

TN 1347048 - How to configure Reports to use Optimise2 **(Instructions for Finance users/superusers)**

Overview

"Enhanced Reporting Optimisation" is also known as "ERO" and "Optimise2".

- For the sake of simplicity, it shall be referred to only as "**Optimise2**" from now on.

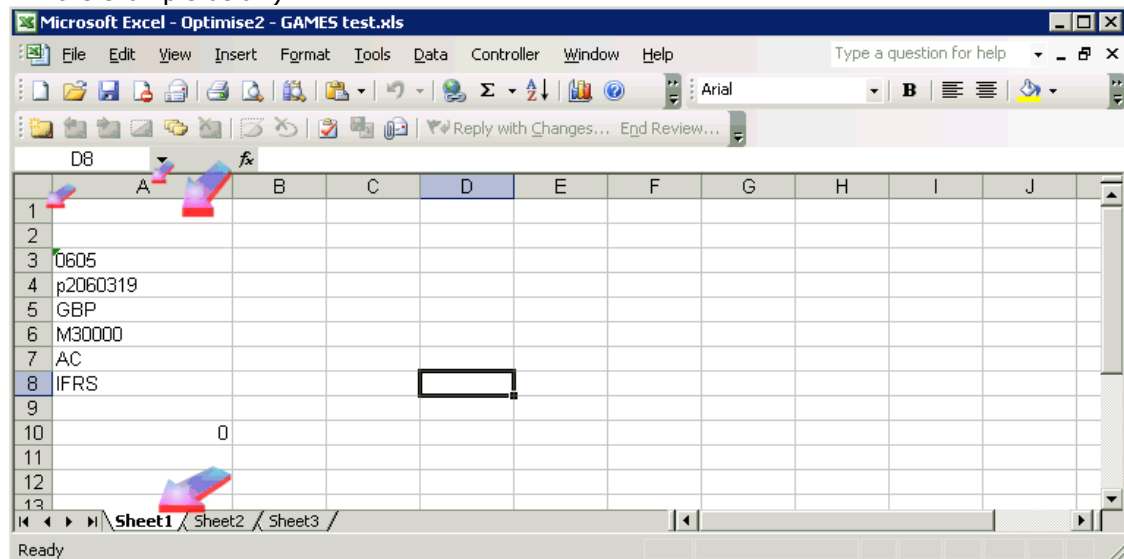
Optimise2 is a feature of Controller which is to speed up certain types of user-defined reports (mainly Excel link reports). The type of reports that benefit the most, are those with many "cc.fGetVal" formulae inside them.

There are **two** separate parts that need to be done to implement Optimise2.

- (1) Ensure that the Controller **I.T. environment** is configured to allow Optimise2 to work
 - This is done by the I.T. administrator
- (2) Switch on the Optimise2 "flag" **inside the application itself**
 - This is performed by the Controller "super-user(s)" themselves
 - This needs to be done for ***each*** separate report that they wish to use Optimise2/ERO with

This document shall concentrate on (2) – it demonstrates how the finance user can enable Optimise2 in their individual reports.

- In general, the instructions are to navigate to cell **A1** of the first worksheet (e.g. "Sheet1" in the example below)...



- ...and then add the name "Optimise2" to this cell.

TIP:

- For more information on Optimise2 see separate IBM Technote located here: <http://www-01.ibm.com/support/docview.wss?uid=swg21347048>
- All public Controller-related Technotes are searchable from the Controller portal here: http://www-947.ibm.com/support/entry/portal/Overview/Software/Information_Management/Cognos_Controller

Details

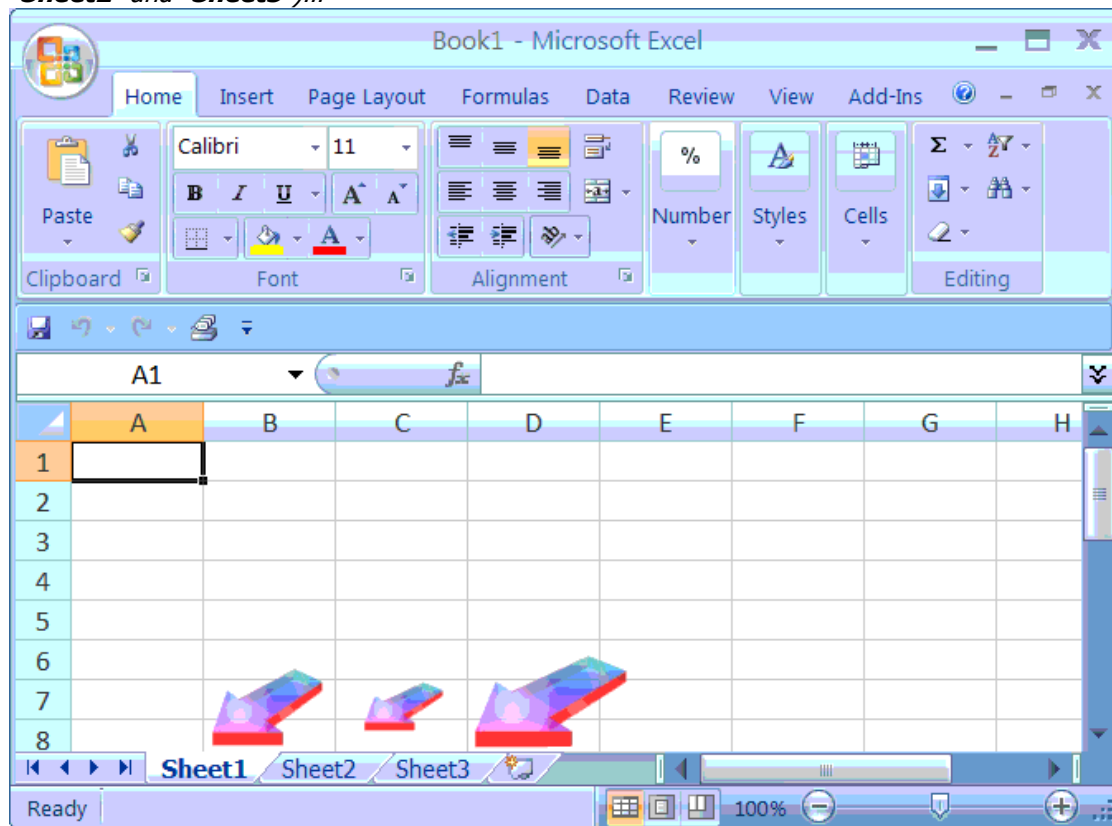
Optimise2 needs to be enabled individually for each and every report. Therefore, you must repeat the following instructions for each and every report that you wish to benefit from Optimise2.

(1) Check the worksheet names of the report

IMPORTANT: Be aware that it is very easy to stop Optimise2 from working by using Excel worksheets with incompatible worksheet names.

- For full details, see IBM Technote #1365263: <http://www-01.ibm.com/support/docview.wss?uid=swg21365263>

Therefore, you must ensure that your Excel worksheet names (*by default called "Sheet1", "Sheet2" and "Sheet3"*)...



... are named appropriately.

To summarise, the **Excel sheet names must not have spaces in them.**

For example:

- **PROFIT 2011** = bad
- **PROFIT_2011** = good
- **PROFIT2011** = good

(2) Enabling Optimise2 inside Excel link reports (XLS / XLSX files stored outside the application itself)

This section refers to Excel link reports that have been saved (e.g. onto file shares) simply as Excel ".XLS" (or .XLSX) files.

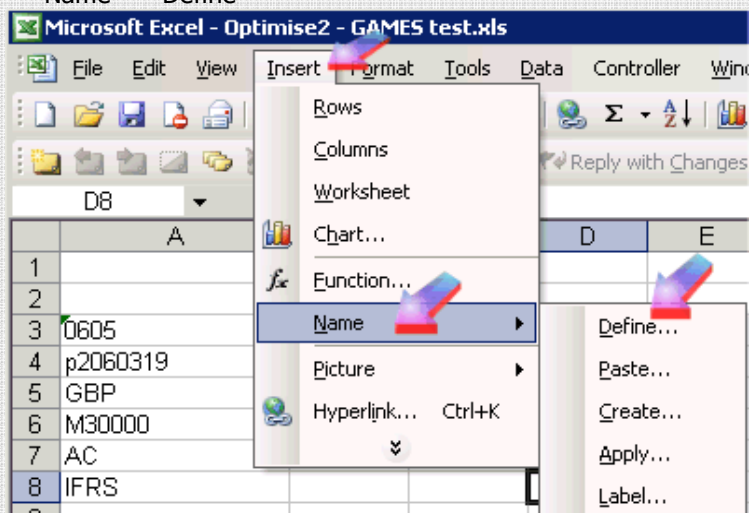
- This is the most common type of report that customers wish to speed up by utilising Optimise2.

The instructions (for how to add the name "Optimise2" to the spreadsheet) vary depending on what version of Excel you are using:

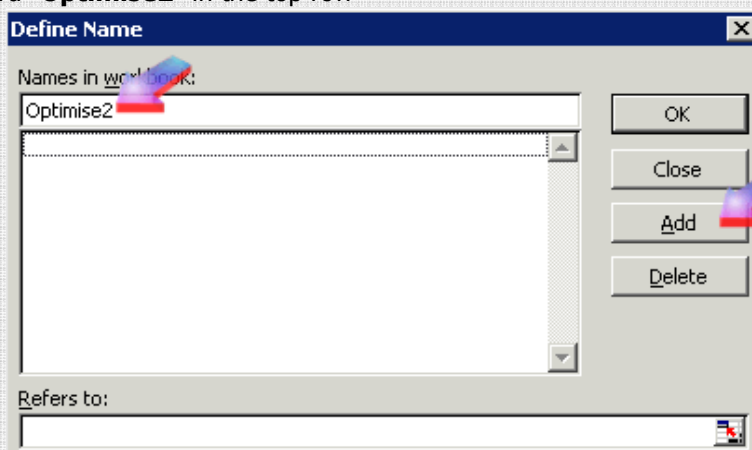


Instructions for Excel **2003**:

- Ensure that cell **A1** is highlighted
- Click on "Insert" – "Name" – "Define"



- Type in the word "**Optimise2**" in the top row

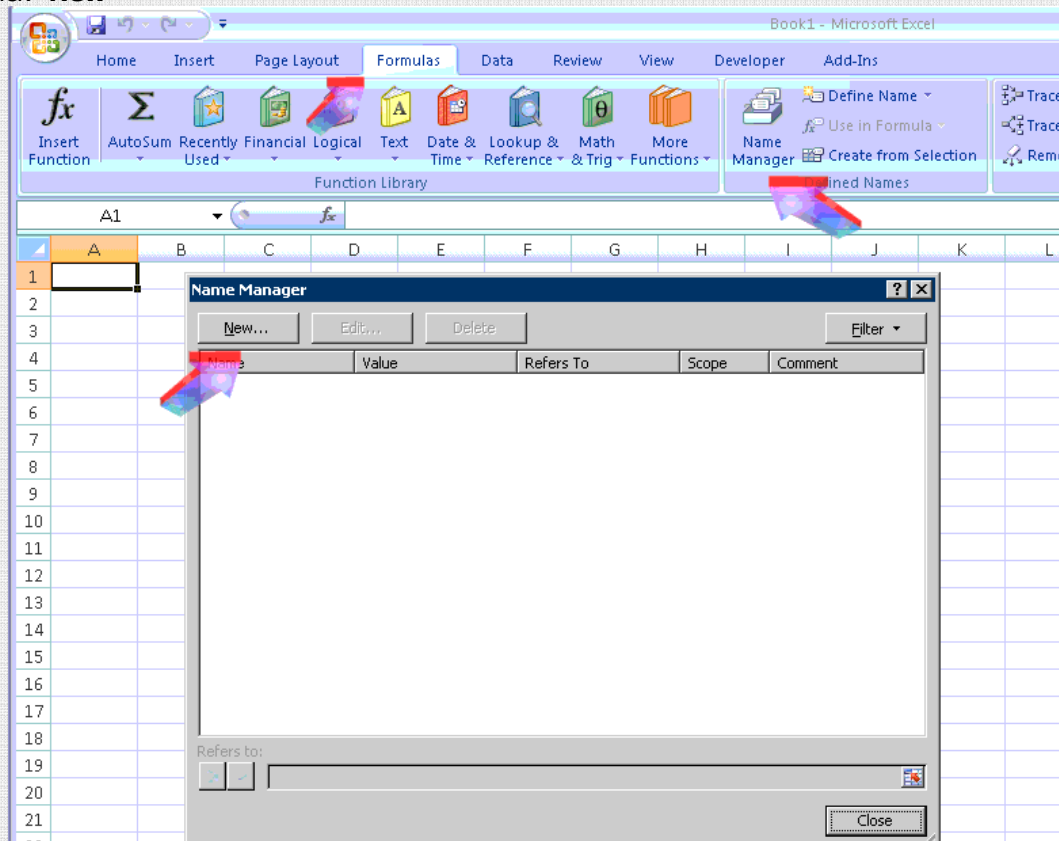


- Click "Add", "OK"

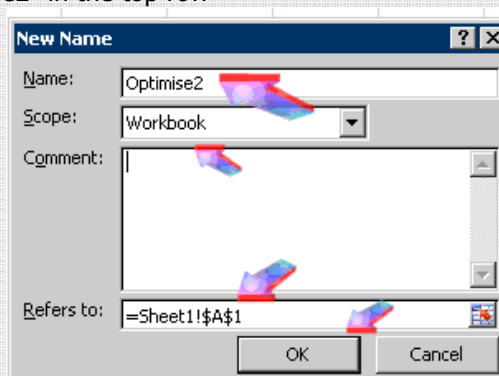


Instructions for Excel **2007** or Excel **2010**:

- Ensure that cell **A1** is highlighted
- Click on tab **"Formulas"**
- Click icon **"Name Manager"**
- Click **"New"**



- Type in the word "Optimise2" in the top row



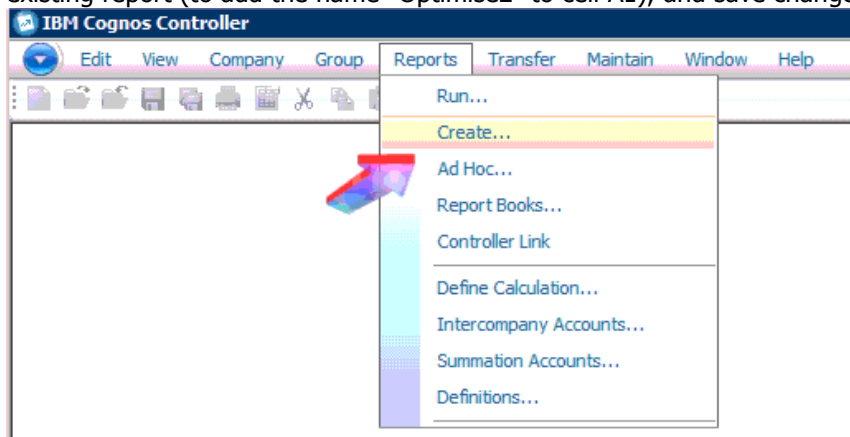
- Ensure that **"Workbook"** is chosen, and that it refers to **"=Sheet1!\$A\$1"**
- Click **"OK"**

(3) Enabling Optimise2 for reports stored inside the Controller application database

These are Excel link reports that have been saved “inside” the database itself, and are accessed by the “Reports” – “Run” menu item inside the main Controller application.

To enable Optimise2 for these reports, you perform **exactly** the same tasks as shown in ‘test#1’, but (naturally) the end-user will need to edit the relevant report using the same menu items that they used when they originally created the report).

In other words, the superuser will have to use the menu item “Reports – Create” to edit the existing report (to add the name “Optimise2” to cell A1), and save changes.



(4) Testing that Optimise2 is enabled (and providing performance benefits)

It is recommended that you compare like-for-like the performance of using "Optimise2" and not using it, for a variety of different spreadsheets:

In other words, perform tests similar to the following:

(a) First test – not using Optimise2:

- Open a standard Excel Link report
 - Ideally, choose one that uses lots of "fGetVal"s
- Login to Controller
- Refresh the report (e.g. click "F9" on keyboard)
- Time how long it takes to run
- Perform another "refresh", and time how long this takes
 - By performing this twice, it should eliminate the effect of any "caching"

This has given us a "baseline" test for how long the report takes to run.

(b) Now we shall enable "Optimise2":

- Enable Optimise2 on the same report
- Refresh the report (e.g. click "F9" on keyboard)
- Time how long it takes to run
- Perform another "refresh", and time how long this takes
 - By performing this twice, it should eliminate the effect of any "caching"

Compare the results from (a) and (b).