Cognos©
Administrator Training Workbook

Updated 8/11/2008

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Revision History Log

Publication Date	Summary
8/11/2008	New workbook that supports general Cognos© Administrator training.

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Introduction

Workbook goal

The goal of this course is to provide the knowledge and practice to create and apply security to folders, perform server administration, data management, security and content administration, activities management, and portal services administration. Cognos Administration is accessed through Cognos Connection's Launch Menu.

Course objectives

In this course you will learn how to:

- create a folder
- apply security to a folder
- monitor the status of current, past and upcoming activities
- monitor, log, and tune system services
- monitor schedules
- add groups and roles (authentication)
- assign users to groups and groups to roles
- assign function and features (authorization)
- create data source connections
- export and import data
- create distribution list and contacts.

Intended audience

IT personnel responsible for Cognos administration.

Prerequisites

To complete this course, you should have completed

- previous application administration experience on Windows or Unix platforms.

Administrative Tasks for Cognos Connection

Section goal

The goal of this section is to provide the knowledge and practice to create and apply security to folders.

Objectives

In this lesson you will learn how to:

- create a folder
- apply security to a folder.

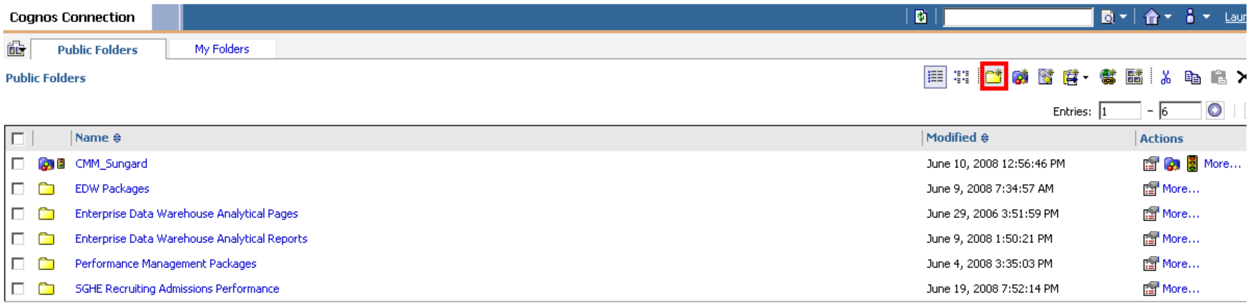
Create a Folder

Introduction

Cognos Connection is the user portal for the storing of report objects. Reports are typically organized into folders. To restrict access to the content of a folder, permissions can be applied to the folder structure. By default, permissions applied are inherited to children folders or reporting objects.

Create a Folder

Organize your reports by grouping them together into a folder.



Steps

Follow these steps to create a folder.

1. Click the **New Folder** Icon  towards the top right corner of Cognos Connection.

2. Enter a **name** for the folder. Optionally you can provide a description and screen tip to help users understand the purpose of the folder.

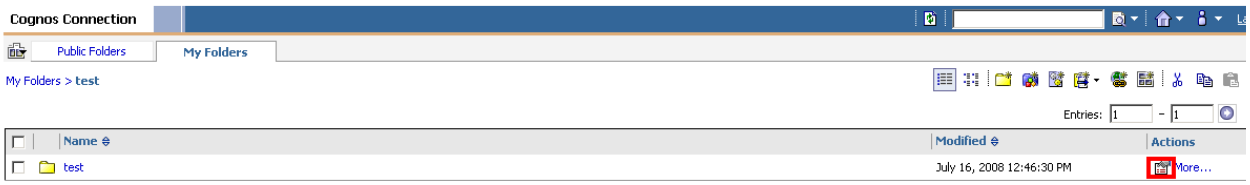
3. Select the **Location** to create the folder by either selecting “select another location ...” or “Select My Folders”.

4. Click **Finish**.

Apply Security to a Folder

Introduction

Keep the contents of the Folder secure by applying permissions.



Steps

Follow these steps to apply security to a folder.

1. Click the **Set Properties** Icon  on the right side under Actions for the folder you just created.
2. Click the **Permissions Tab** at the top left corner.
3. Depending on how deep you are in the folder structure, you may have to select **Override the access permissions acquired from the parent entry** before being allowed to change the permissions for an object.
4. To add a group or role, select "**Add**". Then select the proper security namespace and then place a check next to any groups or roles you want to add from the Available Entries. Use the Green Arrow to move the selections to the Selected Entries. Click **Ok**.
5. You'll notice now that the group or role you added does not have any permission settings. **Check the box** next to the new addition on the left hand side, then grant or deny the appropriate access on the right hand side.
6. You may want to override any children permissions from your current position down through the folder structure. To do so select the "Delete the access permissions of all child entries".
7. Click **Ok**.
8. Test the new permissions by logging in as a user from the newly added group or role.

Cognos Administration

Section goal

The goal of this section is to provide the knowledge and practice to perform server administration, data management, security and content administration, activities management, and portal services administration. Cognos Administration is accessed through Cognos Connection's Launch Menu.

Objectives

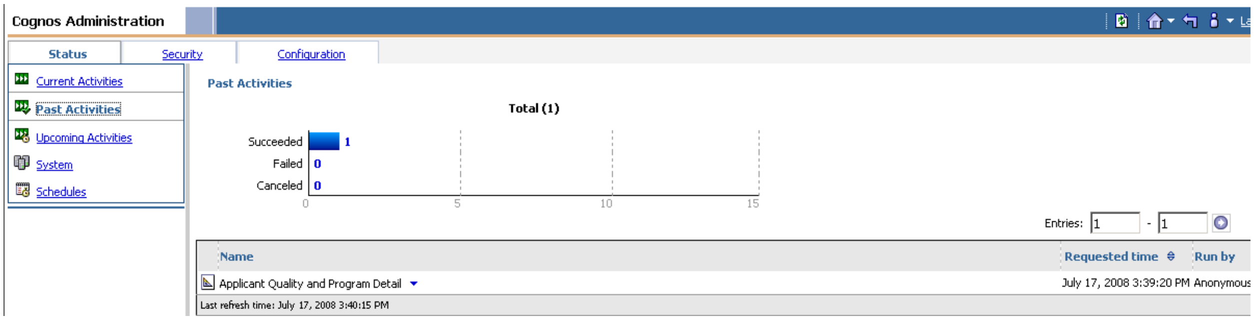
In this section you will learn how to:

- monitor the status of current, past and upcoming activities
- monitor, log, and tune system services
- monitor schedules
- add groups and roles (authentication)
- assign users to groups and groups to roles
- assign function and features (authorization)
- create data source connections
- export and import data
- create distribution list and contacts.

Monitor the Status of Current, Past and Upcoming Activities

Introduction

When users run reporting objects, the progress can be monitored in Current Activities on the Status tab in Cognos Administration. Likewise, once the process completes the run history and status can be viewed in Past Activities. Reporting objects that are scheduled can be viewed in the Upcoming Activities.



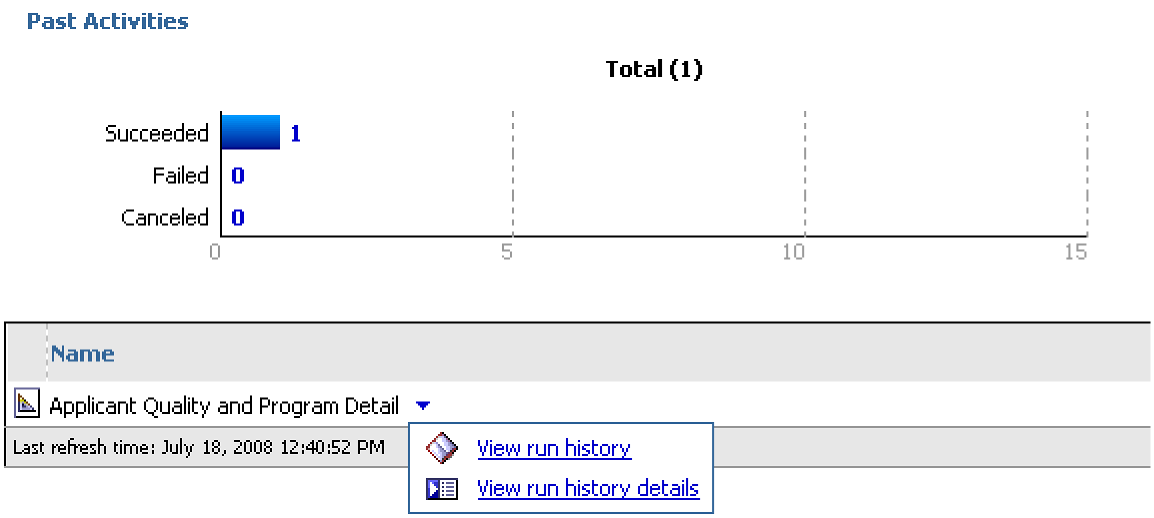
Steps

Follow these steps to view run activities.

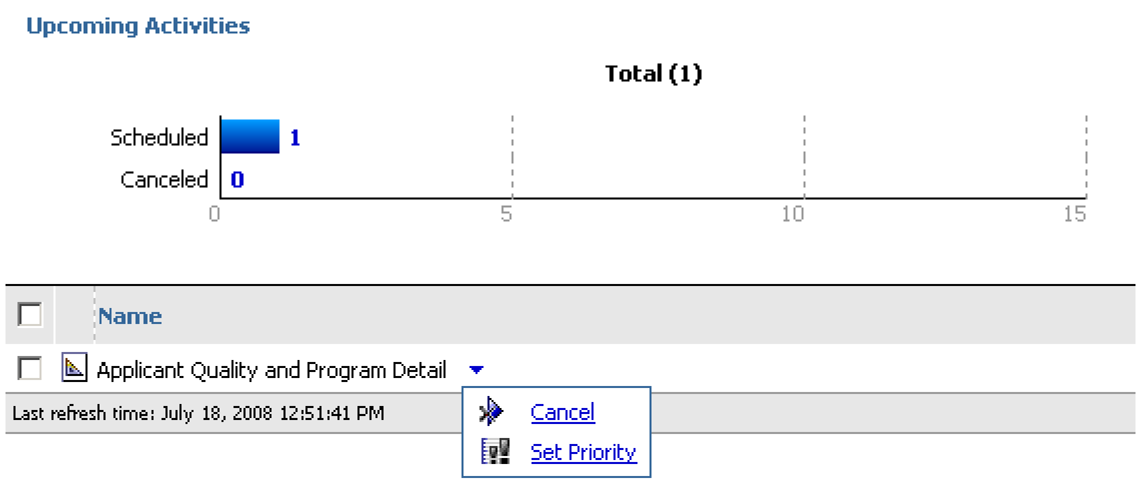
1. From Cognos Connection, click the **Launch** button. Select **Cognos Administration**.

2. On the Status tab menu select **Current Activities**, if not already selected. Notice any reports or jobs that are running. If nothing is currently running you can go back to Cognos Connection by clicking on the home icon and run a report. Then return to the Status tab by following the instructions from step 1 above.

3. Once reports have completed click **Past Activities** to view the status. Click the down arrow next to the report to view the run details.



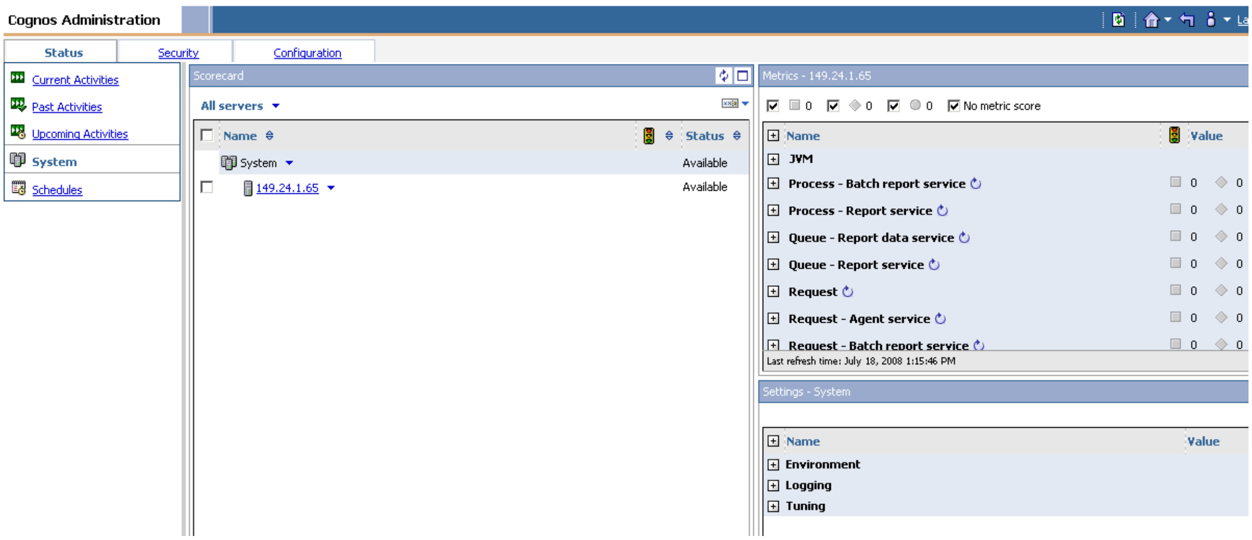
4. To view future scheduled jobs, click **Upcoming Activities**.



Monitor, Log, and Tune System Services

Introduction

Use the **System** link in Cognos Administration to start and stop services, collect metrics about your environment performance, and tune your services for better system performance.



Steps

Follow these steps to start and stop services.

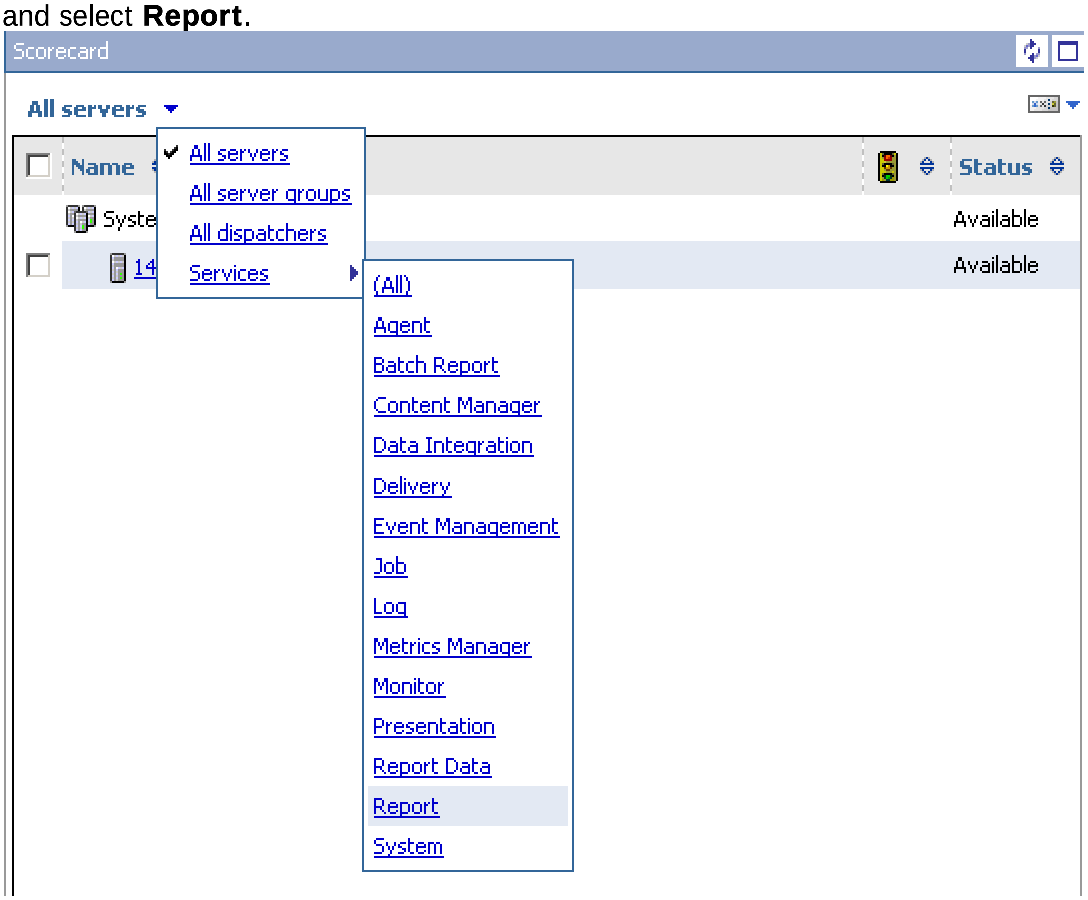
1. From **Cognos Administration - Status** tab click *System*.

2. Click the down arrow next to your Dispatcher, and select **Stop Dispatcher Immediately**. Alternatively you can select to stop dispatchers after running and queued processes have stopped.

3. Return to Cognos Connection and try to run a report. You should receive an error that the dispatcher is unavailable. (Note: that if the everyone group is a member of the system administrators role, the report will run as normal).

4. Return to **Cognos Administration – Status** tab and click the down arrow for your dispatcher and select *Start Dispatcher*.

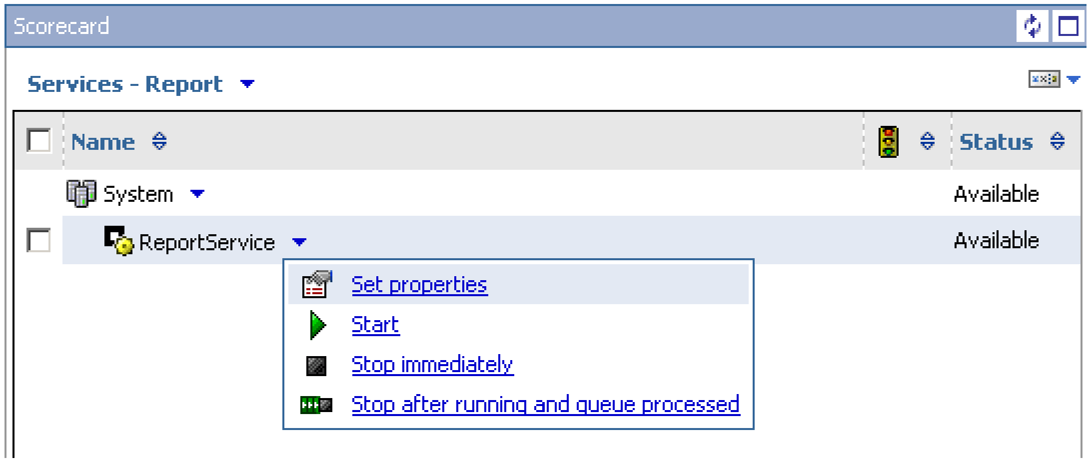
5. Any registered service can be stopped and started from the System page in this same manor. Click the down arrow next to **All Servers**. Navigate to **Services** and select **Report**.



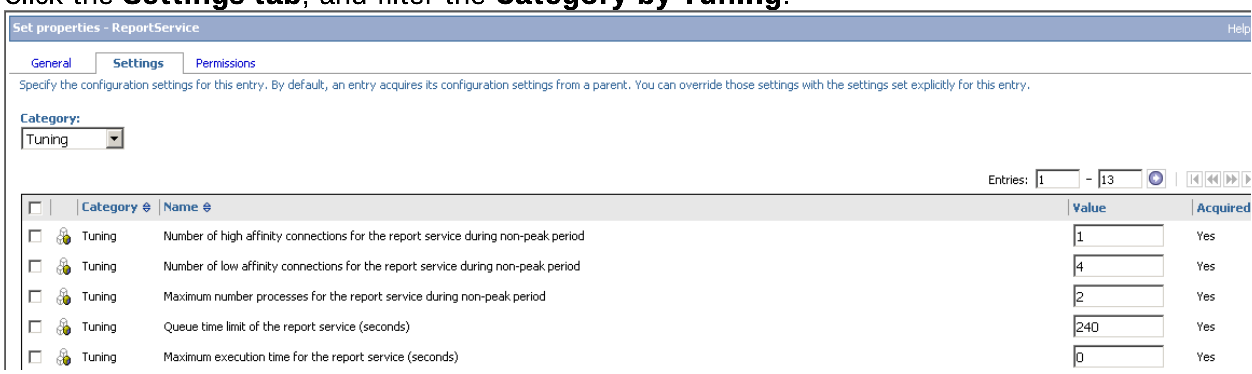
Steps

Follow these steps to set service properties.

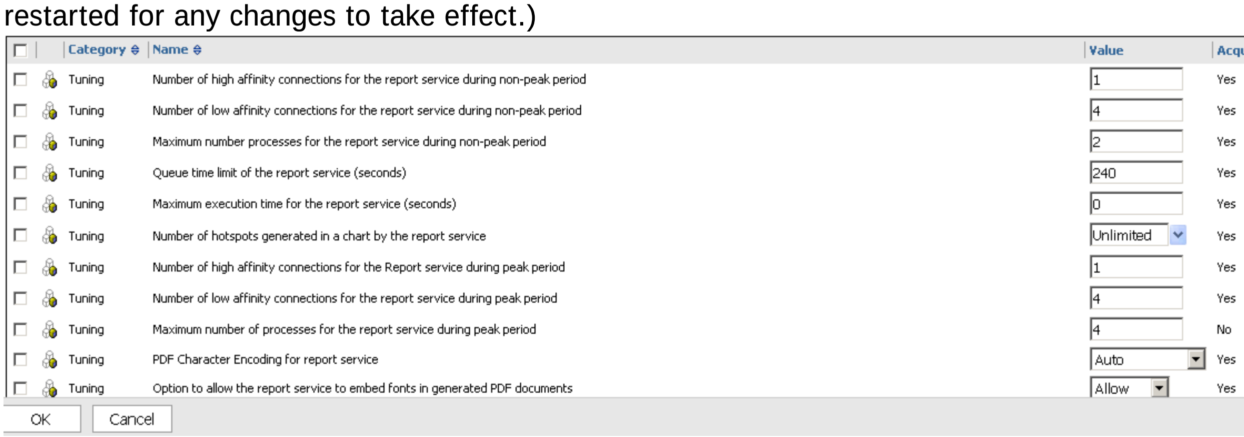
1. Click the down arrow next to the **ReportService**, and select **Set Properties**.



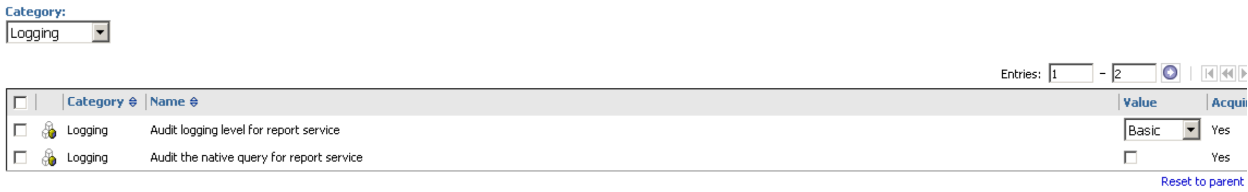
2. Click the **Settings tab**, and filter the **Category by Tuning**.



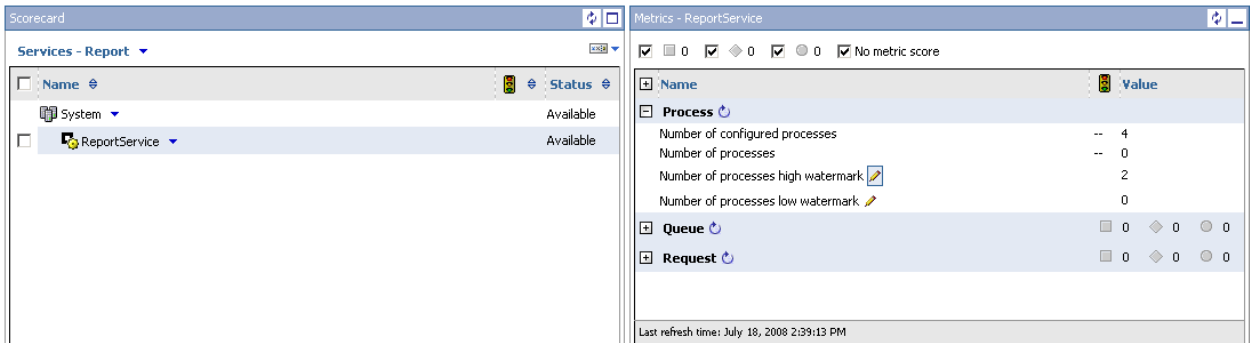
3. Change the value for **Maximum number of processes for the report service during peak period** to **4**. Click **Ok**. (Note: Service will need to be restarted for any changes to take effect.)



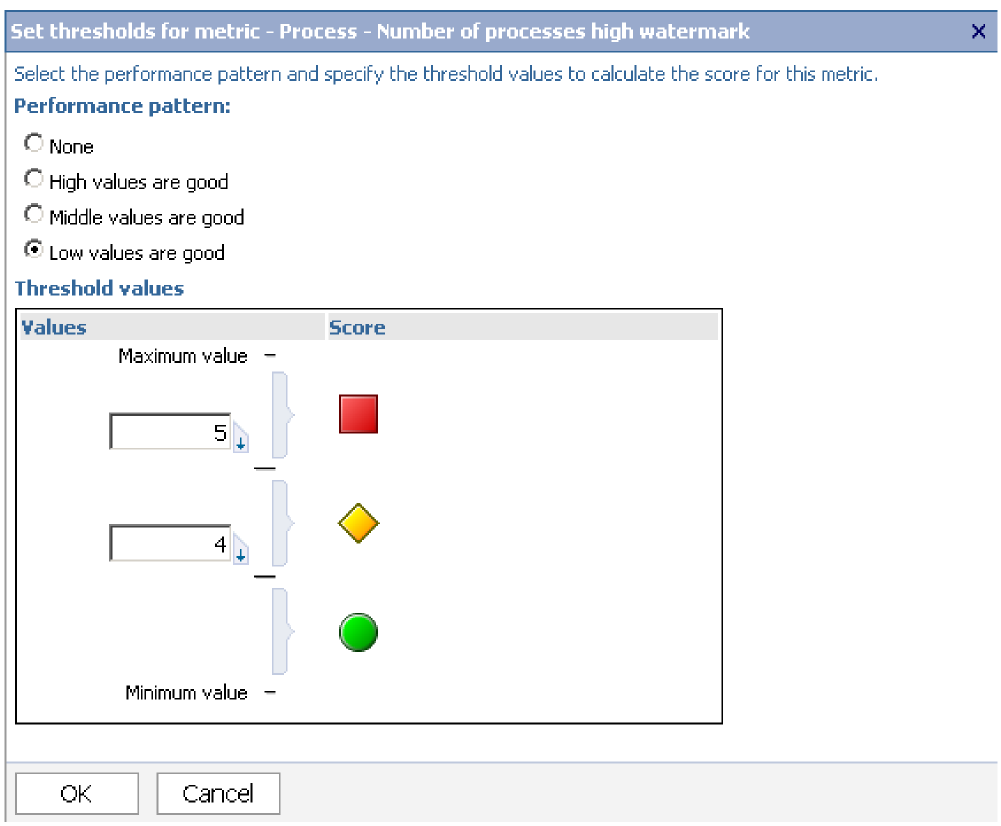
4. Filter the Category to **Logging**. Click **Ok**.



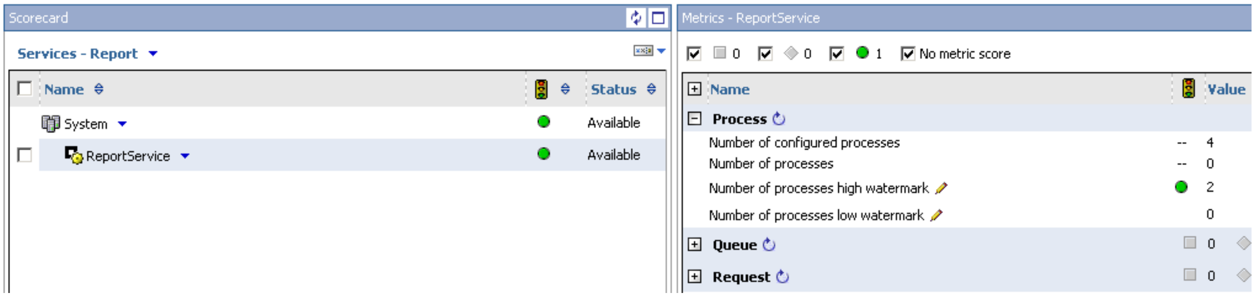
5. With the ReportService still selected Click the **expand button** ⊞ next to **Process**. Click the pencil next to Number of processes high watermark to edit the value.



6. Change the **Performance Pattern** from *None* to *Low values are good*, and set the **Red** value to *5*. Change the **Yellow** value to *4* and Click **Ok**.



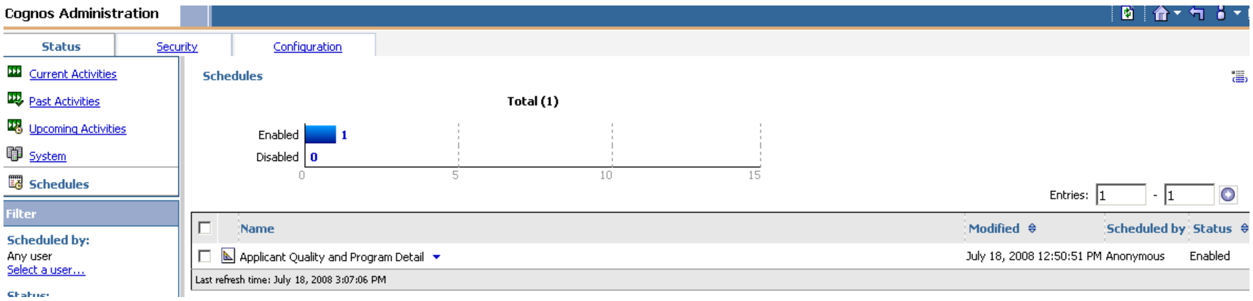
You will notice that the ReportService now has a Score of Green next to it. This means that the service is performing with less than 4 processes. Once the processes hit 4, it will turn Yellow. And if the number of processes ever gets to 5 it will turn Red.



Monitor Schedules

Introduction

The **Schedules** link in Cognos Administration provides you with the ability to what will be running on the system in the future. You can set properties, set priority, modify, remove, and disable schedules.



Steps

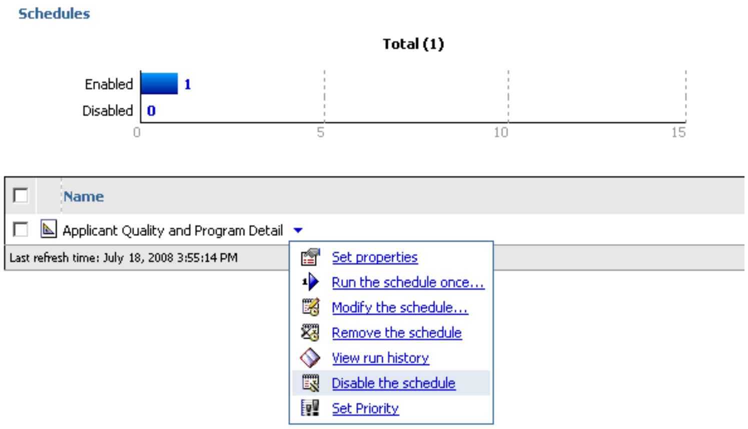
Follow these steps to disable a schedule.

1. From Cognos Connection click **Launch**.

2. Select **Cognos Administration**.

3. Click **Schedules** from the left hand menu.

4. Click the down arrow next to a schedule in the list. Select **Disable the Schedule**.



Add Users, Groups, and Roles (Authentication)

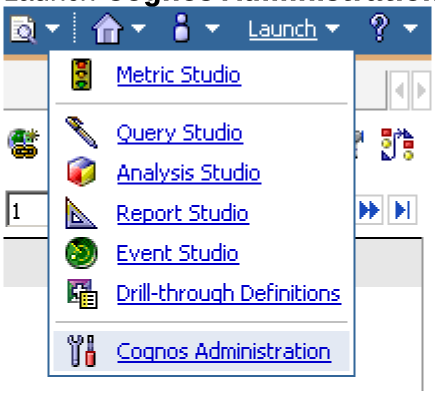
Introduction

Roles and Groups provide the ability to associate users into containers that are easier to manage. Users are brought in from your 3rd party authentication source, and then assigned to groups (i.e. Admissions) and/or Roles (i.e. Authors).

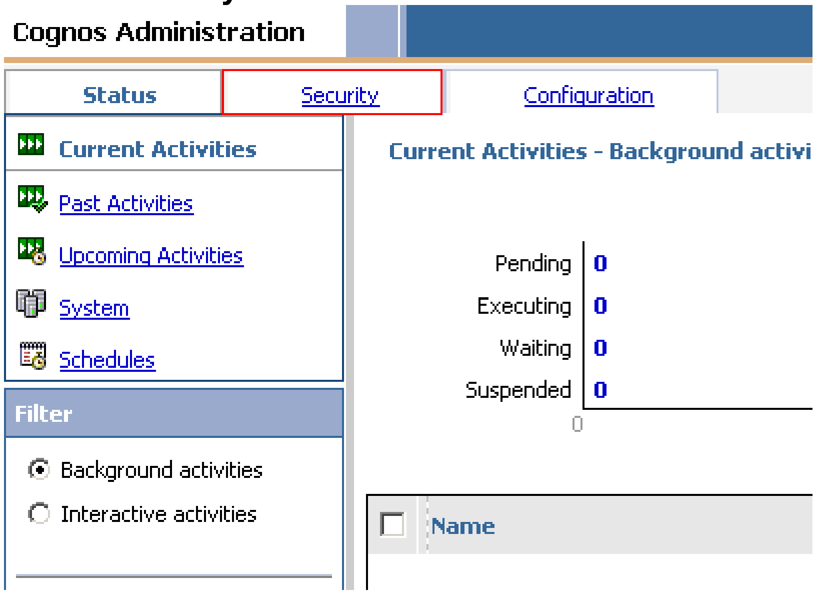
Steps

Follow these steps to create a new group, add a user, and assign a group to a role.

1. Launch **Cognos Administration** from inside Cognos Connection.

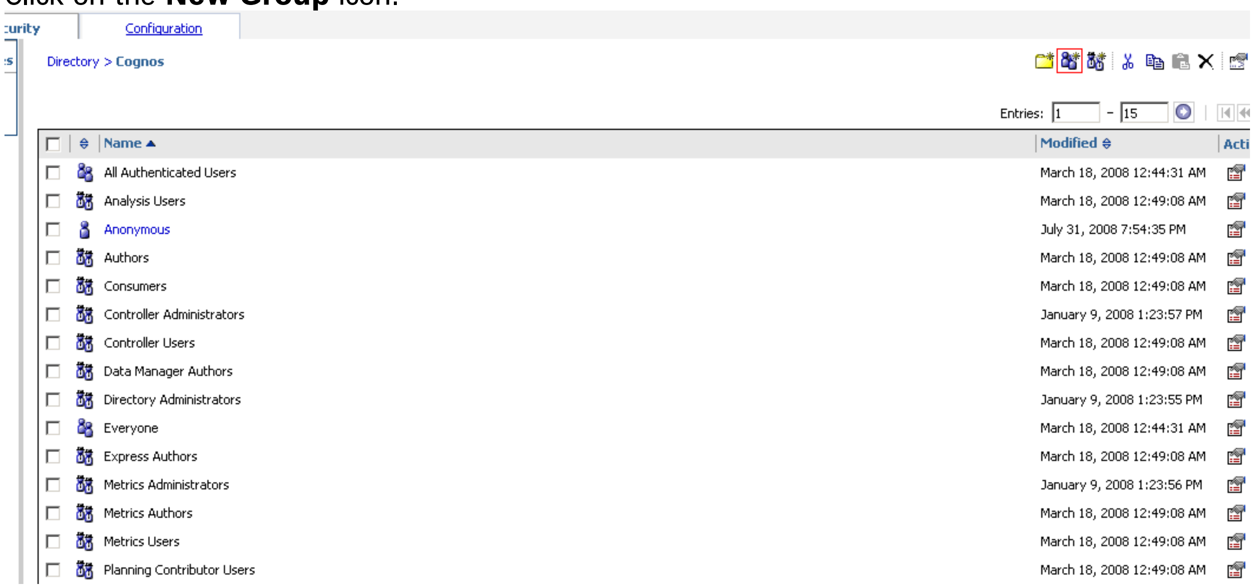


2. Click the **Security** tab.

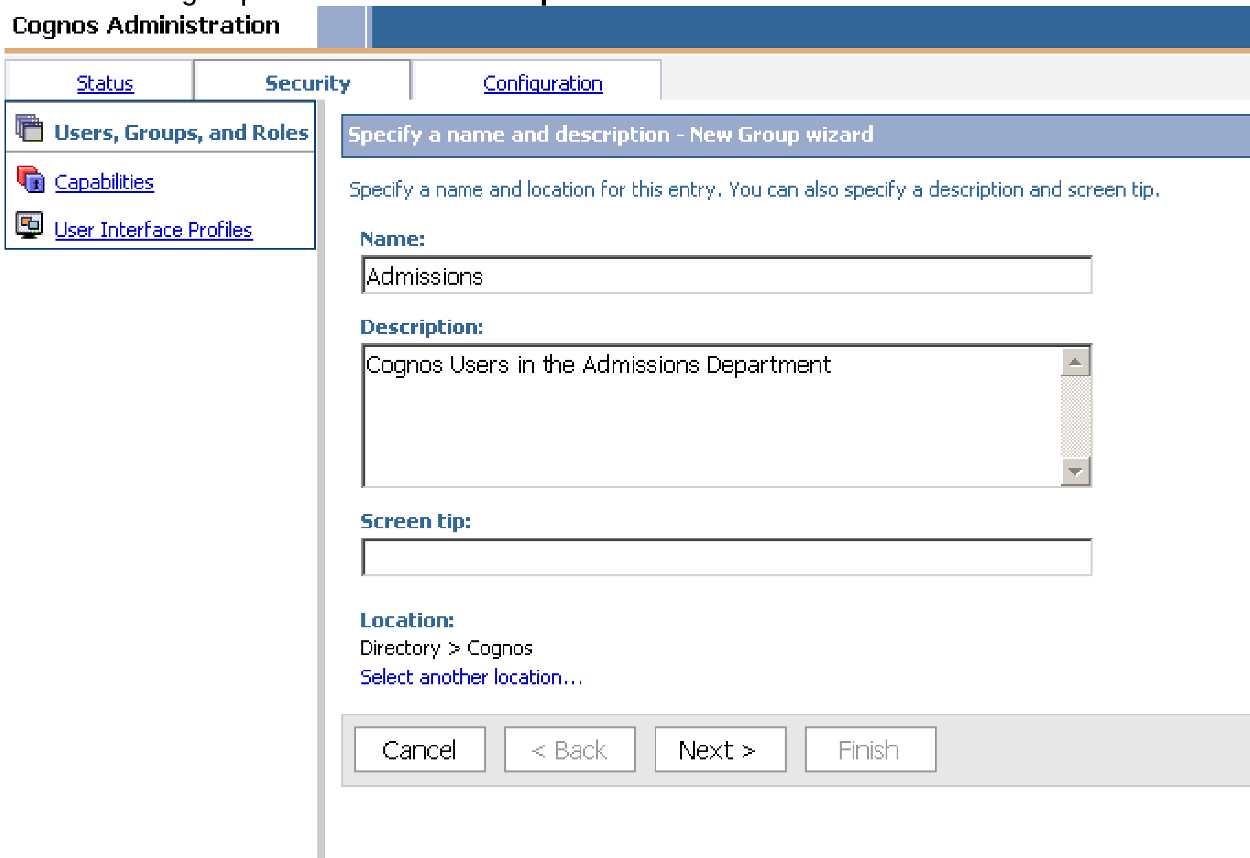


3. Click the **Cognos** namespace.

4. Click on the **New Group** icon.



5. Give the new group a **Name and Description**. Click **Next**.



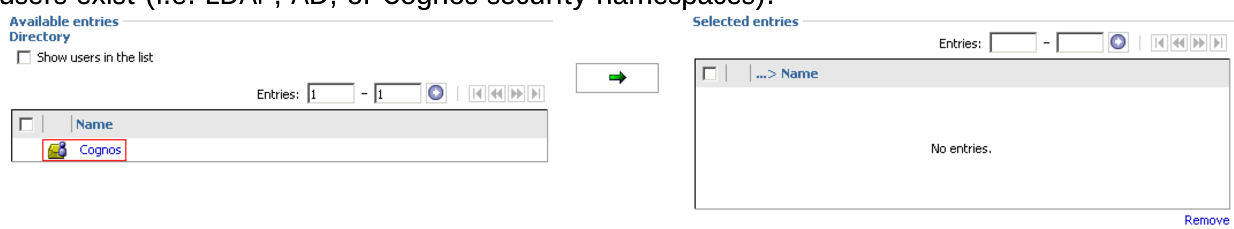
Assign Users to Groups

Steps

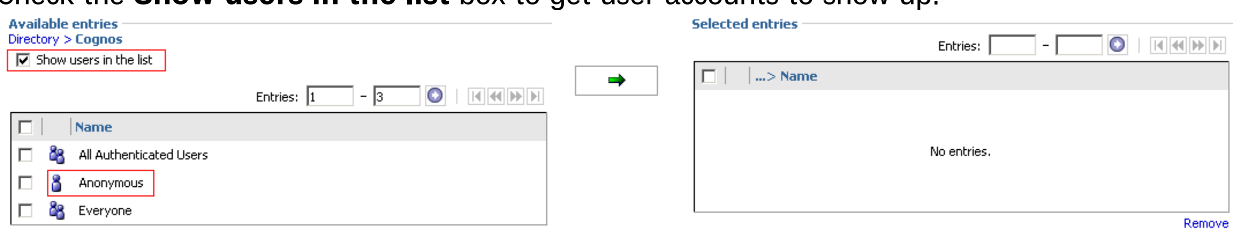
Follow these steps to assign users to groups.

1. Click **Add…** to assign a user to the new group.

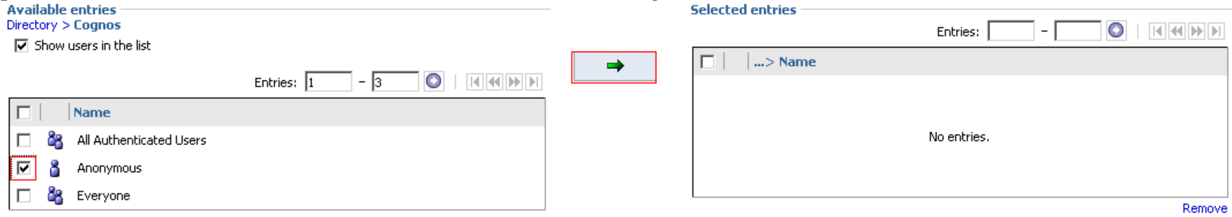
2. From the list of available entries on the left, select the namespace where the users exist (i.e. LDAP, AD, or Cognos security namespaces).



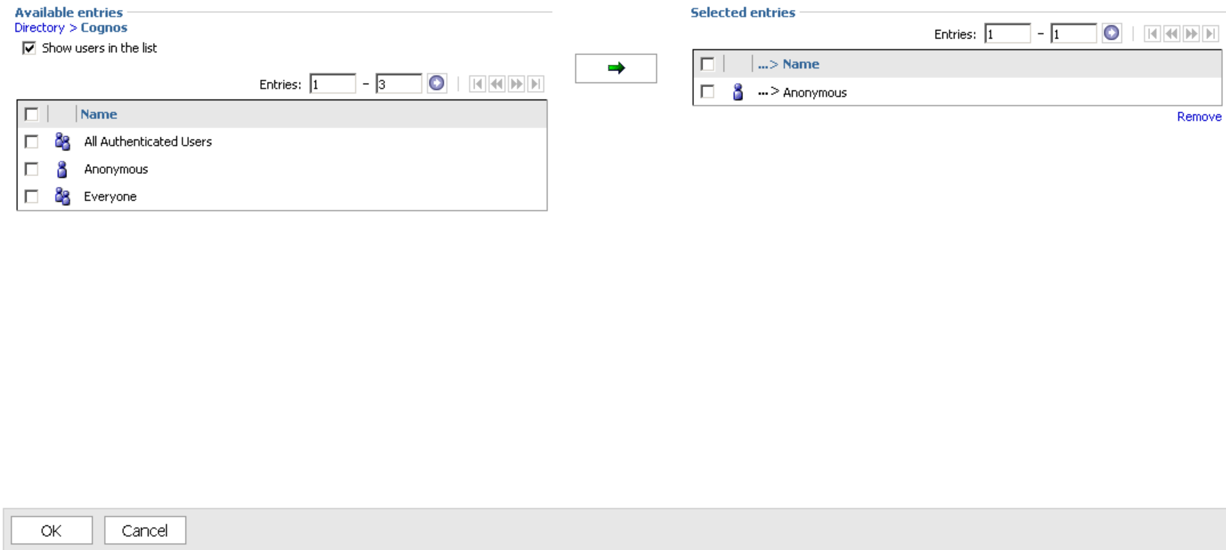
3. Check the **Show users in the list** box to get user accounts to show up.



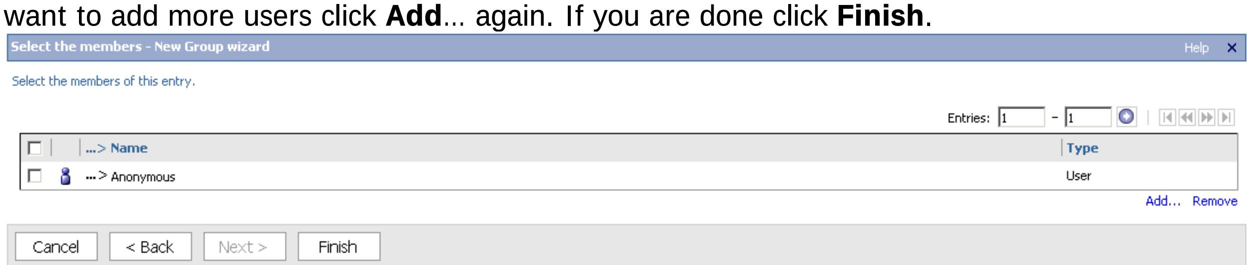
4. Check the box next to the user you want to assign to the group and click the green arrow button in the middle to move the entry to the selected entries.



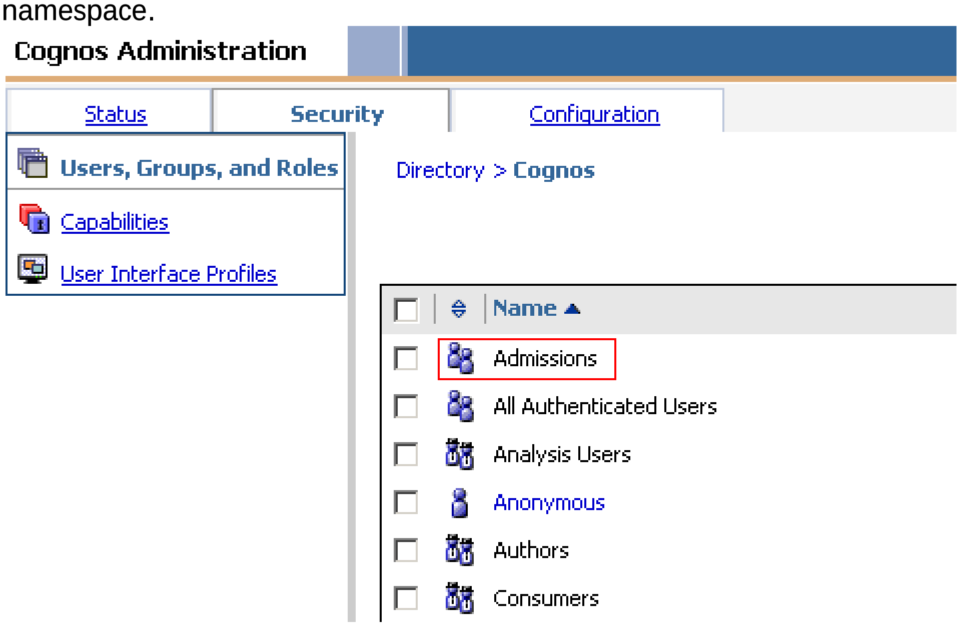
5. Click the **Ok** button.



6. Next you'll see the user you just assigned to the new group in the list. If you want to add more users click **Add**... again. If you are done click **Finish**.



7. You created a new group and assigned a user. The group now appears in the namespace.

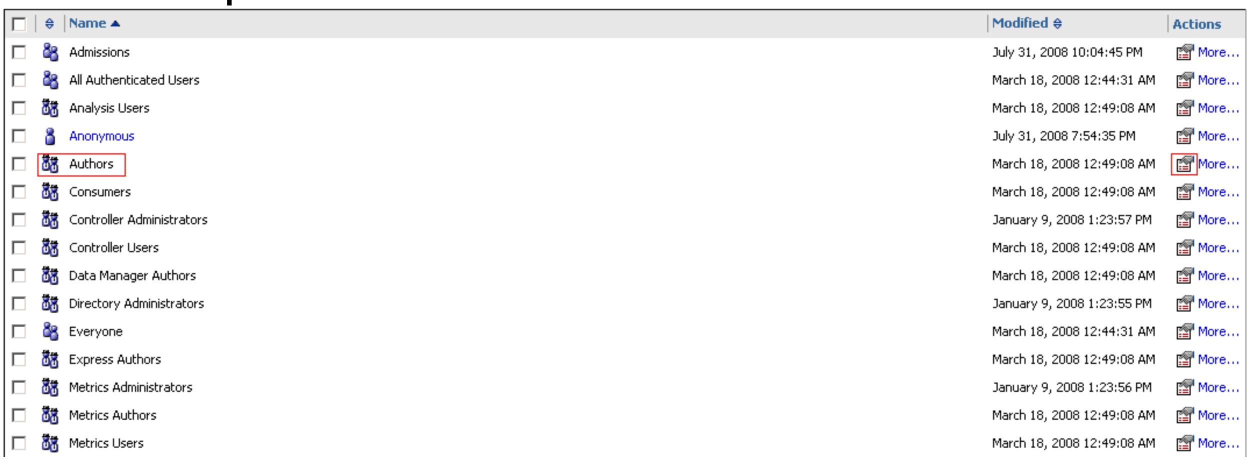


Assign Groups to Roles

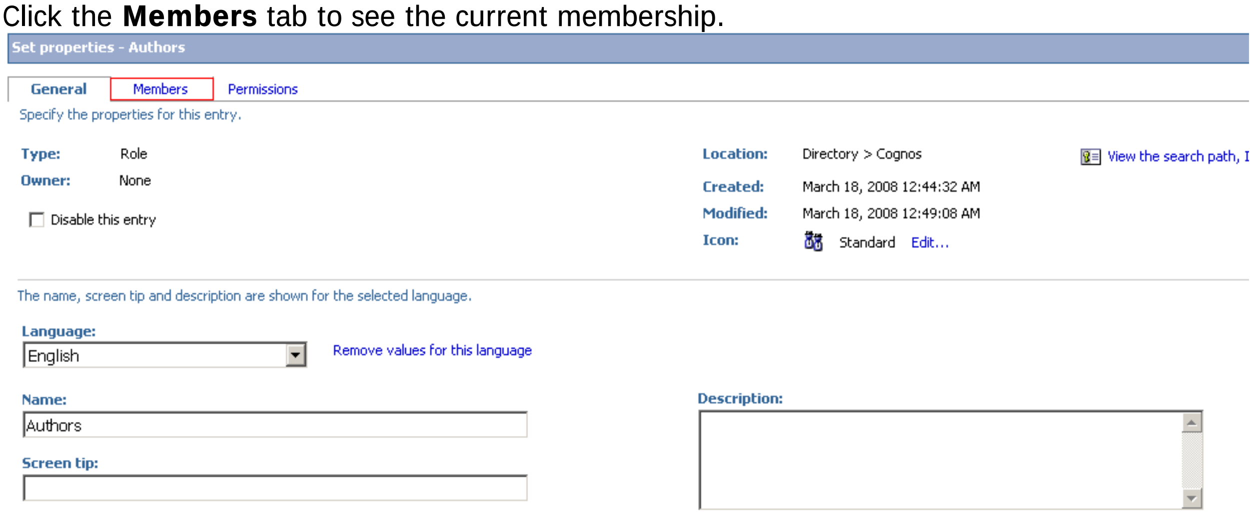
Steps

Follow these steps to assign groups to roles.

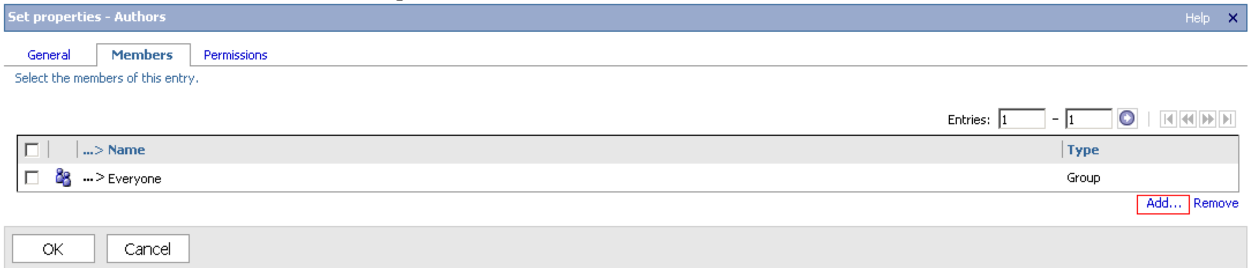
1. Click the **Set Properties** for the **Authors** role.



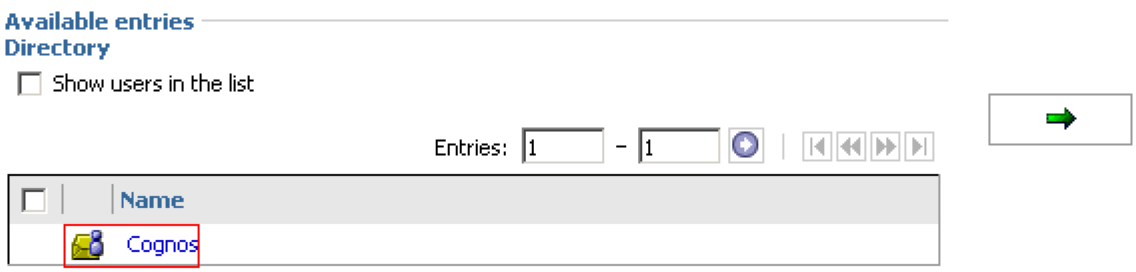
2. Click the **Members** tab to see the current membership.



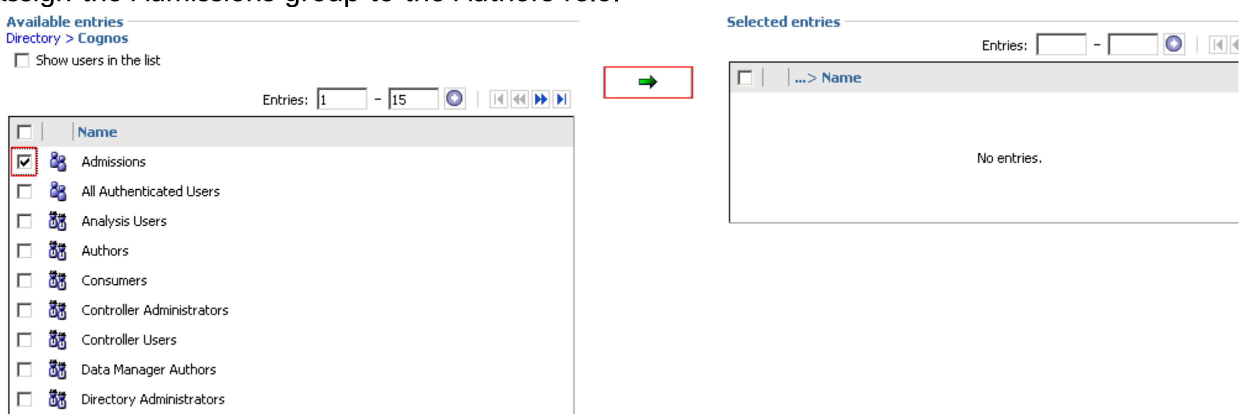
3. Click the **Add…** button to assign a new member.



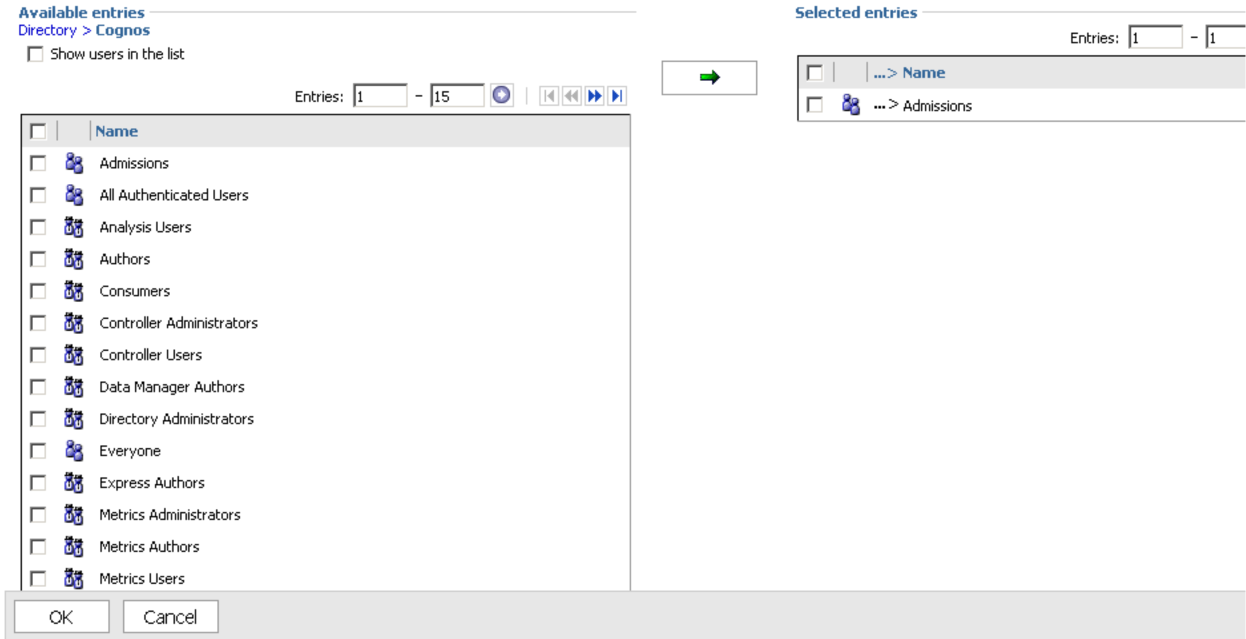
4. Select the namespace where you previously create your new group.



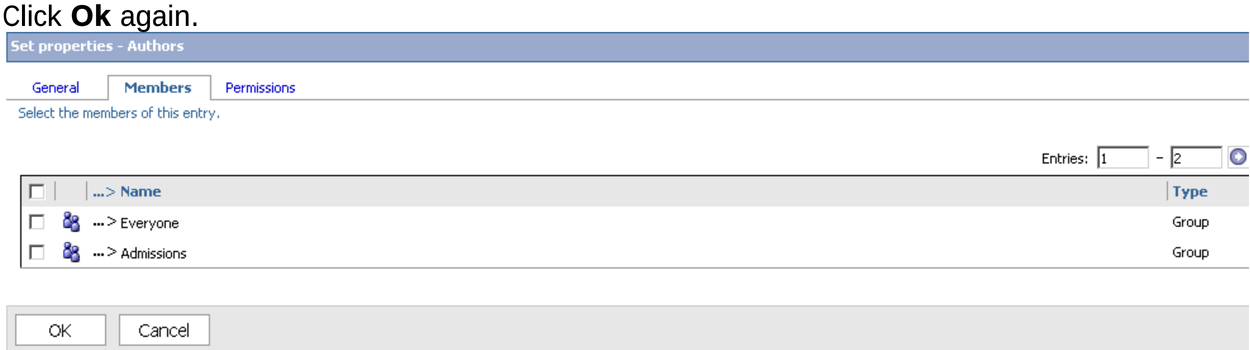
5. Select the **Admissions** check box on the left and click the green arrow button to assign the Admissions group to the Authors role.



6. Click **Ok**.



7. Click **Ok** again.

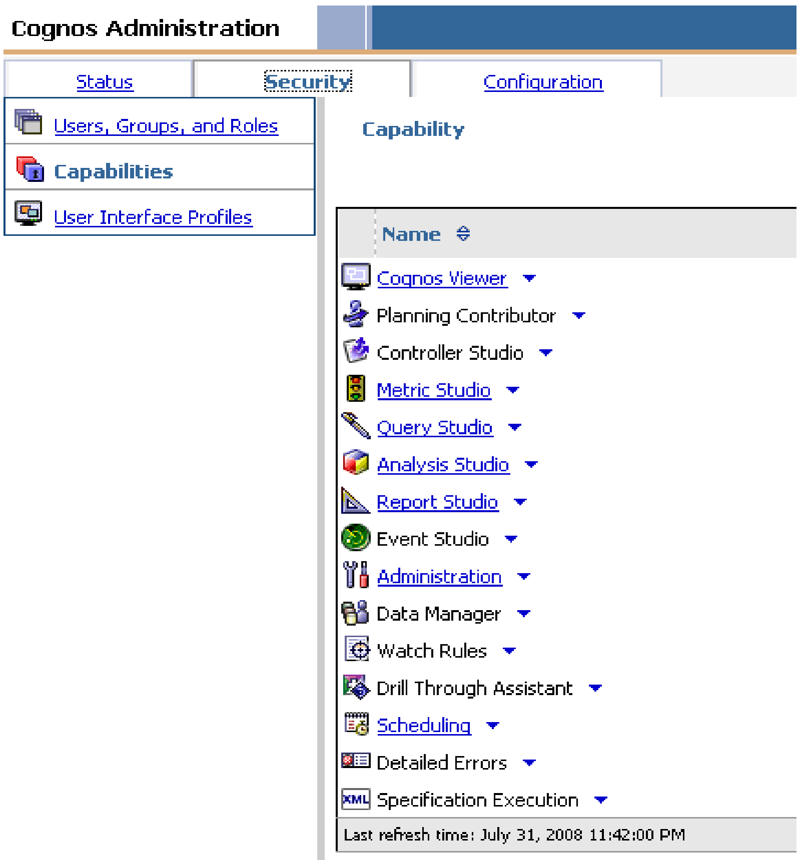


Assign Function and Features (Authorization)

Introduction

Once you have setup authentication into your Cognos environment, assigned users to groups, and assigned those groups to roles your ready to specify what those users can do inside the environment.

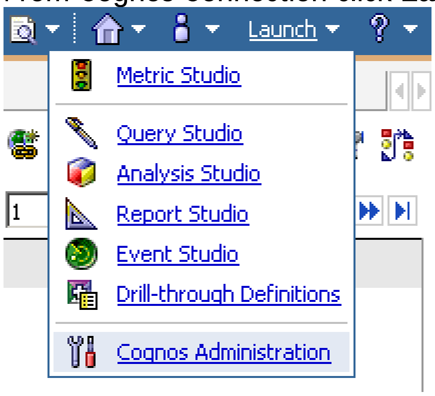
Capabilities allow you to hand out permissions for the functionality of tools like Query Studio, Report Studio, Analysis Studio, and Administrative areas of the environment.



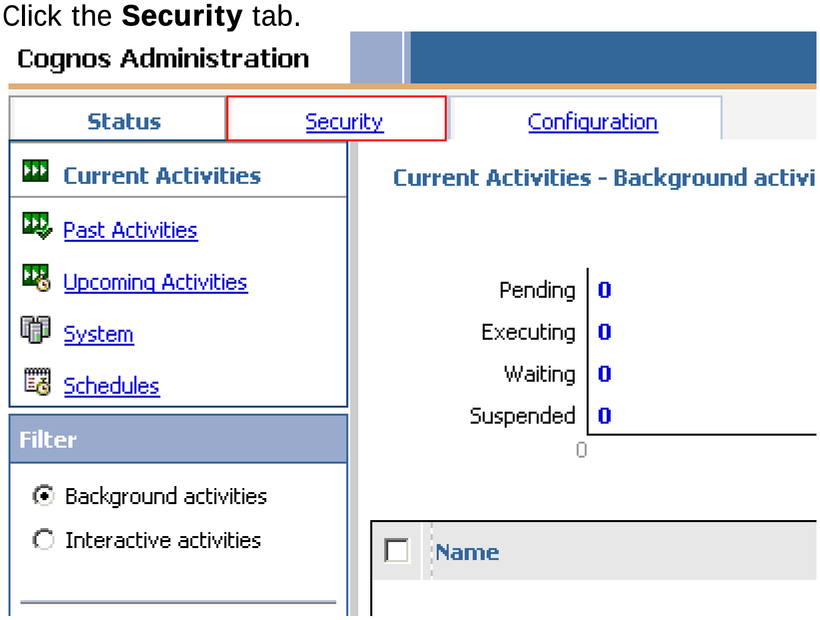
Steps

Follow these steps to assign administration tasks capabilities to the Authors role.

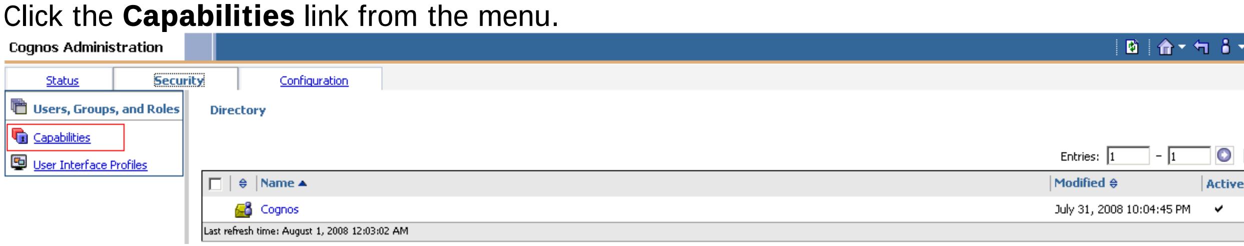
1. From Cognos Connection click **Launch**. Select **Cognos Administration**.



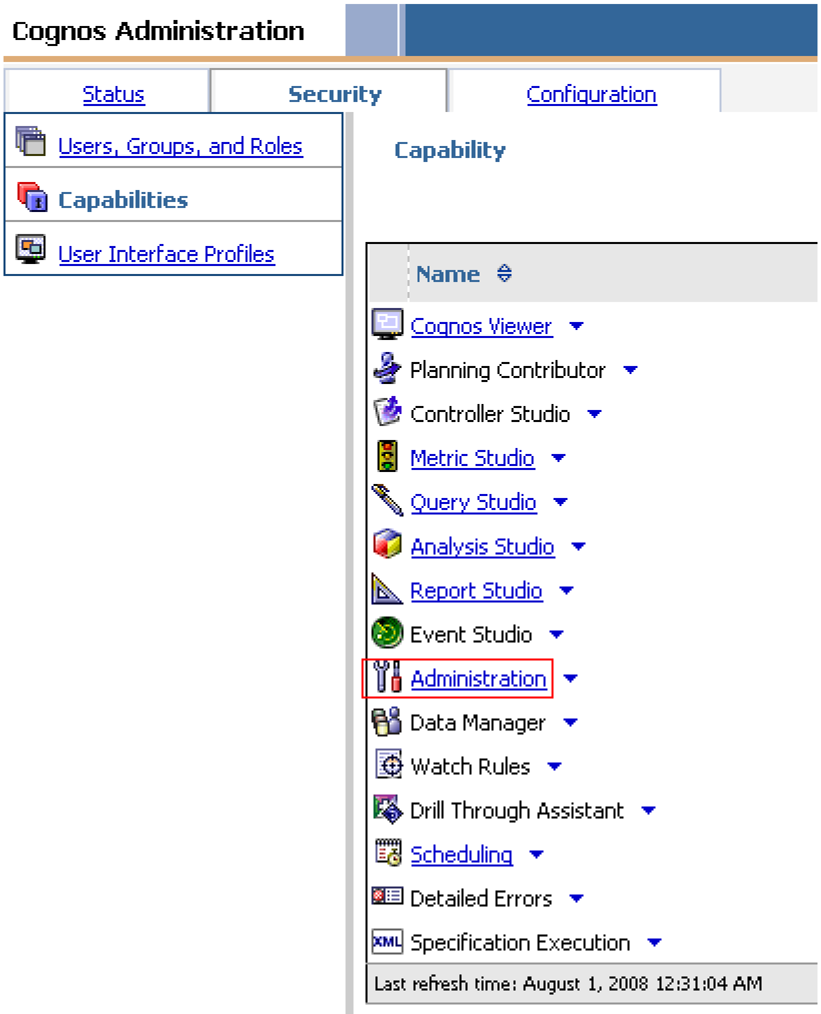
2. Click the **Security** tab.



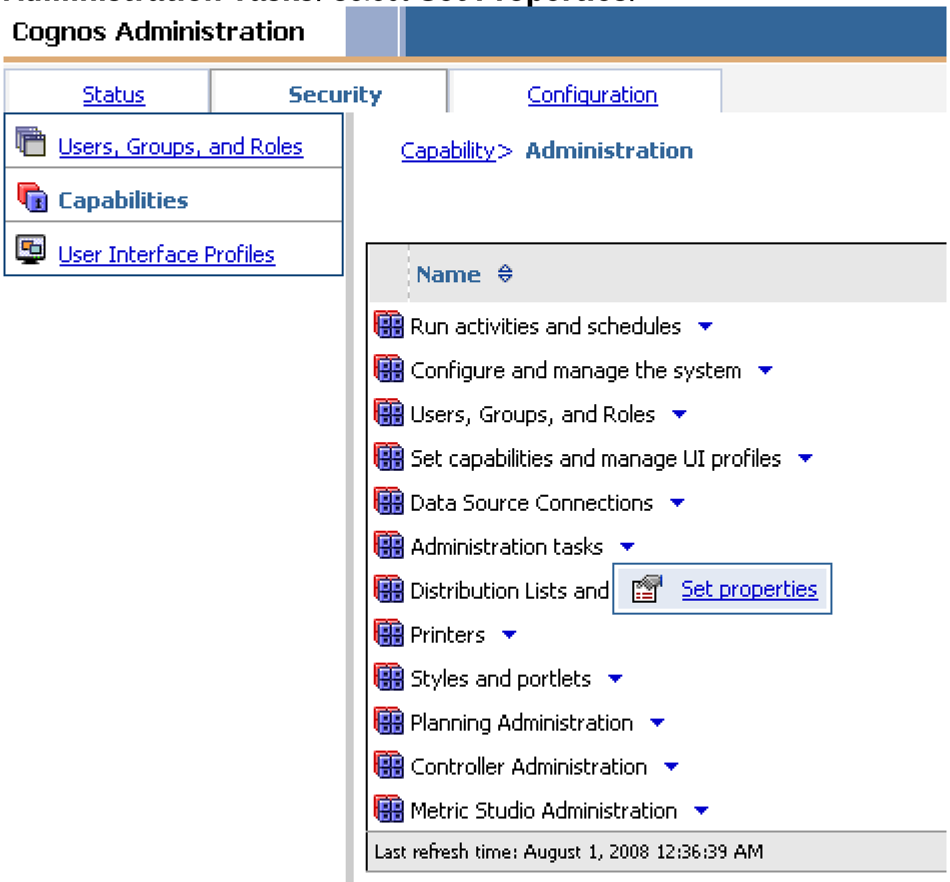
3. Click the **Capabilities** link from the menu.



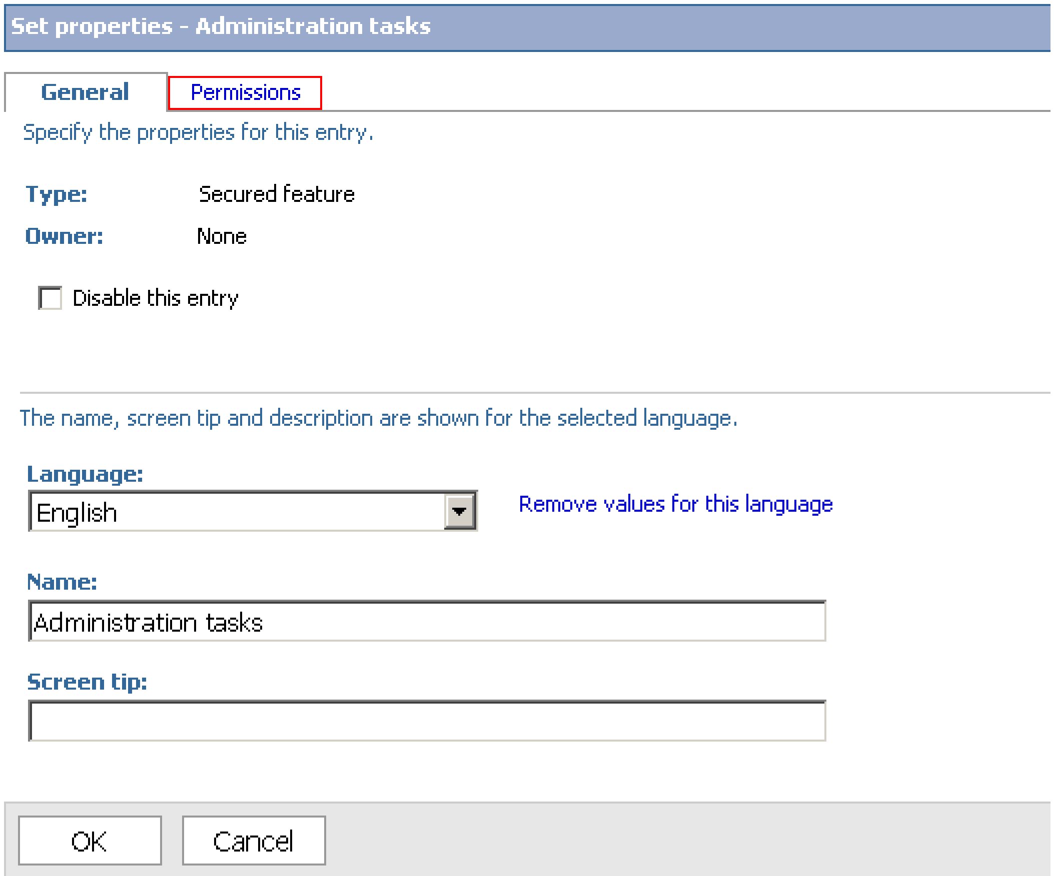
4. Click **Administration** from the list.



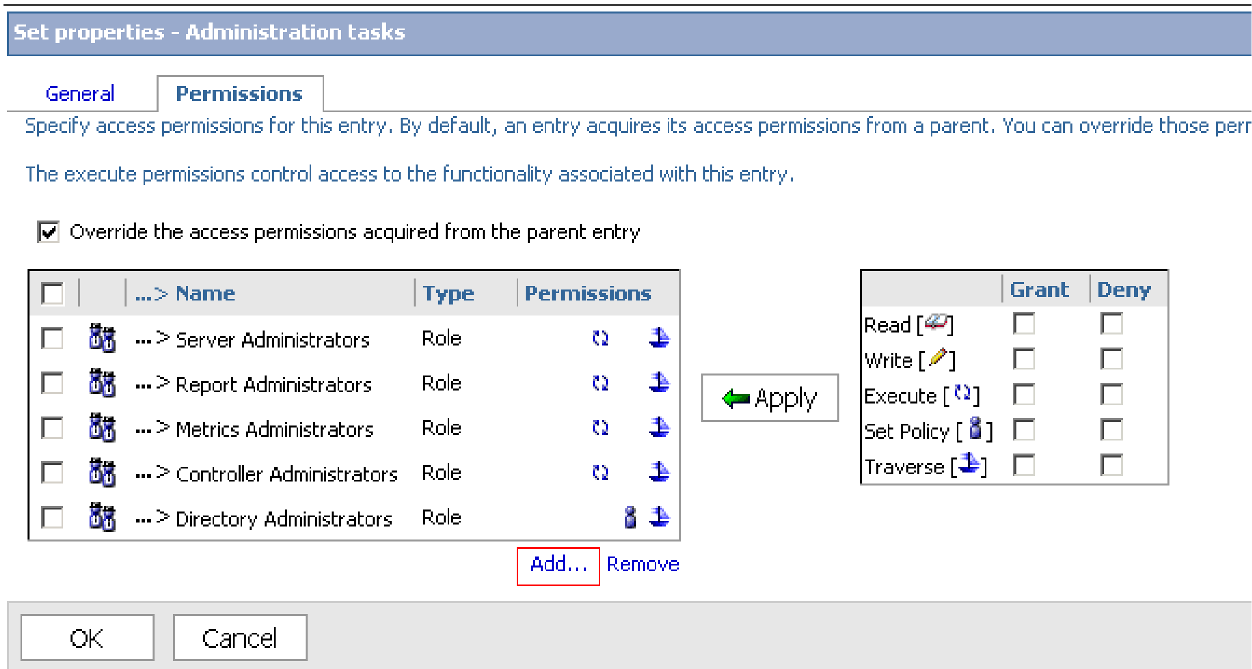
5. You will see a list of Administrative items. Click the Down Arrow menu next to **Administration Tasks**. Select **Set Properties**.



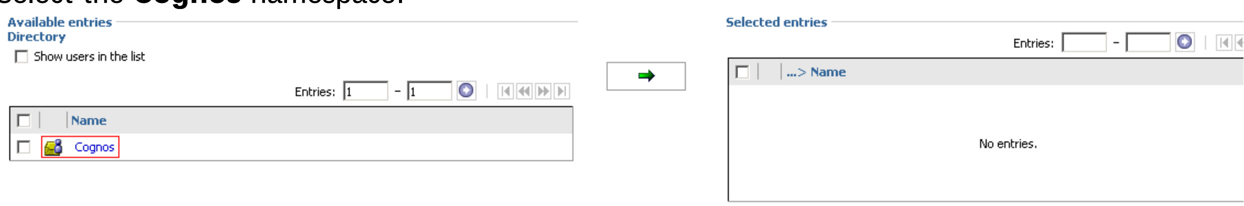
6. Click the **Permissions** tab.



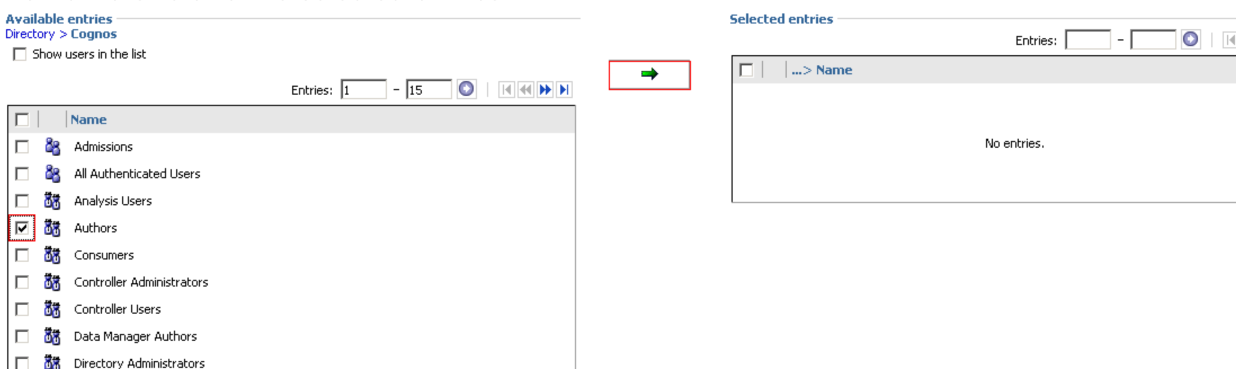
7. Click the **Add...** button.



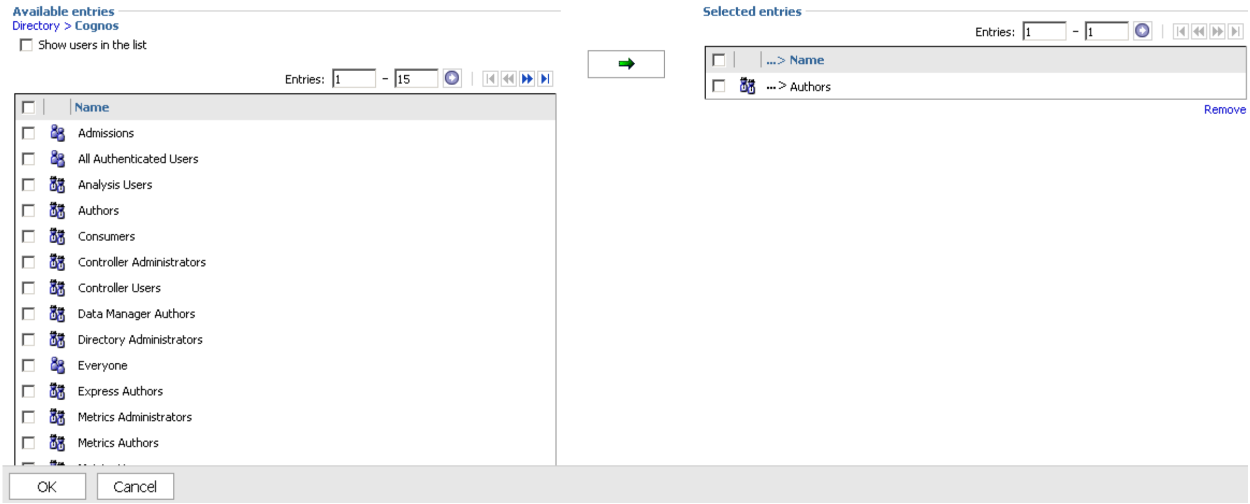
8. Select the **Cognos** namespace.



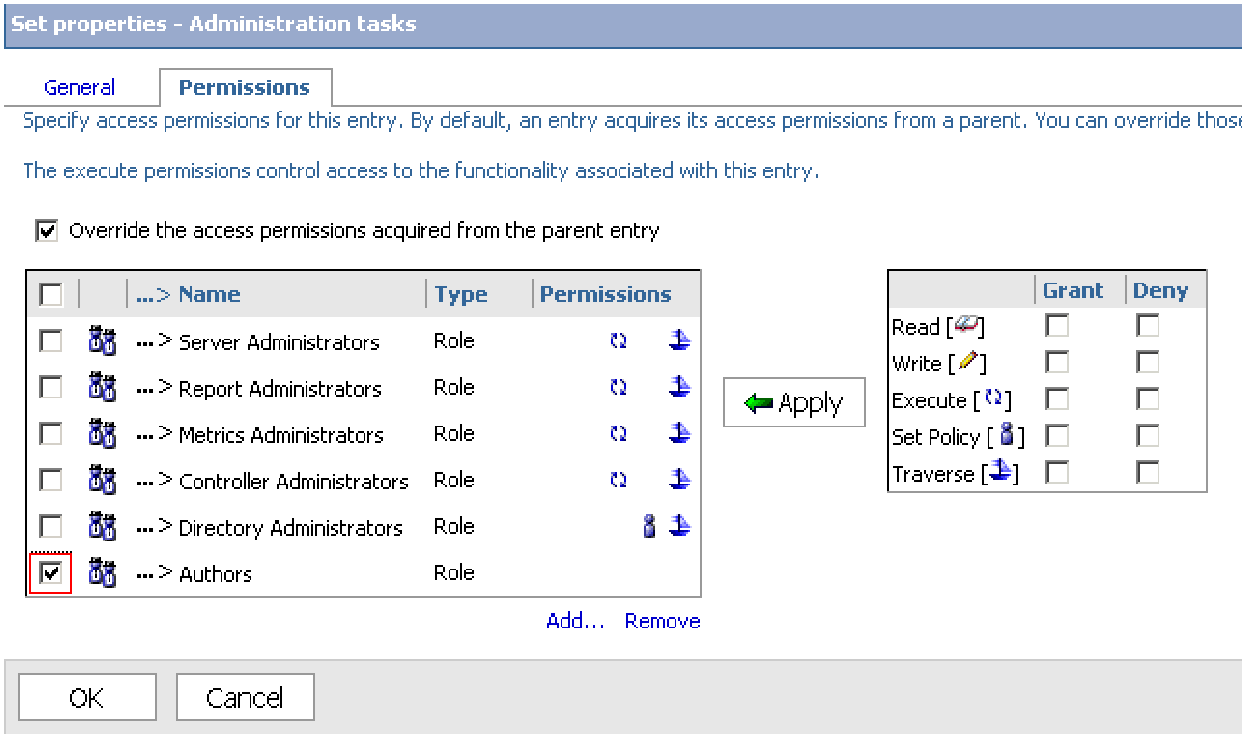
9. Select the check box next to the **Authors** role and click the green arrow to move the Authors role to the selected entries.



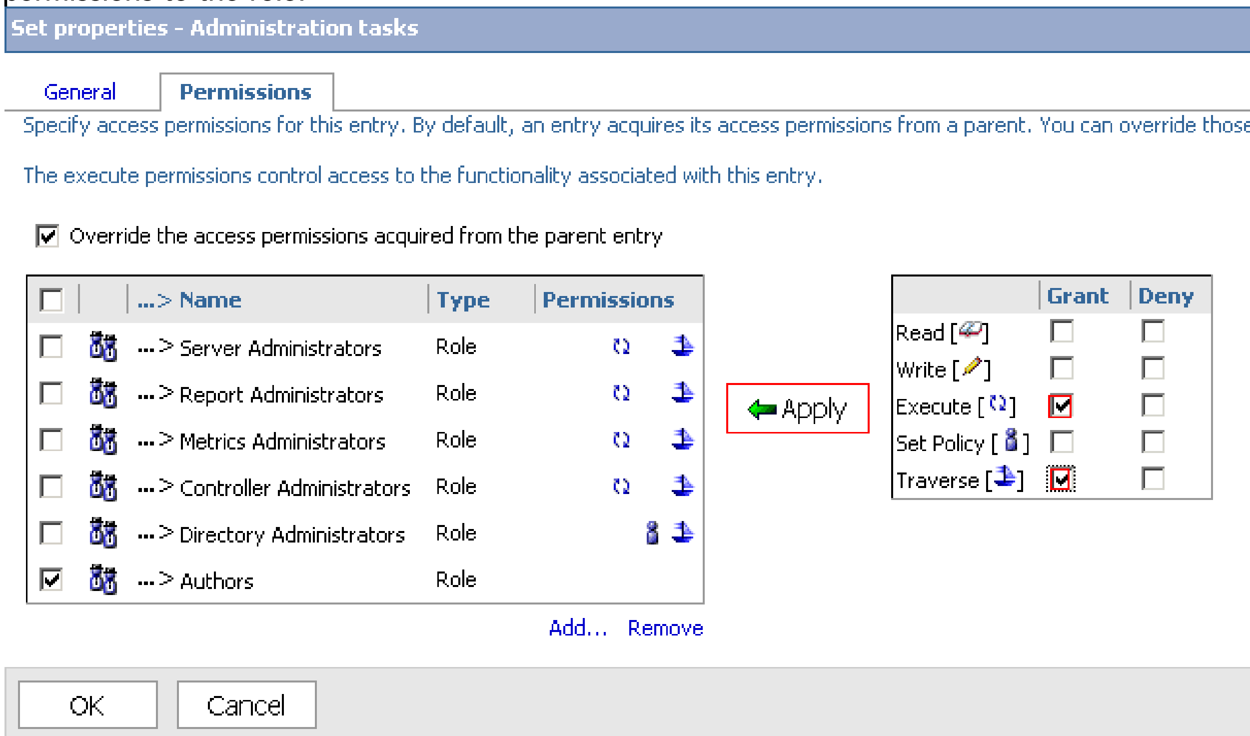
10. Click **Ok**.



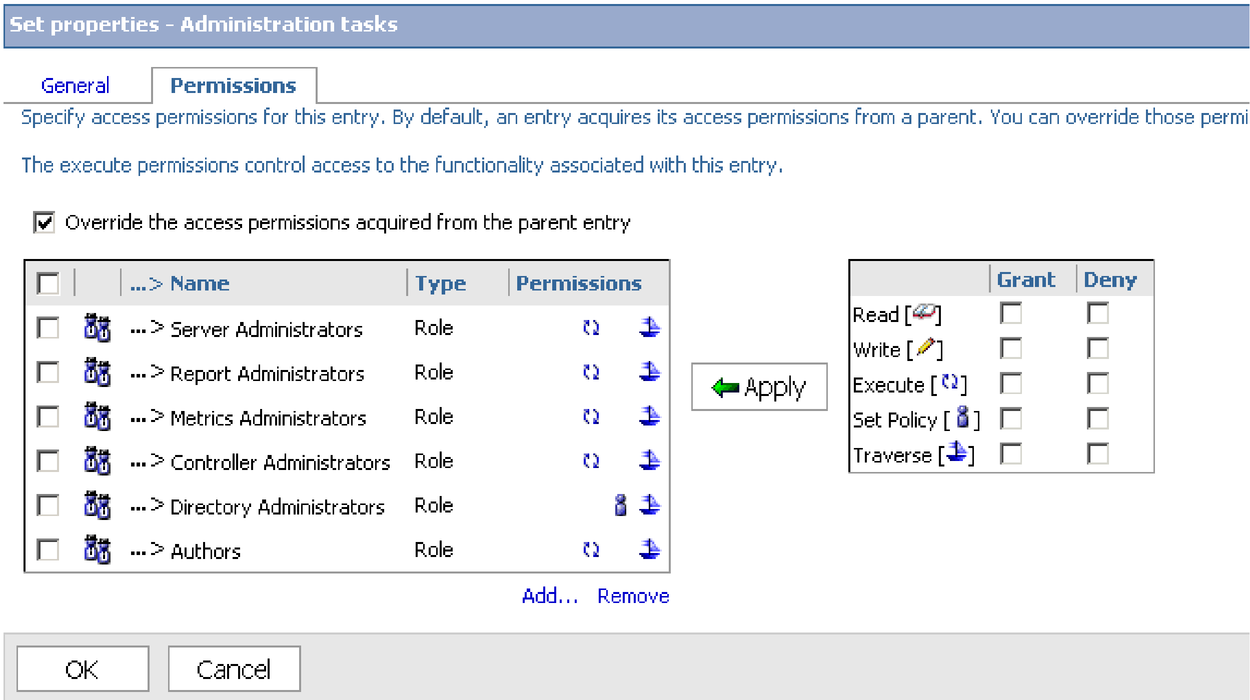
11. You'll notice that the new assigned role does not have any permissions icons next to it. Check the box next the **Authors role** on the left.



12. In the **permissions box** on the right, select **execute** and **traverse** under the Grant column. Then click the **Apply** button in the middle to apply the permissions to the role.



13. Click **Ok**.



The Authors role now has the capability to define exports, imports, index updates, consistency checks and report updates.

Create Data Source Connections

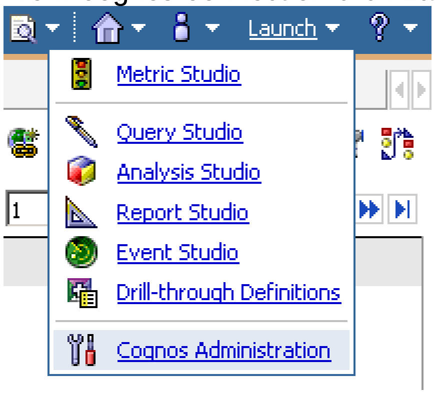
Introduction

A data source connection is required for each data base you intend to report from. These connections are also used for establishing connections in Framework Manager.

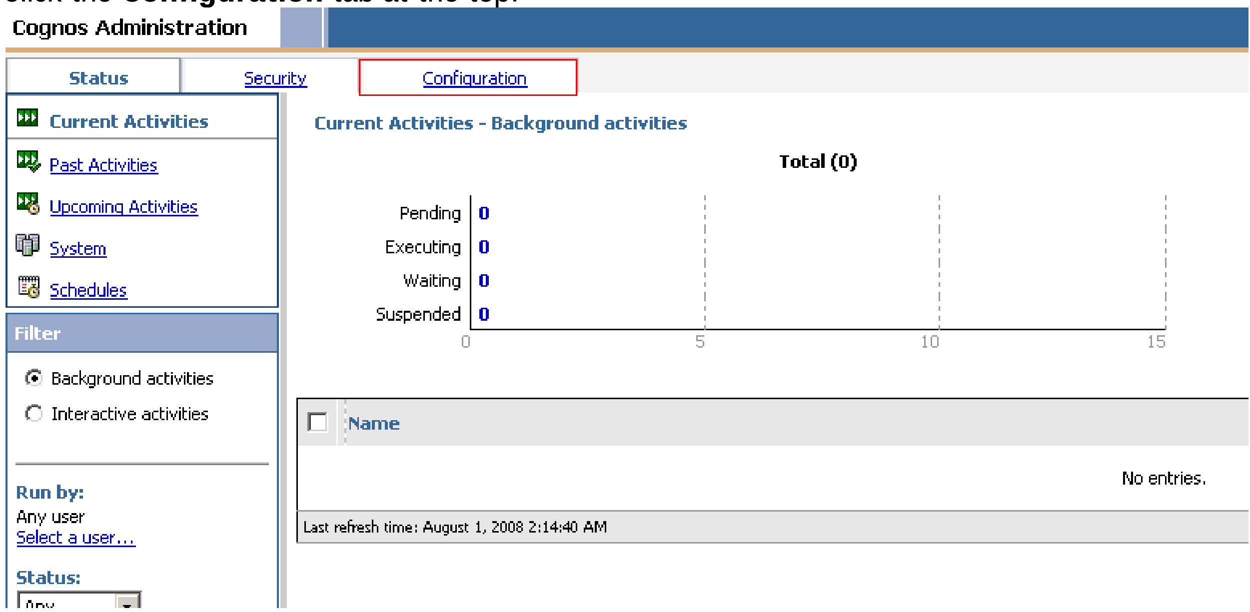
Steps

Follow these steps to create a Data Source Connection.

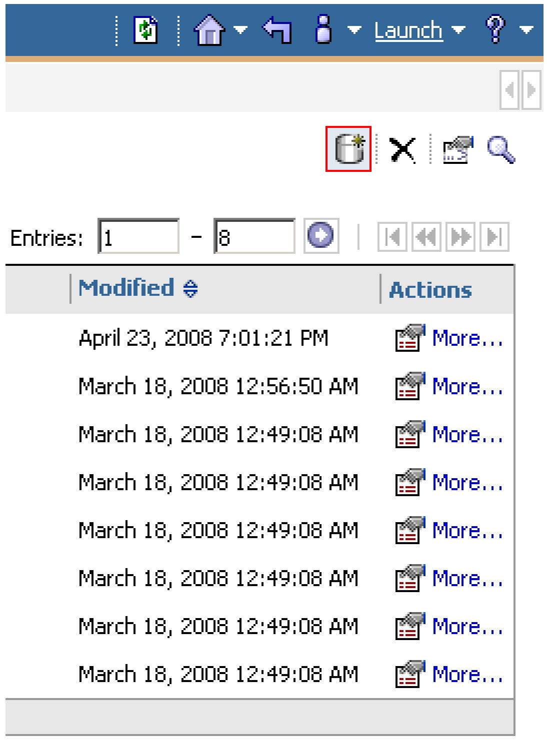
1. From Cognos Connection click **Launch**. Select **Cognos Administration**.



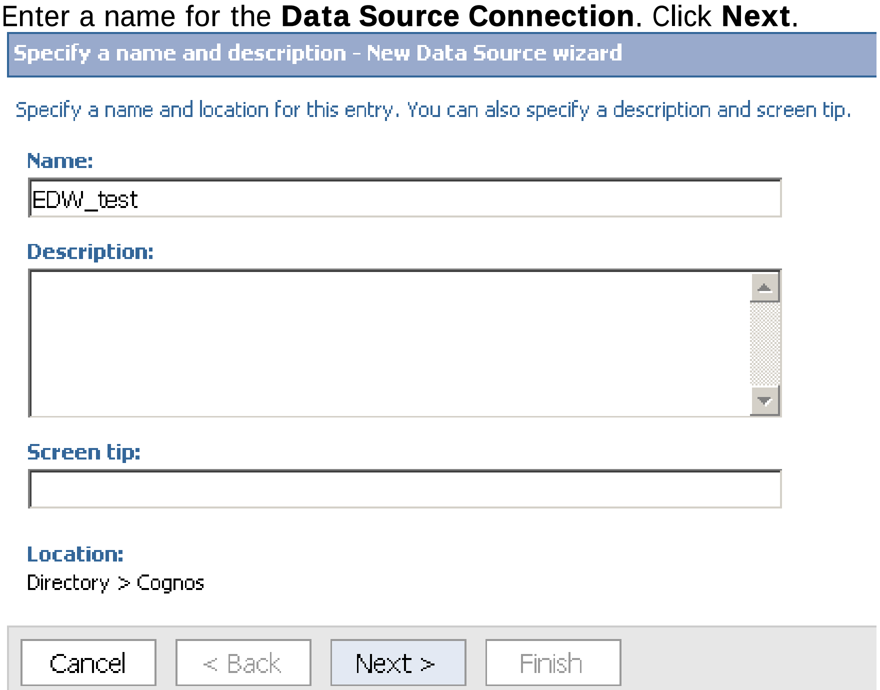
2. Click the **Configuration** tab at the top.



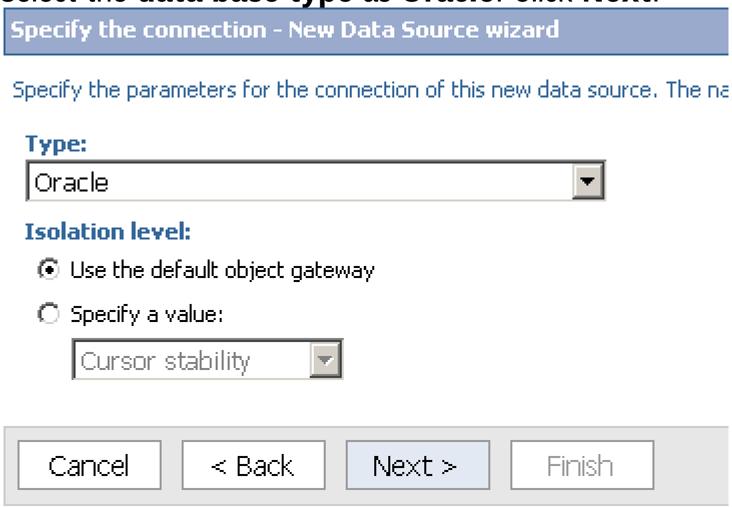
3. With **Data Source Connections** selected on the left menu, click the **New Data Source** icon.



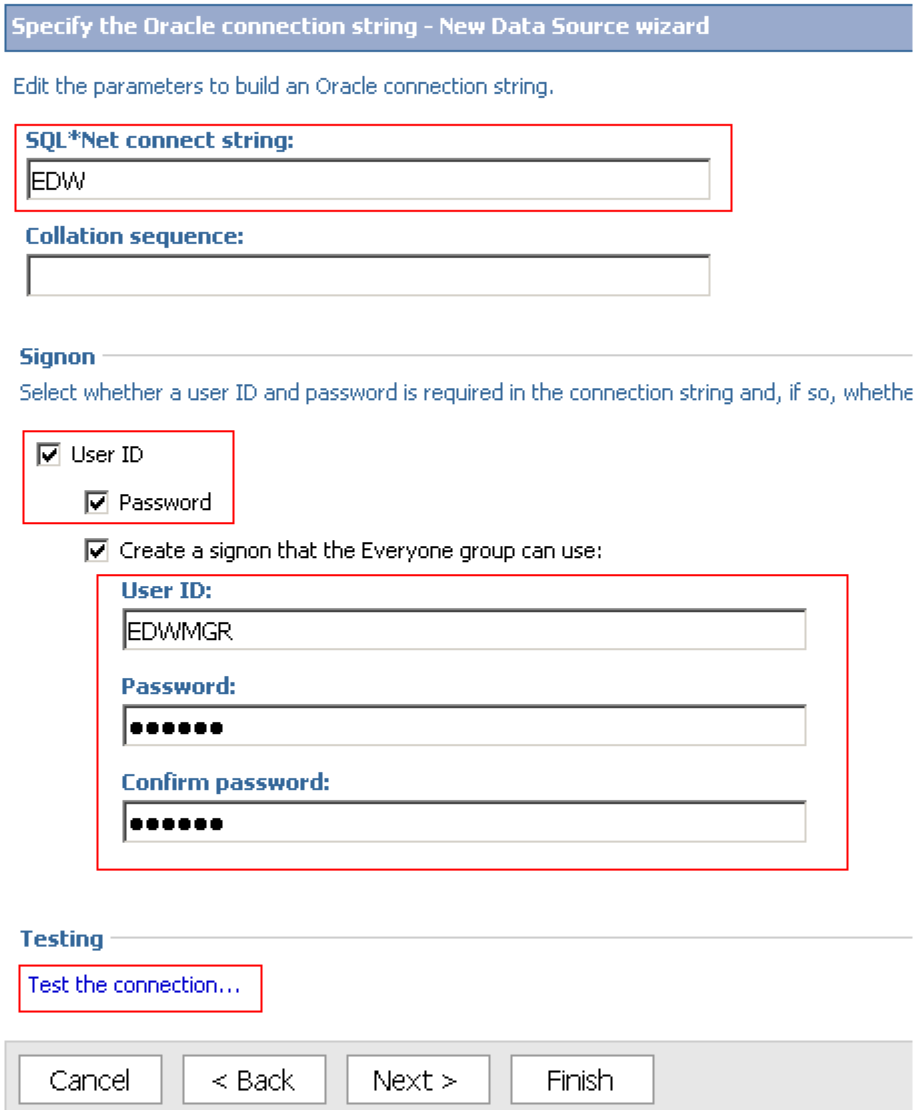
4. Enter a name for the **Data Source Connection**. Click **Next**.



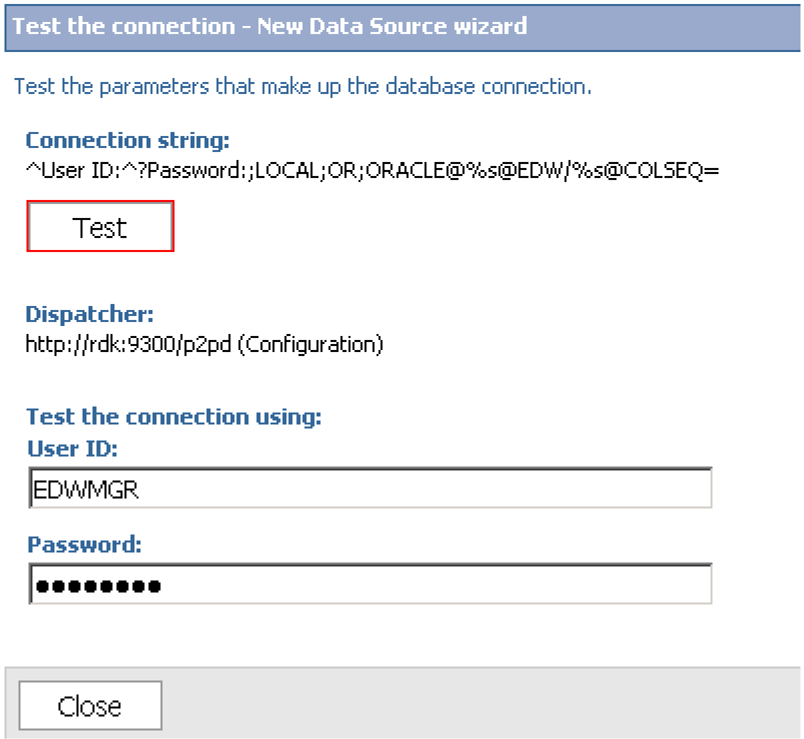
5. Select the **data base type** as **Oracle**. Click **Next**.



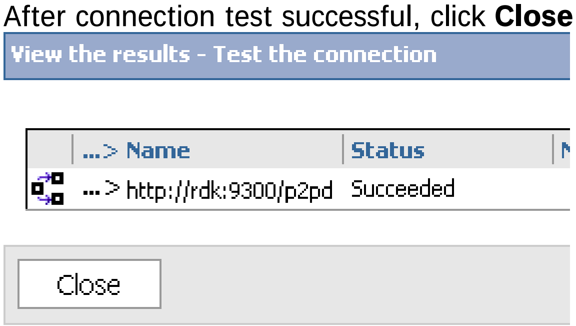
6. Provide the **connection string**, typically the database name that's also entered in your local tnsnames.ora file in your Oracle installation path. In addition **check the boxes** for the **User ID** and **Password** fields. Enter the **schema owner** and **password**. Then click the **Test the Connection...** button.



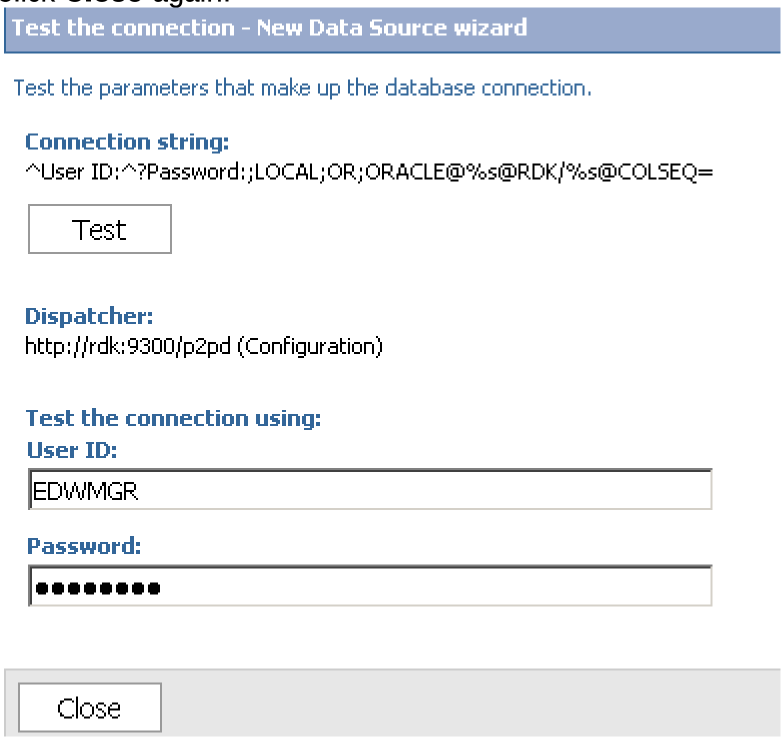
7. Click the **Test button**.



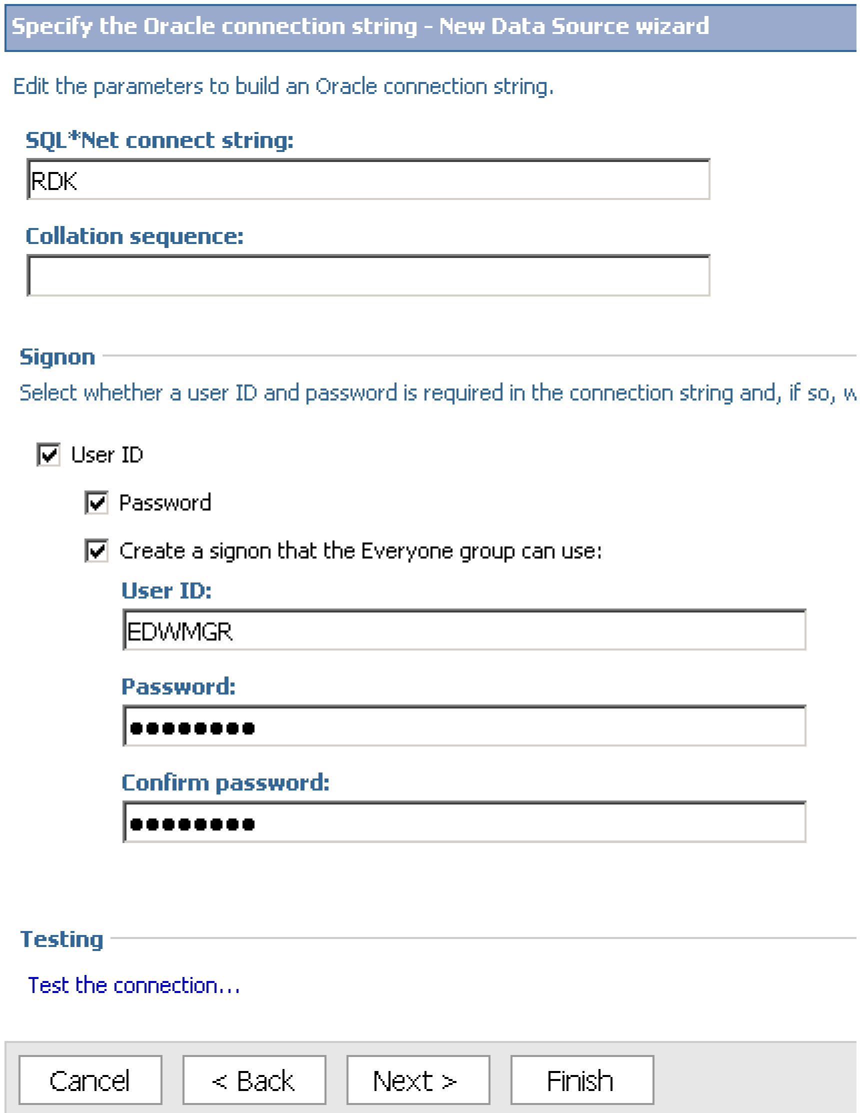
8. After connection test successful, click **Close**.



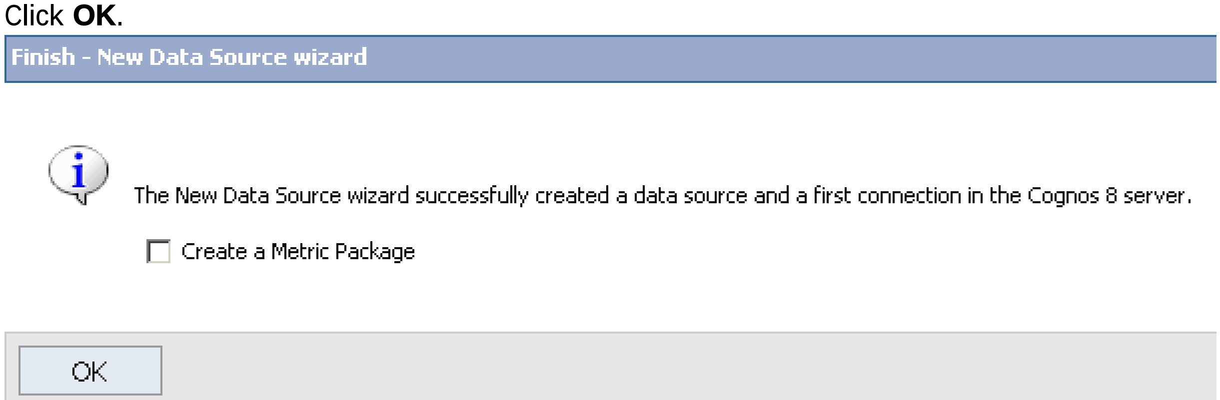
9. Click **Close** again.



10. Click **Finish**.



11. Click **OK**.



Export and Import Data

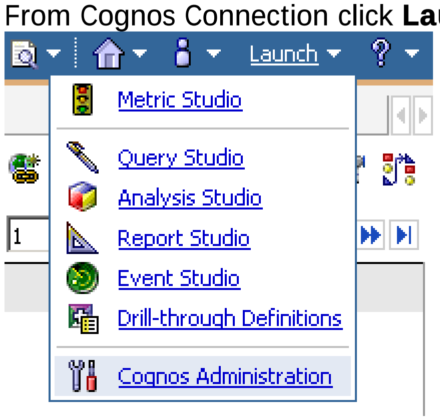
Introduction

Exporting and Importing data allows you to move objects from one environment to another. Exporting environment data can serve as a backup procedure, in addition to server and database backups. Specific parts of the content store can be exported, or the entire content store can be exported.

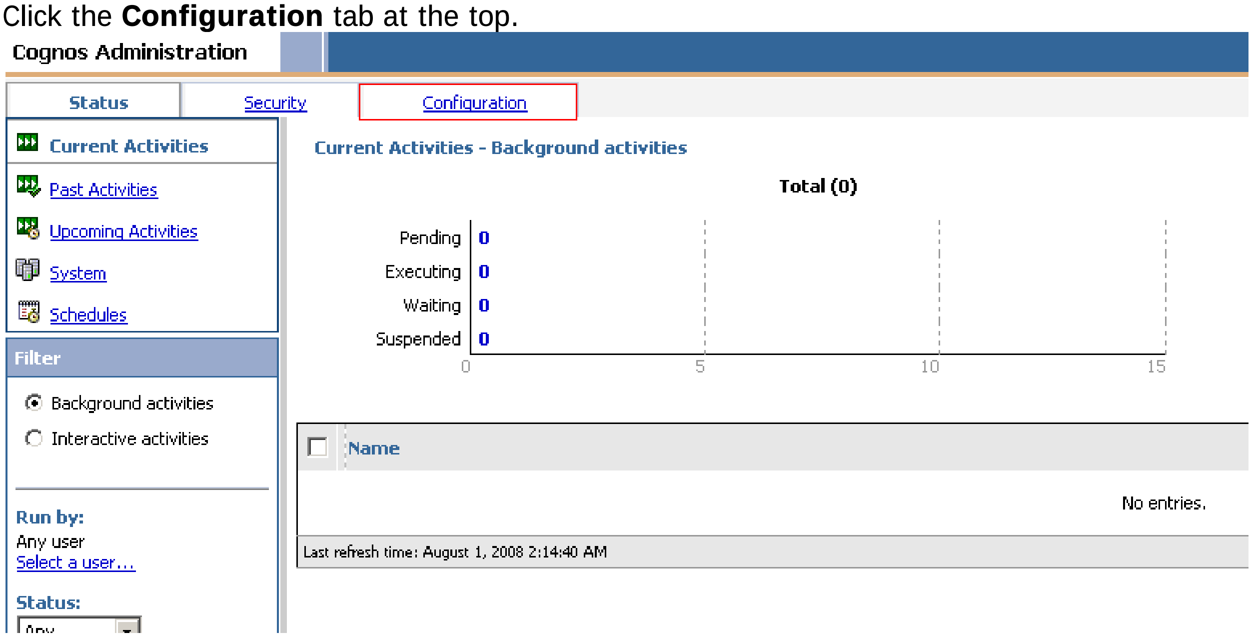
Steps – Export Data

Follow these steps to create an export.

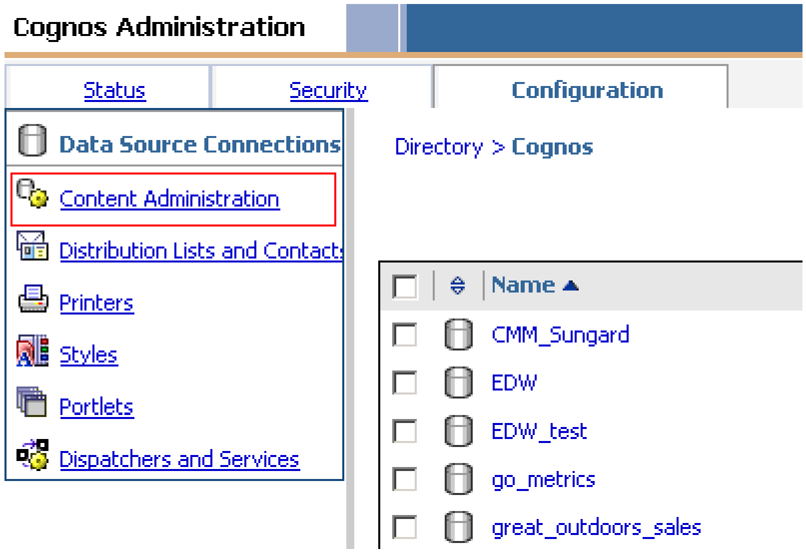
1. From Cognos Connection click **Launch**. Select **Cognos Administration**.



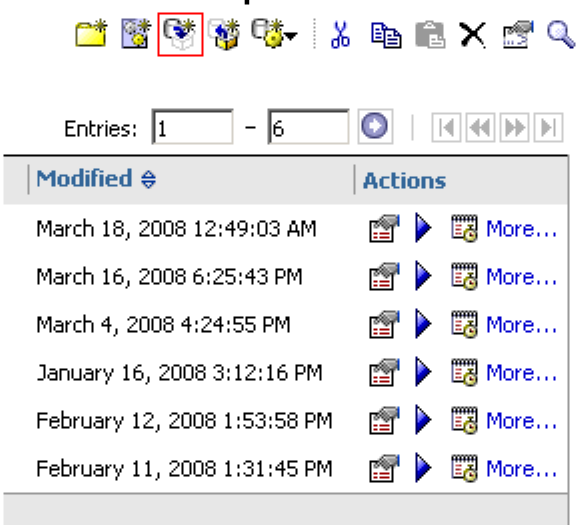
2. Click the **Configuration** tab at the top.



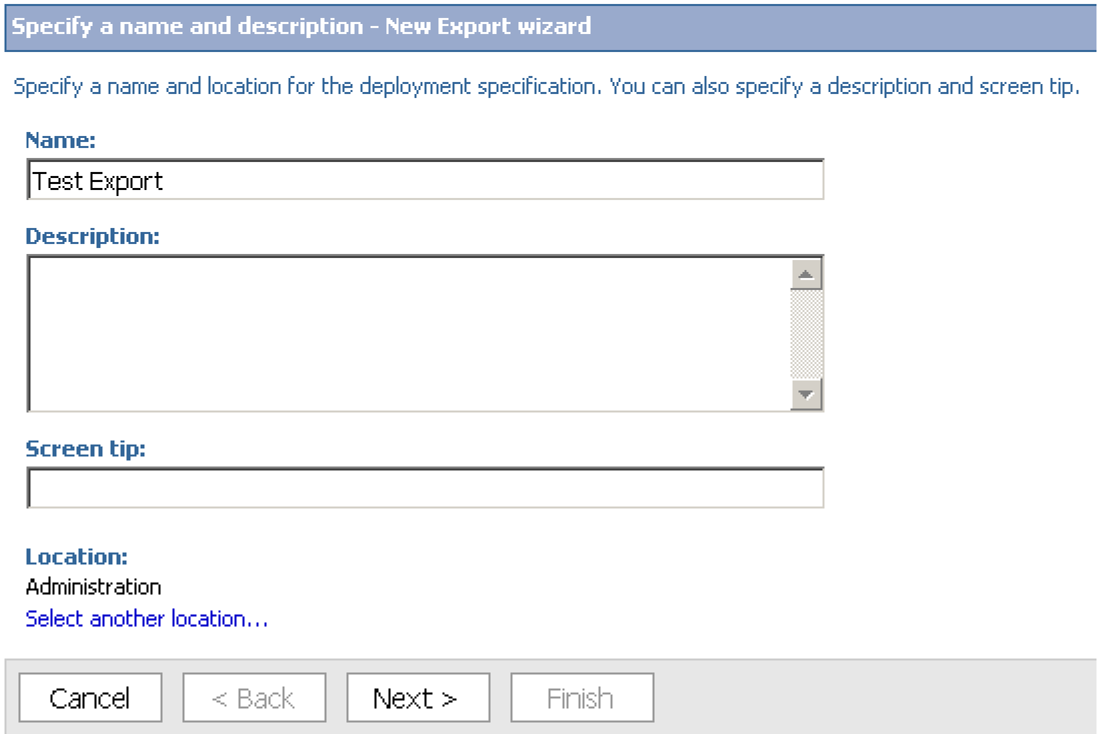
3. Click on the **Content Administration** link.



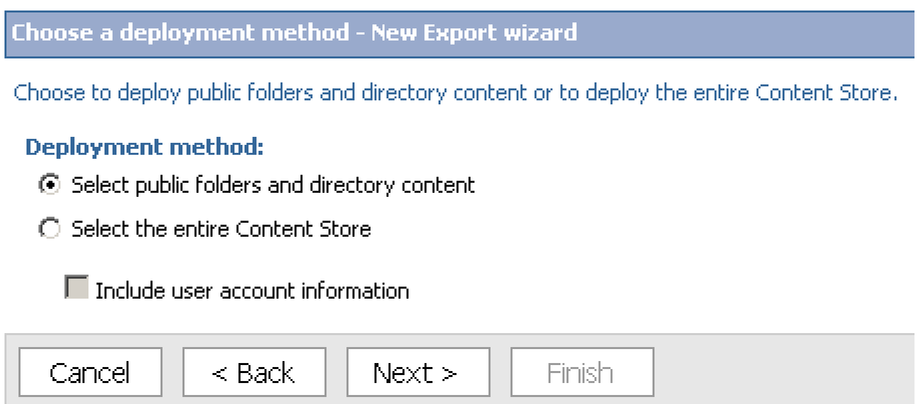
4. Click the **New Export** button.



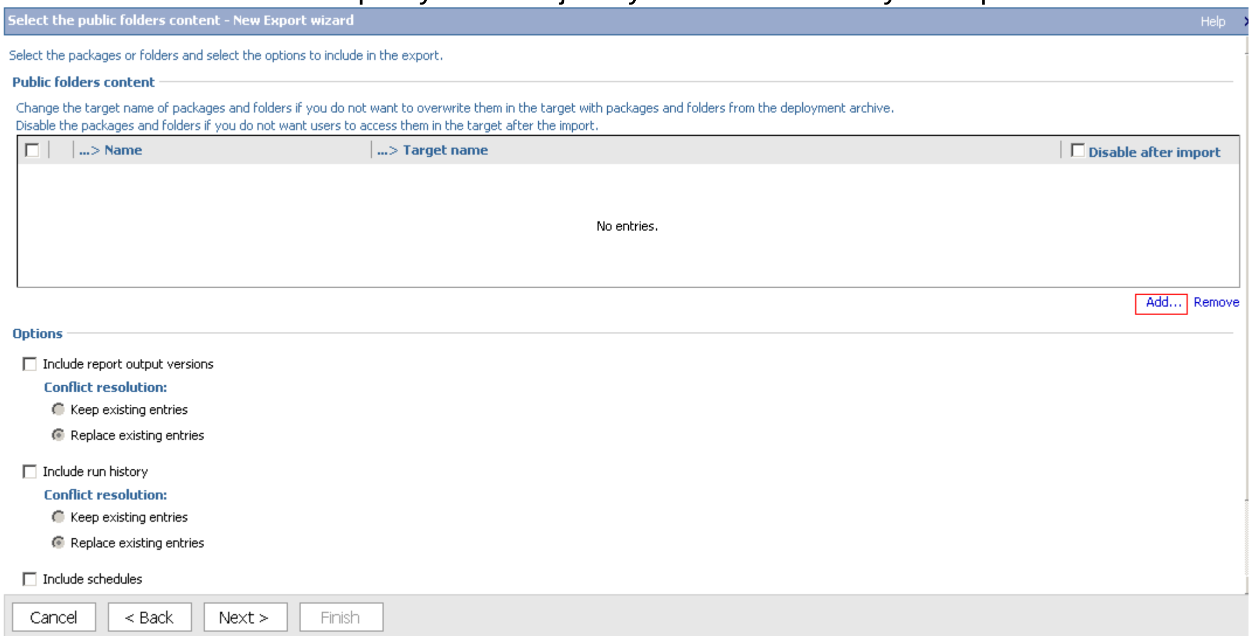
5. Specify an export **Name and Location** to save the file. Click **Next**.



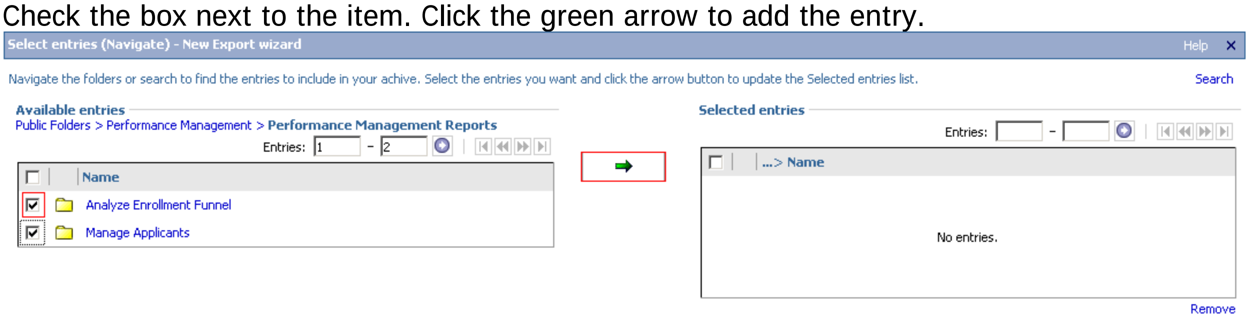
6. Leave the default "Select public folders and directory content" selected. Click **Next**.



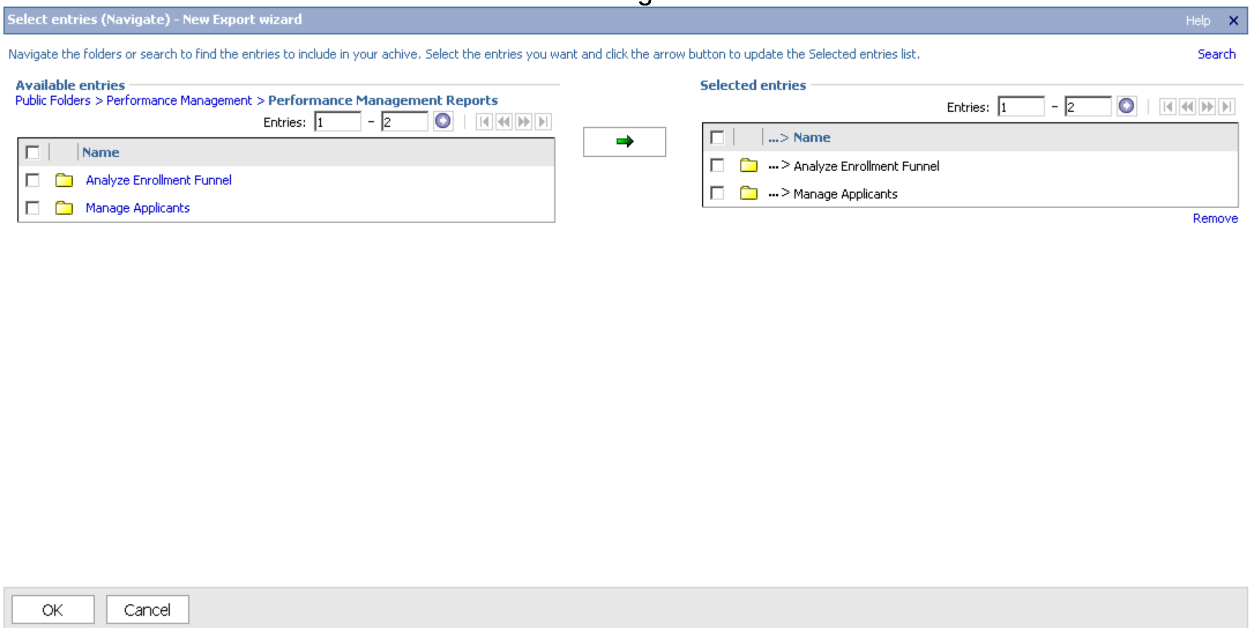
7. Click the **Add…** button to specify which objects you want to add to your export.



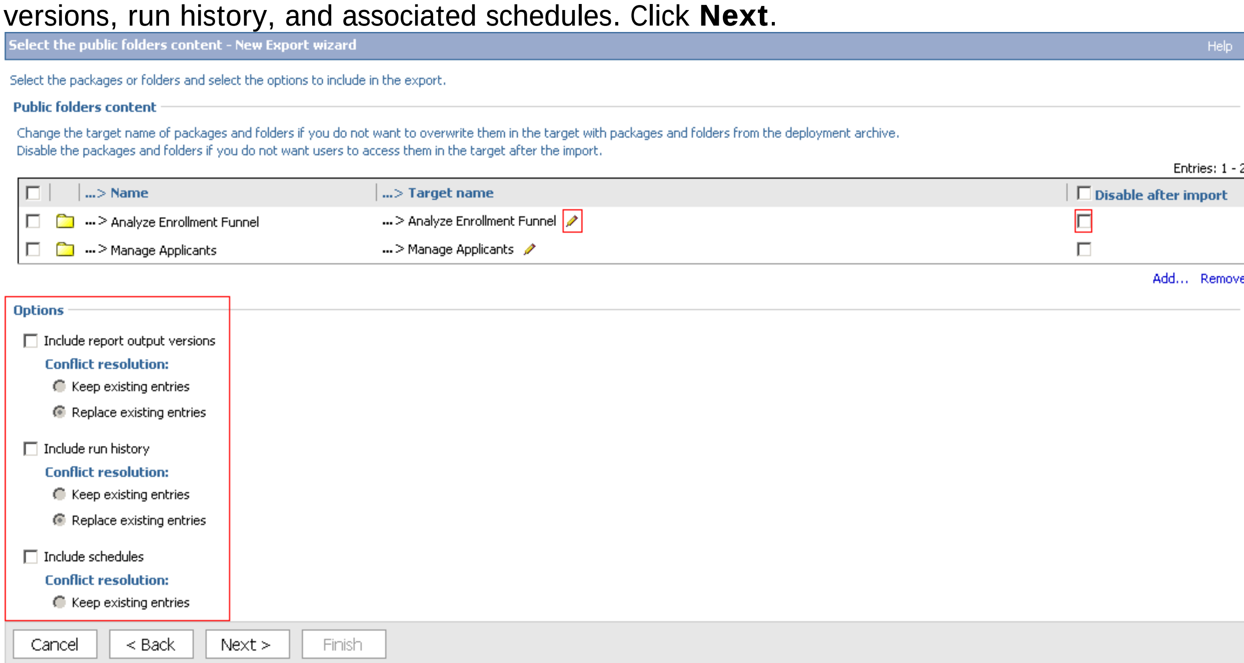
8. On the left, navigate to the folder you want to add by clicking on the folder links. Check the box next to the item. Click the green arrow to add the entry.



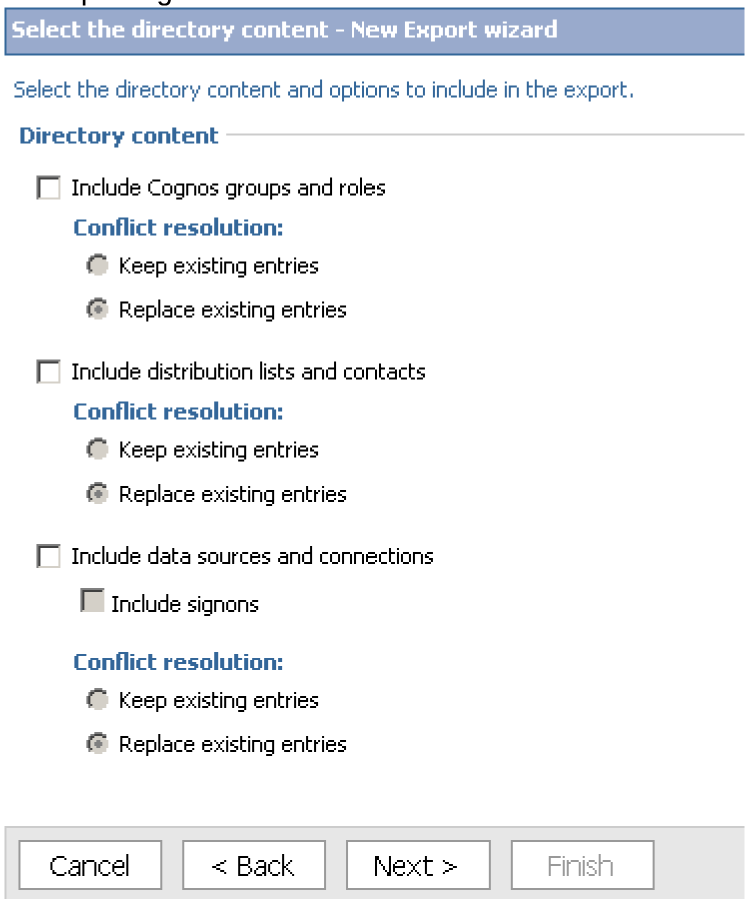
9. Notice that the entries have been added to the right side. Click **OK**.



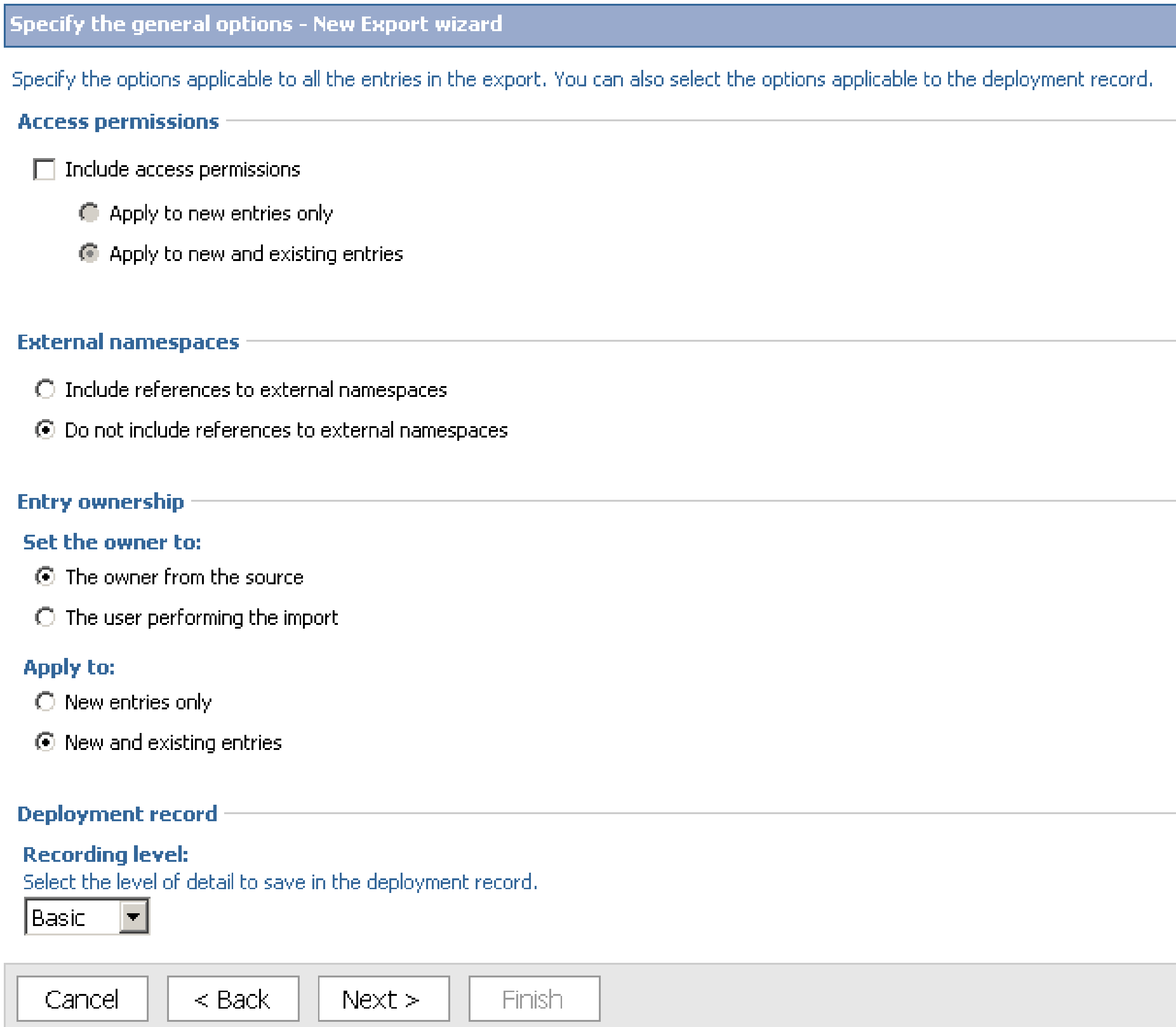
10. You can edit the target name of the objects and disable the objects after import if you choose. In addition under Options, you can decide to include report output versions, run history, and associated schedules. Click **Next**.



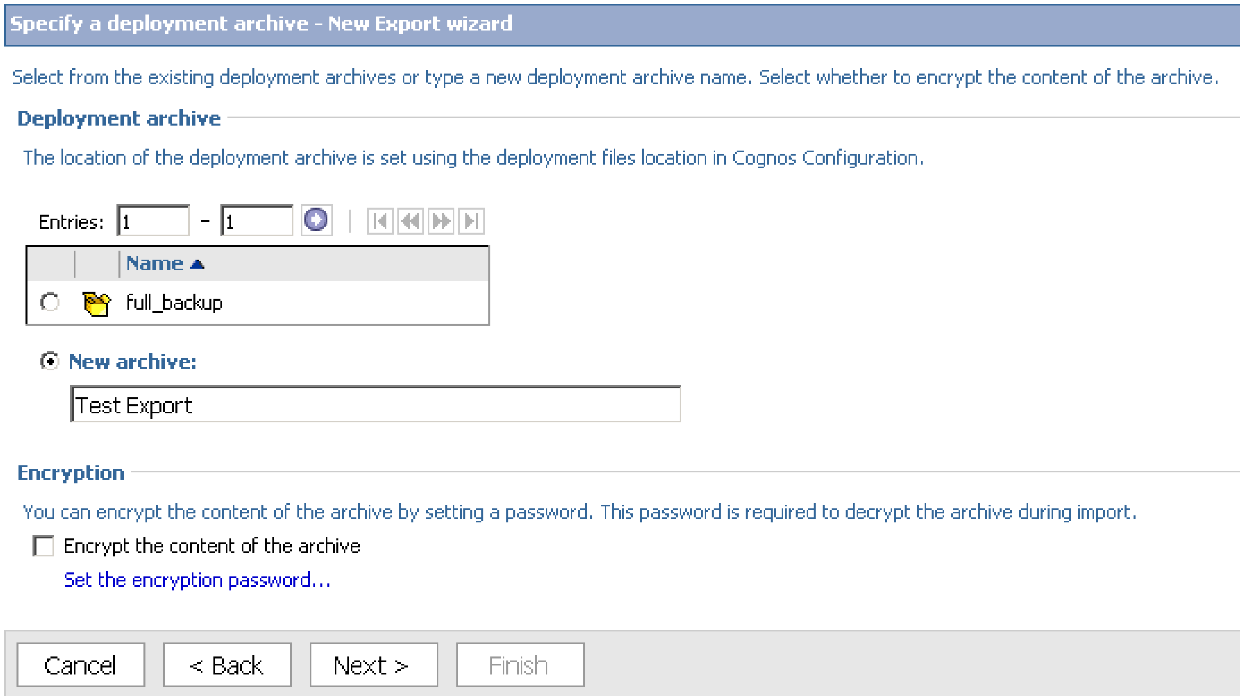
11. Specify if you want to include any of the associated objects of the objects you are exporting.



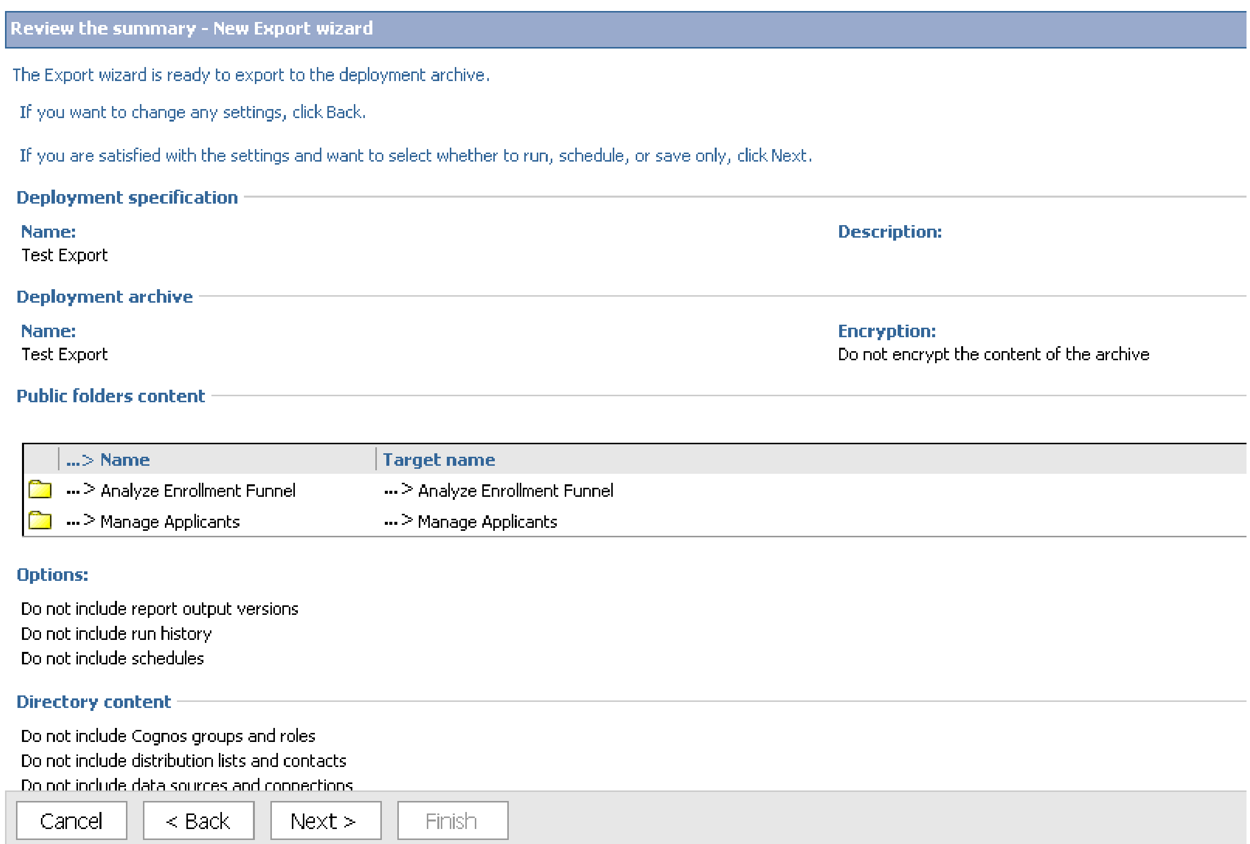
12. Specify the general options of the export.



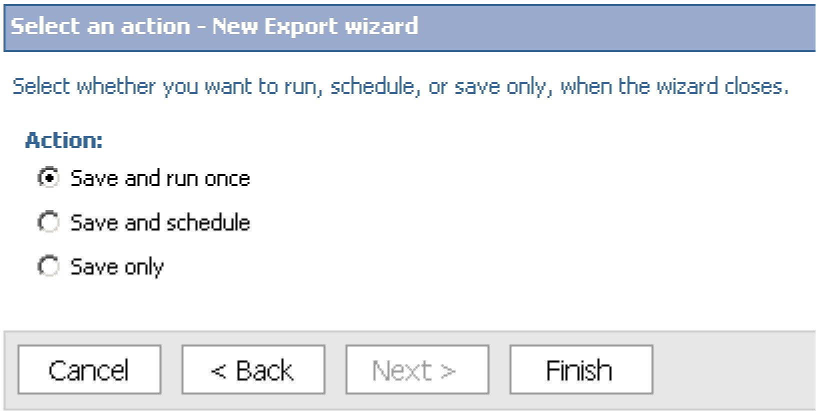
13. Leave the default selected to create a new Archive. Click **Next**.



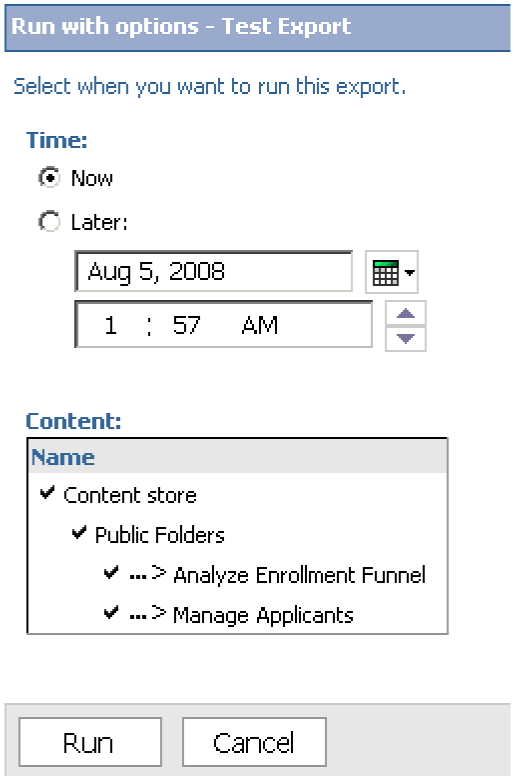
14. Review the summary of the export. Click **Next**.



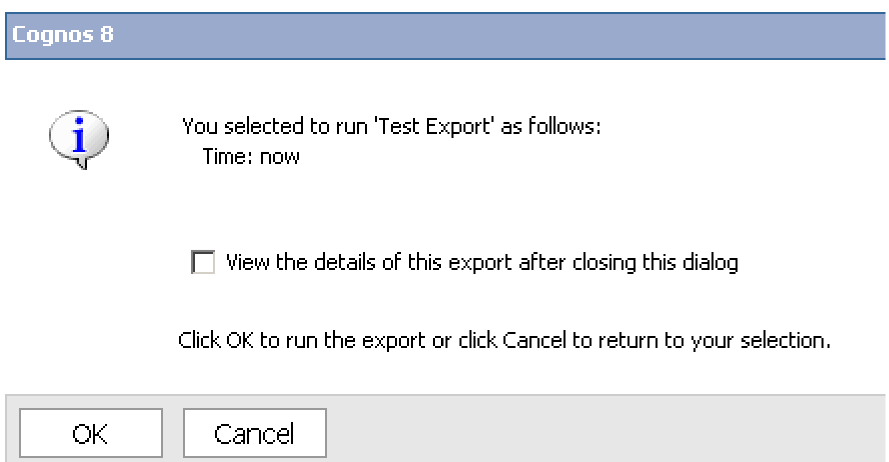
15. Click **Save and Run Once**. Click **Finish**.



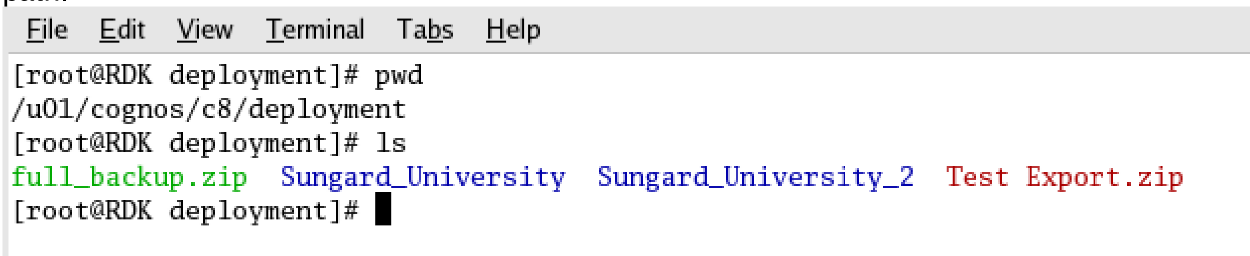
16. Click **Run**.



17. Click **OK**.



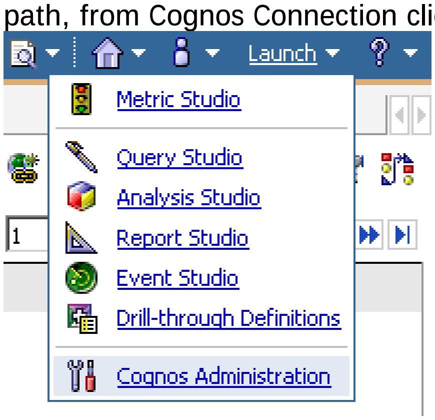
18. Notice that a Zip file was created in your Cognos_installation_path/deployment path.



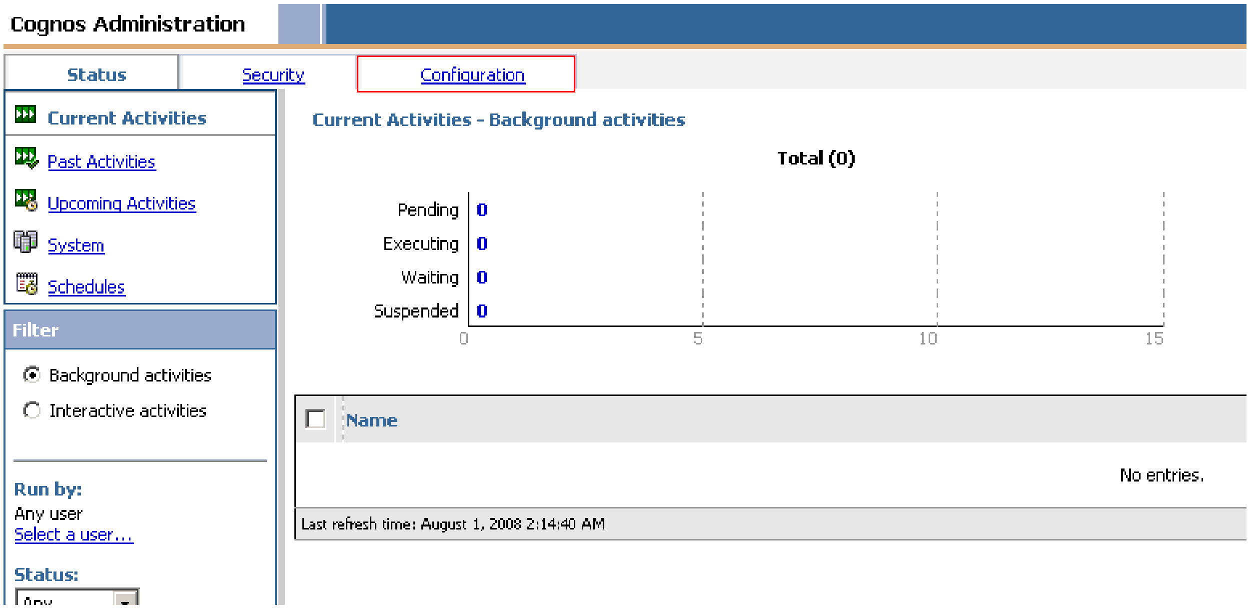
Steps – Import Data

Follow these steps to import data.

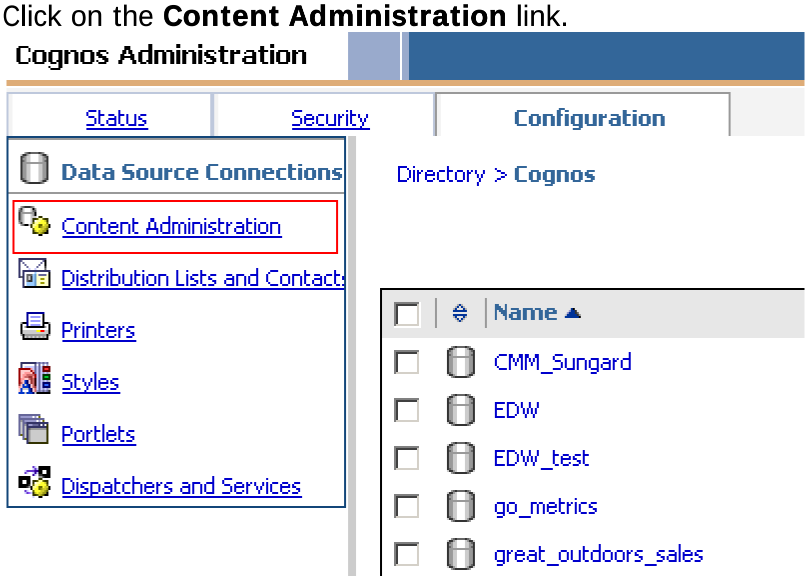
1. With the exported Zip file located in your Cognos_installation_path/deployment path, from Cognos Connection click **Launch**. Select **Cognos Administration**.



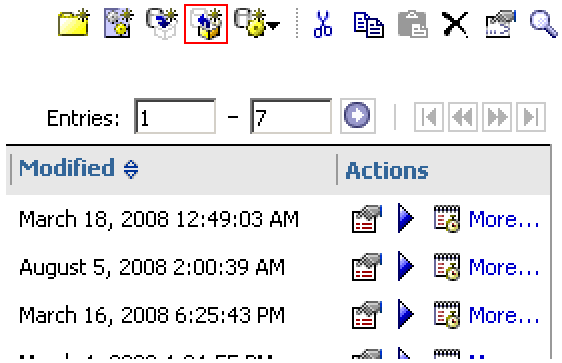
2. Click the **Configuration** tab at the top.



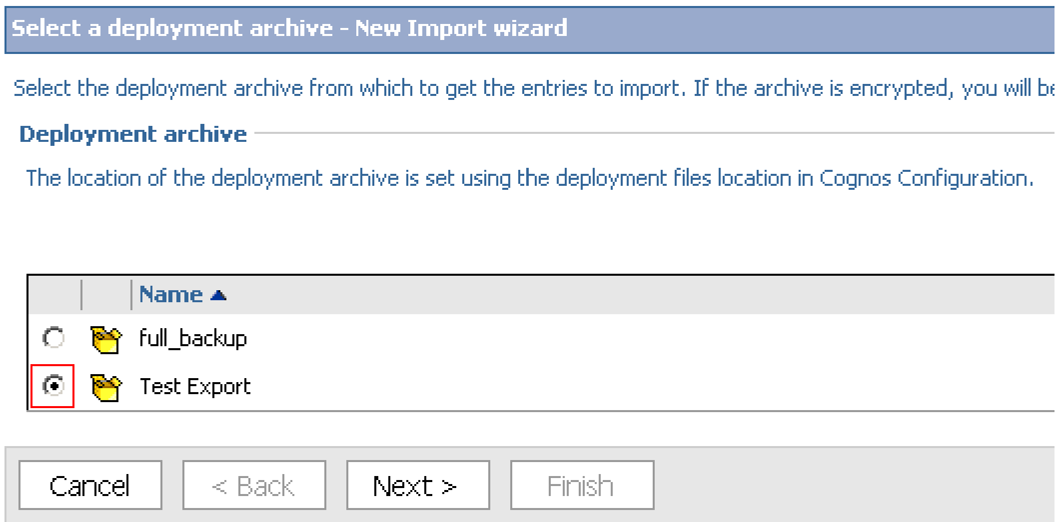
3. Click on the **Content Administration** link.



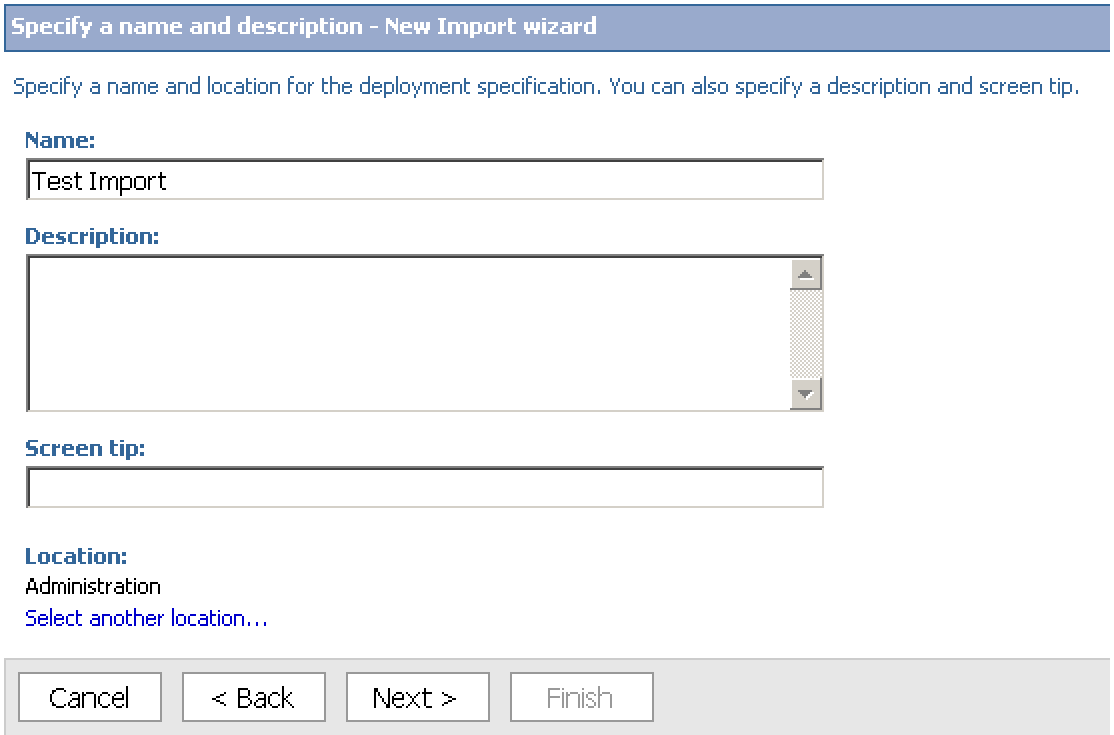
4. Click the **New Import** button.



5. Select the **export folder** you just created. Click **Next**.

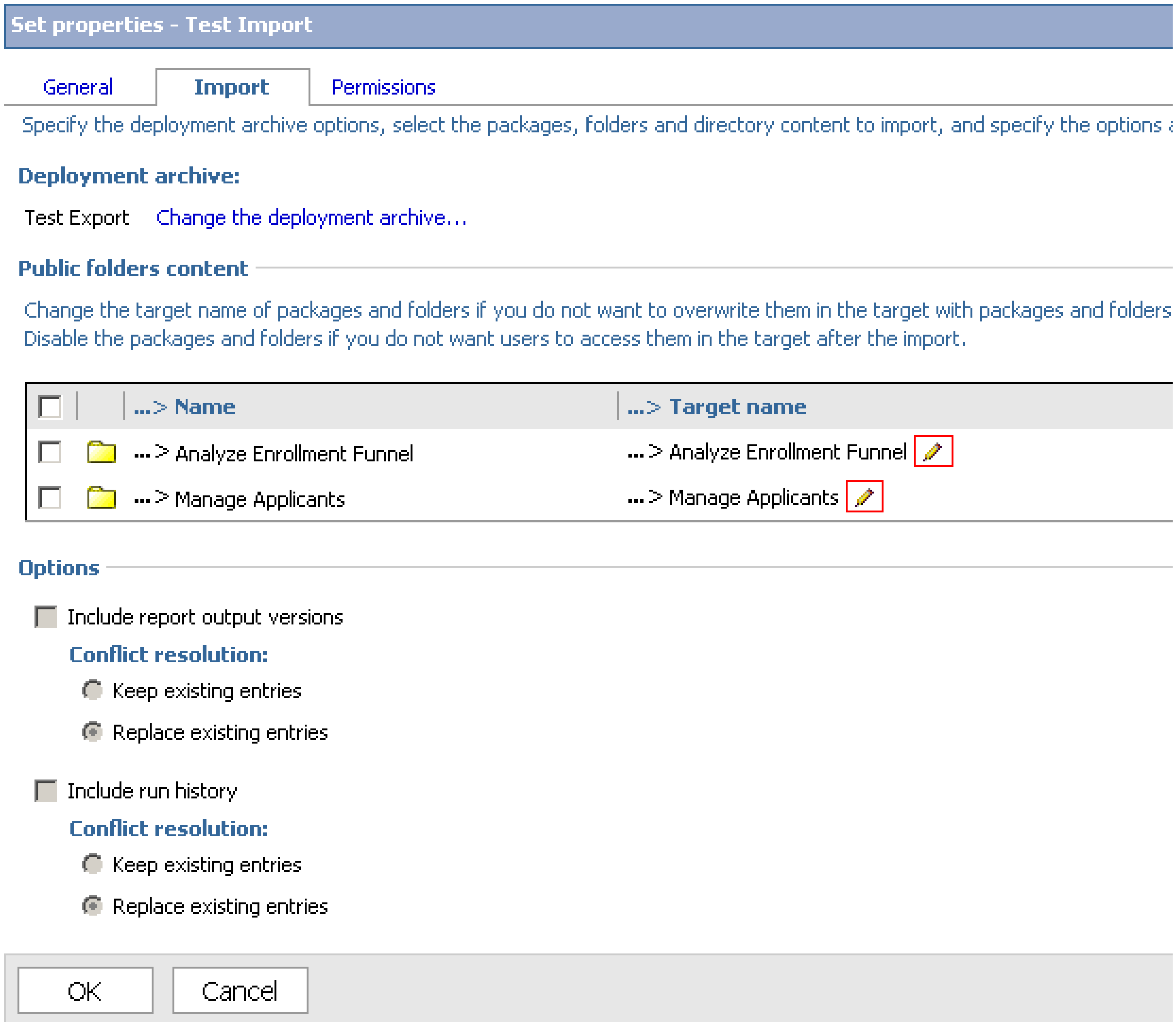


6. Enter a name for your import in the **Name** field.

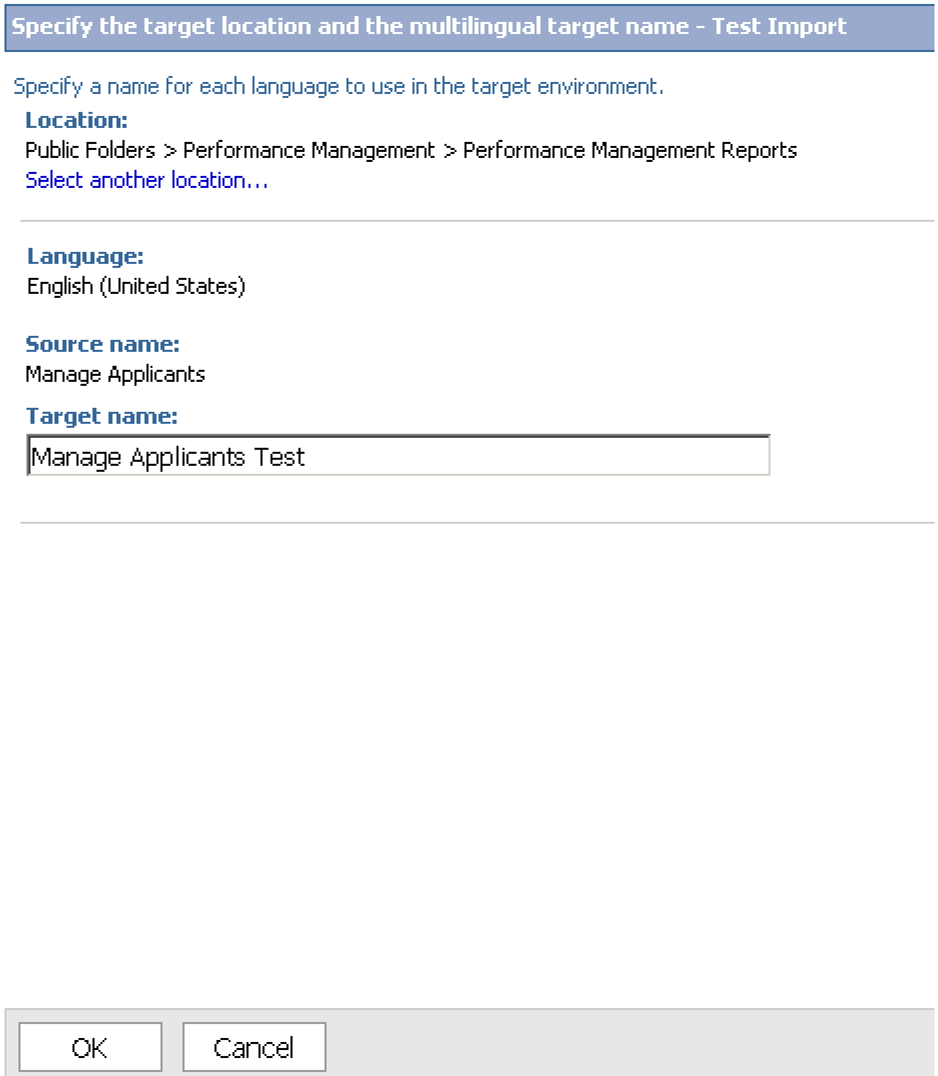


7. Click **Next**.

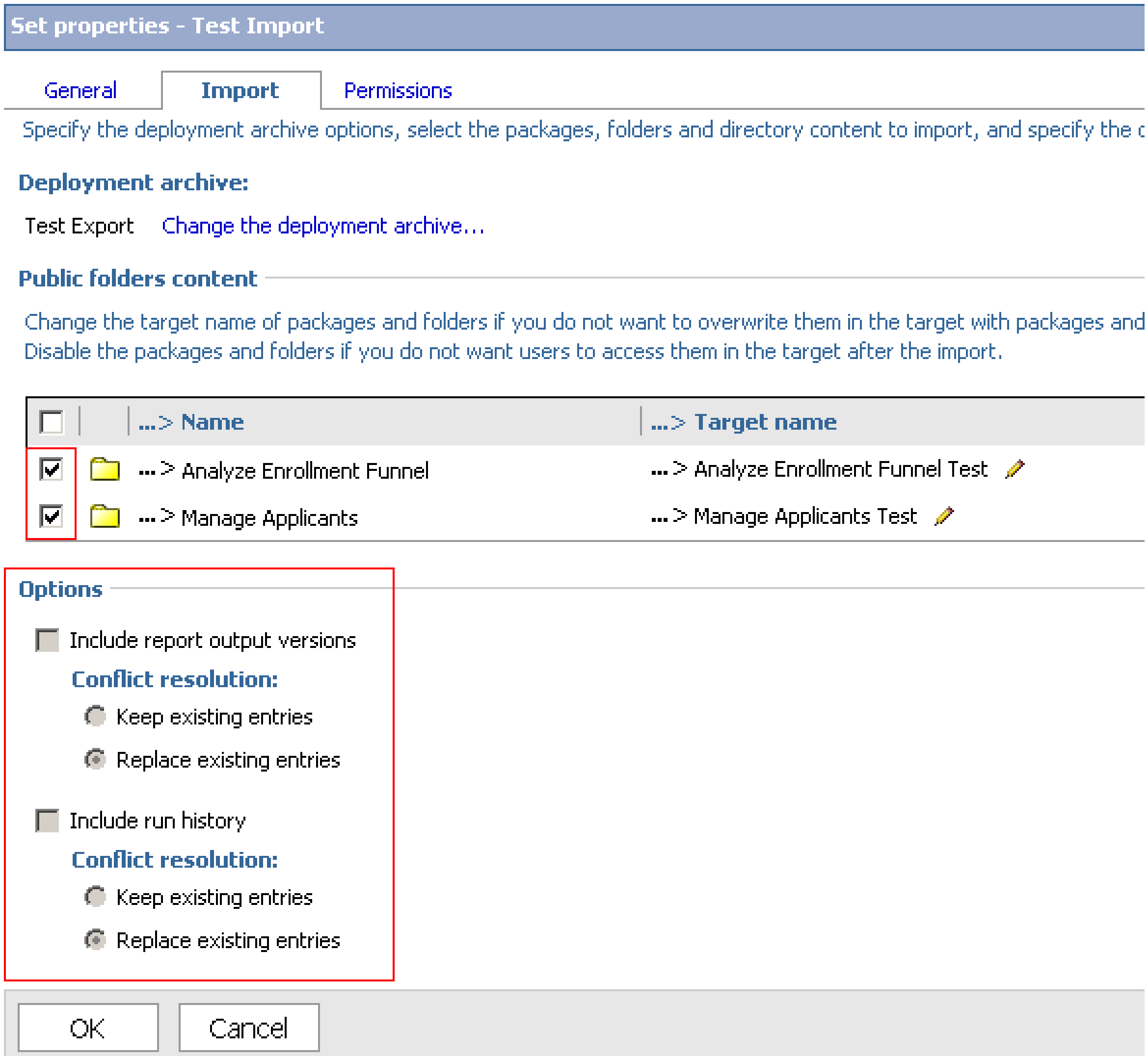
8. Edit the target name of the objects by clicking on the **Edit** (pencil) icon next to the object Target Name.



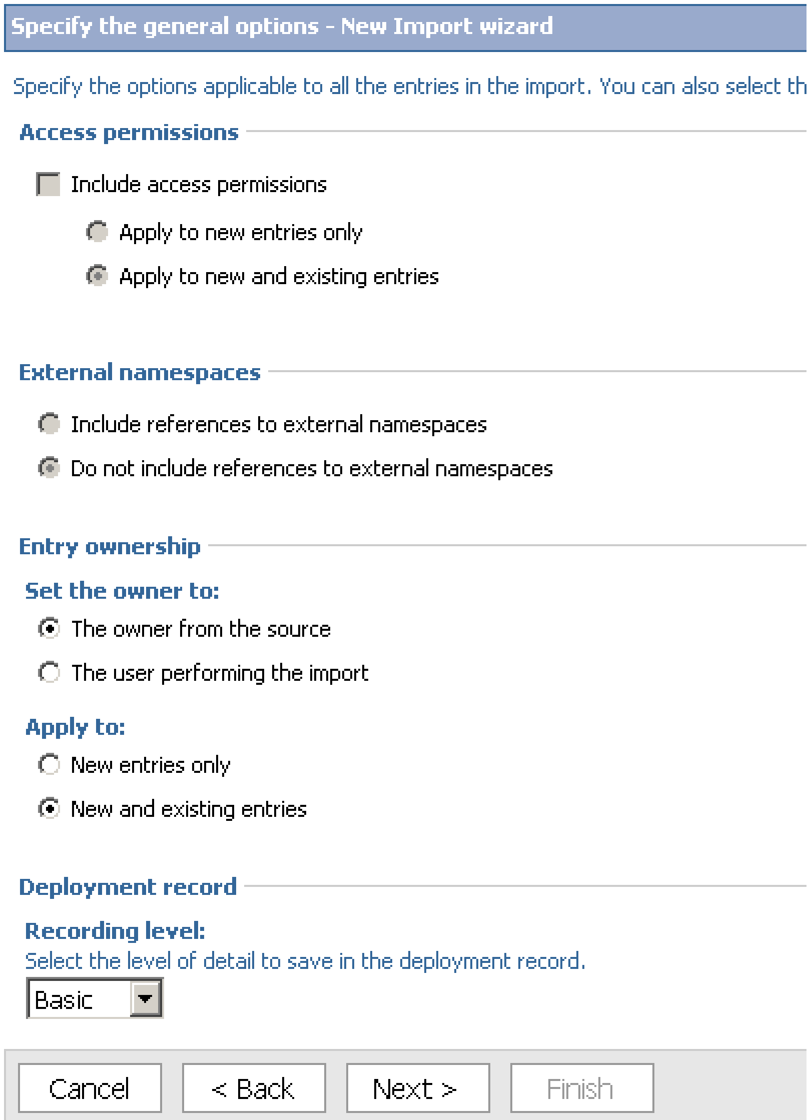
9. Add *Test* to the end of each object name. Click **OK**.



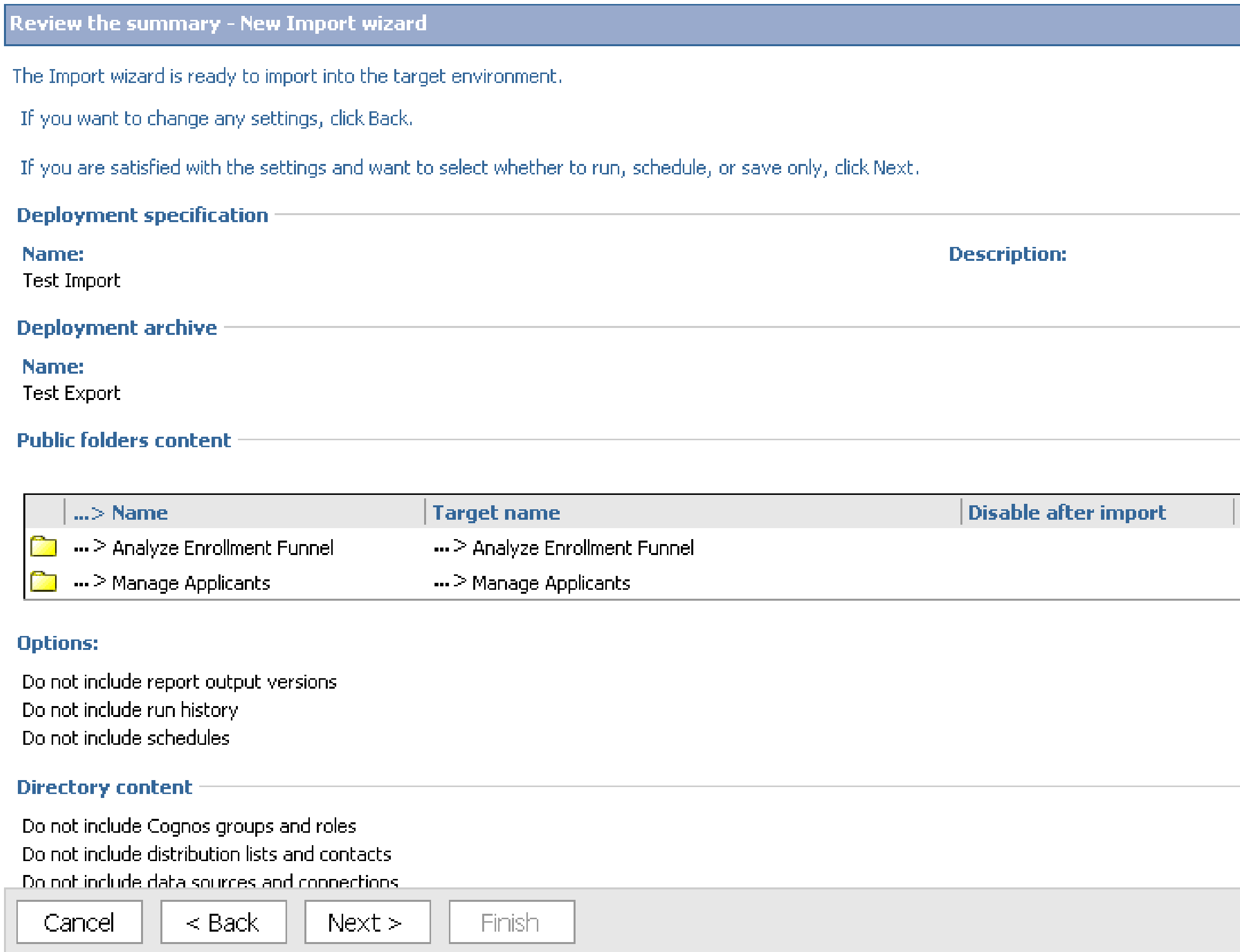
10. Select the objects you want to import. Specify if you want to include report output versions, or run history. Click **OK**.



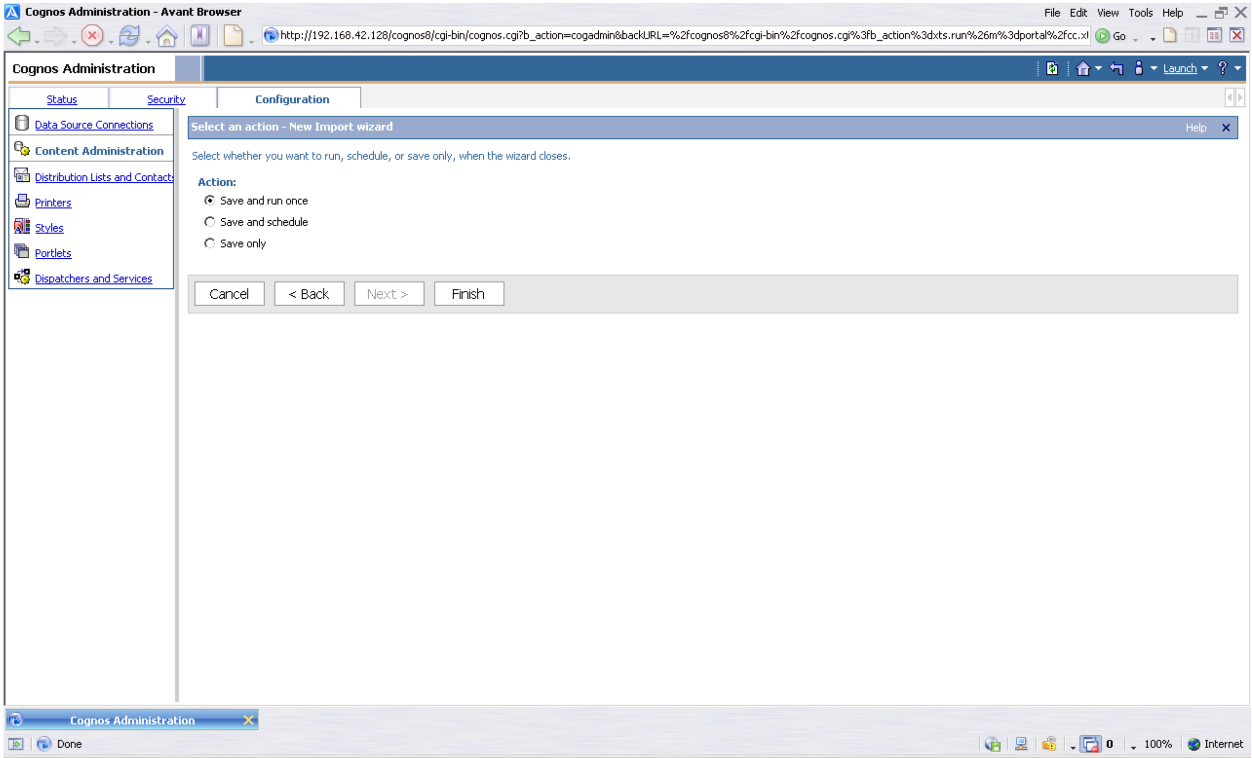
11. Specify if you want to include any of the associated objects of the objects you are importing.



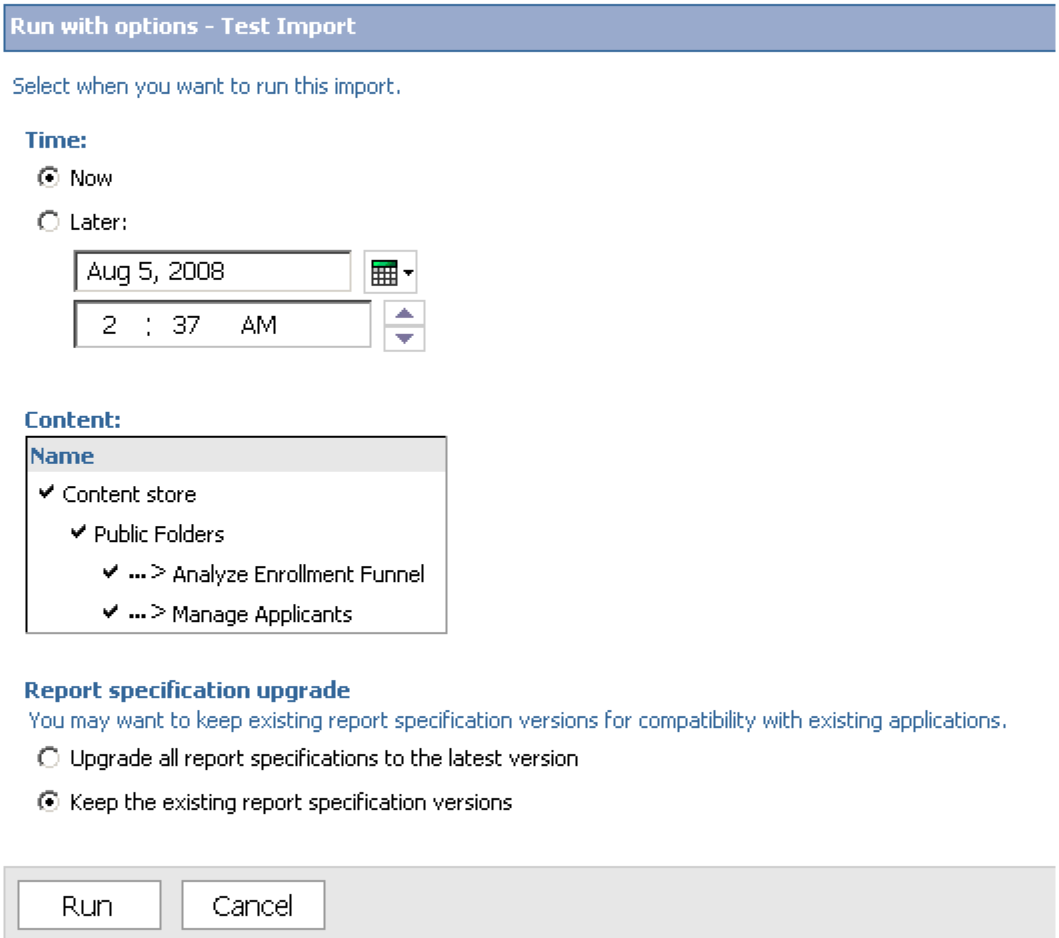
12. Review the summary page. Click **Next**.



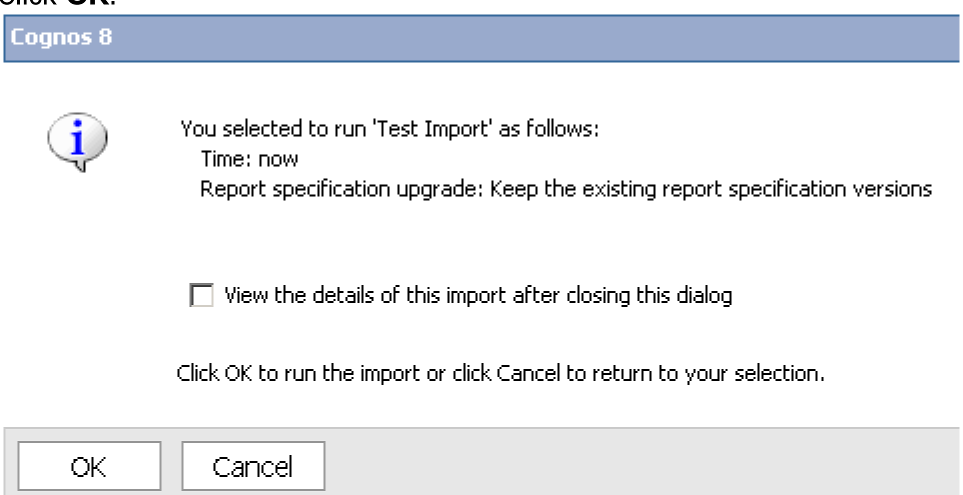
13. Make sure **Run and Save Once** is selected. Click **Finish**.



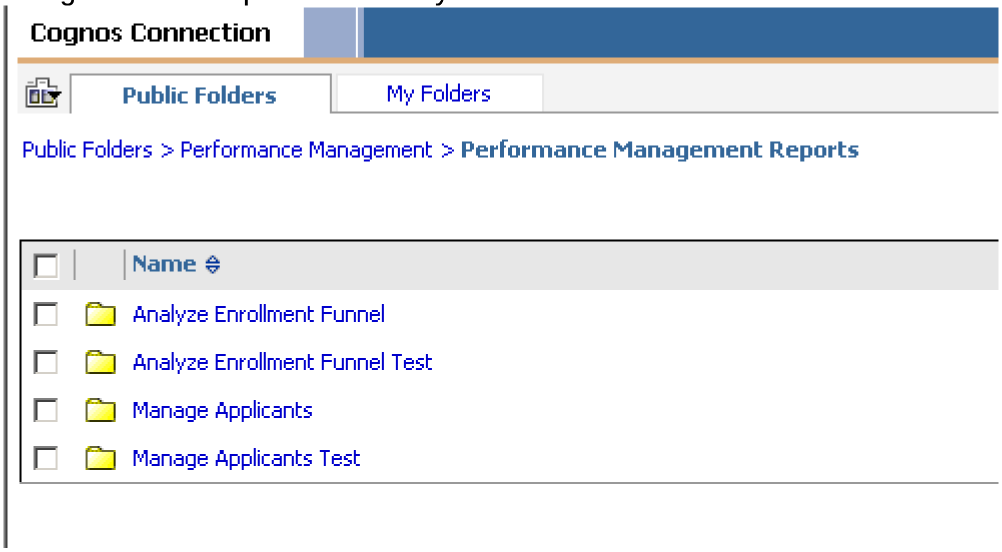
14. Click **Run**.



15. Click **OK**.



16. Navigate to the imported directory.



Create Distribution List and Contacts

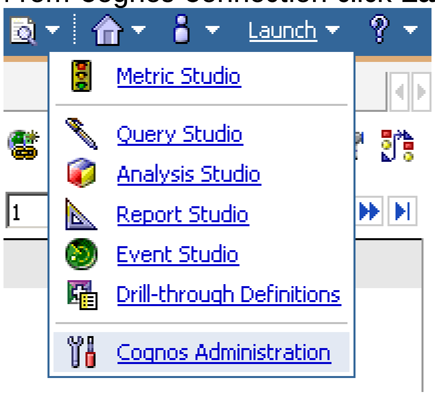
Introduction

Distribution List can be created to easily distribute notifications or report output via emails to user groups. (Note: an SMTP mail server is required.)

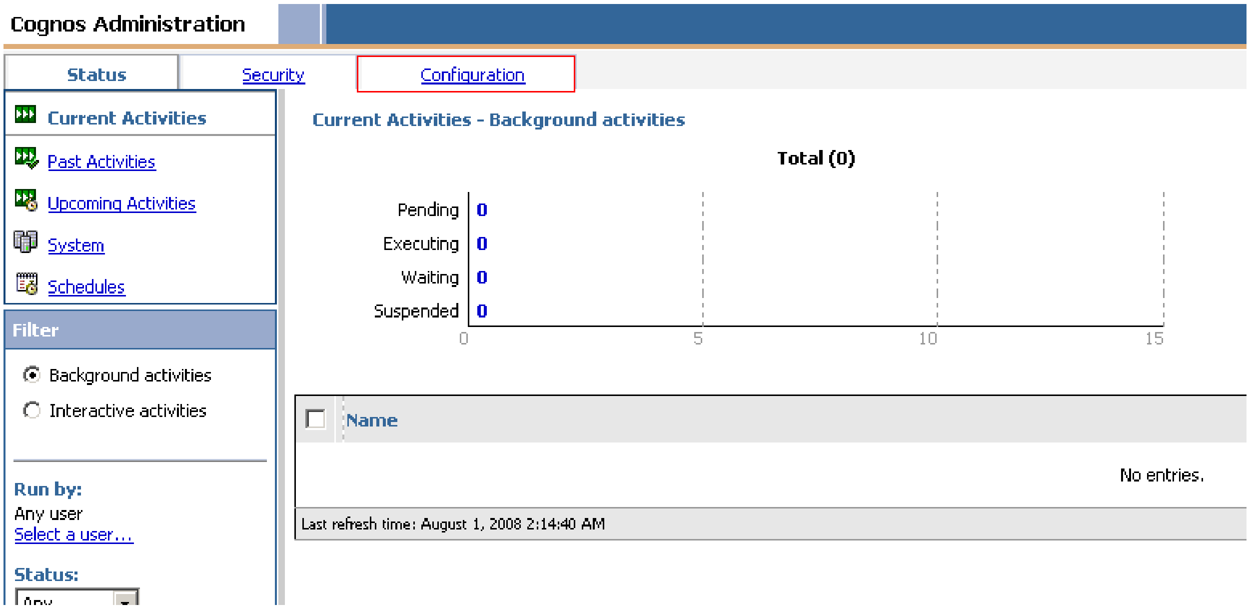
Steps

Follow these steps to create a distribution list.

1. From Cognos Connection click **Launch**. Select **Cognos Administration**.

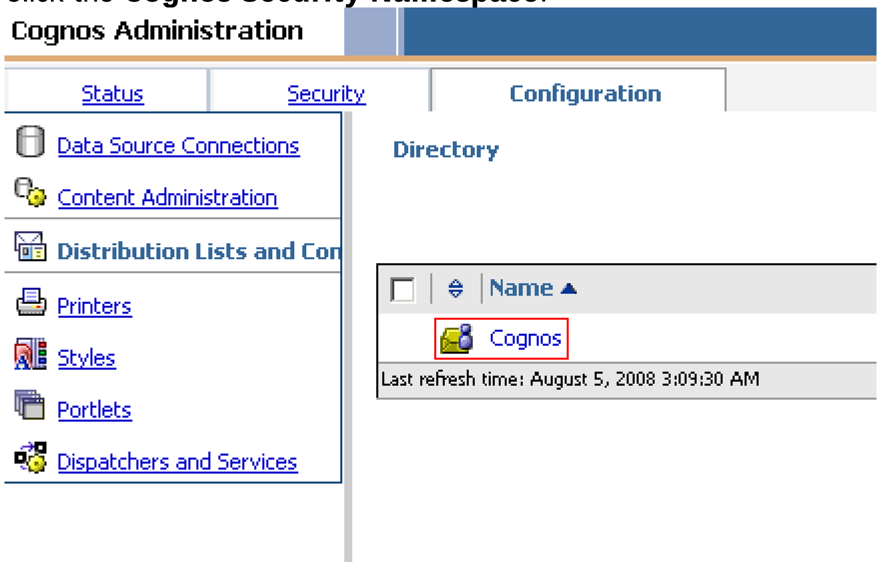


2. Click the **Configuration** tab at the top.

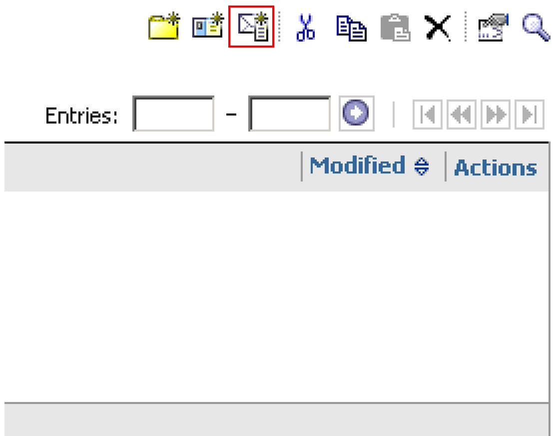


3. Click **Distribution List and Contacts**.

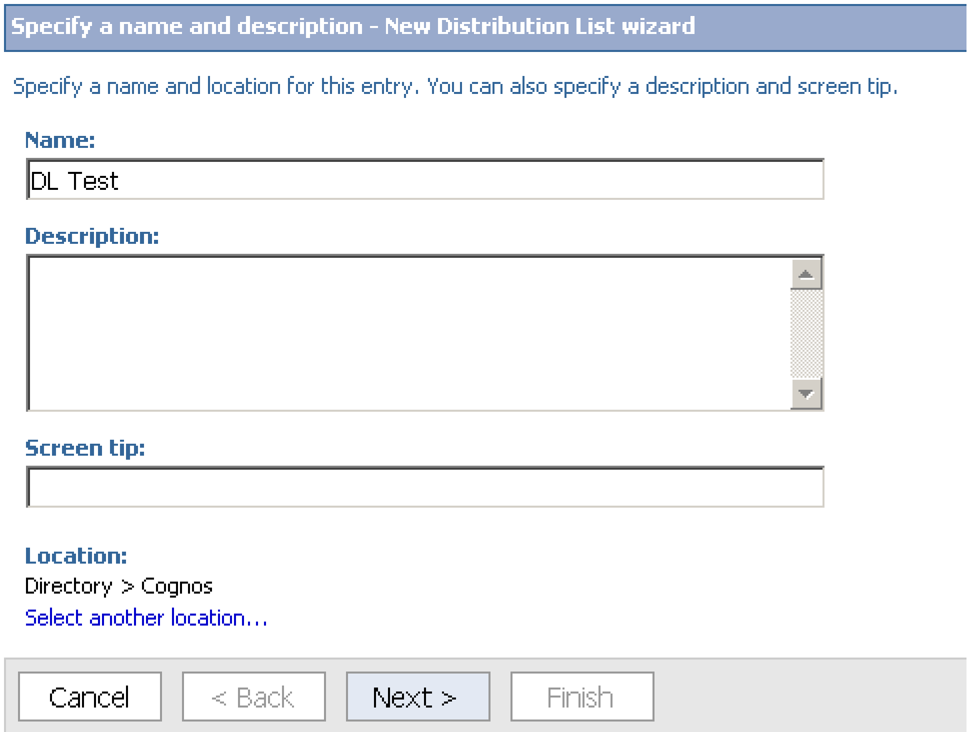
4. Click the **Cognos Security Namespace**.



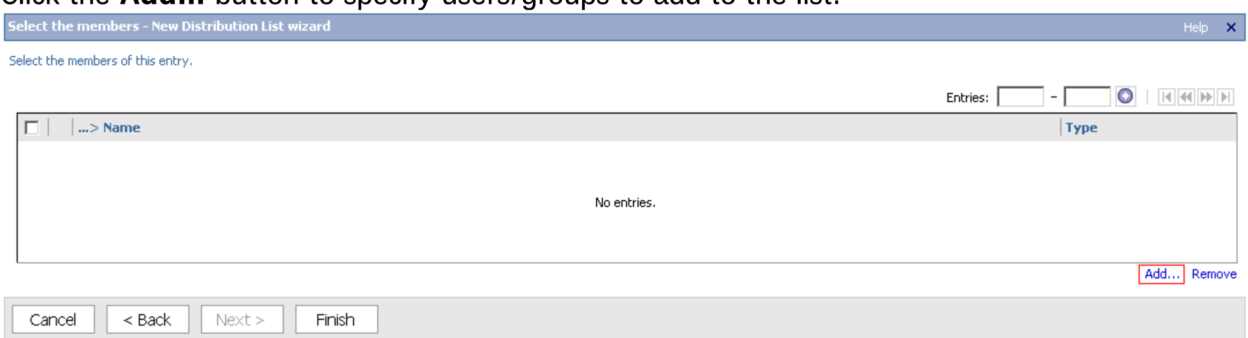
5. Click the **New Distribution List** button.



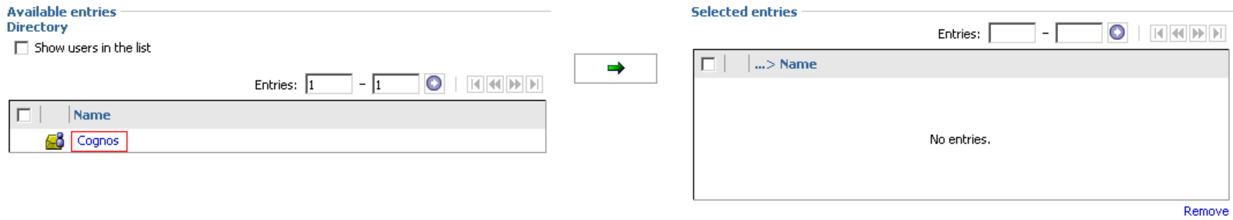
6. **Name** the Distribution List. Click **Next**.



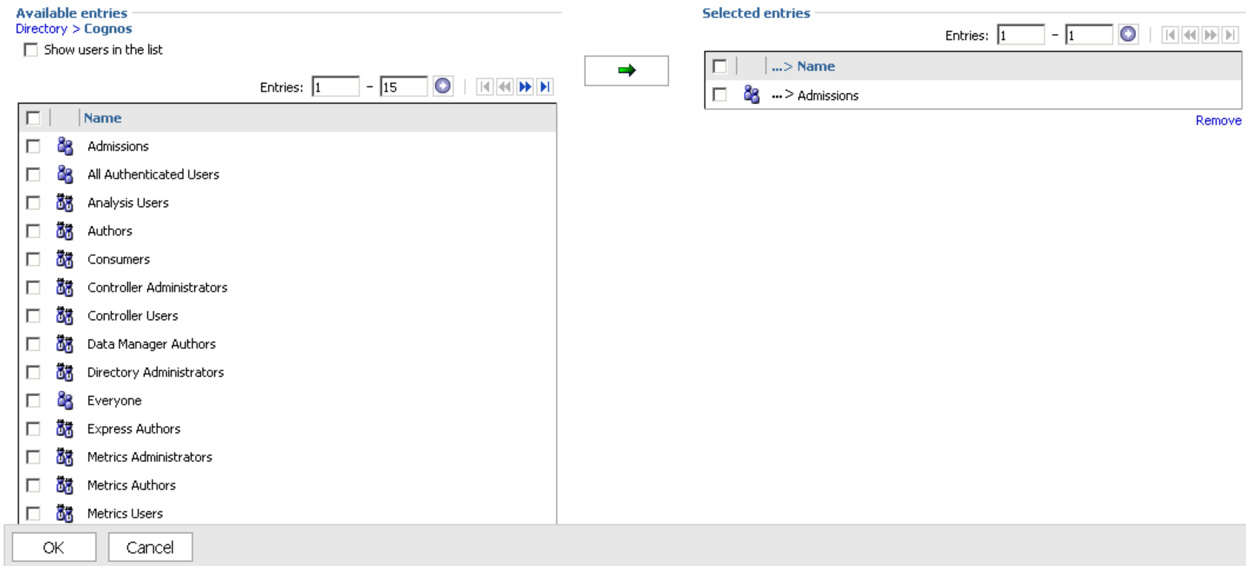
7. Click the **Add...** button to specify users/groups to add to the list.



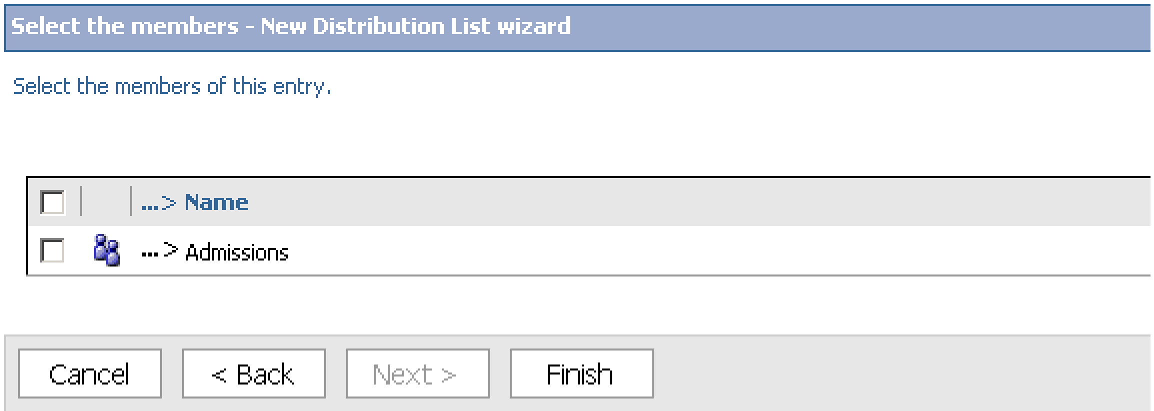
8. Select the **Cognos Security Namespace**.



9. Select the check box next to the **Admissions group**. Click the green arrow to move the selection over to the right. Click **OK**.



10. Click **Finish**.



The Distribution List can now be used when a report is scheduled with a delivery option to email.