



## Getting Started with IBM Cognos Express

## Product Information

This document applies to IBM Cognos Express Version 9.0.0 and may also apply to subsequent releases. To check for newer versions of this document, visit the IBM Cognos Information Centers (<http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp>).

## Copyright

Licensed Materials - Property of IBM

© Copyright IBM Corp. 2009.

US Government Users Restricted Rights – Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

IBM, the IBM logo, ibm.com, and Cognos are trademarks or registered trademarks of International Business Machines Corp., in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at [www.ibm.com/legal/copytrade.shtml](http://www.ibm.com/legal/copytrade.shtml).

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both. Java and all Java-based trademarks and logos are trademarks of Sun Microsystems, Inc. in the United States, other countries, or both.

---

# Table of Contents

---

Introduction	5
<b>Chapter 1: Welcome to IBM Cognos Express</b>	<b>7</b>
IBM Cognos Express: Essential BI and Planning for midsize companies	8
Components of IBM Cognos Express	9
Web-based user interfaces	10
Windows-based user interfaces	12
The Welcome to IBM Cognos Express page	13
The My Content section	13
The My Actions section	14
The Daily News section	14
<b>Chapter 2: Getting started with IBM Cognos Express Advisor</b>	<b>17</b>
Workflow	17
Configuring the ODBC data source	18
Configuring the ODBC data source for Express Data Advisor on the client system	18
Configuring the ODBC data source for Express Data Advisor on the server	19
Installing and Launching IBM Cognos Express Data Advisor	20
Making connections	20
Uninstalling IBM Cognos Express Data Advisor	21
Creating an analysis definition	21
Configuring an analysis definition	22
Selecting data	22
Creating relationships	22
Creating dimensions	22
Analyzing your data in IBM Cognos Express Advisor	22
Starting IBM Cognos Express Advisor from IBM Cognos Express Data Advisor	22
Starting IBM Cognos Express Advisor from IBM Cognos Express Manager	23
Features of IBM Cognos Express Advisor	23
<b>Chapter 3: Getting started with IBM Cognos Express Reporter</b>	<b>25</b>
Launching IBM Cognos Express	25
Installing Framework Manager	25
Uninstalling Framework Manager	27
Creating or modifying a model in Framework Manager	27
Creating a report with Query Studio	28
Create a report with Report Studio	29
View content in IBM Cognos Connection	30
<b>Chapter 4: Getting started with IBM Cognos Express Xcelerator</b>	<b>31</b>
Xcelerator Server overview	31
Creating Xcelerator cubes and dimensions	32
Creating a dimension	33
Creating additional dimensions	34
Creating an Xcelerator cube	34

## Table of Contents

Viewing the Xcelerator cube	35
Adding a rule to an Xcelerator cube	35
Testing the rule calculation	36
Deploying Xcelerator data by using spreadsheets	36
Installing Xcelerator client	37
Uninstalling Xcelerator	38
Index	39

---

# Introduction

---

This document is intended for new users of IBM® Cognos® Express™. IBM Cognos Express is a simple, yet complete, solution that integrates all of the essential business intelligence and planning features.

This guide provides an overview of IBM Cognos Express and will provide you with information on how it is designed as well as get you started with using the features it contains.

## Audience

To use this guide, you should be familiar with

- Basic Windows tasks
- Reporting, analysis, and planning concepts

## Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

**Note:** For online users of this document, a Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the IBM Cognos Resource Center ([http://www.ibm.com/software/data/support/cognos\\_crc.html](http://www.ibm.com/software/data/support/cognos_crc.html)).

Document	Description
IBM Cognos Connection User Guide	Using IBM Cognos Connection to publish, find, manage, organize, and view IBM Cognos content, such as scorecards, reports, analyses, and agents
Query Studio User Guide	Creating self-service business intelligence reports
Report Studio Professional Authoring User Guide	Authoring reports that analyze corporate data according to specific needs
Report Studio Express Authoring User Guide	Authoring financial reports that analyze corporate data according to specific needs
Framework Manager User Guide	Creating and publishing models using Framework Manager
IBM Cognos Express Advisor User Guide	Providing a guide to the features available within IBM Cognos Express Advisor and Data Advisor.

Document	Description
IBM Cognos Express Xcelerator User Guide	Describing how to use the IBM Cognos Express Xcelerator clients

### Finding Information

Product documentation is available in online help from the **Help** menu or button in IBM Cognos products.

To find the most current product documentation, including all localized documentation and knowledge base materials, access the IBM Cognos Resource Center ([http://www.ibm.com/software/data/support/cognos\\_crc.html](http://www.ibm.com/software/data/support/cognos_crc.html)).

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

### Using Quick Tours

Quick tours are short online tutorials that illustrate key features in IBM Cognos product components. To view a quick tour, go to the **Welcome to IBM Cognos Express** page and click the **Quick Tour** button in the lower-right corner of the page or access it from the Help menu in Cognos Connection.

### Getting Help

For more information about using this product or for technical assistance, visit the IBM Cognos Resource Center ([http://www.ibm.com/software/data/support/cognos\\_crc.html](http://www.ibm.com/software/data/support/cognos_crc.html)). This site provides information on support, professional services, and education.

---

# Chapter 1: Welcome to IBM Cognos Express

---

IBM® Cognos® Express™ is a business intelligence and planning solution that integrates three IBM Cognos products with a central application used for installation and administration:

- **IBM® Cognos® Express™ Advisor** - *using the analysis features of IBM Cognos Executive Viewer*

IBM Cognos Express Advisor enables users to quickly move from raw data to high-impact analysis and visualizations. Conduct powerful 'what if' scenario modeling using simple point-and-click.

- **IBM® Cognos® Express™ Xcelerator** - *using the performance management capabilities of IBM Cognos Advisor*

IBM Cognos Express Xcelerator allows users to transform common spreadsheets for planning and analysis and optimize large, highly complex data sets with real-time response. Gain more insight through multidimensional analysis while retaining a familiar Excel interface.

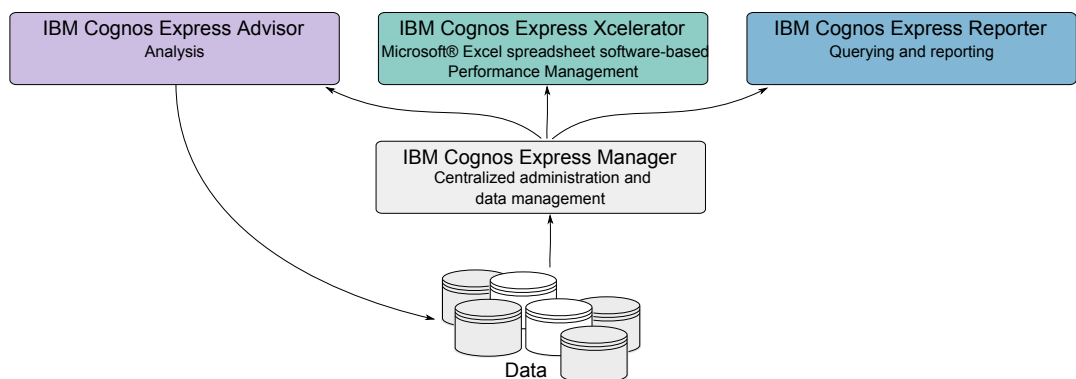
- **IBM® Cognos® Express™ Reporter** - *using the querying and reporting power of IBM® Cognos® 8*

IBM Cognos Express Reporter empowers business users to access, modify and author reports with complete self-service reporting and ad hoc query capabilities. Access any type of data - relational, analytical OLAP, or desktop files - and deliver your reports via the web, PDF, Microsoft® Excel spreadsheets, email, or portal.

- **IBM® Cognos® Express™ Manager**

IBM Cognos Express Manager provides the ability to install, configure and administer all IBM Cognos Express products. Publish data sources, add users and secure business content in one central, easy-to-use application.

The IBM Cognos Express products and IBM Cognos Express Manager are shown in the following diagram.



# IBM Cognos Express: Essential BI and Planning for midsize companies

IBM® Cognos® Express™ delivers the essential reporting, analysis, dashboard, scorecard and planning capabilities purpose-built and priced for midsize companies. Everything is included in a self-contained solution that makes it simple and easy to own, operate, and grow. Most important, it allows midsize companies to deliver consistent, reliable information to the business for better, faster decisions to manage costs, drive profitability and growth of the company.

For organizations that are just beginning to develop a Performance Management strategy, IBM Cognos Express includes everything you need to begin your deployment. It offers powerful but easy-to-use capabilities for both novices and advanced users to encourage broad user adoption.

## IBM Cognos Express is easy

IBM Cognos Express is designed to be easy.

### ❑ Easy to install

IBM Cognos Express includes everything required for immediate success in a preconfigured, no-assembly-required solution. A single, centralized console controls all aspects of installation, deployment and management requiring only a few simple mouse clicks.

### ❑ Easy to use

Self-service allows business users to work on their own to analyze information, create and modify reports - all without having to rely on IT for help. It ensures that data is presented in a context that business users understand. It also ensures that the data is accurate and consistent across the organization. This allows executives and managers in different departments to spend their time analyzing data, instead of arguing over whose data is correct.

### ❑ Easy to buy

IBM Cognos Express is packaged and priced to let companies start small, realize immediate business value, and then grow over time. With no hidden costs for additional software and unsurpassed ease of use, it delivers a rapid return on investment and a predictable ongoing cost of ownership. Companies can easily match their projects and needs to match their budget and resource constraints.

## IBM Cognos Express is complete

IBM Cognos Express is a complete solution for business intelligence and planning. You can purchase it in its entirety or start with just the specific capabilities you need today with an easy growth path toward the future. IBM Cognos Express powerfully integrates three products: IBM® Cognos® Express™ Xcelerator, IBM® Cognos® Express™ Reporter, and IBM® Cognos® Express™ Advisor.

- **IBM Cognos Express Xcelerator**

### Microsoft® Excel-based planning and business analysis

Transforms common spreadsheets with a powerful, in-memory analytics engine for real time multidimensional analysis, reporting and planning. Extends the familiar Excel interface, making



it easy and fast for business users to gain better and improved insight into the business and to take action to optimize the business.

- **IBM Cognos Express Reporter**

**Self-service reporting and ad hoc query**

Empowers business users to access, modify, and author reports with comprehensive, self-service reporting and ad hoc query capabilities. Deliver the right information in the appropriate interface to all users meeting all your business user needs.

- **IBM Cognos Express Advisor**

**Freeform analysis and visualization**

Easily go from raw data to high-impact analysis and visualization. Sophisticated analysis with rich visualization and intuitive drill-down, drill-up, slice-and-dicing of information. Delivered by a fast and powerful in-memory analytics engine with write-back that enables "what if" scenarios for business optimization.

### **IBM Cognos Express helps you**

Using IBM Cognos Express, businesses can work with information the way they want to. It means accessing relevant information is fast and easy. You are confident that the numbers you see are the same throughout the organization. Information is presented in a business context that makes it easy to understand, so you can quickly make informed decisions rather than lose time debating what action to take. And you've connected business intelligence with planning to translate insight into action.

IBM Cognos Express helps you to

- Communicate clearly across the entire organization using scorecards and dashboards that provide an at-a-glance view of performance levels and emerging trends
- Track key performance metrics across processes, products, or supply chains, and drill through to transaction details
- Overcome the risk and limitations of spreadsheet-only business processes
- Perform powerful yet simple analysis to get to the "why" behind an event or action
- Drill down to discover underlying trends that affect customer behavior, sales and marketing, and supply chain performance
- Use the right information on which to base the best revenue generating decisions, the best cost saving decisions and decisions that make the most of your assets

## **Components of IBM Cognos Express**

Depending on your role, you can use IBM® Cognos® Express™ for different purposes. This section gives you an overview of the IBM® Cognos® Express™ components.

IBM Cognos Express is installed and configured using IBM® Cognos® Express™ Manager by the person who is designated as the Express administrator. IBM Cognos Express Manager is also used to manage content and security.

In addition to IBM Cognos Express Manager, IBM Cognos Express has Web-based and Windows-based user interfaces.

Web-based interfaces	Windows-based interfaces
IBM Cognos Express Manager	Framework Manager
IBM Cognos Connection	Data Advisor
IBM Cognos Administration	Xcelerator
Query Studio	
Report Studio	
Advisor	
Xcelerator	

## Web-based user interfaces

The zero footprint, Web-based interfaces include

- IBM Cognos Express Manager (p. 10)
- IBM Cognos Connection (p. 11)
- IBM Cognos Administration (p. 12)
- Query Studio (p. 12)
- Report Studio (p. 12)
- Advisor (p. 12)
- Xcelerator (p. 12)

The interfaces that are available to users depend on which Express server products you install and whether you make the client products available.

### IBM Cognos Express Manager

Using IBM Cognos Express Manager, administrators with little or no training can quickly install and manage IBM Cognos Express products.

For information about using IBM Cognos Express Manager, see *Managing IBM Cognos Express*.


## IBM Cognos Connection

IBM Cognos Connection is a Web portal provided with IBM Cognos Express, providing a single access point to the corporate data available for its products. It provides a single point of entry for querying, analyzing, organizing data, and for creating reports. You can run all your Web-based IBM Cognos Express applications from IBM Cognos Connection. Other business intelligence applications, and URLs to other applications, can be integrated with IBM Cognos Connection.

Like the other Web browser interfaces in IBM Cognos Express, IBM Cognos Connection uses the default configurations of your browser. It does not require the use of Java, ActiveX, or plug-ins, and does not install them.

In addition to selections for viewing data and creating objects, IBM Cognos Connection includes

- portal pages

The new page button  opens a wizard where you can create a customizable page that uses portlets to show different types of content at the same time.


- Public Folders

Public Folders store shared IBM Cognos Express content, such as packages, reports, and Xcelerator cubes.

- My Folders

My Folders store personal IBM Cognos Express content, such as packages, reports, and Xcelerator cubes.

- User preferences

The my area button  includes links to My Watch Items, alert lists and watch rules that help you monitor business events; My Preferences, settings for format, language, time zone, contact information, and portal content; and My Activities and Schedules, status windows where you can set priorities for and monitor your IBM Cognos such as packages, reports, and Xcelerator cubes activities.

- Link to tools and applications

The **Launch** button provides links to the IBM Cognos Express studios, Xcelerator Web, Advisor Web, and IBM Cognos Administration.

For information about using IBM Cognos Connection, see the IBM Cognos Connection *User Guide* or the online Quick Tour.

The open IBM Cognos Express architecture means that you can choose to integrate IBM Cognos Express into your organization's existing Web portal. You can use Portal Services, provided with IBM Cognos Express, to integrate IBM Cognos Express with a number of portals, including

- SAP Enterprise
- IBM WebSphere
- Plumtree

For more information, see "Deploying Cognos Portlets to Other Portals" in the *IBM Cognos Connection Guide*.

### **IBM Cognos Administration**

IBM Cognos Administration is a central management interface that contains the administrative tasks for IBM Cognos Express. It provides easy access to the overall management of the IBM Cognos environment and is accessible through IBM Cognos Connection.

For information about using IBM Cognos Administration, see the *Administration and Security Guide*.

### **Query Studio**

Using Query Studio with little or no training, you can quickly design, create and save reports to meet reporting needs not covered by the standard, professional reports created in Report Studio.

For information about using Query Studio, see the *Query Studio User Guide* or the online Quick Tour.

### **Report Studio**

Using Report Studio, report authors create, edit, and distribute a wide range of professional reports. They can also define corporate-standard report templates for use in Query Studio, and edit and modify reports created in Query Studio.

For information about using Report Studio, see the *Report Studio Professional Authoring User Guide*, the *Report Studio Express Authoring User Guide*, or the online Quick Tours.

### **Advisor**

Using IBM Cognos Express Advisor, you can analyze and visualize your company data using views created in an easy-to-use web interface. Simple analysis will allow you to spot trends, detect areas of your business that need attention and easily extend the underlying data with business calculations.

For information about using IBM Cognos Express Advisor, see the *IBM Cognos Express Advisor User Guide*.

### **Xcelerator**

Using the Web client for IBM® Cognos® Express™ Xcelerator, you can perform analyses on Xcelerator cubes.

For information about using IBM Cognos Express Xcelerator Web, see the *IBM Cognos Express Xcelerator User Guide*.

## **Windows-based user interfaces**

The Windows-based IBM Cognos Express interfaces are the modeling components: Framework Manager, Data Advisor, and Xcelerator client/Perspectives.

## Framework Manager

Framework Manager is the IBM Cognos Express modeling tool for creating and managing business-related metadata for use in IBM Cognos Express analysis and reporting. Metadata is published for use by reporting tools as a package, providing a single, integrated business view of any number of heterogeneous data sources.

For information about using Framework Manager, see the Framework Manager *User Guide*.

## Data Advisor

Using IBM Cognos Express Advisor, you can create an analysis definition that is based on your relational tables.

For information about using IBM Cognos Express Advisor, see the IBM Cognos Express Advisor *User Guide*.

## Xcelerator client

Using IBM Cognos Express Xcelerator, you can integrate business planning, performance measurement and operational data to enable companies to optimize business effectiveness and customer interaction regardless of geography or structure.

For information about using IBM Cognos Express Xcelerator, see the IBM Cognos Express Xcelerator *User Guide*.


# The Welcome to IBM Cognos Express page

**Important:** The **Welcome to IBM Cognos Express** page is your entry point to all of the features available in IBM® Cognos® Express™. Be sure to bookmark it in order to easily access it.

The **Welcome to IBM Cognos Express** page displays when:

- In a browser window, you enter the following URL:  

```
http://express_server_name:19300/cognos_express/manager/welcome.html
```


 where *express\_server\_name* is the computer name of the IBM® Cognos® Express™ server.  
**Tip:** Your Express administrator should give you the URL.
- You go to the upper right corner of the IBM Cognos Connection window, and from the Help options button , click **Go to the Welcome Page**

There are three sections in the **Welcome to IBM Cognos Express** page: **My Content**, **My Actions**, and **Daily News**.

## The My Content section

Use the **My Content** section to open IBM Cognos Connection. You have these options:

- If you click **My Home**, IBM Cognos Connection will open at the page that you set as your home page.

**Tip:** To set your home page, go to the page you want as your new home page, and then next to the home icon , click the arrow, and click **Set as Home Page**.

- If you click **IBM Cognos Content**, IBM Cognos Connection will open at the top level of Public Folders.

For more information, see the IBM Cognos Connection *User Guide*.

## The My Actions section

Use the **My Actions** section to perform IBM Cognos Express tasks that were enabled by the administrator, start IBM Cognos Express products, download IBM Cognos Express client software to your computer, or view *Getting Started with IBM Cognos Express*. Depending on what your administrator has made available, you may have any of the following options:

- If you click **Query my business data with Query Studio**, Query Studio starts. For detailed information, see the Query Studio *User Guide*.

If you just want to get started using Query Studio, see "[Creating a report with Query Studio](#)" (p. 28).

- If you click **Create professional reports with Report Studio**, Report Studio starts. For detailed information, see the Report Studio Professional Authoring *User Guide* or the Report Studio Express Authoring *User Guide*.

If you just want to get started using Report Studio, see "[Create a report with Report Studio](#)" (p. 29).

- If you click **Explore my data with Advisor**, Advisor starts. For detailed information, see the Advisor *User Guide*.

If you just want an overview of Advisor, see "[Getting started with IBM Cognos Express Advisor](#)" (p. 17).

- If you click **Manage my business performance with Xcelerator**, Xcelerator starts. For detailed information, see the Xcelerator *User Guide*.

If you just want an overview of Xcelerator, see "[Getting started with IBM Cognos Express Xcelerator](#)" (p. 31).

- If you click **Download Express software to my computer**, you can download the client software that your administrator has made available.

For information about installing the client software, see the instructions for installing Data Advisor (p. 20), Framework Manager (p. 25), or Xcelerator client (p. 37).

- If you click **Read "Getting Started with IBM Cognos Express"**, the document *Getting Started with IBM Cognos Express* displays.

## The Daily News section

Watch the **Daily News** section for updates on when a product is installed, client software is made available to you, or a service is unavailable.

For example, the following message may appear in the **Daily News** section:

The Framework Manager download for IBM Cognos Express Reporter is now available.

If you see the message above in the **Daily News** section and your administrator has assigned the appropriate access to you, you can install Framework Manager([p. 25](#)).

**Note:** To see the latest news, refresh your browser window.





---

# Chapter 2: Getting started with IBM Cognos Express Advisor

---

IBM® Cognos® Express™ Advisor allows you to quickly go from relational data to multi-dimensional analysis.

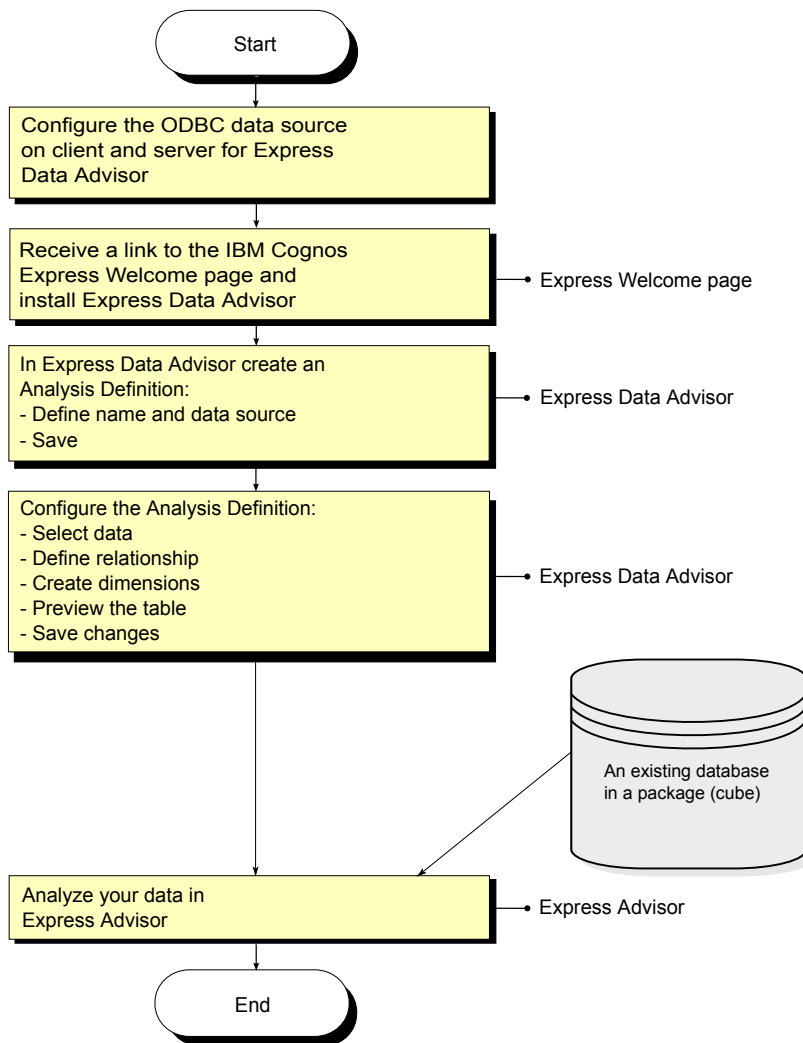
Express Data Advisor creates an analysis definition that is based on your relational tables. With this analysis definition, Express Advisor Server generates an OLAP database and view for analysis of the data.

Express Advisor helps you to understand this data in new ways and from different perspectives. Express Advisor can also receive information in other ways in order to focus on key result areas of your choice. You can customize reports or have Express Advisor do dynamic analyses of results that are important to the decision-making process.

## Workflow

The following workflow diagram shows how to get started with IBM® Cognos® Express™ Data Advisor and IBM Cognos Express Advisor.

Express Data Advisor is used to produce an analysis definition from a relational database. You can use the analysis definition to create a multidimensional structure and analyze it in Express Advisor.



## Configuring the ODBC data source

The ODBC data source must be configured identically on the Advisor Server system and on an Express Data Advisor client system. The ODBC data source for both the Advisor server and the Express Data Advisor client must have the same name and must link to the same relational database.

The Express administrator must make sure that the configuration of the client system and the ODBC data source is exactly the same.

## Configuring the ODBC data source for Express Data Advisor on the client system

You must configure the ODBC data source for Express Data Advisor on the client system.

### Steps

1. Check that the Advisor Server is configured. The Advisor Server must be configured before you can configure your computer.
2. Click **Start > Control Panel**.

3. Select **Administrative tools > Data Sources (ODBC)**.
4. From the **ODBC Data Source Administrator** dialog box, select the **System DSN** tab.
5. Select **Add**.

The **Create New Data Source** dialog box opens.

6. From the drop-down menu, select the data source driver.
7. Click **Finish**.

The **Create New Data Source** dialog box for the driver type opens.

8. Complete the on-screen instructions for the driver type. The fields that are required to be completed are dependant on the data source type. Make sure that the naming convention is the same as given by the system administrator on the server.

The data source name must be the same on both the server and the client system.

9. Click **OK** until all dialog boxes close.

## Configuring the ODBC data source for Express Data Advisor on the server

**Important:** Check that the Express administrator follows the steps below to configure the ODBC data source for Express Data Advisor on the server. The procedure on the server is slightly different than the procedure on the client.

A 64-bit server requires that the ODBC data sources must be 32-bit. To do this you should use the 32-bit data sources application.

### Steps

1. Click **Start > Run**.
2. In the **open** field, type `%WINDIR%\SysWOW64\odbcad32.exe`
3. Click **OK** to launch the 32-bit data sources application.
4. From the **ODBC Data Source Administrator** dialog box, select the **System DSN** tab.
5. Select **Add**.

The **Create New Data Source** dialog box opens.

6. From the drop down-menu, select the data source driver.
7. Click **Finish**.

The **Create New Data Source** dialog box for the driver type opens.

8. Complete the on-screen instructions for the driver type. The fields that are required to be completed are dependant on data source type, but may include:

- Data source name - Required
- Data source description

- Data source server
- Data source address

**Note:** The data source name must be identical on both the server and the client system.

9. Click **OK** until all dialog boxes close.

## Installing and Launching IBM Cognos Express Data Advisor

You install IBM® Cognos® Express™ Data Advisor from the **Welcome to IBM Cognos Express** page.

Before you install Data Advisor:

- You must install Microsoft .NET Framework version 3.5 SP1
- Your administrator must give you access to download the software

**Tip:** It is good practice to read the messages in the **Daily News** section (p. 14) regularly. You will know that you can install Data Advisor when you see this message:

The Data Advisor download for IBM Cognos Express Advisor is now available.

### Steps

1. In a browser window, go to the **Welcome to IBM Cognos Express** page.

**Tip:** The Express administrator should send you the Web address, which is usually the following:

`http://express_server_name:19300/cognos_express/manager/welcome.html`

where `express_server_name` is the computer name of the IBM® Cognos® Express™ server.

2. Select **Download Express software to my computer**.
3. Select **Data Advisor** and run the installation wizard.
4. When the **Install Complete** page displays, select **Launch Advisor**.

You can now make a connection to a package or a cube (p. 20).

For more information, see the IBM Cognos Express Advisor *User Guide*.

## Making connections

For both new and existing views, you must make a connection to a package and a valid cube for the view.

### Steps for a new view

1. Click **Views** button on the toolbar tab.
2. Select a view or folder and click **Open View**. If you click on **Open View** when a folder is selected, all views in the folder are opened.
3. Select a Package from the **Database** list on the **Connection Information** window and click **OK**. If there is more than one cube in the package, select the cube.

**Note:** Local Views will not be available when you use Advisor on Windows Vista with Internet Explorer 7 running in protected mode.

4. In the **Credentials** window, enter your IBM Cognos security credentials to access the server and click **OK**.

### Steps for an existing view

1. Click on the **Connection** button on the toolbar to connect to a different cube or package.
2. On the **Connection Information** window, select the cube or package to change the connection to the server.
3. To clear the credentials, including passwords, for the server, click **Forget Credentials**.

## Uninstalling IBM Cognos Express Data Advisor

You can uninstall Data Advisor from your computer. Uninstalling removes Data Advisor from your computer only.

**Note:** If your administrator uninstalls Reporter on the Express server, your instance of Data Advisor will no longer work.


### Steps

1. From the **Start** menu, click **Settings > Control Panel**.
2. Start **Add or Remove Programs**.
3. In the list of currently installed programs, click **IBM Cognos Express Data Advisor**.
4. Click **Remove** and follow the instructions.

## Creating an analysis definition

In IBM® Cognos® Express™ Advisor you can create an analysis definition.

### Steps

1. Click the **New Analysis Definition** icon .
2. In the **New Analysis Definition** dialog box specify the following:
  - **Name**  
This is the name of your analysis definition. This name will also be used for the file name when you save an analysis definition.
  - **Data Source**  
The available tables from the ODBC data sources that are defined on your system are displayed. Select the ODBC data source you want to use in your analysis definition.
  - **Package**

This option allows you to store the package in the public folder or in my folder in the content store.

## Configuring an analysis definition

The analysis definition is the basis for the analysis of your relational data. After you have configured the analysis definition you can analyze your data in IBM® Cognos® Express™ Advisor.

See the Express Advisor user guide for detailed information.

## Selecting data

The **Select Data** pane allows you to set the tables you are interested in. You can disable and enable tables individually. Alternatively you can disable and enable tables collectively by right-clicking in the **Select Data** pane, outside a table, and selecting the appropriate command.

The contents of a table can be previewed by clicking the **Show Table preview** icon .

## Creating relationships

If relationships are not predefined in your data source, you can create relationships by dragging a field from a table and dropping it on another field.


## Creating dimensions

By default two dimensions are present. The **Values** dimension is mandatory and the **Time** dimension is optional.

Drag and drop the appropriate fields on the **Values** dimension and the **Time** dimension.

Create additional dimensions by dragging and dropping fields in the **Create Dimensions** pane.

Create hierarchies by adding additional levels to a dimension.

The contents of a table can be previewed by clicking the **Show Dimension preview** icon .

## Analyzing your data in IBM Cognos Express Advisor

After you create your analysis definition, you can start analyzing your data with IBM® Cognos® Express™ Advisor.

If an existing database in a package (cube) is already available, you can start using Express Advisor without using Data Advisor.


## Starting IBM Cognos Express Advisor from IBM Cognos Express Data Advisor

You can start IBM® Cognos® Express™ Advisor from IBM Cognos Express Data Advisor.

Depending on the complexity of your analysis definition and the relational data source, this may take some time.

The first time you start Express Advisor you will be asked to install it.

### Step

- With an analysis definition open in Express Data Advisor, click the **Analyze** icon . Express Advisor starts with a view that is based on your analysis definition.


## Starting IBM Cognos Express Advisor from IBM Cognos Express Manager

If an existing database in a package (cube) is already available, you can start using Express Advisor without using Express Data Advisor.

You can start Express Advisor from Express Manager.

The first time you start Express Advisor you will be asked to install it.

### Steps

1. In **IBM Cognos Express Manager** click **Launch > Advisor**.
2. On the toolbar, click the **Views** button .
3. Select a package and click **New View**.
4. Select a database from the package and click **OK**.

## Features of IBM Cognos Express Advisor

With Express Advisor you can:

- Change selections
- Change the position of dimensions
- Format your data
- Create calculations
- Show data in tabular and graphical formats
- Print reports and views of your data
- Export your data to Microsoft® Excel spreadsheets

See the Express Advisor user guide for detailed information.





---

# Chapter 3: Getting started with IBM Cognos Express Reporter

---

IBM® Cognos® Express™ Reporter allows you to perform ad-hoc queries on your company data and to create professional reports for distribution to other users. The starting point for IBM Cognos Express Reporter is a self-service Web portal where you can view and store IBM Cognos Express Reporter content.

You can download to your computer an additional application called Framework Manager. This application allows you to model your company data and make packages available to other users who can then use the packages to create reports.

The tasks in this section help you to start using IBM Cognos Express Reporter and provide an overview of the various applications that are available to you.

## Launching IBM Cognos Express

If you don't already know the Web address to launch IBM® Cognos® Express™, ask your administrator to provide it to you.

The Web address to launch the welcome page is usually as follows:

`http://express_server_name:19300/cognos_express/manager/welcome.html`, where *express\_server\_name* is the computer name of the IBM Cognos Express server.

Notice the following items on the welcome page:

- Under **My Content**, the **IBM Cognos Content** link takes you to IBM Cognos Connection, the portal where you can view shared reports and packages that you and others created.
- Under **Daily News**, you see the status of IBM Cognos Express Reporter and information about data sources and reports that others made available for you to use.
- Under **My Actions**, the **Report Studio** and **Query Studio** links launch the query and reporting tools that come with IBM Cognos Express Reporter.
- Under **My Actions**, the **Download Express software to my computer** link enables you to download and install Framework Manager, the modeling tool for IBM Cognos Express Reporter, provided that your administrator gave you access.

## Installing Framework Manager

You install IBM® Cognos® Express™ Framework Manager from the **Welcome to IBM Cognos Express** page.

Install Framework Manager if you want to model your company data and make packages available to others users with which they can create reports. You do not need to perform any additional configuration to begin using Framework Manager.

To download Framework Manager, your administrator must first give you access.

**Tip:** It is good practice to read the messages in the **Daily News** section (p. 14) regularly. You will know that you can install Framework Manager when you see this message:

The Framework Manager download for IBM Cognos Express Reporter is now available.

## Steps

1. In a browser window, go to the **Welcome to IBM Cognos Express** page.

The Web address is usually the following:


`http://express_server_name:19300/cognos_express/manager/welcome.html`

where *express\_server\_name* is the computer name of the IBM® Cognos® Express™ server.

2. Download the installation package.

- Click **Download Express software to my computer**.

**Tip:** If this link is not available, your administrator has not yet assigned your Express userid to the Express Framework Manager User role.

- Click **Framework Manager**  .

- Click **Save**, choose a location to save the installation package, then click **Save** again.

**Important:** Do not change the filename of this installation package.

The **Download complete** dialog displays.

3. Click **Run**.

4. Click **OK** to confirm that the product language is English.

5. In the installation wizard, do the following:

- On the **Introduction** page, click **Next**.
- Read the license agreement, click **I accept both the IBM and the non-IBM terms**, and then click **Next**.
- If you want IBM Cognos Express Framework Manager to be installed in a location other than the one shown, browse to the location you want.
- Click **Next**.
- Choose your preferred method for starting IBM Cognos Express Framework Manager.
- Click **Next**.

6. Click **Install**.

7. When the **Install Complete** page displays, select **Launch Express Framework Manager**, and then click **Done**.

Framework Manager starts in a new window.

You can now use Framework Manager to create a new project, view data sources in IBM Cognos Connection, create a new package, or publish a package to the IBM Cognos Connection.

For more information, see the Framework Manager *User Guide* by clicking **Contents** from the Framework Manager **Help** menu.

## Uninstalling Framework Manager

You can uninstall Framework Manager from your computer. Uninstalling removes Framework Manager from your computer only.

Before you uninstall Framework Manager, you should back up your Framework Manager projects and models. This prevents the loss of your data should your computer be damaged or stolen. After your computer is operational, you can restore your data. If you use a source control system to store your Framework Manager projects, you do not need to back up your projects.

**Note:** If your administrator uninstalls Reporter on the Express server, your instance of Framework Manager will no longer work.

### Steps

1. From the **Start** menu, click **Settings > Control Panel**.
2. Start **Add or Remove Programs**.
3. In the list of currently installed programs, click **IBM Cognos Express Framework Manager**.
4. Click **Remove** and follow the instructions.

## Creating or modifying a model in Framework Manager

After you install Framework Manager, use it to create or modify models and to publish packages if this is a function that you will perform in your organization.

Because stored data is typically designed for storage and not for reporting, a model allows you to structure, add to, and manage data in ways that make sense to business users. For example, a model defines business rules, data descriptions, data relationships, business dimensions and hierarchies, and administrative tasks.

A package contains all the information that a specific user or group of users needs to create reports. For example, one package can contain human resources data, and another sales data. When you open an authoring studio, you must select which package to use. Each report can contain data from only one package.

This section does not include instructions for modeling data in Framework Manager. For information about how to use Framework Manager, see the Framework Manager *User Guide* and *Guidelines for Modeling Metadata* that accompany Framework Manager.

## Creating a report with Query Studio

The following steps will help you to create a simple report in Query Studio and will highlight some of the features that are available. In Query Studio, with minimal steps, you can view data, author basic reports, change the report layout, filter and sort data, add formatting, and create charts.


- ❑ Open Query Studio.

On the IBM® Cognos® Express™ welcome page, click **Query my business data with Query Studio**. You must select a package before you can continue. You can select a package that your administrator or another user published or a package that you created with Framework Manager.


- ❑ Select data for your report.

In Query Studio, under **Insert Data** on the left side menu, browse the data tree and find the items that you want to include in your report.

- ❑ Add data to your report.

Double-click the data items you want to add or drag them to the empty report on the right side of your screen. To remove items, select them and click the delete button . To rename items, double-click the title area and type the new title. To move items, drag them to a new position in the report.

- ❑ Group data.


To group data, select the columns that you want to group and click the group button . If your report includes measures, notice that summaries, such as totals and subtotals, are added automatically.

- ❑ Format data.

To format data, right-click a cell in the report and click **Format Data**. For example, you can change the number of decimal places or add a currency symbol.


You can also change the appearance of your report with the buttons on the style toolbar. For example, you can add color or change the font.

- ❑ Filter data.


To narrow the focus of your report to one or more data items, select the column that contains the items that you want to use to filter and click the filter button  (or right-click and select **Filter**).

This opens a new screen that allows you to select only the data items that you want in your report. For example, include data for only a specific year or product line.

- ❑ Add a chart.

To add a visual representation of your data to the report, on the standard toolbar, click the chart button . You see a list of available chart options to add to your report. Choose the one that best suits the data that you want to represent. Data is automatically plotted on the chart. To change the chart type, repeat this process.

- ❑ Save the report.

To save your report, click the save button . Provide a name for your report and select a location in IBM Cognos Connection to save your report. Save your report in **Public Folders** to make it available to others. Save it in **My Folders** to make it available only to yourself. To change the default location, click **Select another location**.

**Tip:** By default, you cannot save reports at the top level of IBM Cognos Connection unless your system administrator has given you permission to do so.

Now that you have saved the report, you can open it again later with Query Studio to change it or make it available to other users who can view and print it from the IBM Cognos Connection portal.

For more information about how to use Query Studio, see the Query Studio *User Guide* and quick tour available from the **Help** menu.


## Create a report with Report Studio

You can use Report Studio to modify the report that you created and saved in the last section or to create a more sophisticated report. Report Studio allows you to create reports with more complex layout, formatting, and report user interactions. The following steps provide an overview of some of the features available in Report Studio.


- ❑ Open Report Studio.

On the IBM® Cognos® Express™ welcome page, click **Create professional reports with Report Studio**. When prompted, select the same package that you used in the previous exercise, and then click **Open an existing report or template**. Choose the Query Studio report that you already saved. Alternatively, if you still have the Query Studio report open, from the **Manage File** menu on the left side of the Query Studio screen, select **Open in Report Studio**.


- ❑ Change the list to a crosstab.

You can represent your report data in a crosstab instead of a list. Select a cell in the list report, and click the pivot list to crosstab button .


- ❑ View objects that you can insert in your report.

At the bottom of the **Insertable Objects** pane, click the **Toolbox** tab . From here, all the objects that you can insert into your report are available, such as calculations, filters, prompts, and layout objects. With these objects, you can add additional business logic and sophisticated formatting to the report.

- ❑ Run the report.

On the toolbar, click the drop-down arrow beside the run report button . Here you will see a variety of options for viewing the report. Click **Run Report - PDF**. If you added prompts to your report, you are asked to enter values in your prompt before you can view the report. Your report opens in PDF format, which is suitable for printing and saving for distribution to other users.

- ❑ Save the report.

To save your report, click the save button . Provide a name for your report and select a location in IBM Cognos Connection. Save your report in **Public Folders** to make it available to others. Save it in **My Folders** to make it available only to you. To change the default location, click **Select another location**.

**Tip:** By default, you cannot save reports at the top level of IBM Cognos Connection unless your system administrator has given you permission to do so.

Report Studio provides you with all of the capabilities that you need to create highly formatted reports which can be distributed to end users through a variety of options.

For more information about how to use Report Studio, see the Report Studio *User Guide* and quick tour available from the **Help** menu.

## View content in IBM Cognos Connection

Launch IBM Cognos Connection from the IBM® Cognos® Express™ welcome page and navigate to the locations where you saved the reports that you created in this chapter. Beside each report is a list of **Actions** that you can perform, such as running the report in different formats, scheduling the report to run at a later time, and opening the report in Query Studio or Report Studio for further authoring. For more information about using IBM Cognos Connection, see the IBM Cognos Connection *User Guide*.

---

# Chapter 4: Getting started with IBM Cognos Express Xcelerator

---

IBM® Cognos® Express™ Xcelerator extends your Microsoft® Excel worksheets into multidimensional data structures using the Xcelerator Server. Xcelerator Server organizes your data into multidimensional database objects such as cubes, dimensions, hierarchies and rules that represent your business model. This combines the power of multidimensional data with the formatting and user interaction capabilities of Excel spreadsheets.

You can interact with Xcelerator directly in an Microsoft Excel spreadsheet or by using the Xcelerator Server Explorer and Cube Viewer. When you use Xcelerator, no physical data or business calculations are stored in the spreadsheet, instead, they are all stored on the centralized Xcelerator Server.

This section helps you to start using IBM Cognos Express Xcelerator and provides an overview of the various components and features that are available to you.

## Xcelerator Server overview

The Xcelerator Server manages the database objects that make up any Xcelerator application. The three primary object types are:

- **Cubes:** These represent a multidimensional data structure that manages business data and contains the actual data values.

A spreadsheet has two dimensions; rows and columns. An Xcelerator cube can have up to 256 dimensions that can use meaningful business names like product, customer or scenario.

- **Dimensions:** Dimensions represent the outline or edges of a cube.

Xcelerator dimensions do not store actual data values, but define the shape of an Xcelerator cube. Dimensions typically include a hierarchy of its members. For example, various products rolling up into product groups, or customers rolling up into sales regions.

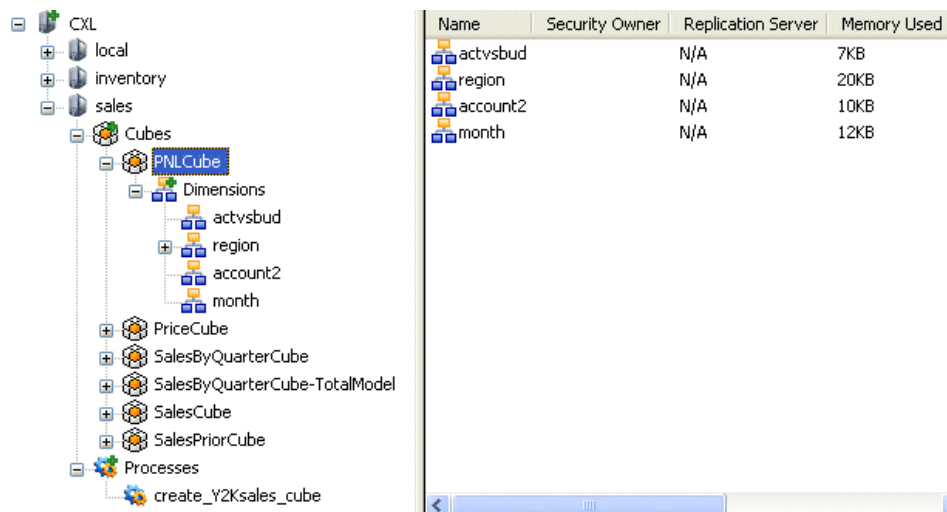
- **Rules:** Rules are custom calculations that can apply sophisticated business rules to your cube data in order to model your business. For example, you can create calculations for pricing or discounting, cost allocations, or cube-to-cube calculations.

Rules are similar to using formulas in a Microsoft® Excel spreadsheet, except a rule applies to the entire cube, not just a single spreadsheet cell. An Xcelerator cube can have only one rule object, but that rule can include as many rule statements as you need to fully define your business calculations.

**Note:** The Xcelerator Server database is named CXMD (Cognos Express Multidimensional Database). This database is also used by other products within the IBM® Cognos® Express™ product family. For example, IBM Cognos Express Advisor. The objects it creates can be recognized by the prefix CXA\_. Any objects you create manually within CXMD using Xcelerator should also use a similar

recognizable prefix, such as CXL\_. Do not modify or delete any objects that you do not recognize, as they will likely be required by other Express users.

The following figure shows an example of cubes and dimensions displayed in Xcelerator's Server Explorer.



## Creating Xcelerator cubes and dimensions

Creating an Xcelerator cube requires you to make two important choices:

- How many dimensions the cube should have.
- What the granularity of those dimensions should be. In other words, what is the lowest level of detail you need to capture in the cube.

Granularity is highly dependent on the Performance Management solution you are creating. For example, for three-year strategic plans, a product granularity of Product Group or Line of Business may be sufficient, whereas for inventory optimization you will often need to manage products at the SKU (Stock Keeping Unit) level.

The largest part of creating a cube is defining dimensions. Once you have defined a dimension in Xcelerator, you can re-use it in as many cubes as you wish. If you change the dimension by adding or deleting members or modifying hierarchies, those changes are automatically applied to every cube that uses that dimension.

For this cube example, you create an Xcelerator planning cube with five dimensions:

- CXL\_customer
- CXL\_product
- CXL\_scenario
- CXL\_month
- CXL\_measures

The last one, CXL\_measures, may not seem like an obvious choice. However, a separate measures dimension gives your Xcelerator cubes the ability to adapt to change in the future. Including a



measures dimension in every cube means that you can simply add additional measures to that dimension as your business requirements evolve.


In this example, you create a single input measure called Units. Later on, you can add more input measures and calculated output measures like Revenue, Margin \$, Margin %, and Average Selling Price, without disturbing the existing cube data or calculations.

## Creating a dimension

Use Xcelerator's Server Explorer tool to create a dimension.

### Steps

1. In a Microsoft® Excel spreadsheet, click the CXL menu and then click **Server Explorer**.
2. In the Tree pane, click to expand the list of servers and then double-click CXMD.  
The **Server Login** dialog box opens.
3. Enter your user name and password credentials to login.  
**Note:** You may need to check with your Express administrator to determine these.
4. In the Tree pane, right-click **Dimensions** and click **Create New Dimension**.  
The **Dimension Editor** window opens.
5. In the **Dimension Editor**, click **Edit, Insert Element**.  
The **Dimension Element Insert** dialog box opens.
6. Click in the **Insert Element Name** field, type **Customer 1** for an element name and then click **Add**.  
The Customer 1 element appears in the list of **Inserted Elements**.
7. Repeat the previous step to create new elements for Customer 2, Customer 3, and so on. You can also use customer names that are representative of your own business.
8. In the **Insert Element Name** field, type **All Customers**, click the **Element Type** drop-down box and select **Consolidated**, and click **Add**.  
The All Customers element will be a hierarchy aggregation point for demonstration purposes. As you get more familiar with Xcelerator, you can add additional aggregation points to represent additional levels in your business hierarchy.
9. Click **OK** to close the **Dimension Element Insert** dialog box and return to the **Dimension Editor** window.

In the **Dimension Editor** window you can see the new elements you created, but the relationship between these elements is not defined. Drag-and-drop the Simple elements, denoted by the lower-case letter "n", which stands for numeric leaf, on top of the Consolidated element, denoted by the Greek letter sigma , to organize the aggregation hierarchy.

You can also use keyboard shortcuts and the toolbar buttons to perform many of the editing operations. For more details, see the IBM® Cognos® Express™ Xcelerator *User Guide*.

10. Click **OK** to save and name your first dimension.  
The **Dimension Save As** dialog box opens.
11. Type **CXL\_customer** as the dimension name and click **OK**.

## Creating additional dimensions

Add other dimensions to your Xcelerator model.

### Steps

1. Repeat the dimension creation steps to create a dimension named **CXL\_product**, following the same naming conventions and structure as the customer dimension.
2. Repeat the dimension creation steps to create a dimension named **CXL\_month**.  
For this dimension, create 12 Simple month elements, four Consolidated quarter elements (Q1, Q2 or Quarter 1, Quarter 2, and so on), and a **Total Year** consolidated element. Drag-and-drop accordingly to create the correct fiscal year hierarchy.
3. Repeat the dimension creation steps to create a dimension named **CXL\_scenario**, with three simple elements; **actual**, **budget** and **variance**.
4. Create the **CXL\_measures** dimension with a single simple element named **units**.

## Creating an Xcelerator cube

After creating the dimensions and hierarchies, create an Xcelerator cube.

### Steps


1. In the Tree pane of the **Server Explorer** window, right-click **Cubes** and click **Create new cube**.  
The **Creating Cube** dialog box opens.
2. In the **Available Dimensions** list, double-click each of the dimensions you created earlier:
  - **CXL\_customer**
  - **CXL\_product**
  - **CXL\_month**
  - **CXL\_scenario**
  - **CXL\_measure**The dimensions are added to the **Dimensions in new Cube** list.  
**Note:** If you make a mistake, click the **Reset** button to start over.
3. After selecting your dimensions, click in the **Cube Name** field and type a name for the new cube, such as **CXL\_MyFirstCube**.
4. Click **Create Cube**.

The new cube, CXL\_MyFirstCube, appears in the Tree pane under **Cubes**. This cube will be used in the rest of the example.

## Viewing the Xcelerator cube

Use the Server Explorer window to view the new cube.

### Steps

1. In the **Server Explorer** window, click **Cubes** to expand the tree.
2. Double-click the new cube you created.
3. In the **Cube Viewer** window, click the Recalculate button  on the toolbar.

The new cube appears with its default configuration. You can re-arrange the dimensions to suit your needs and preferences by dragging and dropping them within the **Cube Viewer** window.

For example, you may want to:

- Put the month dimension in the column area for a traditional annual budget collection perspective.
  - Put more than one dimension on the rows or columns. This is called stacking, and allows you to compare large amounts of information in a concise format.
  - Move dimensions to the title dimension area of the **Cube Viewer** window.
4. Click on a dimension in a row or column to expand or collapse the dimension hierarchy.

Dimensions that appear in the title area can have only one element selected, whereas dimensions on rows or columns can display hierarchies that you can interactively expand or collapse.

Experiment with navigating and expanding the hierarchies to view leaf-level cells. Leaf-level cells are white instead of gray, indicating that the cell is editable. Only leaf-level cells are editable in an Xcelerator cube.

You can also try re-arranging the dimensions in the view.

For more information about working with cubes and dimensions in Xcelerator, see the IBM Cognos Express Xcelerator *User Guide* and IBM Cognos TM1 *Developers Guide*.

## Adding a rule to an Xcelerator cube

Your cube is now configured to capture, calculate and present multidimensional business information. The next example adds a rule that calculates variance.

### Steps

1. In the Tree pane of the **Server Explorer** window, click **Cubes** to expand the list of cubes.
2. Right-click on **CXL\_MyFirstCube** and select **Create Rule**.
3. In the **Rules Editor** window, type the following rule statement exactly as shown here:

```
['variance'] = ['budget'] - ['actual'];
```

Don't forget the semi-colon, which indicates to Xcelerator the end of a rule statement.

**Note:** These steps assume that you named these elements as suggested for the CXL\_scenario dimension. If not, you can use the Brackets button **[ ]** to select the equivalent elements from your scenario dimension.

4. Save the rule and close the **Rules Editor** window.

For more information about how to use rules in Xcelerator, see the IBM® Cognos® TM1™ *Rules Guide*.

## Testing the rule calculation

After creating a rule, verify the cell values.

### Steps

1. In the **Cube Viewer** window, ensure you can see all three scenario elements from the example in the view; budget, actual and variance.
2. Inspect the values in the cube to verify that the rule statement is returning the correct results. In words, the rule formula was: variance is equal to budget less actual.

**Note:** The single rule statement applies to the entire cube, regardless of what level of aggregation you are looking at in the various dimensions.

3. In the **Cube Viewer** window, right-click on any cell and click **Trace Calculation**.

The **Rules Tracer** window opens.

Because the cells in Xcelerator cubes can be calculated by hierarchies or rules, the **Rules Tracer** window lets you inspect the various paths that calculations can take. This tool helps you answer the question, "Why does this cell contain this value?".

## Deploying Xcelerator data by using spreadsheets

This example provides the first steps to deploying Xcelerator applications by using Microsoft® Excel spreadsheets. Xcelerator enables you to manage all the cubes, dimensions, hierarchies, and rules that represent your business model through a familiar spreadsheet interface.

**Note:** Xcelerator Web is also included in the Xcelerator product, allowing you to choose between thick (desktop) and thin (web browser) client deployment modes.

### Steps

1. In the **Server Explorer** window, double-click the **CXL\_MyFirstCube** cube.
2. In the **Cube Viewer** window, arrange the dimensions as desired.
3. From the toolbar, click the Active Forms button **[ ]**.

A new workbook will be created in a Microsoft® Excel spreadsheet with the same structure as your current view. In the Excel interface, you can interact with the cube data in the same way

that you do in the Cube Viewer. You can also use the formatting and presentation capabilities of Excel spreadsheets.

4. In an Excel spreadsheet, click a cell in the worksheet and note the format of the formula in the menu bar.

DBRW (...)

These formulas provide the mechanism that allows Excel spreadsheets to communicate with Xcelerator Server, providing both read and write operations.

For more information about using IBM® Cognos® Express™ Xcelerator, see the IBM Cognos Express Xcelerator documentation.

## Installing Xcelerator client

You install IBM® Cognos® Express™ Xcelerator client from the **Welcome to IBM Cognos Express** page.

Install Xcelerator client to get Perspectives and Architect up and running on your computer. You do not need to perform any additional configuration to begin using the Xcelerator clients.

Before you install Xcelerator client:

- You must install Microsoft Office Professional Edition 2003, 2007, or XP
- Your administrator must give you access to download the software

**Tip:** It is good practice to read the messages in the **Daily News** section (p. 14) regularly. You will know that you can install Xcelerator client when you see this message:

The Xcelerator client download for IBM Cognos Express Xcelerator is now available.

### Steps


1. In a browser window, go to the **Welcome to IBM Cognos Express** page.

The Web address is usually the following:

`http://express_server_name:19300/cognos_express/manager/welcome.html`

where *express\_server\_name* is the computer name of the IBM® Cognos® Express™ server.

2. Download the installation package.

- Click **Download Express software to my computer** .

**Tip:** If this link is not available, your administrator has not yet assigned your Express userid to the Express Xcelerator Client User role.

- Click **Xcelerator client**.
- Click **Save**, choose a location to save the installation package, then click **Save** again.

**Important:** Do not change the filename of this installation package.

The **Download complete** dialog displays.

3. Click **Run**.
4. Click **OK** to confirm that the product language is English.
5. In the installation wizard, do the following:
  - On the **Introduction** page, click **Next**.
  - Read the license agreement, click **I accept both the IBM and the non-IBM terms**, and then click **Next**.
  - If you want Xcelerator client to be installed in a location other than the one shown, browse to the location you want.
  - Click **Next**.
  - Choose your preferred method for starting Xcelerator client.
  - Click **Next**.
6. Click **Install**.
7. When the **Install Complete** page displays, select **Launch Xcelerator client**, and then click **Done**.  
Xcelerator starts in a new window.

If you want to install TM1 Workflow for Xcelerator, go to the *Xcelerator\_client\_installation\_location/Workflow* folder, extract the zip file, and then run the Workflow setup.exe file. For more information, see "Installing TM1 Workflow" in the IBM Cognos Express Xcelerator *Installation Guide*.

You can now use Xcelerator to create a new project, view data sources in IBM Cognos Connection, create a new package, or publish a package to the IBM Cognos Connection.

For more information, see the IBM Cognos Express Xcelerator *User Guide*.

## Uninstalling Xcelerator

You can uninstall Xcelerator client from your computer. Uninstalling removes Xcelerator client from your computer only.

**Note:** If your administrator uninstalls Xcelerator on the Express server, your instance of Xcelerator client will no longer work.

### Steps

1. From the **Start** menu, click **Settings > Control Panel**.
2. Start **Add or Remove Programs**.
3. In the list of currently installed programs, click **IBM Cognos Express Xcelerator client**.
4. Click **Remove** and follow the instructions.

---

# Index

---

## A

ActiveX, [11](#)

Advisor

features, [23](#)

getting started, [17](#)

Advisor workflow, [17](#)

analysis definition

configuring, [22](#)

creating, [21](#)

analyzing data, [22](#)

## C

Components, [9](#)

configuring an analysis definition, [22](#)

content

viewing in IBM Cognos Connection, [30](#)

creating relationships, [22](#)

cube

creating in Xcelerator, [34](#)

viewing in Xcelerator, [35](#)

cubes and dimensions

creating in Xcelerator, [32](#)

## D

Data Advisor, [13](#)

connecting to packages and cubes, [20](#)

installing, [20](#)

uninstalling, [21](#)

deploying Xcelerator data, [36](#)

dimensions

creating, [22](#), [33](#)

creating additional, [34](#)

## E

Express Manager

Welcome page, [13](#)

## F

Framework Manager, [13](#)

installing, [25](#)

uninstalling, [27](#)

## I

IBM Cognos Administration, [12](#)

IBM Cognos Connection, [11](#)

viewing content, [30](#)

IBM Cognos Express

Advisor, [17](#)

launching, [25](#)

IBM Cognos Express Advisor, [12](#)

IBM Cognos Express Xcelerator, [12](#)

IBM Cognos Resource Center, [6](#)

IBM WebSphere Portal, [11](#)

installing client applications

Data Advisor, [20](#)

Framework Manager, [25](#)

Xcelerator client, [37](#)

## M

model

creating or modifying in Framework Manager, [27](#)

modeling, [13](#)

## N

new analysis definition

creating, [21](#)

## O

ODBC data source

configuring on the client, [18](#)

configuring on the server, [19](#)

OLAP, [13](#)

## P

plug-ins, [11](#)

portal services, [11](#)

## Q

Query Studio, [12](#)

creating a report with, [28](#)

## Index

quick tours  
    using, [6](#)

## R

relationships  
    creating, [22](#)

Reporter  
    getting started, [25](#)

Report Studio, [12](#)  
    creating a report with, [29](#)

rule  
    adding to an Xcelerator cube, [35](#)

rule calculation  
    testing, [36](#)

## S

selecting data, [22](#)

spreadsheets  
    using to deploy Xcelerator data, [36](#)

starting Advisor from Data Advisor, [22](#)

starting Advisor from Express Manager, [23](#)

## W

Web-based user interfaces, [10](#)

- IBM Cognos Administration, [12](#)
- IBM Cognos Connection, [11](#)
- IBM Cognos Express Advisor, [12](#)
- IBM Cognos Express Manager, [10](#)
- IBM Cognos Express Xcelerator, [12](#)
- Query Studio, [12](#)
- Report Studio, [12](#)

Web portal, [11](#)

Welcome to IBM Cognos Express page, [13](#)

- Daily News, [14](#)
- My Actions, [14](#)
- My Content, [13](#)

Windows-based user interfaces, [12](#)

- Data Advisor, [13](#)
- Framework Manager, [13](#)
- IBM Cognos Express Xcelerator, [13](#)

workflow for Advisor, [17](#)

## X

Xcelerator  
    getting started, [31](#)  
    overview, [31](#)

Xcelerator client  
    installing, [37](#)  
    uninstalling, [38](#)