



Unified Design Documentation
General Standards
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Revision History

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Document Cross Reference

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Report Specifications

Purpose:

This document will lay out the basic set of rules, specifications and standards that need to be followed and applied when developing BI reports.

I. General Standards

1. All columns should display on one page, no horizontal scrolling
 2. **Name Queries and Pages** – Every query and page in a report has to be named. This will facilitate a smooth transition of reports during maintenance of reports as well as increase efficiency in fixing a report.
 3. **Rows should not wrap** – Set the White Space property to No Wrap. If columns in a crosstab reports are wrapping, then place the crosstab inside a table and set the White Space property of the table row to No Wrap. This will display all the columns in one line and not wrap.
 4. **Spacing** - There should be a one line space between multiple crosstabs/lists. Insert a blank text item with 10 blank spaces inside it.
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II. Page Layout

- 1) *Page Output*: Set page output in Set Properties in Cognos Connection to PDF/Excel. HTML is the default.
- 2) *Page View*: Default view should be set to Landscape. Adjust to Portrait if needed.
- 3) *Page Size*: If run in PDF, select landscape or portrait. More columns will need a landscape setting.
- 4) *Paper Size*: Default paper size setting is A4. Adjust paper size only if business requires it to be on Legal paper.
- 5) *Font*:
 - a. Font style - Always set to default.
 - b. Font size – 8pt for body. Use pre-defined classes for Report Column Titles and Headers.
- 6) *Colors*: The set of colors for displaying conditional events based on good or bad will be as follows:

- a. High/Good – Lime
- b. Medium/Fair – Yellow
- c. Low/Bad – Red

The above colors are assigned in the Foreground Color Property -> Named Colors.

7) *Margins*: Leave this property untouched. Default setting is no margins defined. Adjust this property by assigning a value like 25px to the bottom if you want to fit more content on a single page. Same adjustment can be done to the top of the page. Adjustments to the left and right margin sides are not recommended.

8) *Page border*: Select the Page Body property and assign the class Page Border. This class will display a **blue** line below the header and above the footer.

III. Page Structure

Page Header

- 1) DTV Logo, left aligned
- 2) Entire header, center aligned
- 3) *Parameter Display values format*: **Period: %ParamDisplayValue%**. The title of the prompt should always be bold. The value selected in the prompt selection should display in red.
- 4) *Layout Component Reference*: When there are multiple pages within the same report, create the header on Page 1 and place it inside a table and assign the Name property of the table to say for example PageHeader. Then go to Page 2 and insert a layout component reference object from the toolbox pane and **select object within a report** and select PageHeader. This will create a copy/reference to the header that was defined on Page 1.
- 5) *Re-using header objects*: When headers are similar in content across multiple reports, to save time in recreating a header, click on Page Header and hit CTRL+C and copy the entire header and paste into the header section of a new report. This will copy the entire header with all the logos and objects within it.
- 6) *Date Format*: MM/DD/YYYY – Use Singleton Query from toolbox pane.
- 7) *Classes*: Classes to use within Page Header are:
 - a. Report Header Titles

Page Footer

- 1) *Footnote*: If there is just one footnote, it should be indicated with an asterix like *. If a report has multiple footnotes, they must be numbered beginning with the number 1.

- 2) *Source*: Display the source from where the data is retrieved from. There should be an asterix to the left of this line. E.g. * Source: Enterprise Data Warehouse
 - 3) *Confidentiality*: Display the following line in red, bold and in caps – HIGHLY CONFIDENTIAL – INTERNAL USE ONLY*
 - 4) *Report Run Date/Time*: Display format e.g. - Jan 12, 2010 4:20:00 PM PST. In order to display the time zone, assign the data format as time and set **Display Time Zone property to Yes**.
 - 5) *Page number*: This should be display towards the right side of the information on Point 3 and below information on Point 2. Display format e.g. - 1 - OR Page 1 of 10. Function for getting the page number is **PageNumber()** and function to get the total number of pages is **PageCount()**.
 - 6) *Layout Component Reference*: There is a pre-designed template in the folder – Enterprise Intelligence > Directv Templates folder. Drag and drop a layout component reference object from the toolbox pane into the Page footer and select From Another Report and navigate to the above folder and then select the Footer Object. This will create a copy/reference to the footer that was defined in the template in the above folder. If the footer has to be edited, make changes in the template that is saved in the above folder. Changes to that template will reflect in every report that uses it as a layout component reference.
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IV. Page Objects

- 1) *Buttons*: Use Hyperlink Button from the toolbox pane and insert the report URL within the URL source property. The report URL can be obtained from Cognos Connection, report's Set Properties - View the search path, ID and URL. Copy and paste the URL inside the Hyperlink Button.
 - a. Classes: Button (Button Layout) and Button Font (Font Color & Style)
- 2) *Component Layout Reference*: Use Component Layout Reference object whenever the same headers and footers are repeated.
 - a. From another report - Use this option to get footers.
 - b. From this report - Use this option when there are multiple pages inside 1 report and they all use same headers which are unique to every report.
 - c. How - Create a table in the Header section and from the table property, assign a Name.
 - d. Go to the next page and add the Layout Component Reference object from the Toolbox menu, select From this report, select the named object that you created on page 1.
- 3) *Crosstabs/Elements*: Time periods are usually used as columns.
 - a. Crosstab Elements:
 - i. *Crosstab Corner*: Bold, Underline, Left Align, No Wrap.
 - ii. *Crosstab Rows, Columns, Body*: Use the pre-defined classes.
 - iii. *Crosstab Body*: Assign classes and data format to the parent Fact Cells of the crosstab. This will automatically apply the style and

data format to the facts cells of any new rows or columns that are added to the crosstab.

- iv. *Column Total*: Bold, 1 ½ pt. overline, 2 ½ pt. double underline.
 - v. *Column Total when 100%*: Data format should be set to zero decimal places (when applicable).
 - vi. *Data Format*: Set N/A for Divide by zero and Error Characters properties.
 - vii. *Rows Per Page*: Set rows per page property to more rows to avoid crosstab/list rolling to the next page. Default is 20 rows per page. E.g. The total line is displayed on the next page when you really want it all to be displayed on one single page.
 - viii. *Column Alignment & Wrapping*: Place a crosstab/list inside rows/cells in a table. Assign the White Space property of the table rows/cells to No Wrap. This will display all columns on one page instead of wrapping/rolling to the next page if there are many columns.
- 4) *Lists/Elements*: Apply the pre-defined classes as mentioned in the above Crosstab section.
- 5) *Charts*: Bar, Column, Pie, Combination, Area, Scatter charts are the most commonly used charts. Use of each of these charts is dependant on report requirements provided by the business.
- a. Color Palettes: Should be used (copy-pasted) from the sample report located at [URL link](#).
 - b. Gridlines: Hide all gridlines.
- 6) *Prompts*:
- a. Value prompts: The most commonly used prompts. Use these prompts most of the times.
 - b. Tree prompts: These prompts can only be used against a dimensional model/cube. You have the ability to multi-select and is most commonly used for selecting a period under a time dimension hierarchy.
- 7) *Images/Logos*: Images are stored in the images folder on the Cognos server. There are some standard logos that reside in that folder and only those logos and images should be used. If the need arises to use new images, the Cognos Administrator should be contacted and a request should be opened.
All images should be taken only from the following path:
<http://lwappa03/businessintelligenceportal/samples/images/>
- 8) *Class*: Classes are just like Cascading Style Sheets (CSS) in HTML. You can create a class and assign properties such as font style, alignment, size, etc. and then apply this class to an object like a Crosstab column or row. Classes can be re-used and copy-pasted to other reports. This saves time in re-creating a class that will have the same properties for multiple reports. The main advantage to a

class is that you make the change to the class in one place and any object in the report that uses that class will get updated automatically.

E.g. – A class called Column Titles has its background color property set to Black. If requirement changes and the new color requested to be seen on the column titles is Blue, you simply change the color to blue and all the crosstabs/lists in the report that use that Column Titles class will automatically display all its columns tiles in blue background.

*** Refer to the Report Sample that includes pre-defined classes.**

New classes can be created based on reporting requirements but the existing pre-defined classes should be used by default.

Following are properties of some of the pre-defined classes.

- a. *Prompt Page Tiles*: Bold, Navy, 10pt.
- b. *Report Header Titles*: Bold, 10pt., Center, Middle aligned
- c. *Page Border*: Bold, Blue, 1 ½ pt overline & underline
- d. *Column Titles 70px*: Border: None, Background Color: Transparent, Bold, Center, Middle aligned, Width: 70px
- e. *Column Break 15px*: Border: None, Background Color: Transparent, Width: 15px
- f. *Crosstab Corner 220px*: Border: None, Padding Down: 0px, Background Color: Transparent, Font: 9pt., Bold, Left, Middle aligned, Width: 220px
- g. *No Border No Color*: Border: None, Background Color: Transparent, Font: 8pt.
- h. *Line Height 3-0*: Padding Up: 3px. Padding Down: 0px.

V. EBP Folder Structure

Public Folders

- Packages (contains all FM packages)
- Applications (Planning Contributor apps)
- Dashboards (Shortcuts to portal tabs like PMR & OLR)
- Executive (Executive level reports, c-level reports)
- Enterprise (Cross referenced reports)
- Departments
 - o Finance (Reports and Dashboards related to subject areas)
 - o Sales & Marketing
 - o IT