562.96 | 9,323,103.02 | 12,488,518.65 | 9,906,103.11 | 12,623,796.93 |
| Golf Equipment           | 1,796,219.58 | 3,559,611.16 | 2,152,470.24 | 3,200,914.86  | 2,245,734.65 | 3,517,262.84  | 2,375,074.44 | 3,124,066.27  |



You must have the time period shown as either rows or columns in your crosstab to create a forecast.

If you nest multiple levels of time in your crosstab, PowerPlay Web produces the forecast only at the highest level of time. For example, if you nest quarters within years for revenue and then insert a Forecast calculation, PowerPlay Web generates the forecast only at the years level.

| Actual Revenue as values |           | Camping Equipment | Outdoor Protection | Golf Equipment | Products       |
|--------------------------|-----------|-------------------|--------------------|----------------|----------------|
| 1999                     | 1999 Q 1  | 3,984,224.50      | 321,983.90         | 975,181.00     | 6,595,468.14   |
|                          | 1999 Q 2  | 5,075,177.96      | 611,615.92         | 1,871,413.20   | 9,236,520.84   |
|                          | 1999 Q 3  | 4,645,255.82      | 477,277.94         | 1,169,527.46   | 7,996,510.68   |
|                          | 1999 Q 4  | 6,766,670.60      | 125,578.48         | 1,581,859.20   | 10,922,063.84  |
| 1999                     |           | 20,471,328.88     | 1,536,456.24       | 5,597,980.86   | 34,750,563.50  |
| 2000                     | 2000 Q 1  | 5,638,050.96      | 212,782.46         | 1,553,249.68   | 10,604,831.04  |
|                          | 2000 Q 2  | 8,479,008.16      | 343,938.86         | 3,763,377.96   | 18,711,762.28  |
|                          | 2000 Q 3  | 7,760,772.76      | 316,900.86         | 1,485,202.42   | 14,495,315.04  |
|                          | 2000 Q 4  | 9,495,774.58      | 114,608.46         | 2,796,438.82   | 18,746,580.20  |
| 2000                     |           | 31,373,606.46     | 988,230.64         | 9,598,268.88   | 62,558,488.56  |
| 2001                     | 2001 Q 1  | 8,162,650.72      | 121,930.90         | 1,796,219.58   | 14,208,416.32  |
|                          | 2001 Q 2  | 9,449,464.76      | 232,016.54         | 3,559,611.16   | 20,291,472.74  |
|                          | 2001 Q 3  | 7,370,377.14      | 192,489.80         | 2,152,470.24   | 15,182,187.26  |
|                          | 2001 Q 4  | 12,886,562.96     | 99,990.80          | 3,200,914.86   | 24,585,259.50  |
| 2001                     |           | 37,869,055.58     | 646,428.04         | 10,709,215.84  | 74,267,335.82  |
| Forecast1                | Forecast1 | 47,302,390.34     | 167,010.11         | 13,746,390.17  | 96,708,901.61  |
| Forecast2                | Forecast2 | 56,001,253.69     | -278,003.99        | 16,302,007.66  | 116,467,287.77 |
| Forecast3                | Forecast3 | 64,700,117.04     | -723,018.09        | 18,857,625.15  | 136,225,673.93 |
| Forecast4                | Forecast4 | 73,398,980.39     | -1,168,032.19      | 21,413,242.64  | 155,984,060.09 |
| Years                    |           | 89,713,990.92     | 3,171,114.92       | 25,905,465.58  | 171,576,387.88 |

To generate your forecast at the quarters level, delete the years level before you generate the forecast.

| Actual Revenue as values | Camping Equipment | Outdoor Protection | Golf Equipment | Products       |
|--------------------------|-------------------|--------------------|----------------|----------------|
| 1999 Q 1                 | 3,984,224.50      | 321,983.90         | 975,181.00     | 6,595,468.14   |
| 1999 Q 2                 | 5,075,177.96      | 611,615.92         | 1,871,413.20   | 9,236,520.84   |
| 1999 Q 3                 | 4,645,255.82      | 477,277.94         | 1,169,527.46   | 7,996,510.68   |
| 1999 Q 4                 | 6,766,670.60      | 125,578.48         | 1,581,859.20   | 10,922,063.84  |
| 2000 Q 1                 | 5,638,050.96      | 212,782.46         | 1,553,249.68   | 10,604,831.04  |
| 2000 Q 2                 | 8,479,008.16      | 343,938.86         | 3,763,377.96   | 18,711,762.28  |
| 2000 Q 3                 | 7,760,772.76      | 316,900.86         | 1,485,202.42   | 14,495,315.04  |
| 2000 Q 4                 | 9,495,774.58      | 114,608.46         | 2,796,438.82   | 18,746,580.20  |
| 2001 Q 1                 | 8,162,650.72      | 121,930.90         | 1,796,219.58   | 14,208,416.32  |
| 2001 Q 2                 | 9,449,464.76      | 232,016.54         | 3,559,611.16   | 20,291,472.74  |
| 2001 Q 3                 | 7,370,377.14      | 192,489.80         | 2,152,470.24   | 15,182,187.26  |
| 2001 Q 4                 | 12,886,562.96     | 99,990.80          | 3,200,914.86   | 24,585,259.50  |
| Forecast1                | 11,340,866.24     | 76,289.42          | 3,210,297.11   | 22,800,395.96  |
| Forecast2                | 11,935,435.52     | 47,370.93          | 3,372,067.61   | 24,108,451.90  |
| Forecast3                | 12,530,004.80     | 18,452.45          | 3,533,838.12   | 25,416,507.84  |
| Forecast4                | 13,124,574.08     | -10,466.04         | 3,695,608.63   | 26,724,563.79  |
| Years                    | 89,713,990.92     | 3,171,114.92       | 25,905,465.58  | 171,576,387.88 |

If you applied ranking in your crosstab, PowerPlay creates the forecast you request, however, forecasts are not included in the rankings.

If you convert the currency in your crosstab, PowerPlay creates the forecast on the currency-converted values.

### Steps

1. Right-click a time category in your crosstab display or graphic display, and then click Insert Calculation.
2. In the Operation box, select Forecast.
3. From the Forecast Method list, select the forecasting method you want to use. The methods are Trend, Growth, and Autoregression.
4. In the Forecast Horizon box, type the number of time periods to forecast.
5. Click OK.

### Tips

- To change the label of a calculation, right-click the label, and then click Rename Calculation. Type the new label in the Calculation Name box and click OK.
- To see the formula or categories used for a calculation, right-click the label, and then click Explain.
- Calculated values appear as *na*, or in scientific notation (for example, 1.7976931348623158e+308).

If the values appear as *na*, PowerPlay does not have appropriate values on which to base a forecast. If the value appears in scientific notation, the result is larger than 15 digits.

## Hide Data While Exploring Your Report

Use the Get Data Later option to allow you to create your report without showing the data. This can save you time if you are exploring a large cube with many levels. When you have found the information you are interested in, you can quickly show the data in the display.

Some of the options on the PowerPlay Web Explorer toolbar are unavailable while Get Data Later is enabled.

Get Data Later is available only for a Crosstab display.

### Steps



1. On the PowerPlay Web toolbar, click the Display Options button, and then click Get Data Later.
2. Explore the report until you are satisfied with its current state.
3. In the display, click Get Data.

## Analyze Alternate Hierarchies

You can create crosstabs that show two different hierarchies of the same dimension in the rows and columns. Do this to isolate and analyze relative data at a fine level of granularity.

For example, you create a report that includes information on product vendors. The Vendor dimension in your report includes categories for each type of vendor, and an alternate hierarchy category that represents the vendors by region. Individual vendors are the lowest level in the Vendor dimension when filtered by vendor type. The By Region category includes location categories, including Europe, Far East, and Americas. Individual vendors are also the lowest level in the By Region category. When you create a crosstab that has Vendor in the rows and the alternate hierarchy By Region in the columns, you can quickly analyze the relative performance of the vendors in the different regions.

### Steps

1. Open a crosstab report.
2. In the dimension viewer, right-click the dimension category you want to filter on, and then click Replace Rows.

The filtered category appears bolded in the dimension line and, in the display, the row headings and values change to reflect the filtered category.

3. Right-click the alternate hierarchy category in the dimension, and then click Replace Columns.

The column headings and values change to reflect the addition of the alternate hierarchy filter.

## View Explanations

You can see an explanation of the information you are exploring. The explanation contains general information about the status of the current display and any descriptions of the data that your administrator has added to the cube. In PowerPlay Web Viewer, explanations are available for the row and column headings in the report. In PowerPlay Web Explorer, explanations are available for the following cube data:

- individual cells
- row or column categories
- measures
- filters
- suppression
- exception highlighting
- the physical location of the current cube
- the user and user class for which you were granted access privileges, if you opened the report from Upfront

### Steps for PowerPlay Web Viewer

1. In Adobe Acrobat Reader, pause the pointer over the row heading or column heading that you want an explanation for.



The pointer changes to a hand icon when over a heading with an explanation.

2. Click the heading.

A separate HTML window opens containing the descriptive information about the item.

### Steps for PowerPlay Web Explorer

- Choose whether to view explanations for the entire display or for individual cells:
  - To view explanations for the entire PowerPlay Web display, click the arrow to the right of the help button on the toolbar, and then click Explain.
  - To view explanations for individual cells in the PowerPlay Web display, right-click the cell, and then click Explain.



### Tip

- If an item other than an individual cell does not contain descriptive information in the Explanation window, you can ask your PowerPlay administrator to add it to the cube.

## Drill Through to Other Reports

You can drill through to another report or data source to reveal more detailed information from the current cube. You can drill through to information in another cube or to details in Cognos Query or Impromptu Web Reports, depending on what your PowerPlay administrator has set up. For example, your report shows the 1999 sales for regions in the Americas, but another report contains the specific sales information for the United States region. You drill through to the current report to see sales for each branch in the United States region.

When you drill through to a report, its current measure and dimension line are applied to the new report or query. For example, a report uses the Actual Revenue measure and the 1999 level from the Years dimension. The report that you drill through to also shows revenue for 1999.

When you drill through to a report, your current row and column selections are applied to the new report or query. This helps you to create a drill-through report that includes only the specific data and filtering criteria that you are interested in.

Drill-through information is applied when it is valid for the report or query that you drill through to. For example, you have filtered a report by product. If Product is not a dimension in the report or query that you drill through to, then the filter cannot be applied, and data for all products appears.

If you attempt to drill through to a target that is located on a different computer, you may receive a Cognos Application Firewall rejection message. If this occurs, contact your administrator.

If you drill through to a time-based partitioned cube that contains data that is categorized differently among the PowerCubes that form the time-based partitioned cube, you may receive data that appears inconsistent.

For example, you drill through to a time-based partitioned cube that contains data on the top ten sales staff in San Francisco for 1997. Dave Mustaine, a sales representative in San Francisco, shows total sales for 1997 of \$60,000. When you drill further to isolate Dave Mustaine without a regional context, you see total sales of \$72,000 for 1997, a value which is inconsistent with the original total sales reported. Because Dave Mustaine joined the Denver sales office for two months during 1997, his \$12,000 in total sales for those months were not returned in the original view, which showed Dave Mustaine for San Francisco only. Isolating Dave Mustaine with no context of San Francisco or Denver returns data for both regions for 1997.

Drill through is available only if it has been set up by your administrator.

**Steps**



1. On the PowerPlay Web toolbar, click the Drill Through button.  
A menu of all available reports appears.
2. Click the report you want to drill through to.

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## Chapter 5: Format Data

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Use PowerPlay Web Explorer to format data by changing the currencies and values used in the report, by highlighting exceptional values, sorting, and changing the display. As well, you can create the reports you want by removing categories you do not want to see or that do not contribute to the totals.

### Show Report Values as Percentages

You can show report values as a percentage of the row or column subtotals or of the report total. Examining a dimension as a percentage can provide new insights into your business data. For example, you have Products in the rows of your report and show the revenue values for each product as a percentage of all rows. You can see which products contributed the most to total product revenue.

#### Steps

- In the PowerPlay Web display, right-click the Measure heading, and then click a percentage data format.



**Tip:** You can also click the Display Options button on the PowerPlay Web toolbar, click Options, and then, in the Display Measures box, select a percentage data format.

### Convert Currency Values

You can convert the monetary values in your report into a different currency. For example, you can convert your report values from Canadian dollars to euros. You can select any currency that your PowerPlay administrator has set up in the cube.

When you format a currency value, the currency symbol can be specified separately from the format. This means that your browser locale settings can be used to format the number (for example, the decimal and group separators) while still preserving the currency representation.

#### Steps



1. On the PowerPlay Web toolbar, click the Display Options button.
2. Click Options.
3. In the Currency box, select the currency you want.

If you use a different currency from the one used when the cube was created, the currency appears under the display.

If no currencies are available, none were defined in the cube.

### Define Custom Exception Highlighting

You determine what values are considered exceptional by defining custom exception highlighting rules.

## Create a Custom Exception

A custom exception can contain up to five value ranges, with formatting attached to each range. For each value range there is a minimum value, a maximum value, a font color and a background color. Value ranges are inclusive. All data that falls within a value range appears with the defined formatting.

You define custom exceptions as part of a report. PowerPlay Web stores these definitions so that each time you open this report, the exceptions are available. Exceptions must be applied by the report user. You can define up to 20 custom exceptions, each with up to five value ranges.

### Steps



1. On the PowerPlay Web toolbar, click the Custom Exception Highlighting button.
2. In the Exceptions dialog box, click Add.
3. In the Exception Name box, type a name for the custom exception.
4. In the From box, enter a minimum value for the first range.
5. In the To box, enter a maximum value for the first range.
6. From the Text color well, select a color for the text.
7. From the Cell color well, select a color for the background.
8. Define up to four additional value ranges for this exception.
9. Click OK.

The new definition appears in the Defined Exceptions list.

### Tips

- You can also select Minimum from the From column drop-down list or Maximum from the To column drop-down list. Selecting Minimum as the From value defines the range as having no lower boundary. Similarly, Maximum creates a range with no upper boundary.
- To edit a custom exception definition, select it from the Defined Exceptions list and click Edit. You can make changes to the range values specified for the exception definition, their characteristics, or the name of the exception.
- To delete a custom exception definition, select it from the Defined Exceptions list and click Delete. When you delete a custom exception that is currently applied, your display refreshes dynamically.

## Apply a Custom Exception

You must apply a defined custom exception before it appears in the report. PowerPlay can show only one custom exception definition for a particular cell at a time. When you apply an exception to a column, a row, or to the whole report, this application removes any exception that was previously applied to the same selection.

Where a cell lies at an intersection between two defined custom exceptions, only the most recently applied exception will be visible for that cell.

PowerPlay shows custom exceptions in crosstab view only. You can define custom exceptions in any view, but PowerPlay ignores them.

Custom exceptions apply to all cell types, including calculations, calculated categories, and measures.

### Steps



1. On the PowerPlay Web toolbar, click the Custom Exception Highlighting button.
2. Select a row, column, or measure in the crosstab.

**Tip:** To select the entire crosstab, click the Measure cell in the crosstab. To clear the selection of the entire crosstab, click the Measure cell again.

- In the Defined Exceptions list, select the custom exception you want to apply and click Apply.
- Click OK.

### Tips

- To remove the application of an exception, select the category where it is applied, select (none) from the Defined Exceptions list, and click Apply.
- You can apply one custom exception to a summary category and a different exception to its children. Apply the exception definition you want for the children to the summary total, expand the summary to show the children, and then apply the exception you want to the summary total only.

## Highlight Exceptions Automatically

PowerPlay Web can highlight exceptional values automatically. Exceptions stand out in a report or crosstab and call attention to their values.

PowerPlay Web considers a value exceptional if it is significantly higher or lower than the value expected compared to its row and column totals. By default, automatic highlighting shows low values in a bold, red font and high values in a bold, green font.

For example, in the crosstab display below, the revenues for Camping Equipment in 2000 were higher than expected based on its row and column totals, and so the value was highlighted in green. On the other hand, the revenues for Camping Equipment products in Q1 of 2000 were lower than expected, and highlighted in red.

| Actual Revenue as values |          | Camping Equipment | Outdoor Protection | Golf Equipment | Products       |
|--------------------------|----------|-------------------|--------------------|----------------|----------------|
| 2000                     | 2000 Q 1 | 5,638,050.96      | 212,782.46         | 1,553,249.68   | 10,604,831.04  |
|                          | 2000 Q 2 | 8,479,008.16      | 343,938.86         | 3,763,377.96   | 18,711,762.28  |
|                          | 2000 Q 3 | 7,760,772.76      | 316,900.86         | 1,485,202.42   | 14,495,315.04  |
|                          | 2000 Q 4 | 9,495,774.58      | 114,608.46         | 2,796,438.82   | 18,746,580.20  |
|                          | 2000     | 31,373,606.46     | 988,230.64         | 9,598,268.88   | 62,558,488.56  |
| 2001                     | 2001 Q 1 | 8,162,650.72      | 121,930.90         | 1,796,219.58   | 14,208,416.32  |
|                          | 2001 Q 2 | 9,449,464.76      | 232,016.54         | 3,559,611.16   | 20,291,472.74  |
|                          | 2001 Q 3 | 7,370,377.14      | 192,489.80         | 2,152,470.24   | 15,182,187.26  |
|                          | 2001 Q 4 | 12,886,562.96     | 99,990.80          | 3,200,914.86   | 24,585,259.50  |
|                          | 2001     | 37,869,055.58     | 646,428.04         | 10,709,215.84  | 74,267,335.82  |
| Years                    |          | 89,713,990.92     | 3,171,114.92       | 25,905,465.58  | 171,576,387.88 |

Exception highlighting.

With Web browsers that support cascading style sheets, you may see another font or color for automatic exception highlighting if your PowerPlay administrator has specified different fonts or colors.

In the Enhanced interface, the Exception Highlighting button is not on the PowerPlay Web toolbar by default. To add the Exception Highlighting button to the PowerPlay Web toolbar, contact your administrator.

### Steps



- On the PowerPlay Web toolbar, click the Automatic Exception Highlighting button. PowerPlay Web applies the rules and shows "Exception highlighting" under the display.

## Sort Values

In crosstab displays, you can sort the row and column values in ascending or descending order. For example, a report shows the product sales for the previous ten years. You sort the sales figures to order them from the highest figure to the lowest figure. The data remains sorted until you drill down or drill up.

**Steps**

1. In the PowerPlay Web display, select the row or column in which you want to sort the values. The row or column becomes highlighted, and the Sort icon appears in the row or column heading.

2. Click the Sort icon, and then choose the order in which you want to sort:

- Click Sort Descending to sort the values in descending order.
- Click Sort Ascending to sort the values in ascending order.

The values and the Sort icon change to show the type of sort action that you applied to the row or column.

**Tip**

- To remove the value sorting, click the Sort icon, and then click No Sort.

## Swap Rows and Columns

You can exchange the positions of categories in rows and columns. For example, a report contains few rows but many columns that exceed the width of the printed page. You swap the rows and columns to fit the report on one page.

You can also exchange the positions of categories within a nested crosstab (p. 27). For example, you have Products nested within Years but you exchange the positions to see Years nested within Products.

**Steps to Swap Rows and Columns**

- On the PowerPlay Web toolbar, click the Swap Rows and Columns button.

**Tip:** You can also drag and drop rows and columns to swap them (p. 28).

**Steps to Swap Nested Levels**

- In the PowerPlay Web display, right-click the level selector area for the nested category, and choose how you want to swap the nested levels:
  - If the nested category is in a column, click either Swap Up or Swap Down.
  - If the nested category is in a row, click either Swap Right or Swap Left.

The positions of the parent category and the nested category are exchanged.

**Tip:** You can also drag and drop nested levels to swap them (p. 28).

## Limit the Size of Crosstabs

To improve the performance and readability of large reports, you can limit the data that appears in crosstab displays. For example, you set a row limit of 20 and a column limit of 10. Values that you set in PowerPlay Web for the rows and columns override the default row and column limits set by your PowerPlay administrator.

When you limit the size of a crosstab, PowerPlay Web provides the following navigation buttons in the display:

| Button  | Description                            |
|---|--|
|  | Moves to the next page of columns.     |
|  | Moves to the previous page of columns. |

| Button  | Description                         |
|---|-------------------------------------|
|  | Moves to the first page of columns. |
|  | Moves to the last page of columns.  |
|  | Moves to the next page of rows.     |
|  | Moves to the previous page of rows. |
|  | Moves to the first page of rows.    |
|  | Moves to the last page of rows.     |

When you limit the number of rows or columns in a report with nested categories, you must choose the number of categories you want to show at the lowest level. Subtotal categories are always included on each page (unless Hide Subtotals is enabled), even if the limit must be exceeded to do so.

### Steps



1. On the PowerPlay Web toolbar, click the Display Options button.
2. Click Options.
3. In the Number of Rows box, select the number of rows you want to show.
4. In the Number of Columns box, select the number of columns you want to show.
5. Click Apply, and then click OK.

The crosstab shows the limited number of rows and columns.

### Note

- The Number of Rows and Number of Columns settings apply only to crosstab displays.

## Suppress Values

You can ignore categories whose values fall into a low range. For example, sales channels that were not active contributors to the bottom line are better left out of the report. You can also ignore categories that either don't apply to the report or that return zero values. In these situations, you can use one or both of the following suppression features:

- Zero suppression removes rows or columns containing all zeros.
- 80/20 suppression removes rows or columns whose absolute values do not contribute to the top 80% of results. It then summarizes the removed rows or columns into a single row or column called "Other."

When you apply 80/20 suppression, the data for the cells is sorted in descending order and a total is made of the absolute values. Then the sorted values are added until the cumulative total is eighty percent of the total. If the last value added to the cumulative total appears in more than one cell, all those cells are considered part of the eighty percent.

In Microsoft SQL Server Analysis Services cubes or SAP BW cubes, if the dynamic rollup of the "Other" category includes a category that is also filtered as a result of the overall 80/20 suppression, a conflict results that causes PowerPlay Web to return an NA value for the "Other" category.

All the suppression buttons remain enabled until you click them again.

### Steps to Apply Zero Suppression



1. On the PowerPlay Web toolbar, click the arrow to the right of the zero suppression button.
2. Choose where to apply zero suppression:
  - To apply zero suppression to rows and columns, click Zero Suppression.
  - To apply zero suppression to rows only, click Rows Only.
  - To apply zero suppression to columns only, click Columns Only.

The rows or columns that contain only zeros are removed, and a comment indicating the type of zero suppression applied appears at the bottom of the report.

### Steps to Apply 80/20 Suppression



- On the PowerPlay Web toolbar, click the 80/20 Suppression button.

PowerPlay Web shows the total of values suppressed in an additional row or column called "Other" and shows "80/20 suppression" at the bottom of the report page. If a category labelled "Other" is not shown, all the categories in the report dimension contribute to eighty percent of the total.

## Add Rank Categories Based on Measure Values

You can now add rank categories to your PowerPlay Web Explorer reports to show rank ordinals. Ranking adds ordinals to a report so you can compare your categories to one another. For example, you have a report that outlines revenue for all your products. You can add a rank category to this report to see which products had the highest revenue.

Categories are ranked by their value in a specific row or column. The rank ordinals appear in a new row or column. The labels and values of the rank category are italicized.

The rank results can be unsorted, meaning that they are not in numerical order, or they can be sorted in ascending or descending order. For example, when you rank products by their value in the Revenue category, PowerPlay Web adds a rank column to the report that shows what place each product came in. If you want to see the top ten revenue-generating products, you sort the rank category to arrange the ordinals in numerical order.

Rank categories and sort orders are automatically regenerated whenever there is a change to the report data.

PowerPlay Web reports with rank categories can be exported to PDF ([p. 65](#)), CSV ([p. 64](#)) or Excel ([p. 65](#)) format, saved to the portal ([p. 61](#)), and bookmarked ([p. 66](#)).

You cannot rank forecast calculation or total summary values. You can add rank categories only if your PowerPlay Web administrator enabled the settings in PowerPlay Enterprise - Server Administration.

### Steps

1. In the PowerPlay Web Explorer report, right-click the column or row on which you want to base the rank category, and then click Insert Rank.
 

You can rank on more than one column or row.
2. Verify the category on which you want to base the rank category.
3. In the Show Ordinals list box, click Top, Bottom or All, and type the number of ordinals you want to show.
 

Type Top to show the highest values, Bottom to show the lowest values, or All to show all the values.
4. In the Start the Ordinals From list box, click Highest or Lowest to identify which ordinal is ranked as ordinal 1.
5. In the Sorting Order list box, click Descending, Ascending, or None to set the sorting order.

6. In the Rank Name box, specify a name for the rank category.  
The rank category name appears at the top of the column or beginning of the row in italicized text.
7. Click OK.



**Tip:** You can also use the Rank button on the PowerPlay Web toolbar to add, delete, edit, or rename a rank category.

The new rank category appears in the PowerPlay Web Explorer report, to the right of the selected column or under the selected row.

## Hide Categories

You can selectively show or hide any category in a report, including precalculated categories that were inserted when the cube was created. When you hide categories, the summaries in the report are not affected.

### Steps to Hide a Single Category

1. In the PowerPlay Web display, right-click the category you want to hide, and then click Hide Selection.

### Steps to Hide or Show Multiple Categories

1. In the PowerPlay Web display, right-click a category heading, and then click Hide/Show.
2. In the Visible Categories and Hidden Categories lists, select the categories you want to hide or show and use the arrow buttons to move them to the preferred list.



### Steps to Hide Precalculated Categories



1. On the PowerPlay Web toolbar, click the Display Options button.
2. Click Options.
3. Select the Hide Calculated Categories Defined in the Cube check box, and then click Apply.

## Show Short Names

You can switch between long and short category names in your report. A short name is an optional property that is defined for any category in a cube. You may want to show short category names so that you can see all the rows on your monitor without scrolling down.

After you show short names, they appear in

- crosstab displays
- the dimension viewer
- drill-down views
- the Explain dialog box
- the Calculations dialog box
- exported PDF and CSV reports
- the Find dialog box
- the Hide/Show dialog box

When you show short names, any category that does not have a short name defined in Transformer is represented in PowerPlay Web with its long name.

**Steps**

1. On the PowerPlay Web toolbar, click the Display Options button.
2. Click Options.
3. Select the Show Short Names check box.
4. Click Apply.

## Add a Title

You can create or edit a title for the current report. Meaningful titles can help you to categorize the reports that you use.

**Steps**

1. On the PowerPlay Web toolbar, click the Display Options button, and then click Edit Title.  
**Tip:** You can also right-click anywhere in the report and click Edit Title.
2. In the Title Text box, specify the text and formatting of your title:
  - Type the text you want to appear in your report title.
  - Add valid HTML tags.  
**Tip:** Your administrator may restrict the HTML tags that you can use ([p. 48](#)).
  - If you want to add variables to the title, select them from the Variables box, and click Insert.
3. If you want to use the cube title instead of the report title, click the Default button.
4. If you want the dimension bar and default measure appended when you generate a PDF report, select the Display Dimension Bar Information check box.
5. Click OK.

## Valid HTML Tags in Report Titles

Your administrator can restrict embedded HTML content in the titles of reports that may be published to the Web. This ensures, for example, that unwanted scripts are not run when a consumer views a published report on the Web in interactive HTML exploration. If your administrator does not restrict the HTML content, you can use any valid HTML tag in your report title.

For more information, see the *Enterprise Server Guide*.

By restricting embedded HTML tags in titles, the administrator ensures that only the following HTML tags are valid:

- <I>, <B>, <U>, <BR> (with no attributes)
- <P> (with align, dir, style, class and title attributes permitted)
- <SPAN>, <DIV> (with dir, style and class attributes permitted)

The following items are then exported as text only:

- any unrecognized tags (or tags with invalid attributes)
- any tag containing a style attribute with unexpected values
- all text (both inside and outside tags)
- all attribute values
- all results from VAR tags

### Style Attribute Values

The style attribute, which is permitted on the <P>, <SPAN> and <DIV> tags, can have only the following values:

- font
- font-size
- font-weight
- font-style
- color
- background-color
- text-decoration

Some style elements are not permitted. For example, the font-family element is not recognized. The font-size element can have only numbers after it, and the color element should only be used with the rgb (#,#,#) format.

For example, to create a title in 24 point bold, red text, type the following in the Title Text box:

```
<p STYLE="font-size:24;color:rgb(255,0,0);font-weight:bold">My Customized Report</p>
```

## Add and Reorder Measures

When you open a cube in PowerPlay Web, the measures defined for your cube appear in the order defined in Transformer. You can change this order in your report. You can also add and reorder multiple measures to the report.

You can reorder measures in your crosstab using drag-and-drop. PowerPlay maintains this order in any layout view. Only the top-level measures in the Measure dimension can be reordered.

When you save or close your cube, the new order is lost. To retain this order for future use, you must save your report (if you are using the portal), export it in .pdf or .csv format, or prepare a bookmark for it (p. 66).

To reorder measures, you must be using Internet Explorer as your Web browser.

### Steps

1. In the dimension viewer, right-click the Measures folder, and then click either Replace Rows or Replace Columns.  
The measures are shown in the rows or columns.
2. In the crosstab, click a measure that you want to move within the list.  
**Tip:** You can also click a measure in the dimension viewer.
3. Drag the measure to the highlighted area that appears between two other measures in the list.  
**Tip:** If you are dragging from the dimension viewer a measure that is hidden in the report, the measure becomes visible.
4. Repeat steps 2 to 3 until all the measures appear in the PowerPlay Web display in the order that you want.

### Tips

- You can create this custom ordering whether your measures appear as rows or as columns.
- A cube may contain precalculated categories that were inserted when the cube was created. To hide these categories, click the Display Options button on the PowerPlay Web toolbar, click Options, and then, in the Hide Calculated Categories Defined in the Cube check box, click Apply.



## Use Layers to Page Through Categories in Your Report

You can use Layers to create a different perspective of your data when you export to pdf. Layers can be used to present data in pages where each page is filtered on a sibling of a level within a dimension.

### Steps

1. Explore your PowerPlay Web Explorer report and select a filter within one of the dimensions in your dimension filter bar.
2. On the PowerPlay Web Dimension Filter bar, click the highlighted area over or under the name of the filter to page through the categories in that level of that dimension.



3. On the toolbar, click the File button, and click Export PDF.
4. In the Export PDF dialog box, select Include Layers and choose the dimension for which you would like to apply the layers effect.

## Choose a Display

A display is a visual representation of the report data. You can change displays to

- show information from different perspectives
- find a trend
- compare variables, show variance, and track performance

For example, you can change a crosstab display to a pie display to view the relationship of individual components of your data to the entire data set.

When you view nested categories in graphic display types, each lowest-level intersection is shown in a separate display. To isolate the display for a nested category, click the link for the nested category.



To view summary information for the display, click the Zoom In button.

If there are no nested categories, only one display is shown.

You can use any one of the following displays to present your report. For information about viewing charts and tables together, see ["View a Chart and Table Together"](#) (p. 20).

### Tips



- If some of the chart displays show values that are very close, click the Scale Axis button on the y-axis to regenerate the axis so that the close values are more easily distinguished.

- Choose how you want to save the current view:



- On the PowerPlay Web toolbar, click the Save As button to publish your report to the portal (p. 61).



- Click the File Options button, and then click Prepare Bookmark to save your view as a bookmark (p. 66).



- To return to the initial view of your data, which includes resetting all dimensions to the top level, click the Display Options button on the PowerPlay Web toolbar and then click Reset. If you prepared a bookmark, however, you do not return to the initial view.

## Crosstab Display

The standard crosstab display is the default display type, and it shows data in tabular format. The first two dimensions of the cube represent the rows and columns respectively.

| Actual Revenue as values | Camping Equipment | Outdoor Protection | Golf Equipment | Products       |
|--------------------------|-------------------|--------------------|----------------|----------------|
| 1999                     | 20,471,328.88     | 1,536,456.24       | 5,597,980.86   | 34,750,563.50  |
| 2000                     | 31,373,606.46     | 988,230.64         | 9,598,268.88   | 62,558,488.56  |
| 2001                     | 37,869,055.58     | 646,428.04         | 10,709,215.84  | 74,267,335.82  |
| Years                    | 89,713,990.92     | 3,171,114.92       | 25,905,465.58  | 171,576,387.88 |

If you nest categories, the nested categories appear in rows below or columns to the right of the top level dimensions.

| Actual Revenue as values |               | Camping Equipment | Outdoor Protection | Golf Equipment | Products      |
|--------------------------|---------------|-------------------|--------------------|----------------|---------------|
| 1999                     | 1999 Q 1      | 3,984,224.50      | 321,983.90         | 975,181.00     | 6,595,468.14  |
|                          | 1999 Q 2      | 5,075,177.96      | 611,615.92         | 1,871,413.20   | 9,236,520.84  |
|                          | 1999 Q 3      | 4,645,255.82      | 477,277.94         | 1,169,527.46   | 7,996,510.68  |
|                          | 1999 Q 4      | 6,766,670.60      | 125,578.48         | 1,581,859.20   | 10,922,063.84 |
|                          | 1999          | 20,471,328.88     | 1,536,456.24       | 5,597,980.86   | 34,750,563.50 |
| 2000                     | 2000 Q 1      | 5,638,050.96      | 212,782.46         | 1,553,249.68   | 10,604,831.04 |
|                          | 2000 Q 2      | 8,479,008.16      | 343,938.86         | 3,763,377.96   | 18,711,762.28 |
|                          | 2000 Q 3      | 7,760,772.76      | 316,900.86         | 1,485,202.42   | 14,495,315.04 |
|                          | 2000 Q 4      | 9,495,774.58      | 114,608.46         | 2,796,438.82   | 18,746,580.20 |
|                          | 2000          | 31,373,606.46     | 988,230.64         | 9,598,268.88   | 62,558,488.56 |
| 2001                     | 2001 Q 1      | 8,162,650.72      | 121,930.90         | 1,796,219.58   | 14,208,416.32 |
|                          | 2001 Q 2      | 9,449,464.76      | 232,016.54         | 3,559,611.16   | 20,291,472.74 |
|                          | 2001 Q 3      | 7,370,377.14      | 192,489.80         | 2,152,470.24   | 15,182,187.26 |
|                          | 2001 Q 4      | 12,886,562.96     | 99,990.80          | 3,200,914.86   | 24,585,259.50 |
|                          | 2001          | 37,869,055.58     | 646,428.04         | 10,709,215.84  | 74,267,335.82 |
| Years                    | 89,713,990.92 | 3,171,114.92      | 25,905,465.58      | 171,576,387.88 |               |

### Steps



- Click the arrow to the right of the Crosstab button on the PowerPlay Web toolbar, and then click Crosstab.

## Indented Crosstab Display

Use indented crosstabs so that the levels of nested categories are indented and the relationships between the categories are more easily identified. This display also presents a more compact format than a crosstab, making it better for printing.

| Actual Revenue as values | Camping Equipment | Outdoor Protection | Golf Equipment | Products       |
|--------------------------|-------------------|--------------------|----------------|----------------|
| <b>2000</b>              |                   |                    |                |                |
| 2000 Q 1                 | 5,638,050.96      | 212,782.46         | 1,553,249.68   | 10,604,831.04  |
| 2000 Q 2                 | 8,479,008.16      | 343,938.86         | 3,763,377.96   | 18,711,762.28  |
| 2000 Q 3                 | 7,760,772.76      | 316,900.86         | 1,485,202.42   | 14,495,315.04  |
| 2000 Q 4                 | 9,495,774.58      | 114,608.46         | 2,796,438.82   | 18,746,580.20  |
| 2000                     | 31,373,606.46     | 988,230.64         | 9,598,268.88   | 62,558,488.56  |
| <b>2001</b>              |                   |                    |                |                |
| 2001 Q 1                 | 8,162,650.72      | 121,930.90         | 1,796,219.58   | 14,208,416.32  |
| 2001 Q 2                 | 9,449,464.76      | 232,016.54         | 3,559,611.16   | 20,291,472.74  |
| 2001 Q 3                 | 7,370,377.14      | 192,489.80         | 2,152,470.24   | 15,182,187.26  |
| 2001 Q 4                 | 12,886,562.96     | 99,990.80          | 3,200,914.86   | 24,585,259.50  |
| 2001                     | 37,869,055.58     | 646,428.04         | 10,709,215.84  | 74,267,335.82  |
| Years                    | 89,713,990.92     | 3,171,114.92       | 25,905,465.58  | 171,576,387.88 |

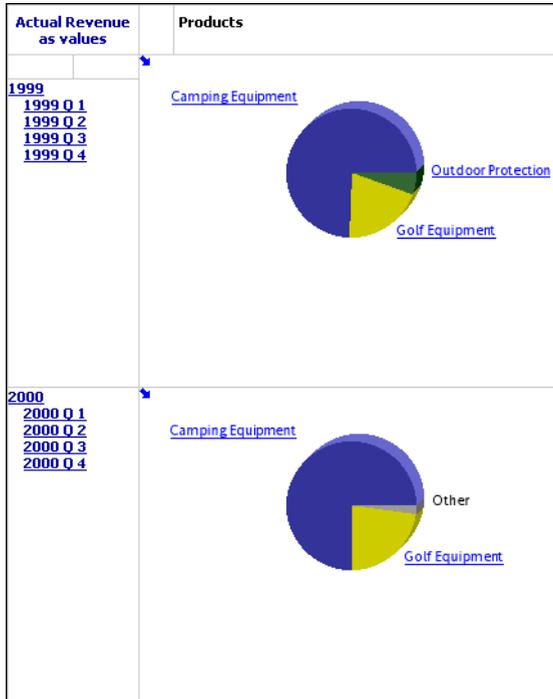
### Steps



- Click the arrow to the right of the Crosstab button on the PowerPlay Web toolbar, and then click Indented Crosstab.

## Pie Display

The pie display charts the summary row of each column to show its proportional contribution to the whole. Any negative numbers are treated as absolute values; for example, the values -50 and 50 are plotted as 50. This type of display is useful for situations where there are not too many items.



If the display does not have nested categories, a legend is shown which identifies the column and data value associated with each colored section of the pie.

### Steps



- Click the arrow to the right of the Chart button on the PowerPlay Web toolbar, and then click Pie.

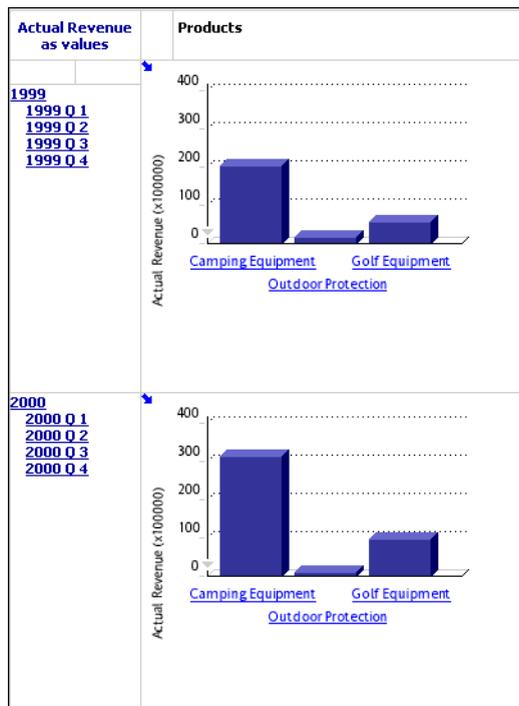
### Steps to Modify the Pie Display



- On the PowerPlay Web toolbar, click the Display Options button, and then click Options.
- In the Pie section of the Options dialog box, choose whether to use names or values to label the pie slices.
- If you want to resize the chart to a percentage of the screen (p. 59), select the Percentage of Screen check box and, in the Height or Width box, type a number between 10 and 500.
- Click Apply, and then click OK.

## Simple Bar Display

The simple bar display charts the summary row of each column to show absolute contribution. Use to show change over a specific time period, contrast two or more variables, and reveal trends in a clear format. This type of display is useful for discrete data.



### Steps



- Click the arrow to the right of the Chart button on the PowerPlay Web toolbar, and then click Simple Bar.

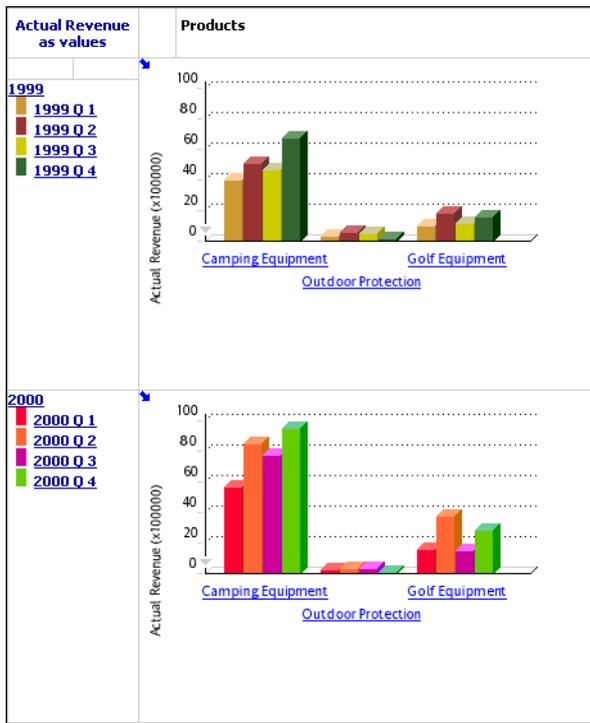
### Steps to Modify the Simple Bar Display



- On the PowerPlay Web toolbar, click the Display Options button and then, click Options.
- In the Simple Bar section of the Options dialog box, change the following settings:
  - To modify the y-axis scale, select the Use Manual Axis Scale check box, and then enter new values for the y-axis in the Minimum Value and Maximum Value boxes.
  - To show the gridlines on the bar display, select the Show the Gridlines check box.
  - To show the data values on the bars in the bar display, select the Show Values on Bars check box.
- If you want to resize the chart to a percentage of the screen (p. 59), select the Percentage of Screen check box and, in the Height and Width boxes, type numbers between 10 and 500.
- Click Apply, and then click OK.

## Clustered Bar Display

The clustered bar display plots the cell values of a crosstab in groups so that you can easily compare related information, summaries, and categories. One bar group is created for each column. Each bar in a group represents the row value.



If the display does not have nested categories, a legend identifies the row or column represented by each color.

### Steps



- Click the arrow to the right of the Chart button on the PowerPlay Web toolbar, and then click Clustered Bar.

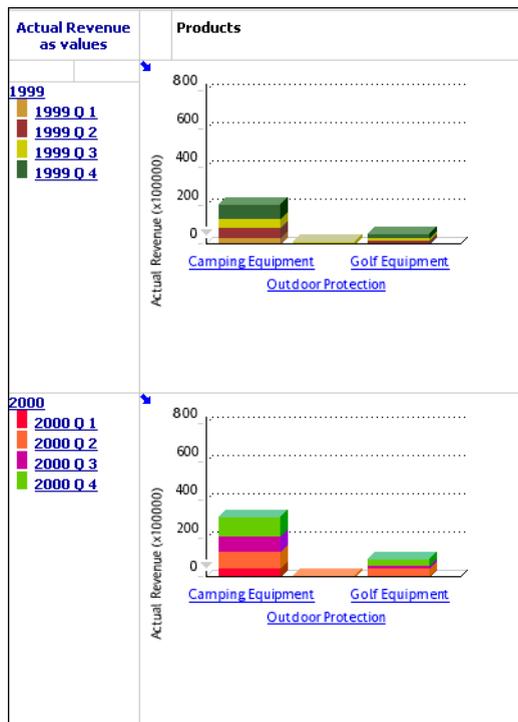
### Steps to Modify the Clustered Bar Display



1. On the PowerPlay Web toolbar, click the Display Options button and then, click Options.
2. In the Clustered Bar section of the Options dialog box, change the following settings:
  - To modify the y-axis scale, select the Use Manual Axis Scale check box, and then enter new values for the y-axis in the Minimum Value and Maximum Value boxes.
  - To show the gridlines on the clustered bar display, select the Show the Gridlines check box.
  - To show the data values on the bars in the clustered bar display, select the Show Values on Bars check box.
3. If you want to resize the chart to a percentage of the screen (p. 59), select the Percentage of Screen check box and, in the Height and Width boxes, type numbers between 10 and 500.
4. Click Apply, and then click OK.

## Stacked Bar Display

The stacked bar display shows trends across columns by plotting the relative proportions of parts to the whole and the relationship between the parts. One bar is created for each column. Within a bar, a segment represents the row value.



If the display does not have nested categories, a legend identifies the row or column represented by each color.

### Steps



- Click the arrow to the right of the Chart button on the PowerPlay Web toolbar, and then click Stacked Bar.

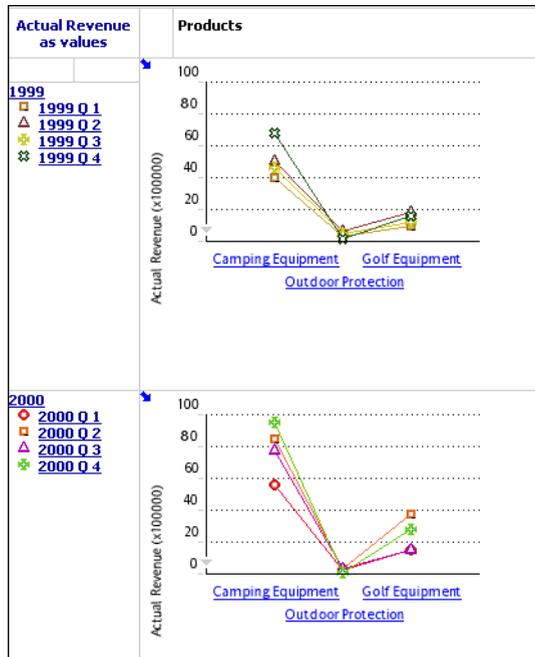
### Steps to Modify the Stacked Bar Display



- On the PowerPlay Web toolbar, click the Display Options button, and then click Options.
- In the Stacked Bar section of the Options dialog box, change the following settings:
  - To modify the y-axis scale, select the Use Manual Axis Scale check box, and then enter new values for the y-axis in the Minimum Value and Maximum Value boxes.
  - To show the gridlines on the stacked bar display, select the Show the Gridlines check box.
- If you want to resize the chart to a percentage of the screen (p. 59), select the Percentage of Screen check box and, in the Height and Width boxes, type numbers between 10 and 500.
- Click Apply, and then click OK.

## Multiline Display

The multiline display shows trends across columns by plotting the cell values of a crosstab in a line chart. One line is created for each column, with a segment of the line representing each row value. Use to reveals and compare trends and cycles that show relationships between variables, or to show time series analysis and relationships between variables.



If the display does not have nested categories, a legend identifies the row or column represented by each color.

### Steps



- Click the arrow to the right of the Chart button on the PowerPlay Web toolbar, and then click Multiline.

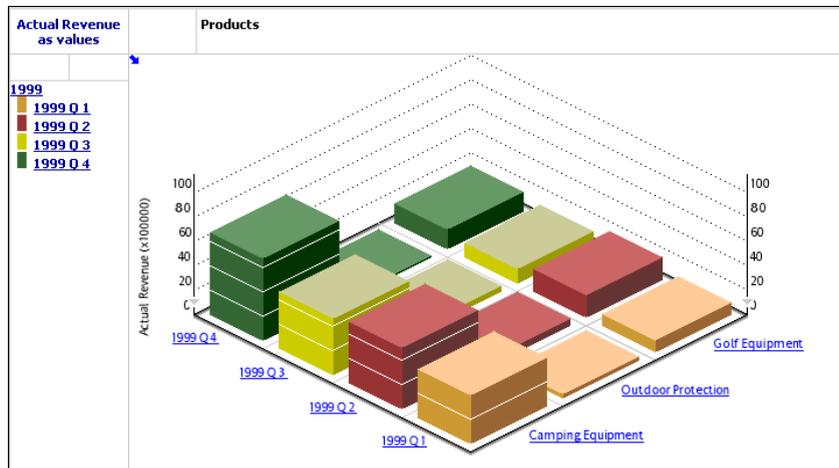
### Steps to Modify the Multiline Display



1. On the PowerPlay Web toolbar, click the Display Options button, and then click Options.
2. In the Multiline section of the Options dialog box, change the following settings:
  - To modify the y-axis scale, select the Use Manual Axis Scale check box, and then enter new values for the y-axis in the Minimum Value and Maximum Value boxes.
  - To show the gridlines on the multiline display, select the Show the Gridlines check box.
  - To show markers on the multiline display, select the Show Markers check box.
3. If you want to resize the chart to a percentage of the screen (p. 59), select the Percentage of Screen check box and, in the Height and Width boxes, type numbers between 10 and 500.
4. Click Apply, and then click OK.

## Three-Dimensional Bar Display

The three-dimensional bar display shows trends across columns by plotting the cell values of a crosstab in a three-dimensional bar. One bar is created for each column, with the top of the bar representing each row value. Use to show relationships between two or more variables to analyze large quantities of data that are difficult to interpret otherwise, or to provide a different perspective on the data.



If the display does not have nested categories, a legend identifies the row or column represented by each color.

### Steps



- Click the arrow to the right of the Chart button on the PowerPlay Web toolbar, and then click 3D Bar.

### Steps to Modify the Three-Dimensional Bar Display

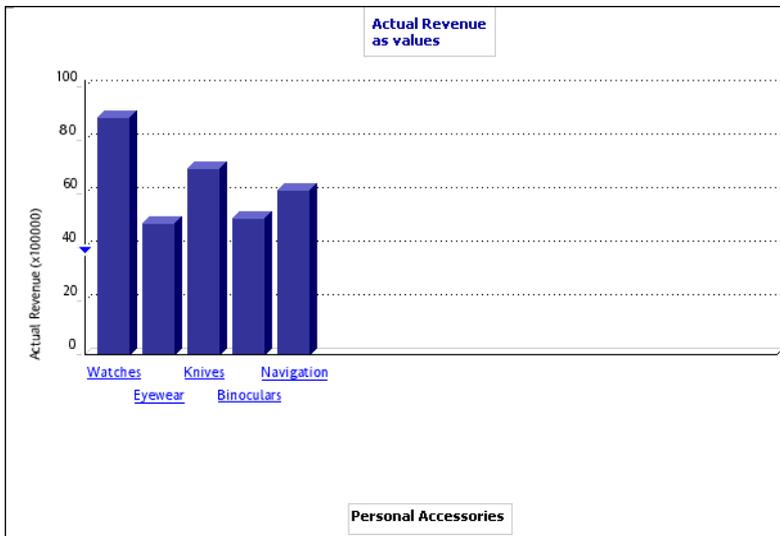


- On the PowerPlay Web toolbar, click the Display Options button, and then click Options.
- In the 3D Bar section of the Options dialog box, change the following settings:
  - To modify the y-axis scale, select the Use Manual Axis Scale check box, and then enter new values for the y-axis in the Minimum Value and Maximum Value boxes.
  - To show the gridlines on the three-dimensional bar display, select the Show the Gridlines check box.
- If you want to resize the chart to a percentage of the screen (p. 59), select the Percentage of Screen check box and, in the Height or Width box, type a number between 10 and 500.
- Click Apply, and then click OK.

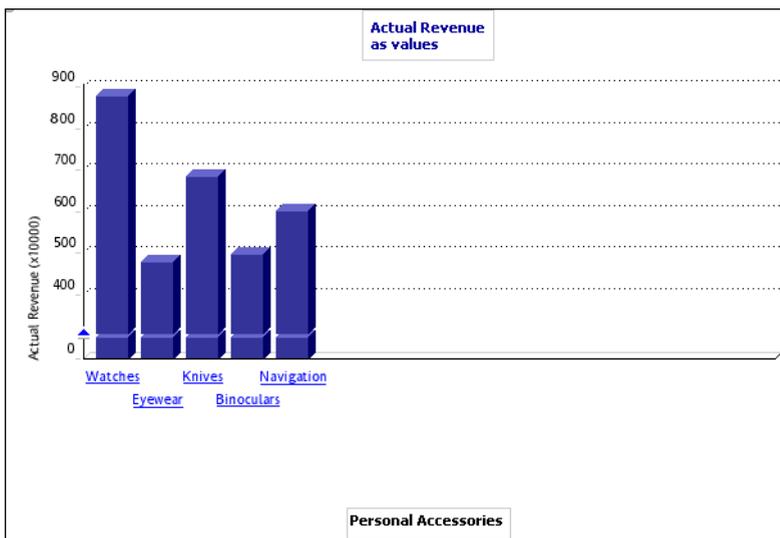
## Scale the Y-Axis

Sometimes the data that is used to display charts does not span a wide range of values. For example, a simple bar display shows inventory levels for three products at 14,000, 14,150, and 13,900. The labels and grid lines on the y-axis are at intervals of 500, making the individual values for each product difficult to distinguish. You can scale the axis to focus on the 14,000 range. This has the effect of visually separating the tops of each bar in the display.

For example, your report for the revenues of Personal Accessories contains the following display.



To make the data more meaningful, you can scale the y-axis to give you the following:



You can scale the y-axis for the following display types:

- simple bar
- clustered bar
- stacked bar
- multiline
- three-dimensional bar

This feature is unavailable if the range of all values is greater than the minimum value.

### Steps

1. On the y-axis of the display, click the Scale Axis button.
2. To reset the original scale of the axis, click the Restore Axis button.

## Resize Charts

You can resize a chart to a percentage of the screen. This helps you to view a chart size that suits your environment.

### Steps



1. Click the arrow to the right of the Chart button on the PowerPlay Web toolbar, and then click a chart type.



2. On the PowerPlay Web toolbar, click the Display Options button, and then click Options.
3. Select the Percentage of Screen check box.
4. In the Height box, type a number between 10 and 500.

This number represents the percentage of the screen to which you want to resize the height.

For a Pie Chart or 3D Bar Chart, to maintain a 1:1 aspect ratio in the resized chart, the number you type appears in both the Height and Width boxes.

5. In the Width box, type a number between 10 and 500.

This number represents the percentage of the screen to which you want to resize the width.

For a Pie Chart or 3D Bar Chart, to maintain a 1:1 aspect ratio in the resized chart, the number you type appears in both the Height and Width boxes.

6. Click Apply, and then click OK.



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## Chapter 6: Distribute Results

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Distribute your results by publishing reports to the Cognos portal for others to view, by printing them, or by exporting reports as PDF files or as comma separated value tables that can be opened in other applications, such as Microsoft Excel. You can also create a bookmark to the report that you can save in your Web browser or send to others. When a colleague opens a report that you have published to the portal or sent as a bookmark, the report opens in their Web browser in PowerPlay Web Explorer.

Using Cognos NoticeCast, you can create an alert that sends an email notification when a specific condition in your data occurs.

### Publish Reports to the Portal

You can publish reports from PowerPlay Web Explorer or PowerPlay Web Viewer to one of the following portals designated by your administrator:

- Upfront

Upfront is the Web interface to Cognos enterprise applications and other Web data. In PowerPlay Web you can save your report as a primary NewsItem in an Upfront NewsBox. However, in Upfront, a primary NewsItem can be deleted by other users who have access to the NewsBox. To prevent this, you can publish it as a NewsItem to a personal NewsBox and then create a linked NewsItem in another NewsBox by copying the NewsItem to that NewsBox.

For more information about Upfront, see the *Web Portal User Guide*.

- Cognos Connection

Cognos Connection is the portal to Cognos ReportNet, the Web-based reporting solution. The Cognos Connection portal provides a single access point to all corporate data available in ReportNet.

For more information about Cognos ReportNet, see your administrator.

#### Steps



1. On the PowerPlay Web toolbar, click the Save As button.

You may be asked to log on to the portal server set up by your administrator.

2. Follow the steps in the wizard, and click OK.

**Tip:** You must have write permissions to the portal location that you choose.

The report reappears in your Web browser and is also available for other users from the portal server.

### Replace Reports in the Portal

If you change a report that was already published to the Cognos portal (either Upfront or Cognos Connection), you can replace the report for other report consumers. You can only replace a report if you access the report from the portal and if you have write access to the portal location.

Your administrator specifies the portal to which reports are published: Upfront or Cognos Connection.

### Steps

1. From an Upfront NewsBox or a Cognos Connection folder, open a report.
2. Explore and format your report until you are satisfied with its current state:
  - In PowerPlay Web Viewer, use the Modify Reports (p. 12) page.
  - In PowerPlay Web Explorer, use any of the available commands to format and explore the report.
3. On the PowerPlay Web toolbar, click the Save button.



The report information is replaced in the portal location, and the report remains open in your Web browser.

## Create an Agent

To help individuals who are responsible for business processes manage business events that are time-critical, you can create an agent that examines a data source on a predefined schedule to determine if a business event occurred. When the agent detects a business event, the agent sends a notification to one or more recipients that includes details about the business event.

For example, you can create an agent that will notify you if a specific customer places an order with a value greater than \$200,000. The notification initiates a follow-up process with the customer.

An agent appears as an entry in Upfront. Agent entries are similar to other Upfront entries. For example, you can view the properties and create custom views of Agents.

You can provide notification about changes or updates to other types of information delivered through Upfront. For example, you can deliver notifications that are triggered each time an Impromptu report runs. For more information, see the *Cognos Web Portal User Guide*.

Before you create an agent, identify some important information about the data sources and the individuals responsible for the processes that provide input to the data sources. To select the most appropriate schedule for the agent, you should know how often the data sources are updated. By scheduling the agent to run immediately after the data source update, the agent evaluates the most current data. To ensure that the business event triggers some action, select email recipients that have control over the processes that contributed to the business event.

To create an agent, the Cognos reporting environment must include Cognos NoticeCast. Also, you must have owner or write privileges for the NewsBox where the agent will appear. Anonymous and guest users can't create agents.

For more information about creating agents, see the *Cognos NoticeCast User Guide*.

### Steps

1. In the crosstab, select the row, column, or cell that you want the agent to evaluate.
2. Click the Agent button.
3. In the Agent dialog box, click the Create Agent link.
4. On the Condition page, enter the parameters for the agent.
5. If you are prompted to select a destination NewsBox, click Other NewsBox, select a NewsBox in the NewsBox list, and then click OK.
6. On the Name, Description and Location page, enter the name and description information for the agent.
7. On the Schedule page, choose when to run the agent:
  - If you want the agent to run each time the data source is refreshed, select Run when the Data Source is refreshed.
  - If you want the agent to run on an established schedule, select Run on the following schedule, and then select the schedule you want to use from the drop-down list.



8. On the Send an Email page, enter the information you want to include in the email notification.
  9. If you want to receive duplicate emails, choose one of these options:
    - Clear the Suppress duplicate emails for the selected topics check box, and click Select topics.
    - On the Select topics page, select the topics for which you don't want duplicate notifications, and then click OK.
  10. If you want to attach a PDF of the PowerPlay report to the email, select the Include the Report as a .pdf Attachment check box.
  11. On the Email page, click Finish.
- The agent appears as an entry in Upfront.
- For information about editing agents, see ["Edit an Agent" \(p. 63\)](#).

## Edit an Agent

After you have created an agent in PowerPlay, you can edit the agent in Upfront.  
For information about creating agents in PowerPlay, see ["Create an Agent" \(p. 62\)](#).

### Steps to Modify the Data the Agent Evaluates

1. In Upfront, click the Actions link for the agent NewsItem.
2. On the Agent Actions page, click Modify the rule.  
The PowerPlay cube appears, as well as the Agent tab showing the current agent conditions.
3. Select the row, column, or cell that you want the agent to evaluate, and then click Update Agent.  
The Modify the Rule page appears. The agent description now shows the new data that the agent evaluates.
4. On the Modify the Rule page, enter the parameters for the agent, and then click OK.

### Steps to Modify the Agent Schedule

1. In Upfront, click the Actions link for the agent NewsItem.
2. On the Agent Actions page, click Schedule.
3. On the Schedule page, choose when to run the agent:
  - If you want the agent to run each time the data source is refreshed, click Run when the Data Source is refreshed.
  - If you want the agent to run on an established schedule, click Run on the following schedule, and then select the schedule you want to use from the drop-down list.

### Steps to Modify the Agent Notification List

1. In Upfront, click the Properties link for the agent Newsitem.
2. On the Agent tab, click Edit Email List.
3. On the Email Recipient List page, modify the email recipient information as required, and then click OK.
4. On the agent Properties page, click OK.

### Steps to Subscribe to the Agent Notification

- To subscribe to the Agent notification, on the Modify the Rule page, click Add Me to the Notification List.

## Export Data

You can export the data in a PowerPlay report for use in other applications. You can export data in comma separated value (.csv) file format or in PDF format.

### Export Data in CSV File Format

You can export data as delimited text using many of the Cognos products. In PowerPlay for Windows, you can export data as a delimited ASCII text file (.asc). In PowerPlay Web and Cognos Query, and Impromptu and Impromptu Web Reports, you can export data as a Comma Separated Value file (.csv).

Delimited text format is one of the most popular export formats, because the resulting file can be used as an import source by many applications. The updated delimited text format used in Series 7 ensures a high degree of compatibility in multi-language environments. It also ensures reliability when importing into third-party applications such as Microsoft Excel.

Each Cognos product exports data to delimited text format in the same manner, as shown in the following table.

|                              |  |
|------------------------------|--|
| List separator               | <p>The list separator specifies what character separates items in a list. Its default value is derived from the locale settings. The list separator selected is not persisted between sessions or Save As operations.</p> <p><b>Note:</b> In Impromptu, you can optionally change this character.</p>  |
| Export of numeric data       | <p>The decimal symbol for the locale is used, even if the format or pattern of the number contains an explicit decimal that differs from the locale.</p> <p>The digit grouping symbol (the symbol used to group large numbers such as thousands in the US locale) is not used in the CSV export.</p> <p>The negative sign symbol but not the format of the locale is used. This may also be different than the explicit format used for that number. The negative symbol is always leading.</p> <p>For example, for a German locale of DE_DE, a number that was formatted as "(765 000.45)" is exported to CSV format as "-765000,45".</p> |
| Export of currency data      | <p>Currency values follow the same rules as numbers. The currency symbol is not exported.</p> <p>For example, if the locale is EN_US, and the format of the number in a PowerPlay report is "\$123,456.00", then PowerPlay exports "123456.00".</p>  |
| Export of character data     | <p>In some products, you can optionally allow quotes to be put around the text. This technique ensures that a text field containing the list separator (such as a comma) is not interpreted as multiple fields in the exported file.</p>   |
| Export of date and time data | <p>Dates are exported in ISO format, YYYY-MM-DD</p> <p>Time is exported as ISO format, <i>hh:mm:ss</i>. The hour value (<i>hh</i>) uses the 24-hour clock.</p> <p><b>Note:</b> In PowerPlay, the date is defined in the Transformer model and is exported as text.</p>   |

You can view this data in any application that supports comma separated value files, such as Microsoft Excel. If you do not have Microsoft Excel installed, you can save the .csv file to your computer, and then open the file in another application.

If you have Microsoft Excel installed (Excel 97, Excel 2000, or Excel XP) you can save the comma-separated value file (.csv) to your computer or open the data directly in Excel. To open the data directly, your Web browser must be configured to recognize the CSV format.

To configure Internet Explorer Web browsers for Export CSV, you must set the MIME type for the Microsoft Excel Comma Separated Values File format to **text/x-csv** for your operating system. To do this, Open Windows Explorer, click View, Options, and click the File Types tab. Select Microsoft Excel Comma Separated Values File, and click Edit. In the Content Type (MIME) box, type **text/x-csv**

If your administrator enabled the Dimension Line in CSV Export setting, the dimension line appears in your .csv file.

### Steps

1. Explore and format your report until you are satisfied with its current state.
2. On the toolbar, click the File Options button, and then click Export CSV.  
You are prompted to open the file or save it to your computer.



### Tip

- If the cells in your .csv file appear jumbled together, ensure that the regional settings for PowerPlay Web are consistent with the regional settings of your operating system ([p. 8](#)).

## Export Data in Excel Format

You can export PowerPlay Web Explorer reports as formatted Microsoft Excel (.xls) spreadsheets. You can export a maximum of 65,536 rows, including any headings.

### Steps

1. Explore and format your PowerPlay Web Explorer report until you are satisfied with its current state.
2. On the PowerPlay Web toolbar, click the File Options button, and then click Export XLS.  
You are prompted to open the file or save it to your computer.



## Export Data in PDF Format

You can export and print PowerPlay Web Explorer reports in PDF format. PDF export settings ensure that PDF output from PowerPlay Web Explorer closely matches your interactive reports. You can choose the paper size and orientation of your PDF report output, as well as whether to show borders to aid report readability. You can also show layer views filtered on each sibling in a dimension level.

### Steps

1. On the PowerPlay Web toolbar, click the File Options button, and then click Export PDF.
2. In the Orientation field, click either Portrait or Landscape.
3. In the Paper Size box, select the size you want.
4. If you want to show the borders for crosstab and chart frames, select the Display Frame Borders check box.



5. If you want to show layer views filtered on each sibling in a dimension level, do the following:
  - In the dimension line, select a filter in one of the dimensions.
  - Click the highlighted area above or under the name of the filter to page through the categories in that level of the dimension.
  - Select the Include Layers check box.
  - Click a dimension in the In Dimension field.
6. Click Apply.

### Tips

- The settings are changed throughout the current browser session even if you don't export a PDF file. If you don't click Apply, the settings are applied to only the current PDF export.
  - To revert to the default PDF settings, click Reset.
7. Choose one of the following options:
    - To save the PDF export settings and return to the PowerPlay Web Explorer report, click Close.
    - To export the PDF file with the settings you chose, click Export.

## Prepare a Bookmark

Bookmarks are a convenient way to return to specific reports. For example, you bookmark a report showing sales figures filtered for a specific set of products. You then select the name of the report from the list of bookmarks in the Web browser. The report opens in the browser and shows current data.

When you prepare a bookmark, you capture the complete URL for the report shown in the Location or Address box of your Web browser. This URL includes information about the categories in the report, data formats, and filtering that is not usually included in the URL. After you capture the URL, you can bookmark the report and add its URL to your list of bookmarks or favorites in your Web browser.

If the complete URL for the report is long, you may be prompted to choose between the following options because long URLs cannot be maintained in some Web browsers:

- Save to the Portal, which saves your report to the portal (Upfront or Cognos Connection) specified by your administrator instead of showing a bookmark. Reports saved to Upfront will maintain all the details of the report. For more information, see "[Publish Reports to the Portal](#)" (p. 61).
- Save This Page With a Link to the Report, which means that you must click File, Save in your Web browser to save the Bookmark Options page as an HTML file on your computer. When you open the saved file in your Web browser, you can create a bookmark. The file will contain a link to the report.

### Steps

1. Explore and format your report until you are satisfied with its current state.
2. On the PowerPlay Web toolbar, click the File Options button, and then click Prepare Bookmark.



The complete URL for the report appears in either the Location or the Address box of your Web browser.

3. Use the features of your Web browser to add the bookmark to the list of Web browser bookmarks or favorites.

# Print Reports

In PowerPlay Web Viewer, you print reports using the Print button on the Adobe Acrobat toolbar. In PowerPlay Web Explorer, you can print the report by exporting to PDF and then using the Print button on the Adobe Acrobat toolbar.

You print reports using the Adobe Acrobat PDF format to render, paginate, and size the output, producing high-quality reports suitable for distribution. You can use PDF printing for both PowerPlay Web Viewer and PowerPlay Web Explorer reports.

## Steps to Print Web Viewer Reports

- On the Adobe Acrobat Reader toolbar, click the Print button.

## Note

- Do not use the Print command in your Web browser toolbar for PowerPlay Web Viewer reports.

## Steps to Print Web Explorer Reports

For information about exporting PowerPlay Web Explorer reports to PDF format, see "[Export Data in PDF Format](#)" (p. 65).

- On the Adobe Acrobat Reader toolbar, click the Print button.



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# Appendix A: Forecast Formulae

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All PowerPlay forecasting methods use univariate techniques, which means that each category, whether a row, a column, or a summary row or column, is treated as a separate time series.

For clarification of the Forecast function and the legal explanation of its terms of use, see "[Create a Forecast](#)" (p. 33).

## Trend Forecast Formula

The formula for Trend forecasting is:

$$y = at + b$$

where  $y$  is the dependent variable (for example, revenue);  $t$  is the independent time variable and

$$a = \frac{N \left( \sum_{i=1}^N t_i y_i \right) - \left( \sum_{i=1}^N t_i \right) \left( \sum_{i=1}^N y_i \right)}{N \left( \sum_{i=1}^N t_i^2 \right) - \left( \sum_{i=1}^N t_i \right)^2} \quad (\text{the slope of the trend line})$$

and

$$b = \frac{\left( \sum_{i=1}^N y_i \right) \left( \sum_{i=1}^N t_i^2 \right) - \left( \sum_{i=1}^N t_i \right) \left( \sum_{i=1}^N t_i y_i \right)}{N \left( \sum_{i=1}^N t_i^2 \right) - \left( \sum_{i=1}^N t_i \right)^2} \quad (\text{the intercept})$$

The coefficient of determination, a measure of how closely the trend line corresponds to your historic data, is defined by the following equation:

$$R^2 = 1 - \frac{SSE}{SST}$$

where

$$SSE = \sum_{i=1}^N (y_i - \hat{y}_i)^2 \quad (\text{sum square of the residual errors})$$

and

$$SST = \left( \sum_{i=1}^N y_i^2 \right) - \frac{\left( \sum_{i=1}^N y_i \right)^2}{N}$$

## Growth Forecast Formula

The formula for Growth forecasting is:

$$y = bt^a$$

where  $b$  is the intercept and  $a$  is the constant growth rate.

PowerPlay uses a logarithmic transformed regression model to solve this equation.

## Autoregression Forecast Formula

The formula for Autoregression forecasting is:

$$y_t = \sum_{j=1}^M d_j y_{t-j}$$

where

$$\sum_{j=1}^M \phi_{|j-k|}^k d_j = \phi_k \quad (k=1, \dots, M) \quad (d_j \text{ are the linear prediction (LP) coefficients})$$

and

$$\phi_j \equiv \langle y_i y_{i+j} \rangle \approx \frac{1}{N-j} \sum_{i=1}^{N-j} y_i y_{i+j} \quad (\text{auto-correlation of the historic series})$$

PowerPlay uses Burg's algorithm and a data window (M) equal to half the number of data points to solve these equations.

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# Glossary

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## **3-D Display**

A graph that shows relationships between two or more variables. Use a 3-D display to analyze large quantities of data that are difficult to interpret otherwise.

## **Access Control**

The mechanisms that limit user access to information or controls based on user identity and membership in predefined groups. Access control is typically used by system administrators to control user access to network resources, such as servers, directories, and files.

## **Agent**

A process that monitors data and uses email to deliver alerts when the data meets predefined thresholds and notifications when the data changes. Agents run according to a predefined schedule or when new Business Intelligence content becomes available

See also notification.

## **Alert**

See notification.

## **Alternate Drill-Down Path**

An alternate path within the same dimension that leads to child categories.

## **Ancestor Category**

In PowerPlay, a category above another category along a drill-down path. For example, 1997 is an ancestor category of 1997/Apr.

## **Automatic Exceptions**

Exceptional values that are automatically highlighted. A value is considered exceptional if it deviates significantly from the expected value computed from its row and column percentages.

## **Autoregression**

A method of forecasting based on the auto-correlation approach to time series forecasting. Autoregression forecasting is most reliable when the driving factors of your business affect your measures in a seasonal fashion.

## **Base Value**

The category against which proportions are calculated in Percent of Base calculations.

## **Calculated Category**

A category that shows the results of a calculation. Calculated categories are added to the cube in Transformer. In PowerPlay Web Explorer, you can choose to hide calculated categories.

## **Calculated Column**

A column whose values are calculated from other columns, functions, constants, and other calculated columns.

### **Calculated Measure**

A measure whose values are calculated from other measures, mathematical operators, and numeric constants in an arithmetic equation.

See also "[Measure](#)" (p. 74).

### **Category**

The items in the rows or columns of the report.

### **Category Label**

A name that identifies a category.

See also "[Category](#)" (p. 72).

### **Child Category**

A category one level below another category along a drill-down path. For example, 1997/Q1 is a child category of 1997, where 1997 is the parent category.

See also "[Parent Category](#)" (p. 75).

### **Children**

Categories one level below another category along a drill-down path. For example, Outdoor Products, Environmental Line, and GO Sport Line are children of Products.

### **Clustered Bar Display**

A chart that groups related information, compares summaries, and compares categories.

### **Column**

A category that shows related information in a vertical list.

### **Control Cube**

A cube that contains the structural information used to combine multiple time-segmented PowerCubes into a time-based partitioned cube.

### **Crosstab Display**

A chart that shows data in tabular format.

### **Cube**

A multidimensional data source created in PowerPlay Transformer. It contains measures (data) organized into dimensions to provide faster retrieval and drill-down in PowerPlay.

### **Custom Exceptions**

Exceptional values that are defined as rules and applied to categories in a report. A value is considered exceptional if it falls within the defined value range.

### **Custom Subset**

A group of categories contained in a dimension that appear in a separate, customized category defined by user-specified criteria.

### **Descendant Category**

Any category below another category along a drill-down path. For example, 1997/Apr is a descendant of 1997.

See also "[Ancestor Category](#)" (p. 71) and "[Child Category](#)" (p. 72).

## Dimension

A broad grouping of descriptive data about a major aspect of a business, such as products, dates, or markets. Each dimension includes different levels of categories in one or more drill-down paths and an optional set of special categories.

## Dimension Line

In PowerPlay for Windows and PowerPlay for Excel, one or more rows that shows the categories from each dimension used to filter on data for the current report.

In PowerPlay Web, one or more rows that shows the categories used to filter the data from each dimension in the cube. The dimension line appears above the display in your Web browser.

In Transformer, the row of dimension names that appears either along the top of the dimension map window or just below the Measures and Data Sources option buttons in the Show Scope window.



## Dimension Viewer

An organized view of all dimensions, levels, and categories in the selected cube. Use the dimension viewer to add categories as rows or columns and to filter information.

You can also use the dimension viewer in Windows to add categories as layers, create subset definitions, format measures, and define sets of categories.

## Display

A type of chart or graph.

You can change the display by clicking a display button on the toolbar.

## Drill

An action that shows different categories. Drilling down shows child categories. Drilling up removes child categories from the report.

## Drill Down

An action that shows child categories.

## Drill-Down Path

A line that connects a root category to a leaf category and that passes through the drill category of the primary or alternate drill-down path.

See also "[Leaf Category](#)" (p. 74) and "[Root Category](#)" (p. 76).

## Drill Through

To view the information linked to a value in a report, cube, or macro, or a PowerPlay cube, PowerPlay report, PowerPlay Web report, Impromptu report, Impromptu Web report, or Cognos Web Query (IWQ) report. For example, you can drill through a value to view the detailed sales transactions for a particular customer. Any filtering of information in the original object is automatically applied.

In Cognos Planning, drill through is not supported. However, you can look up values from another cube, or update a plan using values from another plan that has the same set of dimensions.

## Drill Up

An action that removes the child categories, and adds the parent and sibling categories.

### **Enhanced User Interface**

PowerPlay Web Explorer interface based on enhanced Web technology support.

### **Event**

An action or occurrence that a program can respond to. An event can be simple, such as clicking a button, or complex, such as meeting a set of conditions defined in an agent. For example, if the event is refreshing a data warehouse, Impromptu Web Reports runs a report each time the warehouse is refreshed.

### **Exception Highlighting**

Formatting that is applied when the information in the report meets the conditions set by the automatic exception sensitivity, or by the application of a custom exception.

### **Explain Window**

A window that shows details about the current information. The administrator decides what to include when they create the cube.

### **Filter**

A method to emphasize information important to you by removing unnecessary information from the report. For example, instead of looking at the total sales picture, you can view sales for a specific region, product line, or demographic market without deleting data in the report.

### **Forecast**

A calculation of future value by using existing values on the current display. In PowerPlay, you can use forecast to predict future values beyond that currently appearing in your window.

### **Generic User Interface**

PowerPlay Web Explorer interface based on generic HTML.

### **Growth**

A method of forecasting based on the exponential regression technique of time series forecasting. Growth forecasting is most reliable when the driving factors of your business affect your measures exponentially.

### **Leaf Category**

A category at the lowest level of detail in a dimension. For example, if a dimension contains the levels State, City, and Store, and has within these levels the categories California, San Diego, and Pro Form Supplies, then Pro Form Supplies is a leaf category.

### **Legend**

An explanatory list of categories in the report for certain displays. It shows the category name and color representing the associated data. The legend doesn't appear in crosstab, simple bar, single line, and three-dimensional bar displays.

### **Level**

An object that contains common or default attributes for all its member categories. When users drill down on a dimension, they can drill down on categories from one level to another.

### **Measure**

A performance indicator that is quantifiable and used to determine how well a business is operating. For example, measures can be Revenue, Revenue/Employee, and Profit Margin %.

**Measure Folder**

A folder that groups measures from a PowerPlay model into logical groupings. A measure folder can be hierarchical and group either like measures to be collected or calculated measures based on existing measures.

In Cognos Visualizer, calculated measure folders can be referenced in the creation of a chart or filter, whereas measure folders that merely group like measures cannot.

See calculated measure.

**Multidimensional Cube (MDC)**

See "[Cube](#)" (p. 72).

**Multiline Display**

A chart that reveals and compares trends and cycles to show relationships between variables. It also shows time series analysis and relationships between variables.

**Nested Category**

Categories are arranged in multiple levels along the rows, columns, or layers in a crosstab display. Nested categories form groups of information that add another perspective to a report.

**Nested Crosstabs**

A crosstab display contains categories arranged in multiple levels along the rows or columns.

**NewsBox**

A container in Upfront for NewsItems, NewsBoxes, and subscriptions to NewsBoxes.

**NewsIndex**

All the objects that a user can see and interact with in Upfront.

**NewsItem**

The source object that points to the underlying report. Security is applied to the NewsItem.

**Notification**

An email message generated by an agent and sent to one or more recipients to provide information about a business event.

See also agent, and event.

**Parent Category**

A category one level above another category along a drill-up path. A category can have more than one parent if it lies along more than one drill-down path. The parent value is usually a consolidation of all its children's values.

For example, 1997 is the parent category of 1997 Q1, 1997 Q2, 1997 Q3, and 1997 Q4.

**Pie Display**

A chart that shows the relationship between the whole and the parts. For example, a pie display can show you how much of a department's budget goes to paper supplies.

**Publish**

Creates an item in the portal (Upfront or Cognos Connection) for other report consumers. Publish is equivalent to saving a report.

### **Relative Time Category**

A special category in a time dimension that allows cube users to create reports using time periods such as Current Month, Last Month, and Quarter-to-Date, each of which is defined relative to the current period.

Relative time categories are updated automatically by the administrator in Transformer, according to the current period set for the dimension.

### **Report**

A document created in PowerPlay for Windows or PowerPlay for Excel, and opened in PowerPlay Web Viewer. A report consists of data selected from a cube. When you save a report and later re-open it, you open the report with the current data from the cube.

### **Root Category**

The category in a dimension or subdimension from which all other categories are descendant.

### **Row**

A category that shows related information in a horizontal list.

### **Rule**

The criteria used by an agent to evaluate data to determine whether a business event occurred. Rules are defined as part of a business information entity.

See also agent, and event.

### **Sibling Category**

Categories at the same level. For example, Outdoor Products, Environmental Products, and GO Sports Line are sibling categories of the parent category Products.

### **Simple Bar Display**

A chart that shows change over a specific time period, contrasts two or more variables, and reveals trends and irregularities in a bar format. This type of display useful for discrete data.

### **Single Line Display**

A chart that shows change over a specific time period, contrasts two or more variables, and reveals trends and irregularities in a line format. This type of display is useful for continuous data.

### **Slice and Dice**

Changes and arranges data when you

- choose different categories for your report
- drill down and drill up
- filter information

For example, if a report shows the number of products sold by each branch at the end of the last quarter, you can slice and dice information to show revenue over the last two months for each product line.

### **Sort**

Arranges values in numerical order or labels in alphabetical order. You can sort in ascending or descending order.

**Split View**

A combination display of both a crosstab and a chart (pie, line, bar, and so on) that remain synchronized during filtering, drill down, and slice and dice operations.

**Stacked Bar Display**

A chart that shows relative proportions of parts to the whole and the relationship between the parts in a stacked bar format.

**Three-Dimensional Bar Display**

A chart that shows relationships between two or more variables. Use to analyze large quantities of data that are difficult to interpret otherwise.

**Time-Based Partitioned Cube**

A cube that combines multiple time-segmented PowerCubes based on the structural information in a control cube.

**Topic**

The data items evaluated by an agent to determine whether a business event occurred.

**Trend**

A method of forecasting based on the linear regression technique of time series forecasting. Trend forecasting is most reliable when the driving factors of your business affect your measures in a linear fashion.

**Vertical Axis**

The y-axis on a display.



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