

Analysis/Intelligence: Bursting

User Guide

Last Revised: March 1, 2024

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Revision History

Date	Revision Notes/Comments
March 1, 2024	<p>Made the following updates to incorporate the information and images for the Cognos 11 user interface:</p> <ul style="list-style-type: none"> • Added the <i>In this Guide</i> section • Added the <i>Step 1: Creating the Report (Cognos 11 UI)</i> section • Added the <i>Step 2: Configuring the Report for Bursting (Cognos 11 UI)</i> section • Added the <i>Step 3: Distributing the Report (Cognos 11 UI)</i> section <p>Also added "(Cognos 10 UI)" to the original section titles under the <i>Procedure – Generating the Report</i> section to indicate the information in these sections is specific to the Cognos 10 user interface.</p>
January 13, 2022	Updated the copyright year; no other changes; cover date not updated
March 29, 2021	Updated the copyright year; no other changes; cover date not updated
June 10, 2020	Added a note about using concept fields when defining burst groups to the <i>Burst Groups</i> section.
March 27, 2020	Added note about bursting reports and performance to the <i>Overview</i> section.
February 4, 2020	Updated the copyright; no other changes; cover date not updated
March 6, 2019	Updated the copyright; no other changes; cover date not updated
April 5, 2018	Updated the copyright; no other changes; cover date not updated
December 16 2016	Changed copyright; no other content changes.
January 19 2016	Changed from book "chapters" to stand-alone guides; no content changes
April 9 2015	Changed the name of Concur Insight to Analysis/Intelligence; no other content changes
February 6 2015	The sample records should have 10 trailing commas; updates our sample to match
March 10 2014	Changed the name of Analysis/Intelligence to Concur Insight; updated the copyright; no other content changes
February 28 2011	Added information about custom fields and the employee import
January 21 2011	Updated the copyright - no content change
February 19 2010	Changed the chapter number from 8 to 9
October 16 2009	Initial publication

Bursting (Intelligence and Premium)

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Overview

Report bursting allows a user to easily distribute the contents of a report to a group of individuals. This varies from a standard distribution list in that every recipient receives *only* the information from that report appropriate to their station. For example, if a custom report called *Expense Reports By BI Manager* report was 'bursting out' to all BI Managers in a company, each BI Manager would receive *only* report information relevant to the people reporting up to them.

Bursting can be based on:

- Reporting Hierarchy relationship
- BI Manager relationship
- Custom fields (defined in the Employee Import): This method allows the client to create its own relationships using the Employee Import.

⚠ IMPORTANT: It is best practice to only use report bursting as part of a strategic and very targeted effort for only specific recipients. Report bursting is not intended or recommended for a large number of recipients.

Bursting a report to multiple recipients or a complex report design can result in potential performance impacts. If you are experiencing run failures for a bursting report, consider splitting your report into more manageable sections by considering the date range of your report data set, and further separating the report by groups, organizational structures, and/or recipient names.

In this Guide

In this guide, the Cognos version 10 user interface is called *Cognos 10 UI*, and the Cognos version 11 user interface is called *Cognos 11 UI*.

Section 2: Getting Ready - Custom Fields

For bursting based on the Reporting hierarchy or BI manager relationship, no additional configuration is required – the Reporting database already contains the hierarchy or BI manager information. If you want to create reports for bursting based on the hierarchy or BI manager information, refer to *Procedure – Generating the Report* on the following pages.

To create a report that is to burst based on custom field, however, requires using the Employee Import. The import creates the relationship in Concur Expense. Then, that information is transferred (archived) to the Reporting database, just like other report-related data. It then becomes available in the model.

Employee Import

In the Employee Import, the 1000 and 1100 record are used for bursting. These fields create the values for the custom bursting table of the transactional database, which is archived to the Reporting database.

Record Type 1000

These are required fields:

- **Emp ID:** The Employee ID of the user that will receive the bursted report (JSMITH, for example)
- **Bursting ID:** A user-defined value that groups users who receive bursted reports (Cost Center owners, for example)
- **Bursting Value:** The actual value that the report will be bursted off of (if a user wanted to receive all data on Cost Center 1234, for example)
- **Future Use Fields:** There are ten future-use fields. Currently, any data in these field will be ignored but they must be accounted for with commas

A sample record:

```
1000,JSMITH,COST_CENTER_OWNERS,1234,,,,,,,,,
```

Record Type 1100

These fields are used to delete values from the custom bursting table of the transactional database. The same ten fields as the 1000 Record Type are required.

To uses these fields:

- If DELETE_ALL_RECORDS is specified in any of the required fields, then all records that match the remaining values will be deleted. For example, the row below would delete all records for employee JSMITH with the Bursting ID of COST_CENTER_OWNERS:

```
1100,JSMITH,COST_CENTER_OWNERS,DELETE_ALL_RECORDS,,,,,,,,,
```

- To quickly delete all records in the custom bursting table, the following record can be used:

```
1100,DELETE_ALL_RECORDS,DELETE_ALL_RECORDS,DELETE_ALL_RECORDS,,  
,,,,,,,,,
```



For more information, about the *Employee Import* chapter of the Expense – Import and Extract Specifications.

Archive Required

Information inserted or deleted will not be immediately available in the Reporting Database. An archive must be successfully completed before this information can be utilized in the model.

Section 3: Procedure – Generating the Report

Bursting functionality is built into Cognos, but requires reports to be set up in a specific manner. Follow the steps below if you would like to burst a report.

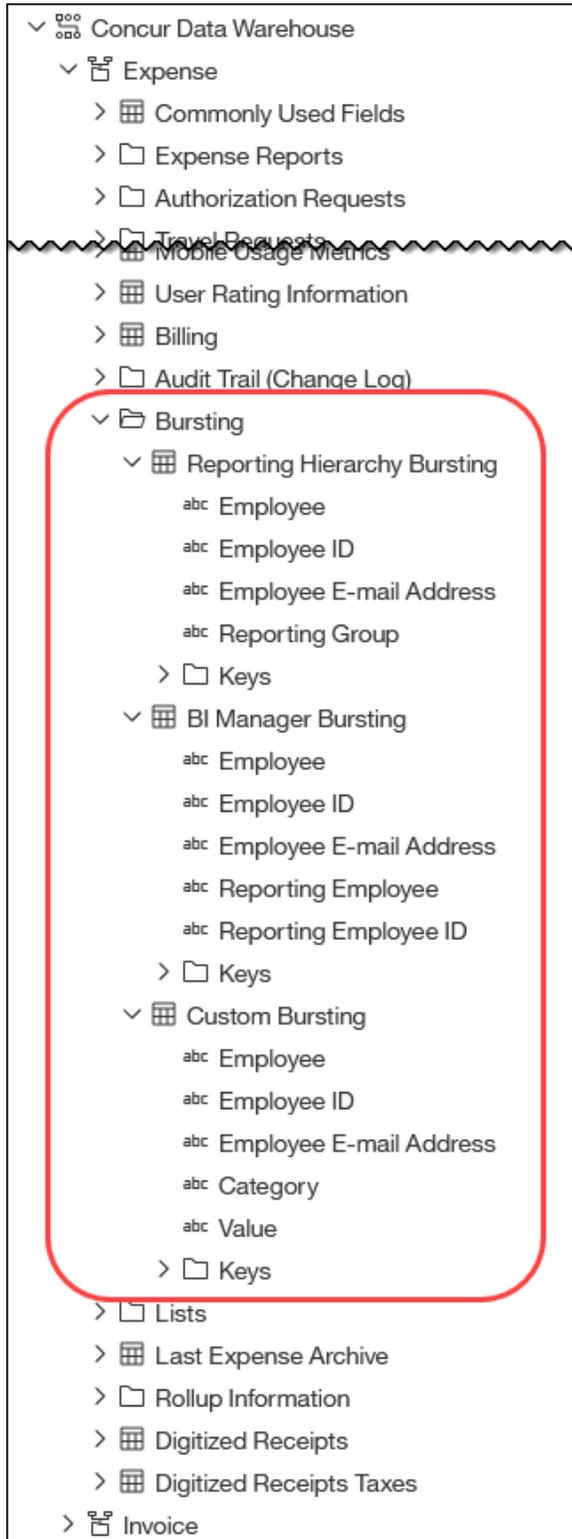
Step 1: Creating the Report (Cognos 11 UI)

A report that is to be bursted must contain a minimum of two components:

- Content Query (what data do you wish to see?)
– and –
- Recipient Query (who is going to receive this report?)

In order for bursting to work properly, the data element you want to burst a report to must be contained in the report. For example, if a report writer wishes to burst a report to all users with a Cognos role in a Reporting Group, then the Reporting Group must be included in the Content Query (chosen from the Expense Subject Header). Correspondingly, the Recipient Query must contain the users within the Reporting Group that will be receiving the report (chosen from the Bursting Subject Header).

Bursting items are available to select at the following location: **Concur Data Warehouse > Expense > Bursting**:



For example: In a very simple report, the Content Query (Query1 within Report) will contain Approved Amount, Reporting Group, and Total. This report will allow the report writer to view the Approved Amount for each Reporting Group.

- Prior to bursting, if the report writer wanted to distribute this information to each Reporting Group owner, they would need to create an individual report for each Reporting Group and then run the report (or filter the report for each individual group).
- With bursting, the Recipient Query (Query2 within Report) needs to be created. From the Bursting Subject Header, Reporting Group and Employee Email Address is added.

Data items:
<input checked="" type="checkbox"/> Approved Amount
<input type="checkbox"/> Reporting Group
<input checked="" type="checkbox"/> Total Approved Amount

Data items:
<input type="checkbox"/> Reporting Group
<input type="checkbox"/> Employee E-mail Address

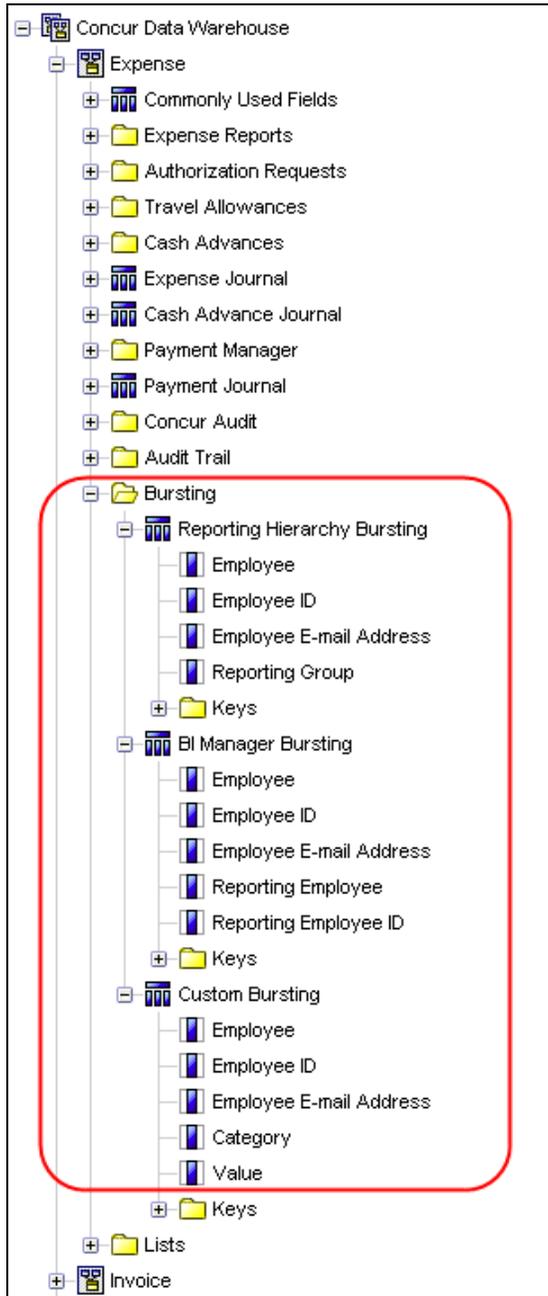
Step 1: Creating the Report (Cognos 10 UI)

A report that is to be bursted must contain a minimum of two components:

- Content Query (what data do you wish to see?)
– and –
- Recipient Query (who is going to receive this report?)

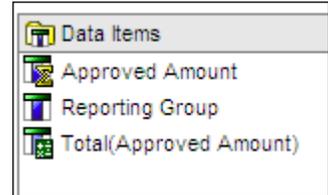
In order for bursting to work properly, the data element you want to burst a report to must be contained in the report. For example, if a report writer wishes to burst a report to all users with a Cognos role in a Reporting Group, then the Reporting Group must be included in the Content Query (chosen from the Expense Subject Header). Correspondingly, the Recipient Query must contain the users within the Reporting Group that will be receiving the report (chosen from the Bursting Subject Header).

Bursting items are available to select at the following location: **Concur Data Warehouse > Expense > Bursting**:



For example: In a very simple report, the Content Query (Query1 within Report Studio) will contain Approved Amount, Reporting Group, and Total. This report will allow the report writer to view the Approved Amount for each Reporting Group.

- Prior to bursting, if the report writer wanted to distribute this information to each Reporting Group owner, they would need to create an individual report for each Reporting Group and then run the report (or filter the report for each individual group).
- With bursting, the Recipient Query (Query2 within Report Studio) needs to be created. From the Bursting Subject Header, Reporting Group and Employee Email Address is added.



Step 2: Configuring the Report for Bursting (Cognos 11 UI)

Once the Content and Recipient Queries have been created, the report needs to be configured to be bursted. In Report edit mode, select **Report > Burst Options**. The dialog box below will be displayed:

The 'Burst options' dialog box is shown. It has a title bar with 'Burst options' and a close button (X). Below the title bar is a checkbox labeled 'Make report available for bursting'. Underneath, there are two main sections: 'Burst Groups' and 'Burst Recipient'. The 'Burst Groups' section contains three dropdown menus for 'Query:', 'Label:', and 'Groups:'. The 'Burst Recipient' section contains three dropdown menus for 'Query:', 'Data Item:', and 'Type:', and a 'Master detail relationships:' field with a three-dot menu icon. At the bottom right, there are 'OK' and 'Cancel' buttons.

By default, the **Make report available for bursting** check box is not selected. To burst the report, this check box must be selected (enabled). Enabling this check box makes the **Burst Groups** and **Burst Recipient** sections active. All items in this dialog box must be populated in order to successfully burst a report.

Burst Groups

Under the **Burst Groups** options, a query must be selected to define the data that is going to be returned. From the list, select the Content Query defined in Step 1 (Query1 in this example).



The screenshot shows a dialog box titled "Burst Groups". It contains three main sections: "Query:", "Label:", and "Groups:". The "Query:" section has a dropdown menu with "Query1" selected. The "Label:" section has an empty dropdown menu. The "Groups:" section has an empty list box. At the bottom left of the dialog, there is a small edit icon (a pencil).

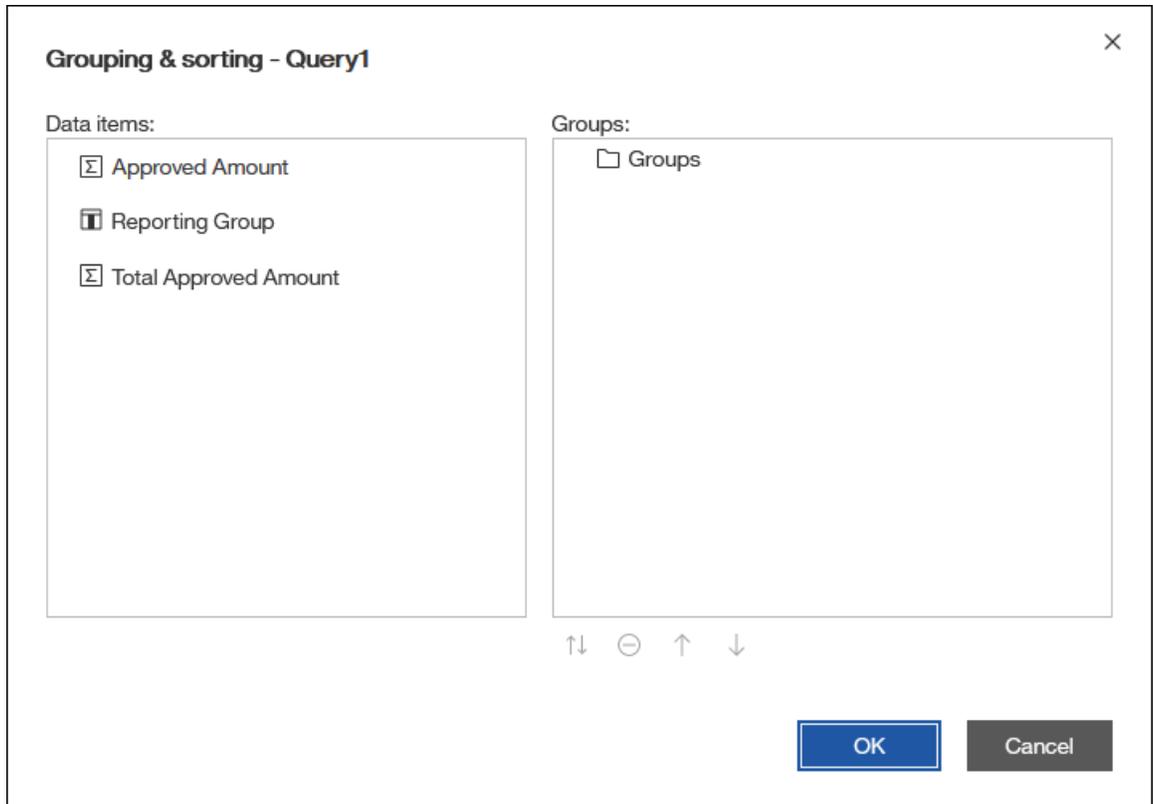
The **Label** list specifies the label that will be used to label each burst report (Reporting Group, in this example).



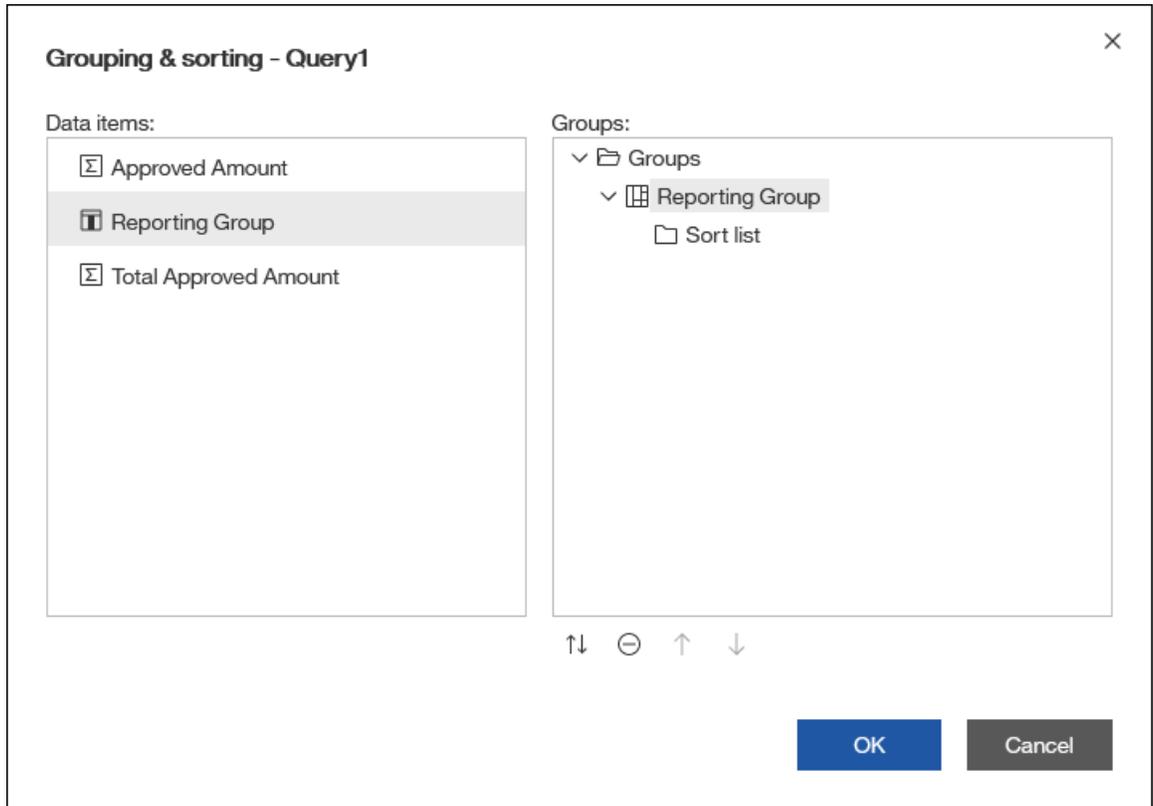
The screenshot shows the same "Burst Groups" dialog box. In this version, the "Label:" dropdown menu is populated with "Reporting Group". The "Query:" dropdown remains "Query1" and the "Groups:" list remains empty. The edit icon is still present at the bottom left.

The last element in the **Burst Groups** section that needs to be populated is the Groups. The value selected here is the data element that the report burst will be grouped by. In this example, the report burst is going to be grouped by the Reporting Group. To populate this, click the **edit** icon in the lower left corner. The **Grouping & sorting** dialog box appears.

NOTE: When defining burst groups, it is best practice to use concept fields instead of custom fields. Concept fields are indexed. Custom fields are not indexed, therefore it is more efficient to use concept fields for report bursting.



To select a data element to group by, double click the desired data element. Once the desired data element has been selected and is displayed under the Groups header, click **OK**.



At this point, the **Burst Groups** selection should be completed, and should look similar to this.

Burst Recipients

With the **Burst Groups** section completed, the **Burst Recipient** section must be populated. First, a query must be selected to define who is going to receive this report. From the list, select the Recipient Query defined in Step 1 (Query2 in this example).

Burst Recipient

Query:
Query2

Data Item:

Type:
Automatic

Master detail relationships:

From the **Data Item** list, the item that uniquely identifies each recipient needs to be identified. In this example, Employee E-mail Address:

Burst Recipient

Query:
Query2

Data Item:
Employee E-mail Address

Type:
Automatic

Master detail relationships:

The **Type** list defines the option the report writer wishes to use to distribute the report. Although there are three options available (Automatic, Email addresses, and Directory entries) Intelligence **ONLY** supports the Email addresses option.

Burst Recipient

Query:
Query2

Data Item:
Employee E-mail Address

Type:
Email addresses

Master detail relationships:

The final step is to define the master detail relationship. This creates the link between the Content Query and Recipient Query using a common data element. Select the ellipse to the right of the field to open the **Master detail relationships** dialog box.

Master detail relationships [X]

Master: Query1

- Approved Amount
- Reporting Group
- Total Approved Amount

New Link

Detail: Query2

- Reporting Group
- Employee E-mail Address

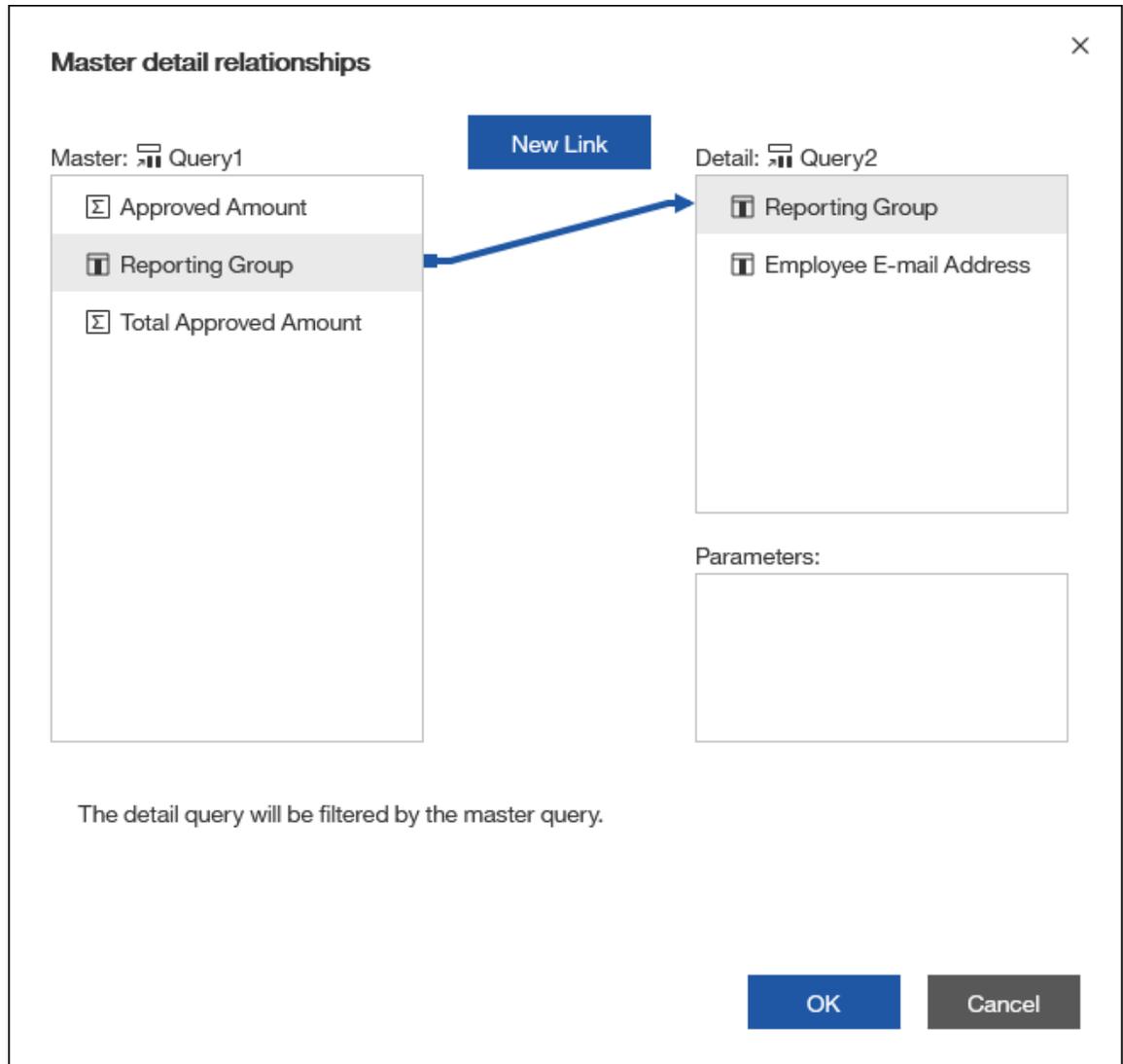
Parameters:

No master detail links have been defined. The detail query will run unfiltered by the master query.

OK Cancel

Click the **New Link** button to establish a link between the two queries.

In this example, the Reporting Group is the common element between the two queries. By default, the new link is associated to the first data element of each query. Selecting the data element will move the link to the data element selected (in this case, Reporting Group).



Once the relationship has been established, click **OK**.

At this point, all the required data has been identified for the report, and it is ready for bursting.

The **Burst options** dialog box should be similar to this:

Burst options [X]

Make report available for bursting

Burst Groups

Query: Query1 [v]

Label: Reporting Group [v]

Groups: Reporting Group [v]

Burst Recipient

Query: Query2 [v]

Data Item: Employee E-mail Address [v]

Type: Email addresses [v]

Master detail relationships: (Defined) [v]

OK Cancel

Step 2: Configuring the Report for Bursting (Cognos 10 UI)

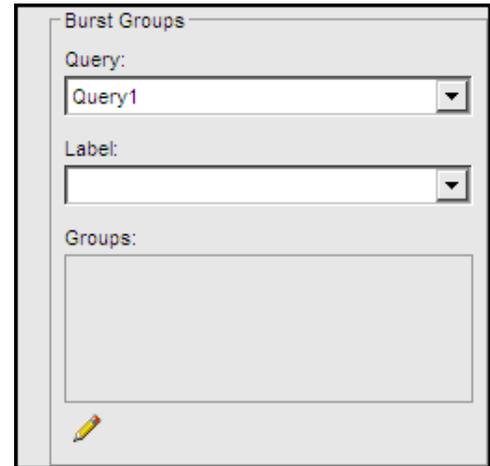
Once the Content and Recipient Queries have been created, the report needs to be configured to be bursted. In Report Studio, select **File > Burst Options**. The dialog box below will be displayed:

The screenshot shows the 'Burst Options' dialog box. At the top left, there is a checkbox labeled 'Make report available for bursting' which is currently unchecked. Below this, the dialog is divided into two main sections: 'Burst Groups' and 'Burst Recipient'.
 The 'Burst Groups' section includes:
 - A 'Query:' dropdown menu.
 - A 'Label:' dropdown menu.
 - A 'Groups:' list box with an edit icon (pencil) at the bottom left.
 The 'Burst Recipient' section includes:
 - A 'Query:' dropdown menu.
 - A 'Data Item:' dropdown menu.
 - A 'Type:' dropdown menu with 'Email addresses' selected.
 - A 'Master detail relationships:' dropdown menu with a small '...' button to its right.
 At the bottom right of the dialog are 'OK' and 'Cancel' buttons. A 'Help' button with a close icon is located in the top right corner of the dialog's title bar.

By default, the **Make report available for bursting** check box is not selected. To burst the report, this check box must be selected (enabled). Enabling this check box makes the **Burst Groups** and **Burst Recipient** sections active. All items in this dialog box must be populated in order to successfully burst a report.

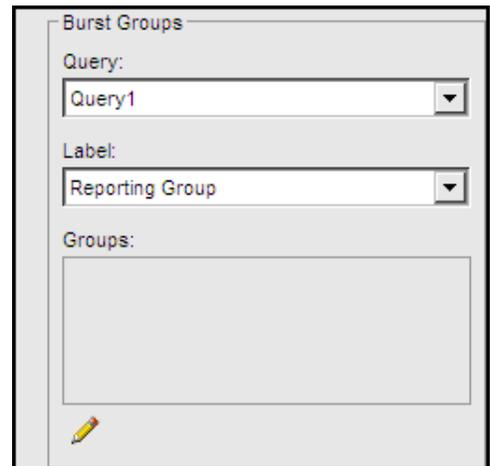
Burst Groups

Under the **Burst Groups** options, a query must be selected to define the data that is going to be returned. From the list, select the Content Query defined in Step 1 (Query1 in this example).



The screenshot shows a configuration window titled "Burst Groups". It contains three main sections: "Query:", "Label:", and "Groups:". The "Query:" section has a dropdown menu with "Query1" selected. The "Label:" section has an empty dropdown menu. The "Groups:" section is a large empty rectangular area. A small pencil icon is located at the bottom left of the window.

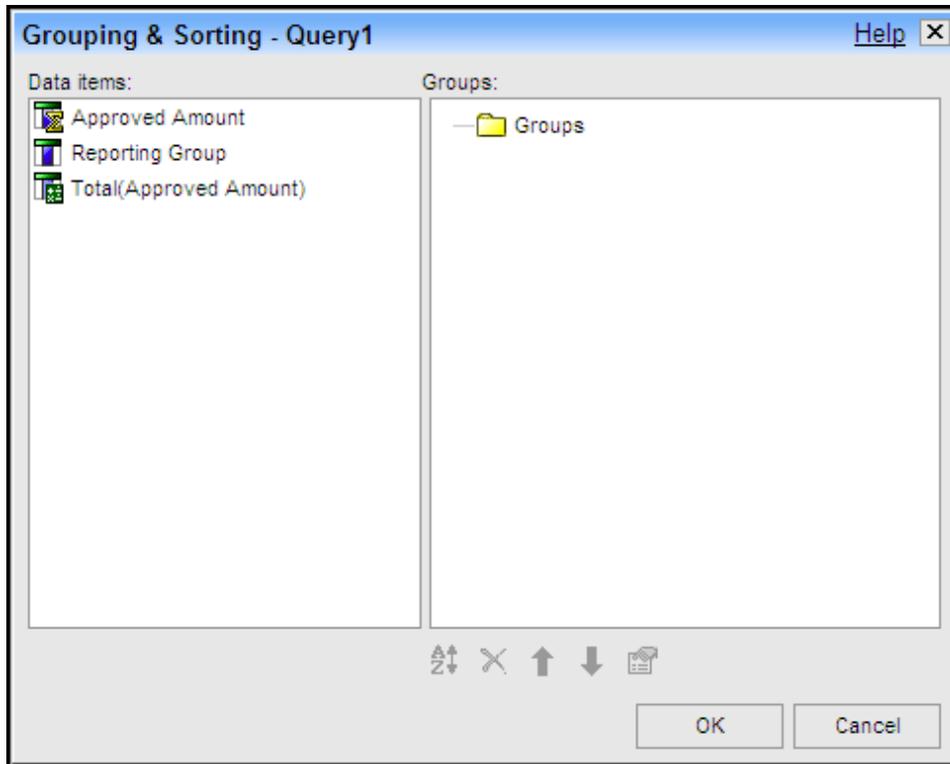
The **Label** list specifies the label that will be used to label each burst report (Reporting Group, in this example).



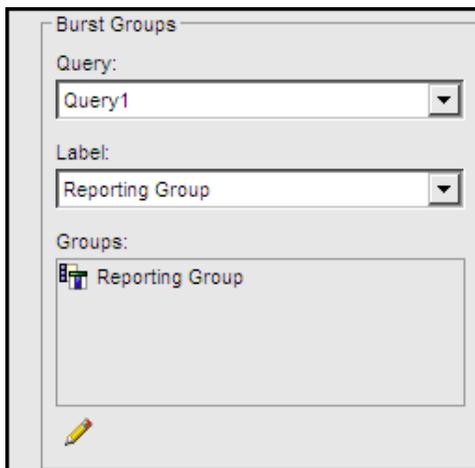
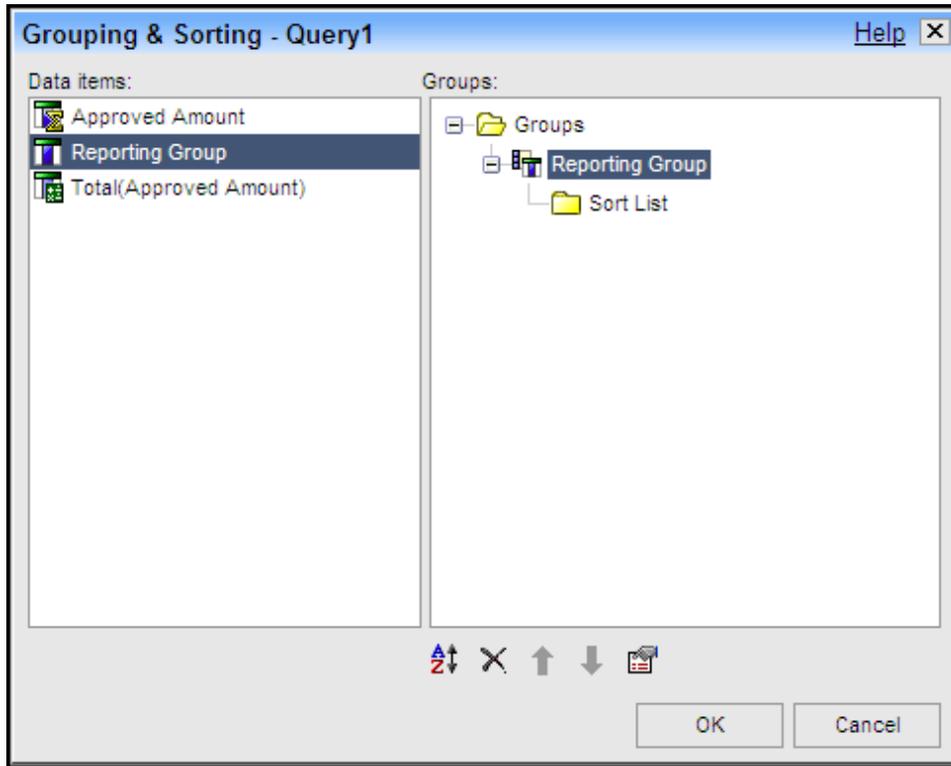
The screenshot shows the same "Burst Groups" configuration window. In this view, the "Label:" dropdown menu is now populated with "Reporting Group". The "Query:" dropdown remains "Query1" and the "Groups:" list remains empty. The pencil icon is still present at the bottom left.

The last element in the **Burst Groups** section that needs to be populated is the Groups. The value selected here is the data element that the report burst will be grouped by. In this example, the report burst is going to be grouped by the Reporting Group. To populate this, click the **edit** icon in the lower left corner. The **Grouping & Sorting** dialog box appears.

NOTE: When defining burst groups, it is best practice to use concept fields instead of custom fields. Concept fields are indexed. Custom fields are not indexed, therefore it is more efficient to use concept fields for report bursting.



To select a data element to group by, double click the desired data element. Once the desired data element has been selected and is displayed under the Groups header, click **OK**.



At this point, the **Burst Groups** selection should be completed, and should look similar to this.

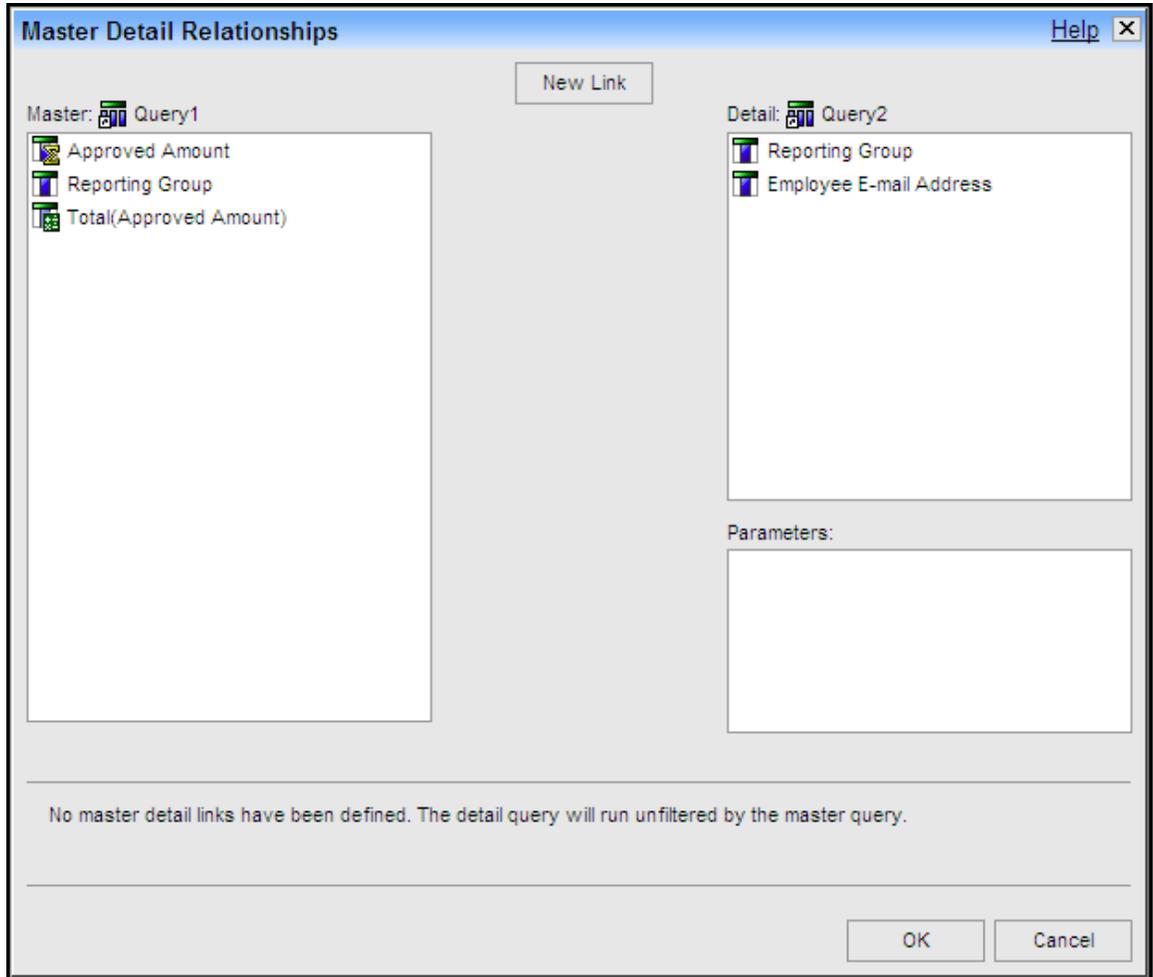
Burst Recipients

With the **Burst Groups** section completed, the **Burst Recipients** section must be populated. First, a query must be selected to define who is going to receive this report. From the list, select the Recipient Query defined in Step 1 (Query2 in this example).

From the **Data Item** list, the item that uniquely identifies each recipient needs to be identified. In this example, Employee E-mail Address:

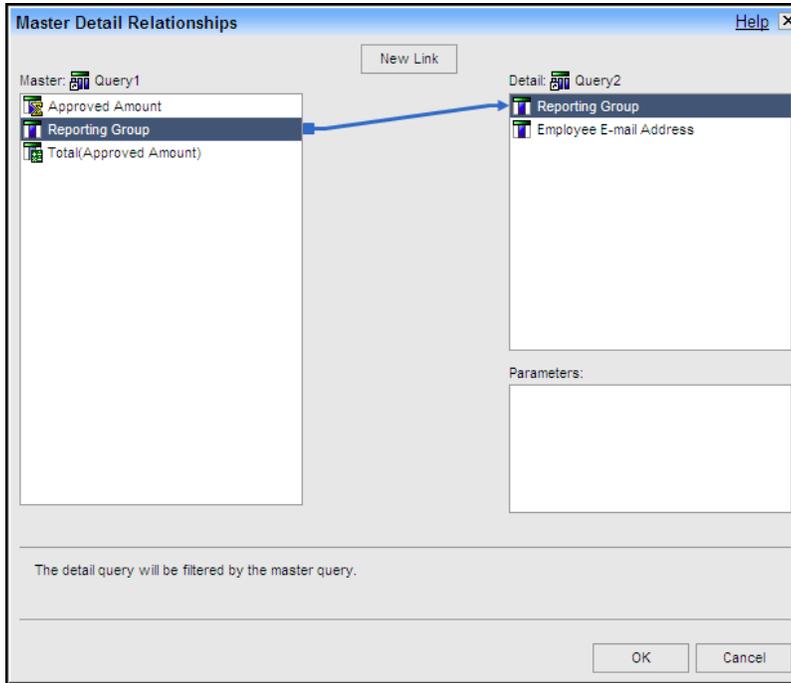
The **Type** list defines the option the report writer wishes to use to distribute the report. Although there are three options available (Automatic, Email addresses, and Directory entries) Intelligence **ONLY** supports the Email addresses option.

The final step is to define the master detail relationship. This creates the link between the Content Query and Recipient Query using a common data element. Select the ellipse to the right of the field to open the **Master Details Relationship** dialog box.



Click the **New Link** button to establish to create a link between the two queries.

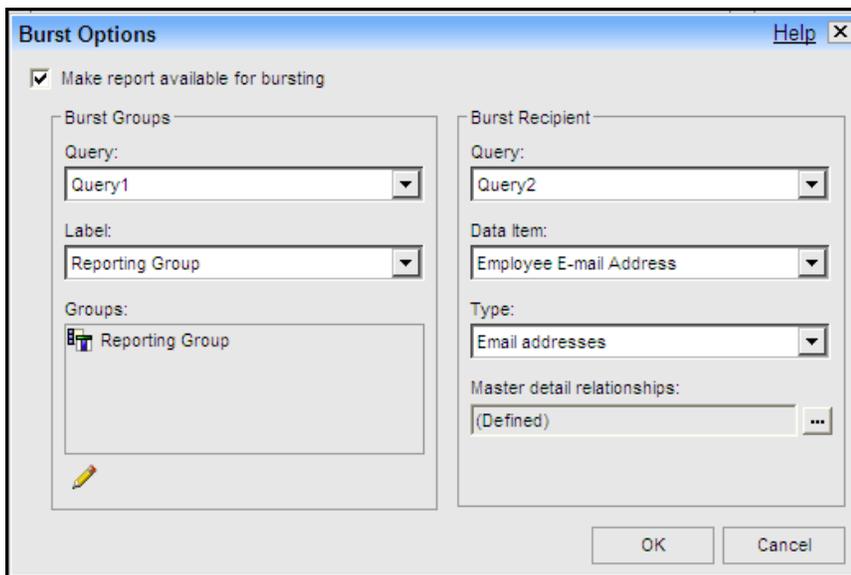
In this example, the Reporting Group is the common element between the two queries. By default, the new link is associated to the first data element of each query. Selecting the data element will move the link to the data element selected (in this case, Reporting Group).



Once the relationship has been established, click **OK**.

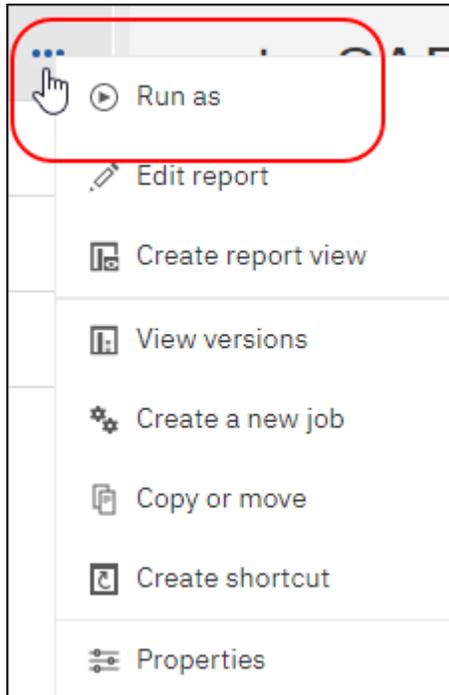
At this point, all the required data has been identified for the report, and it is ready for bursting.

The **Burst Options** dialog box should be similar to this:



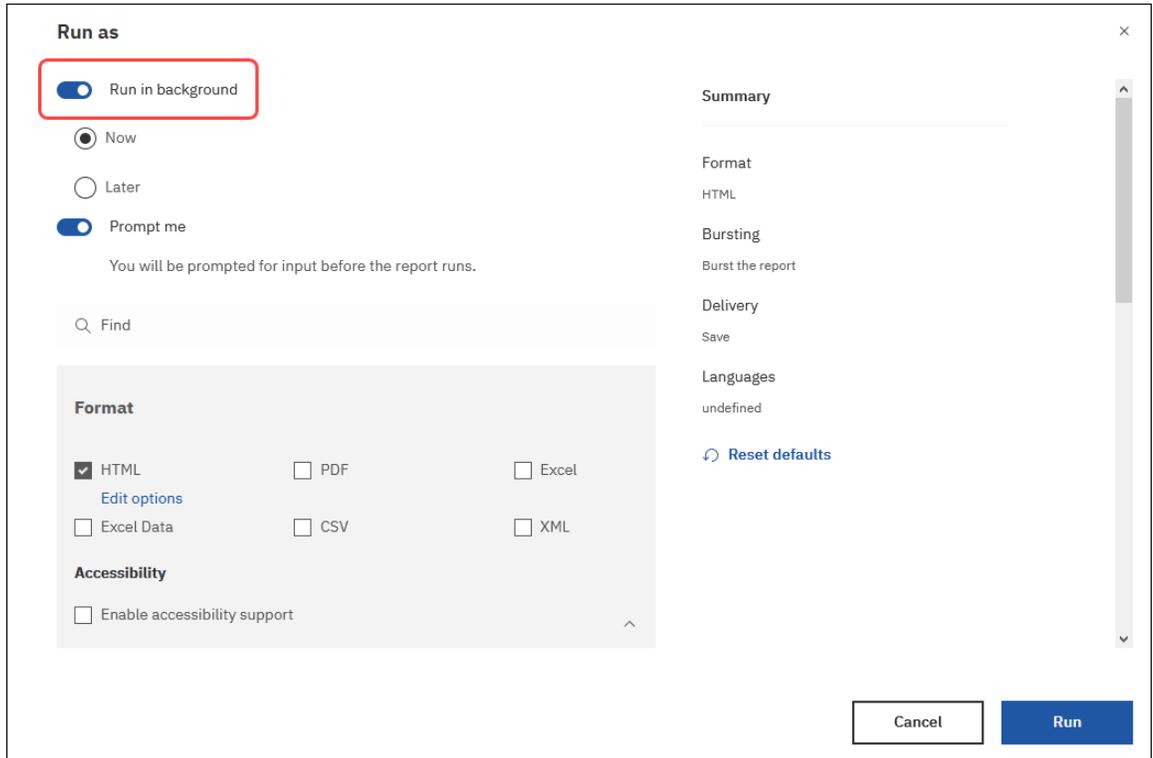
Step 3: Distributing the Report (Cognos 11 UI)

Now that the report has been created and configured for bursting, the distribution of the report needs to be set up. If running the report interactively, click the **More** icon, , for the report, and then click **Run as**.

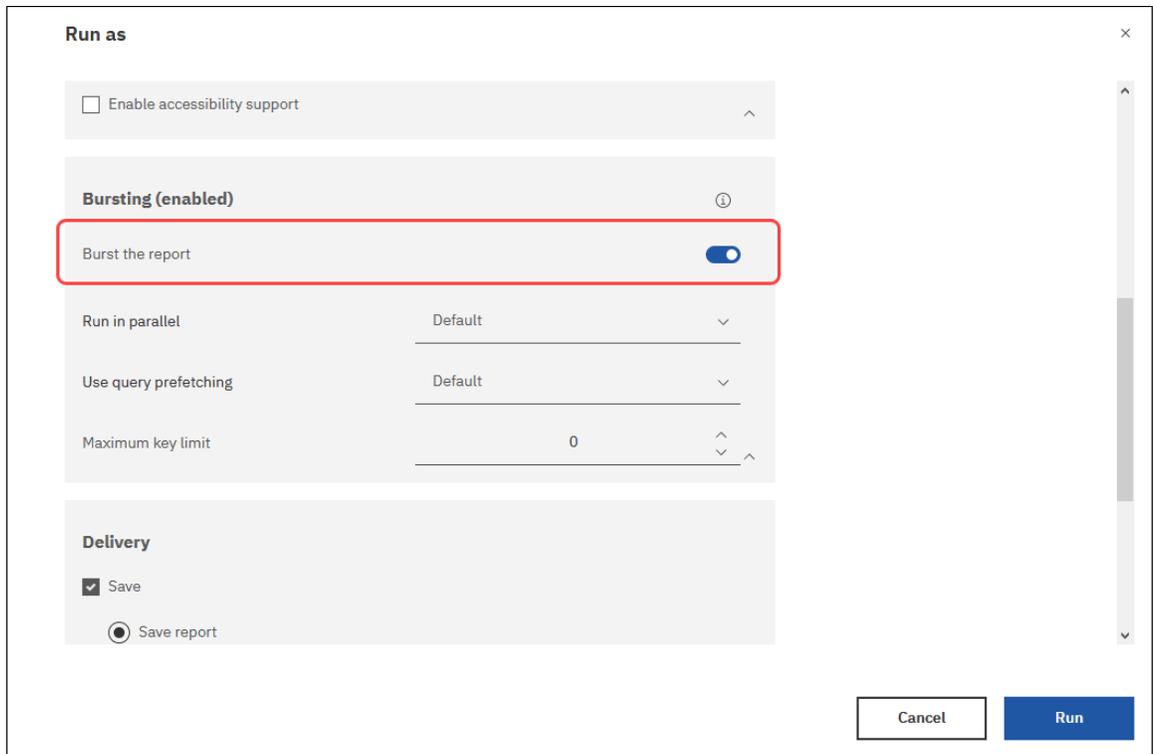


In the **Run as** dialog, ensure the **Run in the background** and **Burst the report** settings are enabled.

⚠ IMPORTANT: If the **Burst the report** setting is not enabled, the report will not be successfully burst.

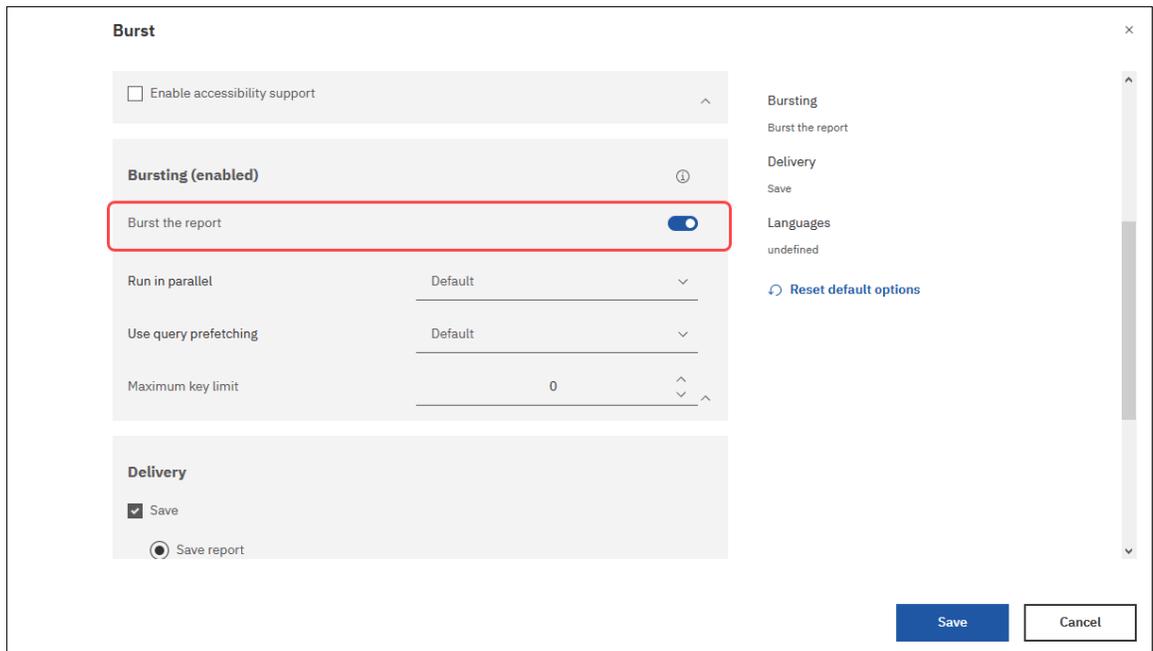
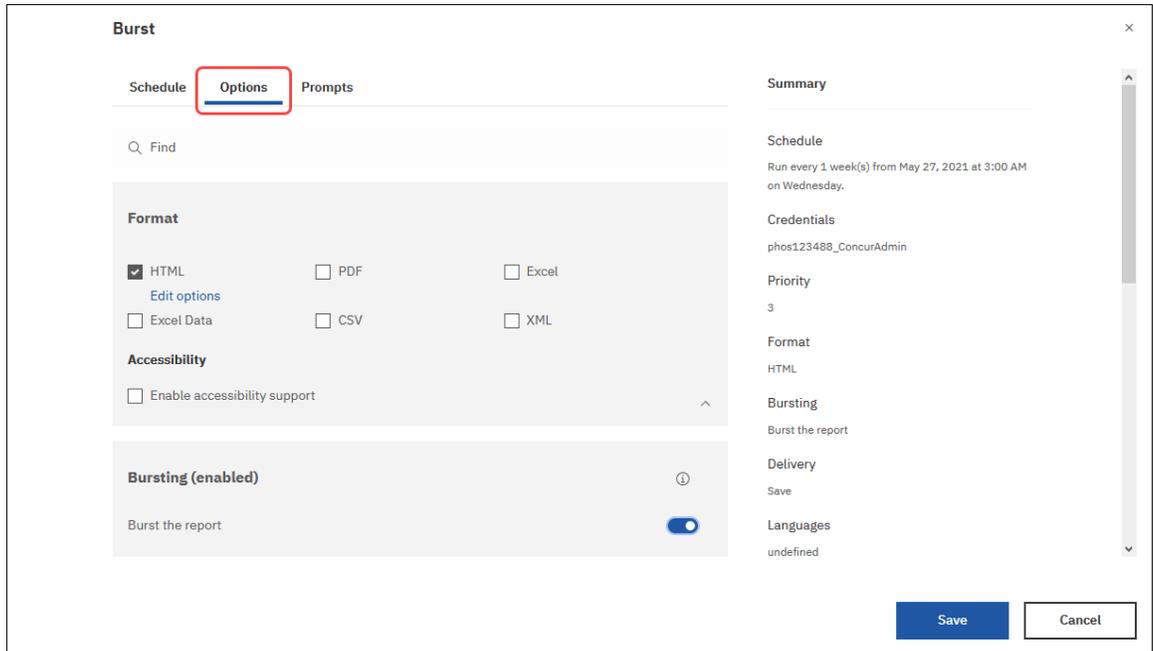


Section 3: Procedure – Generating the Report



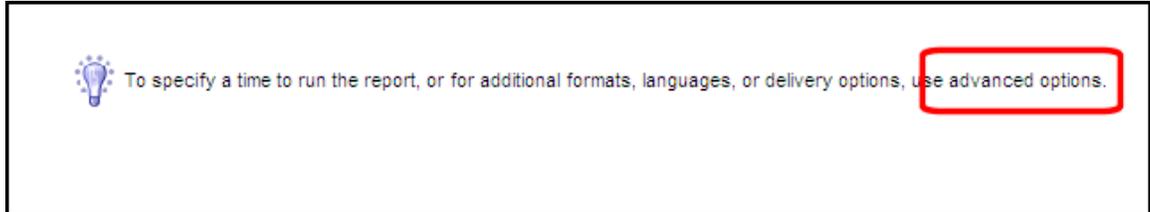
If the report is being scheduled, a similar change needs to be made in the schedule settings. On the **Options** tab in the scheduling dialog, the **Burst the report** setting must be enabled. Enabling this setting allows the bursting option to be available for the report.

You can access the **Options** tab by clicking the **More** icon for the report, and then clicking **Properties** > **Schedule** tab > **Create schedule** button or **Edit** link > **Options** tab.

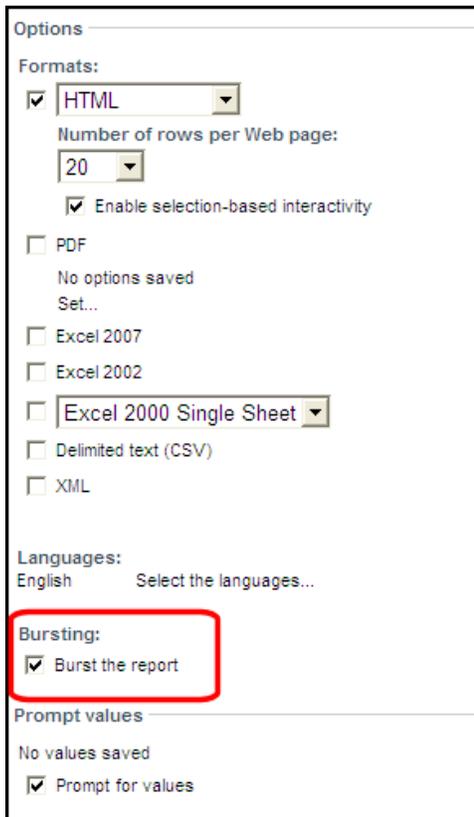


Step 3: Distributing the Report (Cognos 10 UI)

Now that the report has been created and configured for bursting, the distribution of the report needs to be set up. If running the report interactively, click the **Run With Options** icon. On the **Run with Options** screen, click the **Advanced Options** link:



On the **Advanced Options** screen, ensure the **Run in the Background** radio button is selected under the **Time and Mode** header. Enabling this radio button causes the **Burst the report** option to be available:



⚠ IMPORTANT: If the **Burst the report** check box is not selected, the report will not be successfully burst.

If the report is being scheduled, a similar change needs to be made. On the Schedule screen, the **Override the default values** check box must be enabled:

Options

Override the default values

Formats:
Default

Languages:
Default

Delivery:
Save the report

Prompt values

Override the default values
No values saved

Selecting this check box allows the bursting option to be available for the report:

Options

Override the default values

Formats:

HTML

Number of rows per Web page:
20

Enable selection-based interactivity

PDF
No options saved
Set...

Excel 2007

Excel 2002

Excel 2000 Single Sheet

Delimited text (CSV)

XML

Languages:
English Select the languages...

Bursting:
 Burst the report

