

QMF Vision
12.2

Getting Started with QMF Vision



Note:

Before using this information and the product it supports, read the "Notices" topic at the end of this information.

August 2, 2021 edition

This edition applies to Version 12 Release 2 of IBM Query Management Facility (QMF) Enterprise Edition Advanced, which is a feature of IBM Db2 12 for z/OS (5650-DB2), Version 12.1. It also applies to Version 12 Release 2 of IBM QMF for z/OS (5697-QM2), which is a stand-alone IBM Db2 for z/OS tool. This information applies to all subsequent releases and modifications until otherwise indicated in new editions.

© **Copyright International Business Machines Corporation 2016, 2019.**

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

© **Rocket Software Inc. 2016, 2020.**

Contents

- Chapter 1. About QMF Vision.....1**
- Chapter 2. Installing QMF Vision components.....3**
 - System requirements for QMF Vision..... 3
 - Installing QMF Vision on Windows..... 3
 - Installing QMF Vision on Linux..... 4
 - Installing QMF Vision on zLinux.....4
 - Registering QMF Vision user..... 5
 - Adding License file for QMF Vision..... 6
 - Installing the IBM Data Service ODBC driver..... 6
 - Upgrading QMF Vision.....7
- Chapter 3. Administering QMF Vision9**
 - Configuring the company profile.....9
 - Configuring display settings.....9
 - Connecting to data sources..... 9
 - Creating a connected App in salesforce.com..... 10
 - Connecting to salesforce.com.....10
 - Configuring social network for IBM Connections.....11
 - Managing users..... 11
 - Registering users..... 11
 - Managing and authenticating users with LDAP server..... 11
 - Approving new users 14
 - Viewing user statistics.....14
- Chapter 4. Configuring Profile settings..... 15**
 - Managing account settings..... 15
 - Managing groups 15
 - Viewing source security..... 16
 - Connecting to social networks..... 16
 - Default formatting.....16
 - Calendar settings..... 16
- Chapter 5. QMF Vision Home page.....19**
- Chapter 6. QMF Vision terminology 21**
- Chapter 7. Discovery overview..... 23**
- Chapter 8. Content migration..... 25**
- Chapter 9. Data preparation.....27**
 - Hierarchies..... 27
 - Manipulating data 27
 - Managing columns..... 28
 - Splitting the date column 28
 - Splitting the text column..... 28
 - Merging text columns 29
 - Adding categories to data..... 29

Numeric functions.....	30
Creating formulas.....	31
Adding a table.....	32
Adding an APPEND operator.....	32
Adding a Filter	33
Adding a JOIN operator.....	33
Adding a PIVOT operator.....	34
Adding a CROSSTAB operator.....	34
Applying the Cube operator.....	35
Understanding aggregation functions.....	35
Adding the SUM operator.....	35
Adding categories to data.....	36
Querying a database.....	36
Accessing live query.....	36
Creating data packs.....	37
Chapter 10. Visualizations.....	39
Working with a scatter plot.....	40
Overview of table.....	41
Sorting data by value.....	42
Sorting data by name.....	42
Creating custom exception.....	42
Defining alerts criteria.....	43
Formatting a visualization.....	43
Working with maps.....	44
Chapter 11. Dashboards.....	45
Dashboard governance navigator.....	45
Creating a dashboard from the Data page.....	45
Generating automatic dashboards.....	45
Editing dashboards.....	46
Creating header titles for visualizations.....	46
Applying chart action.....	47
Applying chart style.....	47
Data transformation.....	48
Publishing a dashboard	48
Viewing dashboards.....	49
Tagging a dashboard.....	49
Applying a filter container.....	49
Adding filters.....	49
Adding annotations to a dashboard.....	50
Associating visualizations.....	51
Linking dashboards.....	51
Dashboard settings.....	51
Generating automatic dashboards.....	52
Chapter 12. Presentation.....	53
Creating presentations.....	53
Copying presentations.....	53
Chapter 13. Sharing and collaboration.....	55
Sharing dashboards.....	55
Chat functionality.....	56
Sharing dashboards through IBM Connections.....	56
Chapter 14. Overview of scheduling.....	57
Scheduling a task.....	57

Chapter 15. Working with IBM Cognos TM1.....	59
Searching an element.....	59
Searching and saving a subset.....	60
Applying a label.....	60
Creating a custom subset.....	61
Adding a mathematical function to a subset.....	61
Adding a mathematical function to an element.....	61
Performing basic calculations.....	62
Performing advanced calculations.....	62
Chapter 16. Connecting to the IBM Cognos BI server.....	63
Chapter 17. Configuring IBM Connections	65
Notices.....	67
Trademarks.....	68
Terms and conditions for product documentation.....	68
Privacy policy considerations.....	69
Index.....	71

Chapter 1. About QMF Vision

QMF Vision provides companies with self-service dashboards that provide the capability to analyze data in an intuitive way. This capability enables users to dynamically adjust their analysis in accordance with their varying business needs.

QMF Vision is easy to deploy on the Cloud and on-site, and requires minimum maintenance, which reduces overhead costs. QMF Vision simplifies business intelligence (BI) for the organization and improves efficiency. QMF Vision also facilitates sharing of analysis among multiple users to enable quick decision-making through the collaboration feature.

- **Connect:** You can view information the way you want to so that you can make informed decisions and take appropriate actions. QMF Vision provides interactive visualizations. You can create reports and dashboards without IT support.
- **Discover:** QMF Vision has a comprehensive portfolio of integrated BI capabilities. QMF Vision improves decision-making across the organization by delivering timely business information to improve productivity. The solution is scalable and reliable.
- **Share:** You can share dashboards for reuse across the enterprise. Real-time messaging services enable you to connect with each other. Because the solution is supported on various mobile devices, you can easily access dashboards and reports.

Chapter 2. Installing QMF Vision components

The following topics describe the procedure of installing QMF Vision and the IBM QMF Data Service ODBC driver.

System requirements for QMF Vision

Before you begin installation, ensure that your system is configured.

About this task

QMF Vision supports the following server requirements on Microsoft Windows and Linux operating systems.

Microsoft Windows Server Requirements

- Windows 7 64-bit
- Windows Server 2008 R2 Service Pack 1
- Windows Server 2012 or 2016 with .NET Framework 3.5 enabled

Ensure that your production environment has the following minimum server configurations:

- 4-core microprocessor
- 8 GB RAM
- 250 GB free disk space

Linux Server Requirements

- CentOS 64-bit versions 7.0 to 7.6
- Red Hat Enterprise Linux 64-bit versions 7.0 to 7.6

zLinux Server Requirements

- Red Hat Enterprise Linux for IBM System z versions 7.x

Browser Requirements

You can access QMF Vision through the following browsers:

- Chrome version 64 and above
- Firefox version 59 and above
- Microsoft Edge version 40.15063 and above
- Apple® Safari version 10.x and above

Installing QMF Vision on Windows

The topic describes how to install QMF Vision on the Windows operating system.

About this task

To install QMF Vision:

Procedure

1. Download the installer. See the *Obtaining QMF Enterprise Edition Advanced distributed components* topic in the *Introducing Db2 QMF* guide for instructions.
2. Run the setup.exe file to open the installation wizard for QMF Vision.
The **Welcome to IBM QMF Vision Setup** dialog box appears.

3. Click **Next**.
4. If you are using QMF Vision version 12.2.0.5 and above, you will get a **License Warning** window. On the **License Warning** dialog box, click **Browse**, select a valid license file and then click **Next**.
5. Specify a path to an existing MongoDB bin directory in the **MongoDB bin Directory** field and click **Next**.
Note: If you do not have Windows MongoDB installed on your system, go to <https://www.mongodb.com/download-center/community> to download the Windows MongoDB installer setup file. After the MongoDB installation is complete, continue with the QMF Vision installation.
6. Select the directory to install QMF Vision and click **Next**.
7. Select the directory to store the QMF Vision application data and click **Install**.
8. Click **Finish** to complete the installation process.

Installing QMF Vision on Linux

QMF Vision can be installed on the Linux server.

Before you begin

MongoDB must be installed prior to installing QMF Vision on Linux. To install MongoDB, go to <https://docs.mongodb.com/manual/tutorial/install-mongodb-on-red-hat/>.

About this task

Perform the following steps to install Vision on the Linux server:

Procedure

1. Download the installer. See the *Obtaining QMF Enterprise Edition Advanced distributed components* topic in the *Introducing Db2 QMF* guide for instructions.
2. Run the following command to make the `setupLinux.bin` file executable: `chmod +x setupLinux.bin`
3. Run the following command to start the installer: `sudo ./setupLinux.bin`
You will be prompted with the following message, if you are using QMF Vision version 12.2.0.5 and above: *This version of QMF Vision requires license. Ensure you have license file available or contact your system administrator. Do you want to proceed?*
4. Enter `y` at the prompt.
5. To set `/db` as the default installation directory, press `Enter`.
6. Restart the server by entering `y` at the prompt.

Installing QMF Vision on zLinux

QMF Vision can be installed on the zLinux server.

Before you begin

Install MongoDB

Before installing QMF Vision on Linux, you must install MongoDB.

- If you have a MongoDB Enterprise subscription, complete the steps that are described in [Install MongoDB Community Edition on Red Hat or CentOS](#)
- If you do not have a MongoDB Enterprise subscription, complete the steps that are described in [MongoDB Community Server Download](#).

Install Supervisor

Check whether the zLinux server has internet access. If the internet is accessible from the zLinux server, the Supervisor package is automatically downloaded and installed. If the internet is inaccessible, you must manually install Supervisor:

1. On a machine with the internet access, open <https://pypi.org/project/setuptools/#files> and download the `setuptools.zip` file (for example, `setuptools-41.6.0.zip`).
2. Open <https://pypi.org/project/supervisor/#files> and download the `supervisor.tar.gz` file (for example, `supervisor-4.1.0.tar.gz`).
3. Copy the files from [step 1](#) and [step 2](#) to the zLinux server where you want to install Vision.
4. On the zLinux server, navigate to the directory where `setuptools-41.6.0.zip` is located and run the following commands:

```
sudo unzip setuptools-41.6.0.zip
cd setuptools-41.6.0
sudo python setup.py install
```

The `setuptools` application is now installed.

5. Navigate to the directory where the `supervisor-4.1.0.tar.gz` is located and run the following commands:

```
sudo tar -xzvf supervisor-4.1.0.tar.gz
cd supervisor-4.1.0
sudo python setup.py install
```

Supervisor is now installed.

About this task

Perform the following steps to install Vision on the zLinux server:

Procedure

1. Download the installer. See the *Obtaining QMF Enterprise Edition Advanced distributed components* topic in the *Introducing Db2 QMF* guide for instructions.
2. Upload the `setup_qmfvision_zlinux.bin` file to an appropriate directory on Linux on IBM Z via FTP in the binary mode.
3. Run the following command to make the `setup_qmfvision_zlinux.bin` file executable: `chmod +x setup_qmfvision_zlinux.bin`.
4. Run the following command to start the installer: `sudo ./setup_qmfvision_zlinux.bin`.
You will be prompted with the following message: *This version of QMF Vision requires license for activation. Ensure you have license file available or contact your system administrator. Do you want to proceed?*
5. Enter `y` at the prompt.
6. To set `/db` as the default installation directory, press **Enter**.
7. Restart the server by entering `y` at the prompt.

Registering QMF Vision user

After QMF Vision is installed, your browser automatically opens at the registration page.

About this task

To create an account:

Procedure

1. Complete all the fields in the **Create your account** window.

2. Click **Register**.

Note: The first registered user is always Administrator.

Your account is created and registered.

Adding License file for QMF Vision

About this task

For Windows, if you have already supplied the license file during installation, this step is not applicable.

Perform the following steps to add license to the QMF Vision deployment (12.2.0.5 and higher):

Procedure

1. After QMF Vision is installed, login as an administrator user where you will be redirected to the **License Upload** screen.
2. Click **Choose File** and select the license file.
3. Click **Upload**.

On uploading a valid license file, the following message will be displayed. *License is successfully activated. You will be redirected to the home page.*

Installing the IBM Data Service ODBC driver

To connect to QMF Data Service from QMF Vision, you must install the IBM Data Service ODBC driver.

About this task

Perform the following steps:

Note: Connecting to QMF Data Service from QMF Vision is not supported for QMF Analytics for Multiplatforms.

Procedure

1. Go to the QMF Vision installation directory.
2. Open the QMF Vision folder.
3. Run the DS_ODBC_3_1_win64.exe file to open the installation wizard for the IBM Data Service ODBC driver.
4. Choose the language of the installation wizard and click **OK**.
5. Click **Next**.
6. On the **License Agreement** panel, read the licensing terms and select **I Agree** to proceed with the installation.
7. Choose one of the install sets and click **Next**. You can use the information from the table below to choose the install set that suits you best.

Install set	Components installed
Default	ODBC driver and samples.
Minimal	ODBC driver only, installed onto local computer.
Custom	Allows customization of installed features.
Network Admins	Only installs driver definitions on local machine. No physical drivers are installed locally. Drivers must already be installed on another network machine using the Network Install option.

8. Specify the destination folder. Click **Next**.
9. Specify whether you want to install the driver on a single machine or to a network location. Click **Next**.
10. Specify whether environment variables required by the driver are available to all users of the computer or only to the user who performs the installation. Click **Install**.
11. Click **Close** to complete the installation process.

Upgrading QMF Vision

You can upgrade to the latest version of QMF Vision.

About this task

Procedure

1. Download the `setup_win64.exe`.
2. Right-click the `setup_win64.exe` file and run it as an administrator.
3. Follow [Step 3](#) to [Step 8](#) in the topic, [“Installing QMF Vision on Windows”](#) on page 3.

Chapter 3. Administering QMF Vision

The first user to register in QMF Vision is by default the administrator. After an administrator is defined, other users can send registration requests to the administrator for approval. An administrator can configure administration and company settings.

Configuring the company profile

The administrator configures the **Home** page, which is the first page that users see when they log in.

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and select **Settings**.
3. On the **COMPANY PROFILE** tab, enter the company name.

Configuring display settings

You can set a default calendar for your company, and set a header and footer for the dashboard.

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and then select **Settings**.
3. Click **DISPLAY SETTINGS**, and perform one or more of the following actions:
 - Select your preferred language from the **Language** list. The administrator sets the language and you can change it when you login for the first time.
 - Select the background color, image, and texture for the user interface.
 - Set the position of the currency symbol.
 - Set the negative number style.
 - Set the thousand and decimal number separator.
 - Set the decimal number count.
 - Create header information for a dashboard.
 - Create a signature to be displayed below your dashboard.
 - Upload the logo of the company.

Connecting to data sources

Data sources should be configured on the QMF Vision interface.

QMF Vision supports databases and cloud storage sources.

- To access cloud storage through QMF Vision, a user must configure cloud storage on the relevant website. The user must add the Client ID and Client Secret values received from the cloud storage website to the API LIST. The API list is displayed on the Settings page.
- To access database sources, a user must provide information such as host, port, user name, and password on the Data page of the QMF Vision user interface. This information can be modified on the **Data** page.

Additionally, you can add CSV files through the Home and Data pages. On either of the pages, you can drag a source file or browse to select the file. To access data through a file, click **Connect** on the data page, and drag a source file. Alternatively, you can upload the file by clicking the Choose a File button.

To connect to the ODBC System DSN connector, ensure that the System DSN name provided in the QMF Vision user interface matches the one configured in the 64 bit ODBC Data Source Administrator.

Creating a connected App in salesforce.com

Use these steps to obtain the salesforce.com Client Key and Client Secret.

Procedure

1. Log in to Salesforce.
 2. Click **Setup** in the upper-right corner.
 3. Do one of the following to access the Manage apps area:
 - Click **Create** in the left panel under the **Build** area, and then click **Apps**.
 - Click **Manage** under the **Quick Links** area.
 4. Click **New** in the **Connected Apps** area.

The New Connected App page is displayed.
 5. Complete the information in the **Basic Information** area:
 - a) In the **Connected App Name** field, type the connected app name.
 - b) Click the **API Name** field.

The **API Name** field is populated with the name entered in the **Connected App Name** field.
 - c) In the **Contact Email** field, enter an email address.
 6. Complete the information in the **API (Enable OAuth Settings)** area:
 - a) Select **Enable OAuth Settings**.
 - b) In the **Callback URL** field, enter `https://host:port/api/v1/salesforce/oauth2/callback`
 - c) In the **Selected OAuth Scopes** field, use the right arrow button to move the following from the **Available OAuth Scopes** list to the **Selected OAuth Scopes** list:
 - Full access (full)
 - Perform requests on your behalf at any time (refresh_token, offline_access)
 7. Click **Save**.
- The Consumer Key and the Consumer Secret are generated and displayed in the Connected App details page.

- Consumer Key: the Client ID of Salesforce in QMF Vision
- Consumer Secret: the Client Secret of Salesforce in QMF Vision

For the Consumer Secret, click **Click to reveal** to show the details.

Connecting to salesforce.com

Use these steps to connect to salesforce.com using the Client Key and Client Secret.

Procedure

1. Log in to QMF Vision (Administrator account).
2. Click your name and select **Settings**.
3. Click **API LIST**.
4. In the **Salesforce** area, do the following:
 - a) Copy the salesforce.com Consumer Key obtained from the Salesforce site and paste it in the **Client ID** field.

- b) Copy the salesforce.com Consumer Secret obtained from the Salesforce site and paste it in the **Client Secret** field.

Configuring social network for IBM Connections

The administrator configures settings that enable QMF Vision to connect with an IBM server as a third-party application. The IBM server administrator sets up an OAuth 2.0 internal application to connect with the QMF Vision server. If the IBM connection server is on-premise, the IBM administrator provides the URL for the server. The Client ID and Client Secret fields are provided by the IBM connection server.

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and select **Settings**.
3. On the API LIST tab complete the following fields:

Field	Description
Server Base URL	The identifier of the IBM server.
Client ID	The identifier generated by the IBM server.
Client Secret	The identifier generated by the IBM server.

Managing users

In the user management section, the administrator can create and apply licenses, view status of licenses, and delete inactive users from the system.

To manage users, the administrator performs the following tasks:

Registering users

The administrator can register users one at a time or create a .CSV file and register multiple users at once. The .CSV file must have each user's email address in the first column and password in the second column.

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and select **Settings**.
3. On the **USER MANAGEMENT** tab, enter the email address of the user you want to register.
4. Select a license, and click **REGISTER**.
5. Expand Current Users and select **Display view only mode**.
6. To view the account option on the login screen, select **Display the Create Account**.

Managing and authenticating users with LDAP server

The administrator controls which users can access QMF Vision by specifying Groups in an external LDAP server. These users can authenticate by using LDAP to log into QMF Vision.

Following types of LDAP servers are supported:

- Active Directory
- Tivoli Directory Server (TDS) integrated with Resource Access Control Facility (RACF)

Note:

- At a given time, you can only integrate one LDAP server.

- You cannot reset passwords for LDAP users from within QMF Vision.
- LDAP users cannot use the Forgot Password option to reset their passwords.
- LDAP users might not have an associated email address. In this case, these users will not receive notification emails from QMF Vision when Dashboards are shared with them.

Managing users with Active Directory

This topic describes how to enable users that are members of Active Directory groups to log on and use QMF Vision.

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and select **Settings**.
3. On the Settings page, choose the **LDAP** tab.
4. Under **Which action directory you want to configure?**, choose **Active Directory (AD)**.
5. In the **AD Configuration** pane, specify the following:

Field Name	Description
Login	Enable LDAP server login. Set to true to enable login.
Secure Socket Layer (SSL)	The security level for Active Directory. For example, set the value to false for LDAP protocol or set the value to true for LDAPS (secure LDAP).
Host	The Active Directory host name.
BaseDN	The BasedDN for your organization to search for users. For example, dc=example,dc=com'.
Port	The Active Directory port number. For example, 389 .
BindDN	The DN of the user that QMF Vision uses to search RACF. For example, your_domain@example.com.
User Groups	Members of groups specified here can log on to QMF Vision as normal users. For example, ['CN=usergrp1 Lab CN,OU=BIA,OU=Distribution Groups,DC=example,DC=com'].
Admin Groups	Members of groups specified here can log on to QMF Vision as administrator users. For example, ['CN=XY Development WW,OU=Platform,OU=Distribution Groups,DC=example,DC=com'].
Password	The encrypted password for the BindDN. For more information, see Setting the secret key for LDAP password encryption .

6. Click **Save Configuration**.

Managing users through Tivoli Directory Server (TDS) integrated with RACF

The topic describes how to enable users connected to RACF groups to log on and use QMF Vision.

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and select **Settings**.
3. On the Settings page, choose the **LDAP** tab.
4. Under **Which action directory you want to configure?**, choose **Resources Access Control Facility (RACF)**.
5. In the **RACF Configuration** pane, specify the following:

Field Name	Description
Login	Enable server login. Set to true to enable login.
Secure Socket Layer (SSL)	The security level for Active Directory. For example, set the value to false for RACF.
Host	The RACF host name.
User Base DN	The base DN for users in TDS. For example, dc=example,dc=com'.
Port	The RACF port number. For example, 389 .
Group Base DN	The base DN for groups in TDS. For example, ['RACFID=abc,PROFILETYPE=GROUP,CN=RACF'].
User Groups	Enter the user group names to which you want to provide user privileges. For example, ['RACFID=abc,PROFILETYPE=GROUP,CN=RACF']. .
Admin Groups	Enter the admin group names to which you want to provide administrative privileges. For example, ['RACFID=abc,PROFILETYPE=GROUP,CN=RACF']. .
User Attributes	Name of the attribute for user RACF ID. For example, racfid.
Group Attributes	Name of the attribute for group RACF ID. For example, racfid.
Bind DN	The DN of the user that QMF Vision uses to search RACF directory. For example, your_domain@example.com.
Password	The encrypted password for the BindDN. For more information, see Setting the secret key for LDAP password encryption .

6. Click **Save Configuration**.

Approving new users

The administrator can view the list of registered users waiting for approval.

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and select **Settings**.
3. On the **USER MANAGEMENT** tab, view a list of all users waiting for approval.
4. Expand the **Pending Users** panel to view the users awaiting registration approval.
5. Click **Approve**.

Viewing user statistics

The administrator can search for registered users and view their login details. The list of users can be sorted by clicking on a column name.

About this task

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and select **Settings**.
3. On the **USER MANAGEMENT** tab, view the following user details.

Option	Description
Name	The name of the user.
Status	The status of the user. A logged in user is displayed as Online.
Created Date	The date when the user was registered.
Last login	The time elapsed since the user's last login.

Chapter 4. Configuring Profile settings

A administrator can configure accounts, create and manage groups, set TM1 sources, and define social network settings. An administrator can also perform these configurations for other users.

The administrator can perform the following tasks to configure the user profile settings:

Managing account settings

After you create a QMF Vision account, you receive an email that contains your temporary password. You can also select option to view the QMF Vision tutorial.

Procedure

1. Use the user name and password that you received in the email to log into QMF Vision.
2. Click your avatar, and select **Profile**.
3. On the **ACCOUNT** tab, enter your name.
4. To automatically view the tutorial after logging in, activate **Display tutorial at login**.
5. To restrict yourself to only view QMF Vision user interface, activate **Display View only mode**. In this mode a user cannot perform editing functions.
6. Click **RESET PASSWORD**.
7. Enter the new password, and confirm that it is correct.
8. Click **UPDATE**.

Managing groups

You can create a group of users. Each user in the group has permission to view or edit the group. For example, an enterprise can have two executives, so an executive group can be created for these accounts. By default, QMF Vision provides an Admin and All Users group.

Procedure

1. Log in to QMF Vision, and click your avatar.
2. Select **Profile**, and click **GROUPS**.
3. Click **CREATE**, and complete the following fields:

Field	Action
Name	Enter the name of the group. <u>For example, Executive.</u>
Description	Enter a meaningful description of the group.

4. Click **ADD**.
A list of all the registered users is displayed. Add users such as CEO and CFO to the Executive group.
5. Select the users to whom you want to assign a permission. A user with edit permission can add other users to the group.
6. From the drop-down list, select the relevant permission.
7. Click **ADD**.
8. To remove a user from the group, click the **Delete** icon, and then click the **Delete** icon adjacent to the name of the user to remove.

Related reference

[Sharing and collaboration](#)

You can chat with other users and share dashboards, sources, and queries.

Viewing source security

When a user shares a TM1 dashboard, the server name, URL of the TM1 server, along with the login credentials of the user are displayed in the SOURCE SECURITY tab.

Connecting to social networks

A user can connect to IBM connections configured by the administrator.

Before you begin

Ensure that IBM Connections are configured in the API LIST tab on the **Settings** page.

About this task

Procedure

1. Log in to QMF Vision and click your avatar.
2. Select **Profile** and click **SOCIAL NETWORKS**.
3. Click **CONNECT**.

Default formatting

A user can configure default settings for number, language and currency.

About this task

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and then select **Profile** and click **FORMATTING**.
3. From the **Choose preferred language** list, select a language.
4. From the **Choose preferred date format** list, select the date format.
5. From the **Currency** list, select the currency.
6. Select the currency prefix, decimal, and setting for negative numbers.
7. Select the decimal count and Thousand Separator from the list.

Calendar settings

An administrator can set one of the pre defined calendars as the default calendar for the company or create a custom calendar. The default time frame of the calendar is from January to December.

About this task

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and then select **Settings**.
3. Click **CALENDAR** select the pre-defined calendar from the Organization Calendar drop-down, and click, **Default Calendar** .
4. Select the month you want to start the year with, the start and end date of the calendar.

5. Select the first day of the week.
6. To create a new calendar, select the **CREATE CUSTOM CALENDAR** and enter the details in the new window.

Chapter 5. QMF Vision Home page

The **Home** page is the first page that you see when you log in. From the home page, you can view all of the dashboards that you created and all of the dashboards that were shared with you. You can also view interactive e-learning modules and documentation support by clicking the question icon.

The following section explains the layout of the **home** page:

Option	Description
Discovery page	Develop and format visualizations and associate new data sources with dashboards. Search dashboards and presentation.
Data page	View, modify, search, and delete queries
Sharing page	Share dashboards and set view and edit permissions. Create a copy of your data source and dashboards. Search data, dashboard, and source.
Search	Search for dashboards and presentations. The search can be narrowed down by selecting additional filters. Every search can be saved. This functionality is available on all the pages in the user interface.
Search bar	Perform a global search for keywords, terms, and names.
Undo	Undo the step that you last performed.
Redo	Redo the last step that you performed.
Deleted Items	Restore, or permanently delete items.
+DASHBOARD	Create a dashboard.
+PRESENTATION	Create a presentation of all selected dashboards.
More	Select to view delete, import, export, copy options.
Toolbox	Apply settings to a visualization, collaborate with other users through chat, and select dashboard templates.
Filter	Select Dashboard, Presentation, Scheduled, Favorite, Published options.
View All	Display all of the dashboards and presentations that are available.
Shared View As Grid	Arrange the dashboards in a grid.
Shared View As List	Arrange the dashboards in a list.
Sort	Sorts the dashboards by name.

Chapter 6. QMF Vision terminology

This topic helps you become familiar with the terminology used in QMF Vision.

Term	Explanation
Average	Displays the average of all of the available values in a Measure. For example, when this function is applied to the Cost measure, the average cost of products is displayed.
Count	Displays the number of occurrences of measures values. For example, displaying the number of transactions per country.
Maximum	Displays the maximum value of all the measures values.
Minimum	Displays the minimum value of all the measures values.
Measure and Context	Measure comprises measurable data such as profit, sales, and page views. Context provides a basis to analyze the value of a measure. For example, category, country, and region are contexts.
Query	Used to manipulate data by accessing sources. To view synthesized data, you must select columns from the data sources and apply operations on them.
TABLE	Enables you to select multiple tables on the Data page.

Chapter 7. Discovery overview

The **Discovery** page displays a view, where you can perform various tasks with a visualization.

On a dashboard you can perform the following tasks:

- Delete a visualization by hovering over it.
- Resize the placement of a visualization through the **MOVE** option.
- Synchronize visualizations.
- Create a presentation.
- Print the dashboard as a PDF by clicking the **MORE** menu after opening a dashboard . You can select the layout and paper size.
- Modify and discard a dashboard by clicking the **DELETE** button.
- Add a visualization by dragging it from the **Chart Type** panel to your dashboard.
- Select a template. The number of grids display the number of visualizations on a dashboard.

You can create a custom template by opening a dashboard and clicking the **TEMPLATE** icon. The new template has the same format as the current dashboard.

- Add a header and footer to the dashboard.
- Connect to a data source.
- Set a dashboard as a landing page by selecting **ENABLE LANDING PAGE** in the **MORE** menu.
- Share the dashboard by selecting various social media options under **SOCIAL NETWORKS** in the menu.

Chapter 8. Content migration

A user can create a package with multiple dashboards and sources associated with those dashboards. This package can be imported to another environment running QMF Vision. The users accessing this environment should have access to the imported database sources. A user can search for a package on the **Sharing** page and delete it.

About this task

To package the dashboards:

1. On the **Home** page click MORE.
2. Select the dashboards you want to group, and click either the **IMPORT** or the **Export** button.
3. To import, choose a file or drag it in the user interface.
4. To export, enter the name and description of the package, and then click **SAVE**.

Chapter 9. Data preparation

Data preparation is the process of manipulating, transforming, and cleaning up the result set or multiple result sets before visualizing the data. The main area for Data Preparation is on the Data page. You gain access to the data prep functions by using the Create Query function on a table or the View Query function on a query.

You can connect to data through the **Home** page, **Data** page or **TOOLBOX**. The data can also be accessed directly through databases. On either of the pages, you can drag a source file or browse to select the file. To access data through a file, click **Connect** on the data page, and drag a source file. Alternatively, you can upload the file. For more information about Configuring data sources, see [“Connecting to data sources”](#) on page 9. QMF Vision provides functions to help a user manipulate data for further analysis.

Hierarchies

Data in the context list can be organized in a meaningful structure. You can rely on QMF Vision to generate automatic hierarchies or create custom hierarchies. When a user connects to the data source, QMF Vision identifies the descriptive fields, values, and cardinality. Thus, splitting the data into both, contexts and measures along with the count of unique records. Context can be further classified into hierarchies that are useful to view data in reports. For example, a hierarchy containing Country, Region and City provides the viewer the capability of drilling down from countries into the regions and finally into cities within the selected country/region.

To navigate to data quickly, combine two or more contexts into a hierarchy, or generate a smart hierarchy automatically. New hierarchies can be created by clicking on the **TOOLBOX** menu on the **Data** page.

Manipulating data

The data that you upload from a file or from a server connection is displayed without modification. To analyze the data, you apply operations that are provided by QMF Vision.

Working with queries

The **Data** page lists all of the queries and data sources that you create or that are shared with you. By default, the query has the same name as the file or database from which it sources the data. When you click on a query, the View Query button runs the query and display the data in a table and give you access to the data prep functions. It will also allow you to rename the query. The Create Dashboard will bypass the Data Prep area and go right to the Discovery page. Use this option if you have already prepared the data in the query.

Information about the query is shown as the data sources used, the number of nodes in the query (if it has been previously prepared by adding multiple results), and the number of dashboards it has been used in.

The source corresponds to the data source you access, and the query represents the data that is displayed in a visualization. From the **Data** page you can delete, view, and duplicate a query; apply operations such as JOIN, PIVOT, and SUM; and create a query and dashboard.

The following operations are available to transform data:

- Add a TABLE
- Add a FILTER
- Add an APPEND operation
- Add a JOIN operation
- Add a PIVOT
- Add a SUM

- Add a CUBE

Columns

You can perform the following functions on the data in columns:

- Generate automatic hierarchies to organize the data.
- Sort the columns in alphabetical order, followed by context and measures, and then formulas.
- Create categories to group data logically.
- Use the Shift key to select multiple columns for a PIVOT operation.

Managing columns

A user can perform multiple functions in columns on the **Data** page.

- When a query is opened on the Data page, the total number of rows and columns, and the last updated status are displayed on the top-right side of the page. You can download the query by clicking the download icon
- Various columns can be merged to form a single column.
- Expand and collapse the Data Map icon on the Data page to view the data preparation.
- Enter the formula in the Create a formula box to perform calculations on columns.
- Sort a column by clicking the **Sort** icon in that column.
- Reorder the columns by clicking **More** , and then selecting the **Reorder** option.

Splitting the date column

The date column can be split in to several columns each displaying year, month, day, and time.

Before you begin

About this task

Procedure

1. Navigate to the **Data** page, click on a query and click **View query**.
The query is displayed on the **Data** page.
2. Click the date column that you want to split and then select the data type and dimension (or measure) from the drop-down.
3. Hover the mouse over the column and select the MORE menu .
The sub menu is displayed.
4. Click **Split Date**.
The menu in the **TOOLBOX** displays options to view the components of the date. Select year, month, day, or time from the options..
5. Select output format of the time. For example, HH:MM PM.

Splitting the text column

A column with text or alphanumeric values can be split into two columns. For example, Employee Name column can be split in to First Name and Last Name.

Before you begin

About this task

Procedure

1. Navigate to the **Sharing** page and click **View query**.
The query is displayed on the **Data** page.
2. Click the column you want to split.
3. To split the text column, click **Split**.
4. To split the column with number and text, click **Split Number**.
The new columns are added at the end of the column list.

Merging text columns

Various columns with text values can be merged to form a single column, For example, First Name and Last Name columns can be merged to form a single column, Employee Name .

Before you begin

About this task

Procedure

1. Navigate to the Sharing page and click **View query**.
The query is displayed on the **Data** page.
2. Select a column with text values and click **More > Text functions > Merge**.
3. In the **TOOLBOX**, select the separator from the drop-down, and add the columns you want to merge.
The merged column is displayed at the end of the column list. You can rename this column.

Adding categories to data

Data can be categorized to create descriptive fields for a data source. Categories are defined to group the data from the **Data** page. In this example, Profit and Loss categories are created to group data in the Go_Sales_Discover file.

Before you begin

Ensure that you open the query and the data source is displayed on the **Data** page.

Procedure

1. On the **Data** page, select the column to create categories. In this example, Total Cost is selected.
2. In the Toolbox, click **Categorize**. Alternatively, you can click **CATEGORIZE** below the query region.
The Categorize option is displayed in the **TOOLBOX**
3. Edit the default category name. For example, Profit.
4. Expand the category to add a filter criteria.
5. Enter the name of the filter criteria. For example, Profit more than 100. By default, system automatically generates the name of the criteria.
6. Expand the filter to define the function to calculate profit.
7. From the drop-down list, select the conditional operation. For example, Greater Than.
8. Enter the value that measures profit. For example, 100.
The category, Profit is more than 100 is displayed with the filter applied to all the values that are greater than 100.
9. Select **Apply Categories**.

10. Additional categories can be generated by creating additional filters

Numeric functions

Use functions to perform calculations on measures and dimensions.

About this task

On the Data page click **Create Formula** to view the formula bar. When you enter the name of the function, the syntax for the function is automatically displayed.

The following table describes the functions:

Function	Description
ABS(NUMBER)	Returns the absolute value of the number.
ACOS(NUMBER)	Calculates the inverse cosine of a number and returns an angle in radian between 0 and π . For example, ACOS(1/SQRT(2)) returns π .
CHAR(NUMBER)	Returns the ANSI character that corresponds to a specific number. For example, CHAR(65) returns A.
ASIN(NUMBER)	Calculates the inverse sine of a number and returns an angle between $-\pi/2$ and $\pi/2$.
ATAN(NUMBER)	Calculates the inverse tangent of a number and returns an angle in radian between $-\pi/2$ and $\pi/2$. For example, ATAN(1) returns $\pi/4$.
CEILING(NUMBER)	Rounds a positive number up and a negative number, down. For example, CEILING(-9.7) returns -9.
COS(RADIAN)	Returns the cosine of an angle. For example, COS(.785398163) returns 707106781.
MONTHDAYS(MONTHS, YEARS)	Returns the number of days in the given month of the year. For example, MONTHDAYS(12,2014) returns 31.
OR(BOOLEAN,BOOLEAN)	Validates the arguments and returns TRUE if any of the conditions is true. Else, it returns FALSE. For example, the expression, (Price = 345.6 OR (Price >100, Price < 300)) returns TRUE.
AND(BOOLEAN,BOOLEAN)	Validates the arguments and returns TRUE if all of the conditions are true. Else, it returns FALSE. For example, the expression (Price = 345.6 AND (Price >100, Price <300)) returns TRUE.
NOT(BOOLEAN)	Returns the value opposite to the value supplied by the user.
FIND(TEXT,TEXT,INTEGER)	Returns the position of a character within a text string. This function is case sensitive. FIND(n,Canada,1) returns 3. If you do not specify a value for <i>INTEGER</i> , it is 1.
FLOOR(NUMBER)	Rounds a positive number down and a negative number, up. For example, FLOOR(-9.89) returns the value -10.

Function	Description
TEXT(DATE_TIME,DATE_FORMAT)	Converts the format of the values to text. For example, TEXT(1-Jan-06,'DDMMYYYY') = 01012016.
IF(BOOLEAN,VAR,VAR)	Checks whether a condition is met and returns a value if the condition is TRUE or another value if the condition is FALSE. For example, IF(Gross Profit >100, 'bigger','smaller').
ISNULL(VAR)	Checks the column for a value. Returns '1' if the value is in the column and '0' if it is not.
LN(NUMBER)	Returns the natural algorithm of a number. For example, LN(10) returns 2.30.
LOG(NUMBER)	Returns the logarithm of a number.
NOW()	Returns the current date and time.
ROUND(NUMBER,INTEGER)	Rounds a number to a specified number of digits. For example, Round(123.456,2) returns 123.46.
SIN(RADIAN)	Returns the sine of a given angle in radians. For example, SIN(RADIANS(-30)).
SQRT(UNSIGNED)	Returns the square root of a number.
LEFT(TEXT,INTEGER)	Returns the specified number of characters from the start of a text string. For example, LEFT(Chicago,3) returns Chi.
LEN(TEXT)	Returns the number of characters in a text string. For example, LEN(Chicago) returns 7.
RIGHT(TEXT,INTEGER)	Returns the specified number of characters from the end of a text string. For example, RIGHT(Chicago, 3) returns "ago".
MID(TEXT,INTEGER,INTEGER)	Returns the character from the middle of a text string. For example, MID(USA,2,2) if country is USA, the function returns SA.
TAN(RADIAN)	Returns the tangent of an angle.
LOWER(TEXT)	Converts the text to lowercase.
UPPER(TEXT)	Converts the text to uppercase.
TRUNC(NUMBER,INTEGER)	Truncates a number to an integer by removing the decimal part. For example, Trunc(2.345,2) truncates the number to, 2.34.
DATE(YEAR,MONTH,DAY)	Returns the date. For example, DATE(2013,4,29) returns 2013-04-29.

Creating formulas

To perform mathematical functions, apply addition, subtraction, multiplication, and division functions on measures. To calculate complex functions, enclose the functions in parentheses.

Before you begin

About this task

For more information about mathematical functions, see [“Numeric functions” on page 30](#).

Procedure

1. In the query area, click **CREATE FORMULA**. A new formula column is added to the list of all available columns.
2. Select the formula column, and in the **TOOLBOX** menu, give a relevant name to the formula. For example, Profit.
3. From the drop-down in the **TOOLBOX** menu select the data type. For example, Integer.
4. From the drop-down in the **TOOLBOX** menu select the Dimension or Measure options.
5. Select the formula column, and select or type the formula.
6. Click the **Apply** .

Adding a table

You can add two data sources to create a new table. In this example, the sources are `Go_Sales_Discover.CSV` and `Go_Discover_revenue.CSV`. The common column between the two data sources is, ID.

Before you begin

A prerequisite of creating a table is that both data sources have a column with the same name.

About this task

Procedure

1. On the **Data** page, select the source, and click **View**.
The query editor is displayed.
2. Click the **ADD** icon or **Table**.
A drop-down list of all the sources available in the database is displayed.
3. Select the source by clicking the **Plus** icon adjacent to it.
The columns available in `Go_Discover_revenue.CSV` are displayed below the query area.
Note: You can search for source names in the search bar.
4. In **Toolbox**, you can modify the name of the table.
5. Click **Create Dashboard**. The dashboard with the combined tables is displayed.

Adding an APPEND operator

The APPEND operation combines data from multiple sources. It is helpful when data of the same type has to be combined. The source that is appended should have the same column structure as the main source. In this example, append `Go_Discover_Sales_2013.CSV` with `Go_Discover_Sales_2014.CSV`. Both the sources have same columns. The resultant query shows the combined sales for years 2013 and 2014.

Before you begin

On the Data page, select one of the CSV queries and click on **View Query**. Select TABLE and select the other CSV file.

Procedure

1. Click the **APPEND** operation. It automatically links the two selected tables.

2. Enter a name for the APPEND operation in the **TOOLBOX**. This helps you identify the purpose of the APPEND operation, especially if you have complex queries. In this example, the name of the operation is Sales by region.
3. Select the columns you want to append in **TOOLBOX**.
The area below the query region displays the combined data.
4. Click **CREATE DASHBOARD**. The dashboard with applied APPEND operator is displayed.

Adding a Filter

You can add a filter to the data to view content based on selected conditions. This operation eliminates rows from a specific data set. In this example, add a quantity-based filter on the sales data in the `Go_Sales_Discover_product_sales.CSV`. The Filter option type provides an interactive control that a user can select content to update the dashboard.

Before you begin

Ensure that you open the query.

About this task

Procedure

1. Select the source and click **FILTER**.
The Filter operation is added to the query area.
2. Select the Filter operation and edit the default name to a meaningful name. This helps to convey the reason behind filtering and also differentiates between multiple filters. In this example, the filter is applied to quantity.
3. Select the source and then, click **Add a filter**.
Multiple drop-down lists are displayed. The first drop down is for specifying the column to filter. The second drop-down list contains conditional operators such as Less Than, Greater Than, Is Not, Between. The last field is to enter a value for the filter. For example, you can select Quantity Less Than 20.
4. Select and enter the criterion. For example, Quantity is > 20.
The resulting columns are displayed below the query area. In this example, all products that have a quantity higher than 20 are displayed.
5. Click **CREATE DASHBOARD**.
6. The use of radio buttons in a filter object can be changed to a drop-down list if required. Position the mouse cursor over the right corner of the filter and click the vertical ellipsis. Select **Drop-down Filter**.

Adding a JOIN operator

This operator combines rows with columns. It is helpful when data is logically related. For example, you can use this operation to join transaction records with customer details. Sometimes data may only partially relate to one another. You can use the Venn diagram (or join type) to determine what unmatched rows still get included. An INNER JOIN operation returns rows if same key value exists in both the tables. A LEFT JOIN operation returns all rows from the left table even though no rows match with the right table. A RIGHT JOIN operation returns all the rows from the right table even though no rows match with the left table.

About this task

In the following example, the LEFT OUTER JOIN is applied to the `Go_Sales_Discover1.CSV` and the `product.CSV`.

Procedure

1. Click the **JOIN** operator.
2. Enter the name for the JOIN operator. This helps you differentiate between multiple JOIN operators. In the example, the name of the operation is Product sales.
3. In the **TOOLBOX**, select the CSV sources and the columns from the **Nodes** drop-down list. In this example, the sources are Go_Sales_Discover and product.
All the columns in the CSV files are automatically populated. The ProductName column from both the sources are matched and the resulting columns are displayed below the query region.
4. Select the condition to apply on the JOIN operation. For example, Unit Sale Price = 10.
5. Click **CREATE DASHBOARD**. The dashboard with applied JOIN operation is displayed.

Adding a PIVOT operator

A PIVOT operation transforms data that is in cross-tab format to a flat table. You can pivot the data around measures or columns.

Before you begin

Ensure that you open the query and the data source is displayed on the **Data** page.

Procedure

1. Click the **PIVOT** operation.
The system automatically groups the measures to create a multi-value pivot group. If required, you can add measures to this group.
2. Select All Measures or All Column from the drop-down list.
3. Enter a meaningful name for the Pivot column.
4. Click the **Plus** icon to create a new pivot group.
5. Expand the group to add pivot values.
6. Click **CREATE DASHBOARD**.

Adding a CROSSTAB operator

A cross tab operation transforms data by combining tables to form a new tab.

Before you begin

Ensure that you open the query and the data source is displayed on the **Data** page.

Procedure

1. Click the **+CROSSTAB** operation.
The system automatically groups the measures to create a multi-value cross-tab.
2. In the **TOOLBOX**, enter a meaningful name for the new Cross-tab.
3. Click the **Region** drop-down from either the Vertical Dimensions or Horizontal Dimensions panels to toggle the **Pivot** option.
4. Click the **Profit Margin** drop-down from the Measures panel to select the options for calculating Sum, Average and other such operations.
5. Click **CREATE DASHBOARD**.

Applying the Cube operator

The Cube operator enables a user to prepare data for direct consumption by the IBM Cognos TM1 server.

Before you begin

Ensure that you are connected to an IBM Cognos TM1 server and the query is displayed on the **Data** page.

About this task

Procedure

1. Click the **CUBE** operator and rename it in the **TOOLBOX**.
2. Select the TM1 source from the drop-down list.
3. Select the IBM Cognos TM1 server from the **Output Connection** drop-down list.
4. Click **CUBE**. The systems populates dimensions and measures in the **TOOLBOX**.
5. Select the server from the Output list and then click **SEND** to send the data to the TM1 server.

Understanding aggregation functions

QMF Vision provides the functionality to apply mathematical functions on a set of values. You can apply these functions when you select the SUM operator on the **Data** page in the **TOOLBOX**.

The following aggregation functions are supported by QMF Vision:

Sum

Combines rows with same dimension and adds their corresponding values. Thereby reducing the number of columns and rows to query.

Average

Calculates the mean of all the numbers in data.

Minimum

Calculates the minimum value in the measure.

Maximum

Calculates the maximum value of a measure.

Count

Calculates the number of rows in either a measure or a dimension.

Adding the SUM operator

The aggregate function helps you to summarize large data. When a column has recurring fields, this function combines these fields and their corresponding values, reducing the size of data to query. The aggregate function comprises count, sum, average, minimum, and maximum sub functions. In this example, various Aggregation functions are applied on the Go_sales_Discover .CSV file.

Before you begin

Ensure that you open the query and the data source is displayed on the **Data** page.

Procedure

1. Click **SUM**.
The column area lists the aggregated values of the Product name context.
2. Click the **Quantity** column.
By default, the sum function is selected in the **TOOLBOX** menu and the aggregation of quantity is displayed against the corresponding product.
3. Click **SUM** in the query area, and then select the column to apply the sub functions.

In this example, the average of quantity of products is calculated.

4. Select **Average** in the **TOOLBOX** menu.

A new column that with the average quantity of each product is displayed below the query area.

Adding categories to data

Data can be categorized to create descriptive fields for a data source. Categories are defined to group the data from the **Data** page. In this example, Profit and Loss categories are created to group data in the `Go_Sales_Discover` file.

Before you begin

Ensure that you open the query and the data source is displayed on the **Data** page.

Procedure

1. On the **Data** page, select the column to create categories. In this example, Total Cost is selected.
2. In the Toolbox, click **Categorize**. Alternatively, you can click **CATEGORIZE** below the query region.
The Categorize option is displayed in the **TOOLBOX**
3. Edit the default category name. For example, Profit.
4. Expand the category to add a filter criteria.
5. Enter the name of the filter criteria. For example, Profit more than 100. By default, system automatically generates the name of the criteria.
6. Expand the filter to define the function to calculate profit.
7. From the drop-down list, select the conditional operation. For example, Greater Than.
8. Enter the value that measures profit. For example, 100.
The category, Profit is more than 100 is displayed with the filter applied to all the values that are greater than 100.
9. Select **Apply Categories**.
10. Additional categories can be generated by creating additional filters

Querying a database

You can run a query against the top 1000 rows and columns in a database or against the entire table. The SQL statement of the query running in the background is displayed if you expand SQL.

Procedure

Create a database query, and perform one of the following steps:

- To run the query against the entire table, click **RUN**.
- To run the query against top 1000 rows and columns, click **Top 1000**.
- To stop the execution of the query, click **STOP**. The dashboard displays partial data.
- To customize the SQL query, select **Customize**.

Accessing live query

The Live query functionality enables a user to access data directly from the database. A regular query process any data modification request through the data engine.

Select the **Live Query** option on the **Data** page to access the data directly from the database.

Creating data packs

A data pack is a logical association of source tables, that is created by linking other data source tables in the relational database management system (RDMS). It acts as a single data source table. You can create query and dashboard from a data pack.

Before you begin

Ensure that you are connected a data source. For more information about connecting to a source, see [Chapter 9, “Data preparation,” on page 27](#).

About this task

In this example, a data pack is created by linking the Suppliers and Products tables in an SQL server data source.

Procedure

1. Navigate to the **Data** page, and click the **SQL Server**.
A list of tables in the data source displays.
2. Click **Create Data pack** beside one of the tables. For example, the Suppliers table.
The Suppliers table is displayed as an Entity Relationship Diagram (ERD).
3. Enter a name for the data pack. In this example, the data pack is renamed to **Order details**.
4. On the **Data** page, click the Plus (+) sign next to the table that you want to link with the selected table. In this example, in the **TOOLBOX** the Products table is selected.
5. In the **TOOLBOX**, click **Add** to view the linking criteria.
6. In the **TOOLBOX**, select the primary key from the dropdown. A Primary key is displayed with the **Key** icon next to it. In this example, SupplierID is selected for the Product table.
7. To include all the records from the selected table, click **Include all**.
If you do not select this option, only the values that satisfy the linking criteria are included in the data pack.
8. In the **TOOLBOX**, select the other table from the menu. In this example, Suppliers is selected.
9. Select the foreign key for the other table. In this example, SupplierID is selected.
10. Repeat Step 7 and click **Done**.

What to do next

You can edit and delete a data pack from the **Data** page. To create a query and dashboard from a data pack, see [Chapter 11, “Dashboards,” on page 45](#).

Chapter 10. Visualizations

To view data in a format that is relevant to you, create a visualization.

A visualization displays data in a graphical format, such as a bar chart, a heat map, and a cross-tab. To customize a visualization, change the color, the axes orientation, and the layout. Cross-tab is the default visualization. You can drill down into a visualization. For example, you can view yearly data, then quarterly data, and then monthly data.

The following table describes the available visualizations:

Visualization	Description
Box plot	Displays a set of values across a range in the ascending order. The values are represented by percentile with median placed in the center of the box.
Bubble	Used to visualize data in three dimensions. This chart is used if your data has three data sets as opposed to commonly used, two data sets.
Bullet chart	This chart is used to portray comparative performance. It is a horizontal bar graph that features a single, primary measure and displays that measure in comparison to one or more other measures in the context of qualitative ranges of performance. For example, you can show actual and target performance.
Column chart	Displays data in the form of vertical bars. The axes of the chart contain various measures and context. For example, the following chart displays the number of people who are injured across different districts in a country.
Dashboard Filter	Used to apply filter criterion to a dashboard.
Dot plot	Displays data points that are plotted on a scale using circles. This chart is used for continuous data. It is usually used for moderate sizes data sets.
Geo bubble	This chart is a combination of Geo map and bubble chart. The bubble size and color intensity combined with regional color fills is used to display data.
Geo map	<p>Presents quantitative data for a country, region, and city by the way of varying color intensity. A user can view analysis of a data based on various geographies. This map can be drilled down to display detailed analysis.</p> <p>The use of a Geo Map requires a API Map Key and a data source that contains geographic information, such as Country, Region, County or Latitude and Longitude. A Map has several MapModes which are accessed by selecting the Settings within the Toolbox. The MapModes use different mapping services which vary the display by map type, resolution and displayed artifacts. The default MapMode is OpenStreetMap</p>
Heat map	This chart is made of cells arranged as a tabular matrix. Each cell displays a quantitative value by varying color gradient.
KPI	Displays the key performance indicators for your data. You can add a histogram to this visualization to view the trend of data along with the value of KPI. The KPI can be set to display an aggregate of count, sum, avg, max or min. KPI charts contain options for displaying color thresholds and a graph histogram. The color thresholds are applied by assigning a color to a value level.
Line chart	Displays information as points connected by straight-line segments. It represents variations in data at fixed time intervals. For example, a finance manager can use this chart to see the trend in wages that are paid to employees in a decade.

Visualization	Description
Pareto	Contains both bars and a line graph. The line that appears above the bar graph shows the cumulative total.
Pie chart	This chart is circular and divided into sectors. The arc length of the chart represents the quantity. Users can explode the chart for an insight into segments.
Scatter plot	The data is represented by a collection of points or clusters. These points are displayed in uneven intervals. A sales manager can use this chart to view the correlation between percentage sales across different demographics. A trend line on the scatter plot shows the sales trend of a product over time.
Spider Chart	Displays multivariate data in the form of a two-dimensional chart. It consists of equiangular spokes. Each spoke represents one of the variables. Each category is plotted on a separate axis, starting in the center and ending on the outer ring.
Stack bar	This chart uses horizontal or vertical bars to display comparison among different categories. Values are plotted on one axis of the graph and categories on the other. This graph can be stacked horizontally. A sales manager can use the bar chart to view sales for five years.
Stacked area	Displays quantitative data on a graph. It is used to compare two or more quantities and the area between axis and line is emphasized by different colors.
Sunburst	This multilevel pie chart is best suited to represent hierarchical by the way of concentric circles. The outermost circle represents the data in top of the hierarchy.
Table	Presents the summary of data that are grouped by categories. It provides relation between two variables. The data is represented in form of a matrix with frequency distribution of variables.
Text and images	Add a description of the key elements on the dashboard or additional information to help the user understand the analysis. The option can be selected from the TOOLBOX and format of the text is modified in the text editor.
Tree map	Represents the data in form of nested rectangles. It helps you to view large data in a small space.
Waterfall	Displays the effect of a series of positive and negative values on the initial value. By default, the negative values are displayed in red color and positive numbers are indicated by green color. These colors can be modified.
Web page	Enables you to embed HTML code on your dashboard.
Word cloud	This chart is used to visualize text data. The text size of these words represents the frequency of the word. To generate meaningful word cloud, the text to be entered should be free of fillers. It can be used to convey the most salient points in a report. This report also makes it easier for a user to spot text. They have a strong visual impact and are easy to understand.

Working with a scatter plot

You can view analysis of data, correlation between data points, and data trend on a scatter plot. Based on your selection of dimensions and measures, the data is displayed in aggregation and transaction modes.

If you select two or more dimensions on the X axis and one measure on the Y axis, and drill down to the last level on the plot, the analysis is displayed in the aggregation mode. If you select two or more measures on the Y axis and more than one dimensions on the X axis, and drill down to the lowest level data, the analysis is displayed in the transaction mode.

The scatter plot also displays correlations between two paired sets of data. The correlation is categorized as weak, moderate, and strong.

The following table lists the correlation category and the corresponding criteria:

Category	Criteria
Weak	If the value of correlation is greater than -0.3 and less than <0.3.
Moderate positive	If the value of correlation is less than 0.7 and greater than 0.3.
Moderate negative	If the value is greater than -0.7 and less than -0.3.
Strong positive	If the value is less than 1 and greater than 0.7.
Strong negative	If the value is greater than -1 and less than -0.7.

Overview of table

QMF Vision provides added reporting functionality by the way of tables, also known as a *cross-tab* visualization. A cross-tab helps you summarize complex data that is displayed on a data sheet and can be organized in multiple ways. Organizing data through a cross tab allows the data which is displayed vertically to be displayed horizontally.

About this task

You can perform the following functions on a cross-tab visualization:

- Swap the rows and columns by clicking SWAP.
- Toggle between the Simple-tab and cross-tab view by clicking **CROSS-TAB**.
- Hide or show a column by clicking the **Show/Hide** icon. This option is visible when you hover the mouse over a column header.

You can format data in cross-tab visualizations by selecting the following options available in **TOOLBOX**.

- View the breadcrumb trail of the navigational path when you drill down the data in a column by selecting **Breadcrumb**.
- View the sub total of every row by selecting **Sub Total**.
- View the grand total of every column by selecting **Grand Total**
- View the serial number of every row by selecting **Line Number**.
- View Grey stripes on alternate rows by selecting **Striped Row**.
- Modify the background colors for dimension, measures, and groups.
- If the Y axis of cross-tab has two or more dimensions, you can drill down a column by selecting the column and clicking **Drill**.
- Select a column and apply formatting options. You can modify the alignment of the text, font size, and font color.
- View cells, columns, rows, and table as percentage.
- Click a dimension to view the various tasks you can perform on a Context.
 - The **Sort** option enables you to apply conditions on the context and see the resulting values in the cross-tab. You can sort the values by name or value.
 - The **Exception** option enables you to select outliers and define custom exceptions.

Sorting data by value

In a cross-tab visualization, data in a measure can be sorted by applying various methods and rules.

Before you begin

Ensure that cross-tab visualization is applied to the query and at least one measure is added on the X axis.

Procedure

1. Click on a measure and select **Sort by Value**.
2. From the **Measure** list, select the measure you want to sort.
3. From the **Method** list, select the mathematical method such as sum, maximum, or average.
4. From the **Rule** list, select the order to sort.
5. Enter the maximum numbers of rows you want to sort in the **Top Count** field.
6. Select the **80/20** to remove data that does not contribute to the top 80% results.
7. Click **DONE**.

Sorting data by name

In a cross-tab visualization, dimensions can be sorted in descending and ascending order.

Before you begin

Ensure that cross-tab visualization is applied to the query and at least one dimension is added on the X axis.

Procedure

1. Click on a measure and select **Sort by Name**.
2. From the **Rule** list, select the order in which you want to sort the dimensions.
3. Enter the number of rows you want to sort in the **Top Count** field.
4. Click **DONE**.

Creating custom exception

A user can define a custom exception for a measure in a dashboard with cross-tab and KPI visualizations.

Procedure

1. Log into QMF Vision.
2. Create a dashboard. For more information about creating a dashboard, see [Creating dashboards](#).
3. Click the **chevron** icon on the context for which you want to create the exception.
4. Select **Exception > Self-defined**.
5. Enter the exception criteria by using mathematical functions. For more information about these functions, see [Calculation functions](#).
6. Click **Done**.

Defining alerts criteria

Alerts are generated for a self-defined exception in a cross-tab and KPI visualizations.

About this task

A schedule that is associated with the cross-tab visualization runs and generates an alert if the exception condition is met. The details of the alert are sent to a user through an email. For information about defining a custom exception in cross-tab, see [Creating custom exception](#).

Procedure

1. Log into QMF Vision.
2. Click the **Sharing** icon.
3. Select the dashboard that has the cross-tab or KPI visualization with the self-defined exception.
4. Enter the user or group to share the alert.
5. Select **Share with alerts** option.

Formatting a visualization

You can change the look and feel of a visualization.

Before you begin

You must edit a dashboard to modify the visualization.

Procedure

1. On the **Discovery** page click **Chart action** in TOOLBOX and select the following options:

Option	Description
Data Grouping	Select the type of grouping you want to apply.
Data Sorting	Select the order in which you want to sort the data.
Data orientation	Select this option to exchange the value on X axis with those on the Y axis.

2. Click **Chart style** in **Toolbox** on the **Discovery** page.
3. Based on your visualization, you can view and select the following options:

Option	Description
X-Axis	Displays the labels on the X-axis.
Y-Axis	Displays the labels on the Y-axis.
Short number format	Displays the values in shortened format. For example, you can view the number 1,000 as 1k.
Legend	Displays the values from the selected Context. You can select the legends that you want to see in the final visualization.
Group	Combines the values that represent 80% of the highest value. The remaining area is grouped as Others.
Width	Move the slider to modify the width of the bars on a chart.
Height	Move the slider to modify the height of the bars on a chart.
Text Rotate	Move the slider to rotate the text on the X-axis.

Option	Description
Enter your link	Enter a link for which you want to view the KPI.
Number format	Displays the format of numeric values.
Interactive	Displays the values when you hover the mouse over the data point. If this option is not selected, you can view the values only on the line.
Trend	Displays the trend of data on a chart.
Magnify	Displays the zoomed in view of data on X axis when you hover the mouse. Ensure that you select the Magnify option in the visualization.
Label Style	Displays different slices of a Pie chart.
Format (percentage)	Displays data in percentage.
Pie Inner Radius	Move the slider to adjust the radius of the Pie chart.
showValues	Displays the values of the X coordinate.
Bar color	Select the color to display the bars on the Pareto chart.
Line color	Select the color to display the line (cumulative total) on the Pareto chart.
Order	Select the order of the data.
Left	Move the slider to modify the width of the Heat map.
Top	Move the slider to reduce the height of the Heat map.
Grid Size	Select the size of the grid from the list.
Customer	Select a custom map from the list.
AU Postcode	Enter a valid Australian post code.
Map Type	Select the type of map. For example, you can select to view the terrain of a region.
Breadcrumb	Select to display the drill down path of dimensions on the chart.
Add reference line	Click to add a reference line to compare the bars against a new value.

4. Click **Show Query Status** to view the last updated status of the query.

Working with maps

A user can create dashboards with Geo map and bubble maps, and customize them to display data in a way that is relevant to you.

Procedure

1. Open the source on the **Discovery** page.
2. Expand **TOOLBOX** and select the preferred map.
3. Apply the header settings for the map. For more information see, [“Creating header titles for visualizations”](#) on page 46
4. In the **Chart style** panel, select the map type from the list. For more information about chart styles, see [Formatting a visualization](#).
5. In the **Group data limit** list, select the data that you want to display on the map.

What to do next

You can drill down the data on the dashboard by double-clicking the data points on the map.

Chapter 11. Dashboards

You can create dashboards from the **Home** page or **Data** page. Viewing dashboards from the **Home** page is useful when you do not want to alter the data. Whereas, viewing dashboards through Data page enables you to manipulate the data.

About this task

By default, QMF Vision provides sample dashboards, associated queries, and sources. When a user logs into QMF Vision, these sample dashboards are displayed on the Home page. These sample files are located in the `etc/webserver.yml` folder. The user can create new dashboards, export them, and place in the folder to be used as samples.

Dashboard governance navigator

The dashboard navigator is displayed when a user clicks the chevron icon at the top of the Home page. The dashboard navigator provides a seamless view of all the dashboards, queries, sources, and association between them. When a user selects an element, the other elements associated with it are highlighted. The user can drill-down the selected element. For example, when the user selects a dashboard, the source, query, and users associated with that dashboard are highlighted.

Creating a dashboard from the Data page

You should use this method when you want to browse through various data sources and queries before creating a dashboard.

Procedure

1. Navigate to the **Data** page, and click a query or source.
2. Click the **Create Dashboard** icon.
To format the visualization, add contexts and measures.
3. Click **Done**. The dashboard is displayed on the **Discovery** page.

Generating automatic dashboards

A user can create a dashboard by selecting a target dimension or measure for a source. This function eliminates the need to create a query before creating a dashboard.

Before you begin

About this task

Procedure

1. Log in to QMF Vision and click **+DASHBOARD**.
2. On the **Data** page, select the data source and then click **ADD**.
3. Select the analysis target measure or dimension and then click **CREATE**.
For example, a user can select the Profit Margin measure for the base analysis.
4. Click **CREATE**.
The dashboard displays analysis for all the dimensions with Profit Margin as the source.

Editing dashboards

Change the size, modify color schemes, and add new visualizations to a dashboard.

You can perform the following tasks to modify a visualization:

- Expand a visualization.
- Add a calculation by selecting values and mathematical functions.
- Modify the properties of a visualization through the **Setting** option.
- Add a title to the visualization by selecting **Show header**.
- Copy of the visualization.
- Refresh the visualization to view the modifications.
- Apply filters to the visualization by selecting the filter criterion from the list.

Use the Histogram option to drill down and view the data for a specific date range.

- The default dashboard name is assigned from the initial chart heading. The name can be modified by selecting and editing the name assigned to the tab in the left hand corner of the dashboard.
- Apply aggregation on a chart to view the average, count, and sum.
- Set colors for a measure to identify values by the intensity of the color. The charts contain a default color scheme which can be changed by specifying a color for a measure. The start color represents the lowest value and end color displays the highest value. After a measure or column is selected either a monochromatic or two color base gradient can be assigned. For example, select a color to represent the minimum and maximum number of sales, as shown. Default color options are provided. Alternatively, a palette can be accessed by clicking on either the start or the end color. If a color patch is selected, then a gradient will be applied using that color base. Once a color is selected, the hexadecimal value and color will populate to specify the selection.
- To drill down through a visualization, apply time-specific filters to a date context. The following chart displays the Year filter selected for the Order Date context.

Creating header titles for visualizations

You can provide a meaningful name to your visualization. This helps you differentiate between various visualizations on your **Home** page.

Before you begin

You must edit a visualization to add and modify a header.

Procedure

1. Click **Header style** in the **TOOLBOX** on the **Discovery** page.
2. Click **Show header**.
3. Enter a title for the visualization.
4. Click the description box to select a color from the color picker.
5. Select the horizontal position of the header.
6. Select the vertical position of the header.
7. Drag the Font size slider to adjust the font size.
8. Drag the header room slider to adjust the space below the title.

Results

The following example displays a dashboard with the unit sale price of a product that is based on the type.

What to do next

Applying chart action

You can modify the way data is grouped on a visualization, sort the data, and change the orientation of the axes.

Before you begin

You must edit a dashboard to modify the visualization.

About this task

Procedure

1. Open a dashboard in edit mode.
2. Expand **TOOLBOX**, and click the **Setting** icon.
3. Click **Hide Chart action** in **TOOLBOX**, and select the following options:

Option	Description
Data Grouping	Select the type of grouping you want to apply.
Data Sorting	Select the order in which you want to sort the data.
Data orientation	Select this option to exchange the value on X axis with those on the Y axis.

Applying chart style

You can customize the data that you view on a visualization.

About this task

Procedure

1. Open a dashboard in the edit mode.
2. Expand **TOOLBOX**, and click the **Setting** icon.
3. Click **Chart style**
4. Based on your visualization, you can view and select the following options:

Option	Description
X-Axis	Displays the labels on the X-axis.
Y-Axis	Displays the labels on the Y-axis.
Short number format	Displays the values in shortened format. For example, you can view the number 1,000 as 1k.
Legend	Displays the values from the selected context. You can select the legends that you want to see in the final visualization.
Group	Combines the values that represent 80% of the highest value. The remaining values are grouped as Others.
Width	Move the slider to modify the width of the bars on a chart.
Height	Move the slider to modify the height of the bars on a chart.
Text Rotate	Move the slider to rotate the text on the X-axis.
Enter your link	Enter a link for which you want to view the KPI.

Option	Description
Number format	Displays the format of numeric values.
Interactive	Displays the values when you hover the mouse over data point. If this option is not selected, you can view the values only on the line.
Trend	Displays the trend of data on a chart.
Label Style	Displays different slices of a pie chart.
Format (percentage)	Displays data as a percentage.
Pie Inner Radius	Move the slider to adjust the radius of the pie chart.
showValues	Displays the values of the X axis.
Bar color	Select the color for display on the bars on a Pareto chart.
Line color	Select the color to display the line (cumulative total) on the Pareto chart.
Order	Select the order of the data. You can order the data named of the row.
Grid Size	Select the size of the grid from the list.
Map Type	Select the type of map. For example, you can select a map that displays the terrain.
Breadcrumb	Select to display the drill down path of dimensions on the chart.

Data transformation

To reduce the time that it takes to display a large data set, restrict the number of rows to analyze and display on the dashboard.

Procedure

1. Open a dashboard in the edit mode.
2. Expand TOOLBOX, and click the **Setting** icon.
3. Expand **Data transformation**, and select the data limit from the list.
4. Click **Show Query Status** to view the last updated status of the query.

Publishing a dashboard

A dashboard can be published through a URL. This URL can be shared with various users and these users do not require a new system license to view the shared dashboard.

Before you begin

About this task

Procedure

1. Open the dashboard you want to share from the **Home** page
2. On the **Discovery** page, click the drawer icon and then, select **PUBLISH**.

The Publish Dashboard dialog displays the options to generate a URL or to create an HTML snippet with specified dimensions.

3. Specify the URL and the dimensions of the snippet.
4. Copy the URL or the snippet.

5. Click **DONE**.

The dashboard contains an indicator that it is published.

What to do next

To revoke publishing of the dashboard, while viewing the dashboard select **More > PUBLISH** to open the Publish Dashboard dialog. Slide the **Publish** toggle to the left to revoke the publishing of the dashboard and then click **DONE**.

Viewing dashboards

You can view all of your dashboards on the **Home** page.

You can share dashboards and mark them as favorites. You can categorize your dashboards if you are working on multiple dashboards. You can also view all dashboards, shared, and recently worked on dashboards.

Tagging a dashboard

To organize dashboards related dashboards into logical groups, add tags to the dashboards.

Before you begin

To add a tag, you must have editing permissions for the dashboard.

Procedure

1. Navigate to the **Home** page, and click **Grid View** or **List View** to view the list of dashboards.
2. Click the dashboard that you want to tag, and enter the value for the tag.
For example, the GO_Sales_Discover dashboard displays sales data. Therefore, **sales** is a relevant tag.

Applying a filter container

A filter container comprises different filter criterion a user wants to apply to a dashboard. This functionality helps you get a limited view of the data.

About this task

Procedure

1. Click the dashboard you want to add filters to.
2. Expand **TOOLBOX**, and then click the **Filter** icon.
3. Click the **Add** icon on the filter containers.
4. From the **Field** list, select the measure or dimension.
5. From the **Condition** list, select a comparison condition, such as Null or Is less than.
6. Enter a value for the filter.

Adding filters

To limit the data displayed on a dashboard that has multiple visualizations, apply filters.

About this task

Procedure

1. Open the dashboard to which you want to apply filter.
2. Expand the **TOOLBOX** and click **Filter**
3. Select the field, condition, and enter the value.
4. Click **Plus** to add the filter to the dashboard.

Adding annotations to a dashboard

When a dashboard is shared, all the users can annotate a graph on that dashboard. This functionality enables collaborative users to add additional information to a dashboard. For example, multiple users can add their comments to the sales forecast of a department.

About this task

Procedure

1. Open the dashboard that you want to annotate.
2. Expand the **TOOLBOX** and select **Add reference line**.
3. Enter the following information for the reference line:

Field	Description
Value type and Current value	Select the value from the drop-down and enter value at which you want to start the line.
Label text	Enter the text you want to display on the reference line.
Color bar	Select the color gradient.

4. Select **Enable dragging**.
5. Click **Annotation**, and then double-click the column you want to annotate.
6. Click **ANNOTATION** and enter the following information:

Option	Description
Field	Description
Count	Displays the coordinates of the column.
Shape	Shape of the pointer at the datapoint. The shape can be a circle, a rectangle or no shape (None).
End Type	Style for the end point of the annotation. The style can be either a dot, an arrow or no style (None).
Line Type	Style of the line. The style can be either Curve or Straight.
Color	The color of the annotation line.
Note	Information displayed on the annotation line.

Associating visualizations

You can associate two or more visualizations that are generated by two different data sources on a dashboard. This functionality provides a comprehensive analysis of the resulting data. By associating different visualizations you get to view data in a different perspective.

Before you begin

Ensure that the dashboard has two reports with two different data sources.

Procedure

1. Open the Dashboard.
2. On the **Discovery** page, click the **Association** icon in **TOOLBOX**.
3. Select the source and fields from the drop-down lists.
4. Click **ADD FIELD** and repeat [Step 3](#).

Linking dashboards

A dashboard can contain a variety of visualizations; several may be from the same data source presenting like content. As a result, one dashboard may end up being area specific, such as sales, whereas another may be inventory related. A user can link such dashboards. This functionality enables a user to create a logical group of dashboards with easy navigation across linked dashboards.

About this task

The user can add multiple dashboards together on the Discovery page by clicking the **Show Dashboard Links** button and adding the selected dashboards. These dashboards are displayed as hyperlinks. You can click the back arrow to view the parent dashboards. In a presentation, the user can apply different filters on the linked dashboards to view the same data for different scenarios. These filters are applied only to the linked dashboard and the original dashboard is not modified.

Procedure

1. Select a dashboard.
2. Select **Show Dashboard Links** tab.
3. Click on **Add a Dashboard Link** and click the Plus icon.
4. Select the dashboard by clicking the Plus icon.

The selected dashboard will be displayed as a linked dashboard and can be navigated on the dashboard.

What to do next

After clicking on the link, a user can view the arrow to navigate back to the prior dashboard.

Dashboard settings

You can perform additional functions on a dashboard on the **Discovery** page.

About this task

To view the setting options, click the **Setting** icon in the **TOOLBOX**, and select the following options:

Dashboard Coordinate Highlight:

You can select a specific measure in one visualization and view it in a different context in the remaining visualizations. For example, the following image displays two visualizations with a common data source. The column graph displays the price by country, the stacked chart displays the price of

items by company. If you can drill down in the column bar by country, the stacked chart displays the price of the company you selected in the column graph.

Refresh query when open dashboard

This function enables you to run a query associated with a dashboard when you open the dashboard from the **Home** page. This option ensures that the dashboard displays the latest data.

Auto Play

This function provides two ways to reload the dashboard.

Reload Dashboard

The dashboard is automatically updated at the configured time interval. This functionality is available when the report on the dashboard is created from a database.

Step through data

A specific data source and column in a dashboard is automatically updated at the configured time interval.

Generating automatic dashboards

A user can create a dashboard by selecting a target dimension or measure for a source. This function eliminates the need to create a query before creating a dashboard.

Before you begin

About this task

Procedure

1. Log in to QMF Vision and click **+DASHBOARD**.
2. On the **Data** page, select the data source and then click **ADD**.
3. Select the analysis target measure or dimension and then click **CREATE**.
For example, a user can select the Profit Margin measure for the base analysis.
4. Click **CREATE**.

The dashboard displays analysis for all the dimensions with Profit Margin as the source.

Chapter 12. Presentation

A user can transform dashboards into a presentation. Logically similar dashboards can be combined to create a presentation.

Creating presentations

A user can create a presentation by combining multiple dashboards and view them on **Home**.

About this task

Procedure

1. Log in to QMF Vision, and click **+PRESENTATION**.
2. On the **Discovery** page, click the **Add** icon to add a new dashboard to the presentation.
The queries and dashboards associated with the presentation are also shared.
3. Click the **Play** icon to view the presentation.
4. Click the **Return** icon to return to the dashboard.

What to do next

A user can zoom in or out of the presentation by accessing the controls at the top of the screen.

Copying presentations

A user can create copies of presentations on the Home and Sharing pages.

Before you begin

About this task

Procedure

1. Log in to QMF Vision, and click **My Presentations**.
2. Click **More** to highlight the presentations.
3. Select the presentations and click **COPY**.
4. Select **DONE**. 7. To view the dashboard in a different browser, paste the copied URL.

Chapter 13. Sharing and collaboration

You can chat with other users and share dashboards, sources, and queries.

Sharing

Use the **Sharing** page to search for types of files, sources, and dashboards.

You can assign, view, and modify permissions for a user or a group of users.

Collaboration

QMF Vision provides a way for users to connect and collaborate in real time. You can chat with users, view their availability, and create chat groups.

You can share dashboard with other users through the chat functionality in following ways:

- **Home page:** Drag and drop the dashboard into the chat window.
- **Discovery page:** Click the **Share** icon in the chat window. The dashboard that you are working on is shared with the user. This functionality is helpful if you want to share a draft of your dashboard work before you finalize it.

Related tasks

Managing groups

You can create a group of users. Each user in the group has permission to view or edit the group. For example, an enterprise can have two executives, so an executive group can be created for these accounts. By default, QMF Vision provides an Admin and All Users group.

Sharing dashboards

You can share dashboards with other users and view dashboards that other users shared with you.

Procedure

1. Navigate to the Sharing page, and select the dashboard to share.
2. Enter the name of the user or the group that you want to share the dashboard with.
3. Select access permissions, and click **Add**. The thumbnail of the shared dashboard does not display content unless the user click the thumbnail and confirms they have the permission to view the data.

Example

Note: By default, users do not have to establish a connection with the server to view a dashboard that is shared with them. However, to restrict users from accessing your source, QMF Vision prompts users to connect with server with their credentials to view a shared dashboard. .

Click **Share with credentials** to share the dashboard with other users using your TM1 user name and password. If you do not select this option, QMF Vision prompts users to provide their TM1 user name and password.

What to do next

Alternatively, you can share the dashboard from the Discovery page by selecting **Share** from the menu.

Chat functionality

Users can collaborate using chat functionality within QMF Vision. After logging into the application the chat option displays in the lower right-hand corner . To use chat, click on the chat icon.

Sharing dashboards through IBM Connections

You can share a dashboard with various communities in IBM Connections. The dashboard can be shared as a status update, bookmark, or idea from the Sharing and Discovery page.

About this task

If a dashboard is shared as a status, updates to the dashboard are visible to members of the community. A bookmark is a hyperlink of the dashboard. Members can click the link to view the dashboard. An idea is similar to a status but with added voting functionality. Members of the community can like and comment on the idea associated with the shared dashboard.

Before you begin

IBM Connections must be configured. For more information, see [Configuring social networks](#).

Procedure

1. Open the dashboard that you want to share.
2. Click the **Menu** icon, and select **SOCIAL NETWORKS > IBM CONNECTIONS**.
3. Select the mode for sharing the dashboard. For example, you can share the dashboard as a bookmark.
4. Select the communities to share the dashboard with.
5. Enter a message pertaining to the dashboard and click **OK**.

Chapter 14. Overview of scheduling

You can create multiple schedules to update queries and dashboards that are created using a database source.

Schedules can be configured to run at a specific minute, hour, day, week, or month. By default, a schedule is run daily at midnight. If the system encounters a predefined exception after running a schedule, an alert is sent to the user through an email.

Scheduling a task

You can create a schedule to run a task at a specific time. If a schedule fails, an email notification is sent to the owner of the dashboard.

Procedure

1. In **Toolbox**, click **Schedule**.
2. Select **Enable Schedule**.
3. From the **Refresh Frequency** drop-down list, select one of the following options:

Option	Description
By Minute	Runs the task at the specific minute
Hourly	Runs the task at the specific hour.
Daily	Runs the task daily at the specific hour.
Weekly	Runs the task every week on the selected days and specified time.
Monthly	Runs the task every month on the selected days and specified time.

4. In the **Social Network Notification** area, select any social network that you want to notify. Social networks must be configured for options to display in the **Social Network Notification** area. For more information, see [“Configuring social network for IBM Connections”](#) on page 11.

Chapter 15. Working with IBM Cognos TM1

You can connect to an IBM Cognos TM1 server and use the predefined cubes to generate dashboards.

About this task

The data in cubes can be modified through the QMF Vision user interface and gets updated in the TM1 server. This functionality is called *write back*. Any cell in the cube that has text or numerical values can be written back to the TM1 server. A consolidated value in a cell is displayed in bold. If you modify this value, all the individual values associated with it are automatically updated.

Note: QMF Vision connects to the TM1 server using the latest TM1 REST API. This requires IBM Cognos TM1 version 10.2.2 Fix Pack 3 and above.

By default the TM1 REST API is not enabled. To enable this API, edit the `tm1s.cfg` file for each IBM Cognos TM1 server.

Procedure

1. Select the IBM Cognos TM1 server, and then enter the host, user name, and password. The default value of port number is 5895.
2. Click **Connect** and select the server. In this example, Planning Sample is selected.
All the cubes on the Planning Sample server are displayed.
3. Select the cube, and click **CREATE DASHBOARD**.
The dashboard with the data from the cube is displayed.
4. To view shared, private, and public views, click **Views**. You can also change the current view by clicking another view.
5. View the dimensions and their hierarchy by clicking **Context**. You can search for elements within the hierarchy
6. To change the axis on which data is displayed, click **SWAP**. Additionally, you can change the axis by exchanging dimensions in Rows and Columns.
7. Click **HIERARCHY** to toggle between showing the row elements in a list or showing them in a hierarchy.
8. Select a color from the gradient by dragging a measure below the color picker.
9. To expand the hierarchy, click **EXPAND ALL**.
10. To refresh the data displayed, click **UPDATE**.
11. To show or hide empty rows and columns select the relevant option by clicking **Show empty data**.
12. To view the data as a finance statement, select **Finance** from the **Mode** drop-down list in the **TOOLBOX**.
13. To show and hide columns, click the **Toggle** option in the column header in the cross-tab.
14. Select the TI process in the **TOOLBOX**.
The T1 process parameters defined on the TM1 server for the selected process are displayed.
15. Click **EXECUTE** to run the process.
16. Click **DONE**.

Searching an element

You can search an element in multiple subsets of a dimension.

Before you begin

Ensure that you are connected to an IBM TM1 server.

Procedure

1. Click the **Data** page and select the TM1 server.
2. Click View to see the cubes on the server.
3. Select the cube, and then click **Create Dashboard**.
4. Expand the dimension in which you want to search the element.
The default subset is displayed in the **Current Subset** drop-down list.
5. Enter the element you want to search.

Searching and saving a subset

A dimension has multiple subsets and elements. A user can search for an element in a subset pertaining to a dimension and narrow the search by attributes, value of element, and the element level.

Before you begin

Ensure that you are connected to an IBM TM1 server.

About this task

The search results can be saved and used as a new subset. Drag the search result and drop it to the right panel or click the **Copy** icon to create a new subset. You can rename the new subset by clicking the **Add** icon in the right panel.

Procedure

1. Click the **Data** page and select the TM1 server.
2. Click View to see the cubes on the server.
3. Select the cube, and then click **Create Dashboard**.
4. Expand the dimension in which you want to search the subset.
5. Click SUBSET EDITOR, and then enter the name of the element.
6. Click **SAVE**.

Applying a label

A label is an alias that is applied on alphabetical values in cells. Caption is the default label.

Before you begin

Ensure that you are connected to an IBM TM1 server.

About this task

Procedure

1. Click the dimension to which you want to apply a label.
2. Click the **LABEL** tab.
3. Select the label you want to apply.
4. Click outside the panel to close it.

Creating a custom subset

The first custom subset is generated by the system, and the subsequent subsets are created by the user. All the custom subsets created in QMF Vision are based on the public subsets on the IBM Cognos TM1 server.

Before you begin

Ensure that you are connected to an IBM TM1 server.

About this task

Procedure

1. Click the dimension in a row or column for which you want to create a dynamic subset.
2. Click **SUBSET EDITOR**.
The default subset is displayed in the right panel. The name of the default subset is prefixed with the name of the current subset followed by New.
3. Optional: Delete some elements and save the current subset as a new custom subset.

Adding a mathematical function to a subset

You can add a mathematical function to subset.

Before you begin

Ensure that you are connected to an IBM TM1 server.

About this task

Procedure

1. Click the dimension in row or column for which you want to create a dynamic element.
2. Click the **SUBSETS** tab.
3. Click **SUBSET EDITOR**.
4. Click the **SUBSETS** tab.
5. Enter the name and formula for the subset.
6. Click **Add**.

Adding a mathematical function to an element

You can add a mathematical function to an element.

Before you begin

Ensure that you are connected to an IBM TM1 server.

About this task

Procedure

1. Click the dimension in row or column for which you want to create a dynamic element.
2. Click the **SUBSETS** tab.
3. Click **SUBSET EDITOR**.
4. Click the **ELEMENTS** tab.

5. Enter the name and formula for the element.
6. Click the **Add** icon.

Performing basic calculations

You can perform basic mathematical calculations by applying QMF Vision and IBM Cognos TM1 specific functions on the elements.

About this task

Before you begin

Ensure that you are connected to a TM1 server.

Procedure

1. Click the dimension on which you want to perform a calculation.
2. Click **BASIC CALCULATIONS** to perform basic calculations.
3. Enter the name of the element.
4. Select values from the A and B drop-down list.
5. Select one of the QMF Vision functions.
If you select the IBM Cognos TM1 function, multiple values can be selected from the drop-down list.
6. Click **SAVE**.

Performing advanced calculations

Perform advanced calculations by applying Multi Dimensional Expression (MDX) based formula.

About this task

Before you begin

Ensure that you are connected to a TM1 server.

Procedure

1. Click the dimension on which you want to perform a calculation.
2. Click **ADVANCED**
3. Enter the name of the element.
4. Enter the function in the *Function(dimension.element_name)* format.
5. Click **SAVE**.

Chapter 16. Connecting to the IBM Cognos BI server

A user can connect to the IBM Cognos BI server and create a dashboard.

Procedure

1. Select the IBM Cognos BI server, and then enter the server information, user name, and password.
2. Click **CONNECT**.
All the folders are displayed.
3. Navigate to the folder to select the relevant cube. Alternatively, you can search for the cube in the **Table List** search box.
4. Click **Create Query**.
5. Modify the query as required and create a dashboard.

Chapter 17. Configuring IBM Connections

A user can collaborate with QMF Vision peers through the IBM Connections , an IBM social network. IBM Connections provides options for collaborative dialog and access to files that are shared. The credentials created on the IBM website are used on the QMF Vision profile. The user can share dashboards on the IBM website after this connection is configured. The

About this task

Procedure

1. Log in to QMF Vision.
2. Click your avatar, and then select **Settings**.
3. Click the API List tab.
4. In the IBM Connection box, enter the value for Server Base URL, Client ID, and Client Secret..

What to do next

IBM Connections is displayed as a social network on the **Profile** page.

Notices

This information was developed for products and services offered in the US. This material may be available from IBM in other languages. However, you may be required to own a copy of the product or product version in that language in order to access it.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not give you any license to these patents. You can send license inquiries, in writing, to:

*IBM Director of Licensing
IBM Corporation
North Castle Drive, MD-NC119
Armonk, NY 10504-1785
US*

For license inquiries regarding double-byte (DBCS) information, contact the IBM Intellectual Property Department in your country or send inquiries, in writing, to:

*Intellectual Property Licensing
Legal and Intellectual Property Law
IBM Japan, Ltd.
19-21, Nihonbashi-Hakozakicho, Chuo-ku
Tokyo 103-8510, Japan*

INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some jurisdictions do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM websites are provided for convenience only and do not in any manner serve as an endorsement of those websites. The materials at those websites are not part of the materials for this IBM product and use of those websites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

*IBM Director of Licensing
IBM Corporation
North Castle Drive, MD-NC119
Armonk, NY 10504-1785
US*

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this document and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement, or any equivalent agreement between us.

This information is for planning purposes only. The information herein is subject to change before the products described become available.

COPYRIGHT LICENSE:

This information contains sample application programs in source language, which illustrate programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to IBM, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. IBM, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs. The sample programs are provided "AS IS", without warranty of any kind. IBM shall not be liable for any damages arising out of your use of the sample programs.

Each copy or any portion of these sample programs or any derivative work must include a copyright notice as shown below.

© (your company name) (year).

Portions of this code are derived from IBM Corp. Sample Programs.

© Copyright IBM Corp. _enter the year or years_.

Trademarks

IBM, the IBM logo, and [ibm.com](http://www.ibm.com)[®] are trademarks or registered trademarks of International Business Machines Corp., registered 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 <http://www.ibm.com/legal/copytrade.shtml>.

Linux[®] is a registered trademark of Linus Torvalds in the United States, other countries, or both.

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

UNIX is a registered trademark of The Open Group in the United States and other countries.

Java[™] and all Java-based trademarks and logos are trademarks or registered trademarks of Oracle and/or its affiliates.

Other company, product, and service names may be trademarks or service marks of others.

Terms and conditions for product documentation

Permissions for the use of these publications are granted subject to the following terms and conditions:

Applicability: These terms and conditions are in addition to any terms of use for the IBM website.

Personal use: You may reproduce these publications for your personal, noncommercial use provided that all proprietary notices are preserved. You may not distribute, display or make derivative work of these publications, or any portion thereof, without the express consent of IBM[®].

Commercial use: You may reproduce, distribute and display these publications solely within your enterprise provided that all proprietary notices are preserved. You may not make derivative works of these publications, or reproduce, distribute or display these publications or any portion thereof outside your enterprise, without the express consent of IBM.

Rights: Except as expressly granted in this permission, no other permissions, licenses or rights are granted, either express or implied, to the publications or any information, data, software or other intellectual property contained therein.

IBM reserves the right to withdraw the permissions granted herein whenever, in its discretion, the use of the publications is detrimental to its interest or, as determined by IBM, the above instructions are not being properly followed.

You may not download, export or re-export this information except in full compliance with all applicable laws and regulations, including all United States export laws and regulations.

IBM MAKES NO GUARANTEE ABOUT THE CONTENT OF THESE PUBLICATIONS. THE PUBLICATIONS ARE PROVIDED "AS-IS" AND WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO IMPLIED WARRANTIES OF MERCHANTABILITY, NON-INFRINGEMENT, AND FITNESS FOR A PARTICULAR PURPOSE.

Privacy policy considerations

IBM Software products, including software as a service solutions, (“Software Offerings”) may use cookies or other technologies to collect product usage information, to help improve the end user experience, to tailor interactions with the end user, or for other purposes. In many cases no personally identifiable information is collected by the Software Offerings. Some of our Software Offerings can help enable you to collect personally identifiable information. If this Software Offering uses cookies to collect personally identifiable information, specific information about this offering’s use of cookies is set forth below.

This Software Offering does not use cookies or other technologies to collect personally identifiable information.

If the configurations deployed for this Software Offering provide you as customer the ability to collect personally identifiable information from end users via cookies and other technologies, you should seek your own legal advice about any laws applicable to such data collection, including any requirements for notice and consent.

For more information about the use of various technologies, including cookies, for these purposes, see IBM’s Privacy Policy at <http://www.ibm.com/privacy> and IBM’s Online Privacy Statement at <http://www.ibm.com/privacy/details> the section entitled “Cookies, Web Beacons and Other Technologies” and the “IBM Software Products and Software-as-a-Service Privacy Statement” at <http://www.ibm.com/software/info/product-privacy>.

Index

A

about [1](#)
accessing [5](#)
adding licence [6](#)
aggregation [35](#)
APPEND
 adding [32](#)
application
 installing QMF Vision [3](#)
automatic dashboard [45](#), [52](#)

B

BI server [63](#)
browser [3](#)

C

categories [29](#), [36](#)
chart action [47](#)
chart style [47](#)
collaboration [55](#)
company [9](#)
copying presentations [53](#)
Cross-tab
 adding [34](#)

D

dashboard
 create [45](#)
 editing [46](#)
data packs [37](#)
data page [45](#)
data sources
 connecting [27](#)
date
 split [28](#)
discovery
 editing [23](#)

E

ERD [37](#)

F

Filter
 adding [33](#)
format [43](#)
formula [31](#)

G

group [15](#)

H

header [46](#)
hierarchy [27](#)
home page [19](#)

I

installation [3](#), [4](#)
installing [6](#)

J

JOIN
 adding [33](#)

L

links
 non-IBM Web sites
 [68](#)
live query [36](#)

M

managing columns [28](#)
manipulation
 data [27](#)
merge columns [29](#)

N

new users
 registering [11](#)
notices
 legal [67](#)

O

OAuth settings [10](#)

P

password
 updating [15](#)
permissions
 setting [9](#)
PIVOT
 adding [34](#)
publish [48](#)

Q

query [36](#)

S

- [salesforce.com](#) [10](#)
- [settings overview](#) [11](#)
- [sharing](#) [55](#)
- [sharing, <indexterm>TM1 dashboard</indexterm>](#) [55](#), [56](#)
- [sorting by value](#)
 - [cross-tab](#) [42](#)
- [source settings](#) [16](#)
- [SUM](#) [35](#)
- [supported data sources](#) [9](#)

T

- [table](#)
 - [adding](#) [32](#)
- [tagging](#) [49](#)
- [terminology](#) [21](#)
- [text](#)
 - [split](#) [28](#)
- [theme](#) [9](#)
- [TM1 label](#) [60](#)
- [TM1 server](#) [59](#)
- [trademarks](#) [68](#)

U

- [users](#)
 - [adding](#) [15](#)

V

- [viewing](#)
 - [dashboard](#) [49](#)
- [visualization](#)
 - [chart](#) [39](#)

W

- [write back](#) [59](#)



Product Number: 5650-DB2
5615-DB2
5697-QM2

GC27-8889

