

Cognos© Administrator Training Workbook

Updated 8/11/2008



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Revision History Log

Publication Date	Summary
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8/11/2008	New workbook that supports general Cognos® Administrator training.
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Think before you print.

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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.

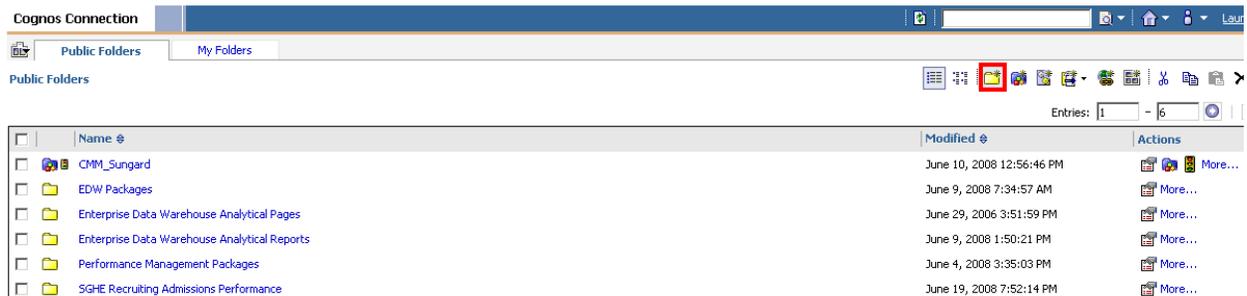
Create a Folder

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

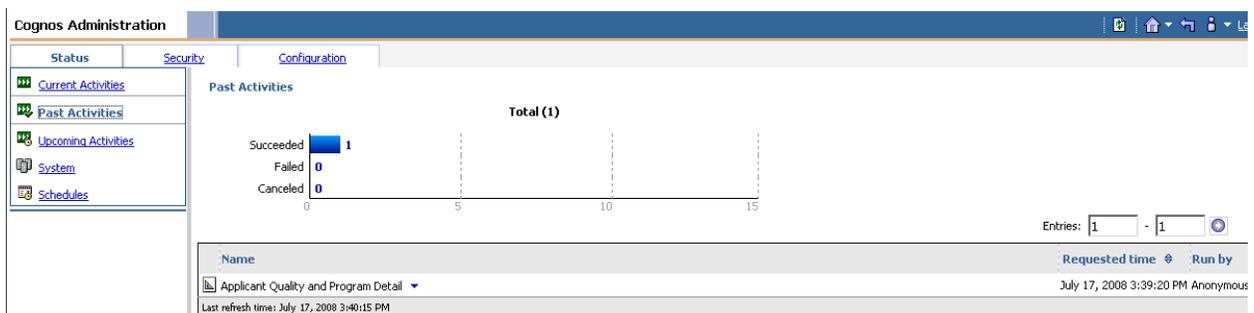
In this section you will learn how to:

- 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.

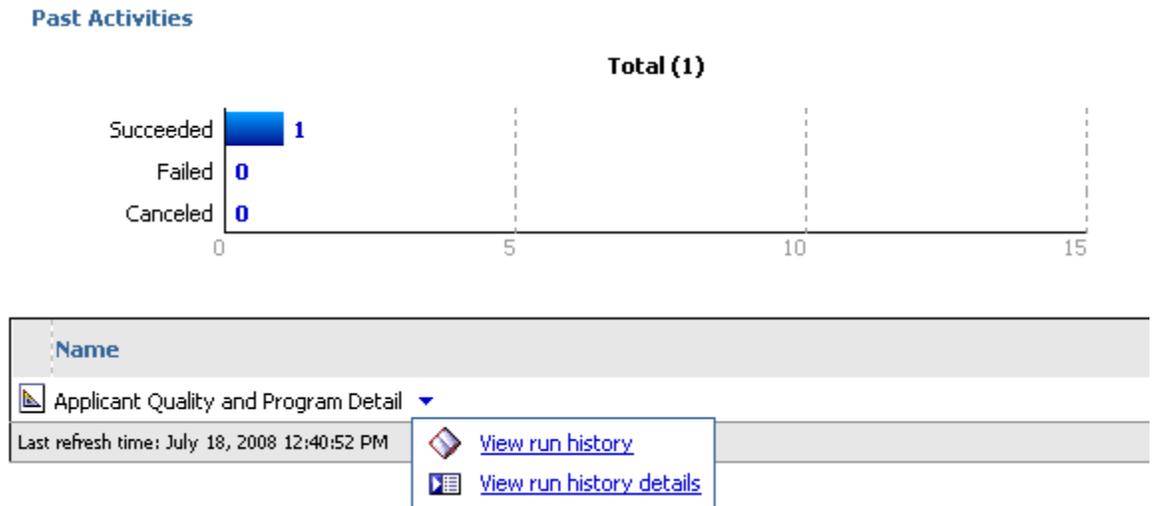


Steps

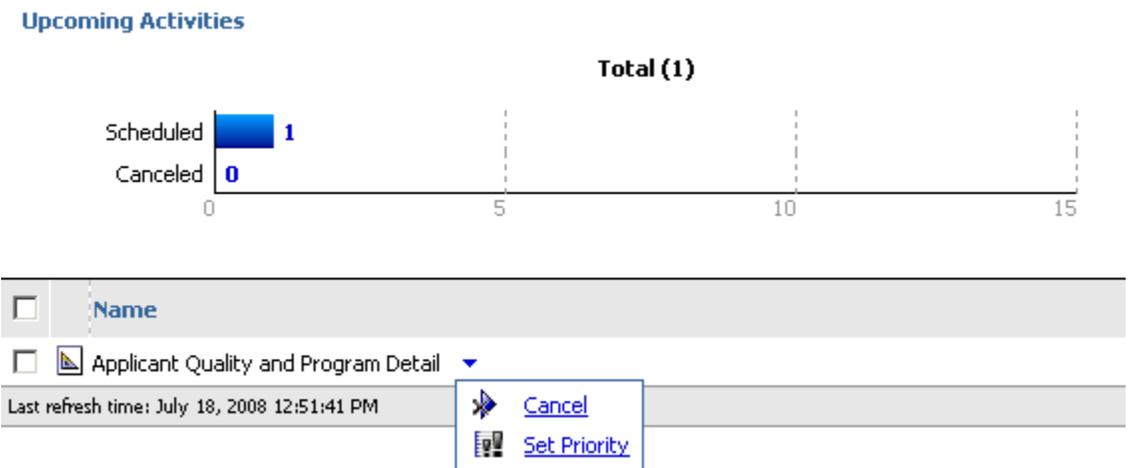
Follow these steps to view run activities.

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.

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



- 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.

The screenshot displays the Cognos Administration web interface. The top navigation bar includes 'Status', 'Security', and 'Configuration'. The left sidebar shows 'Current Activities', 'Past Activities', 'Upcoming Activities', 'System', and 'Schedules'. The main content area is divided into three sections: 'Scorecard' showing 'All servers' with a tree view containing 'System' (Available) and '149.24.1.65' (Available); 'Metrics - 149.24.1.65' showing a table of service metrics; and 'Settings - System' showing a table of system settings.

Name	Value
JVM	
Process - Batch report service	0
Process - Report service	0
Queue - Report data service	0
Queue - Report service	0
Request	0
Request - Agent service	0
Request - Batch report service	0

Name	Value
Environment	
Logging	
Tuning	

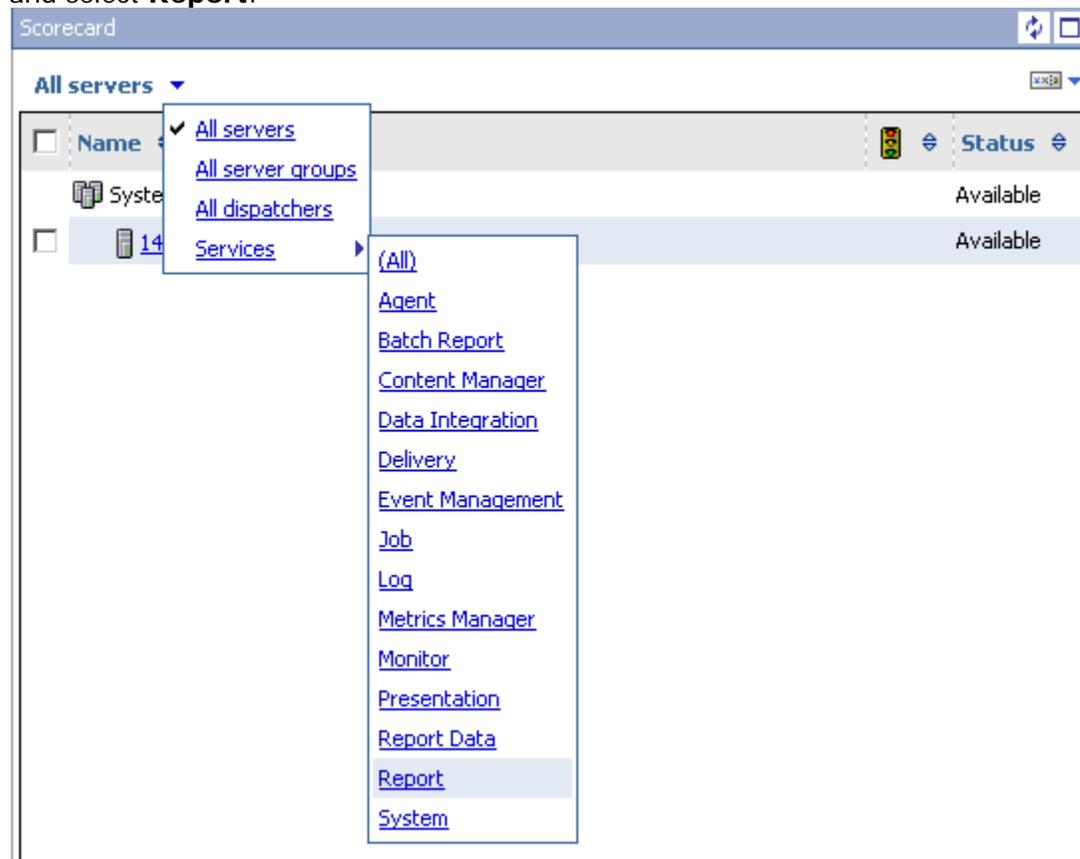
Steps

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.



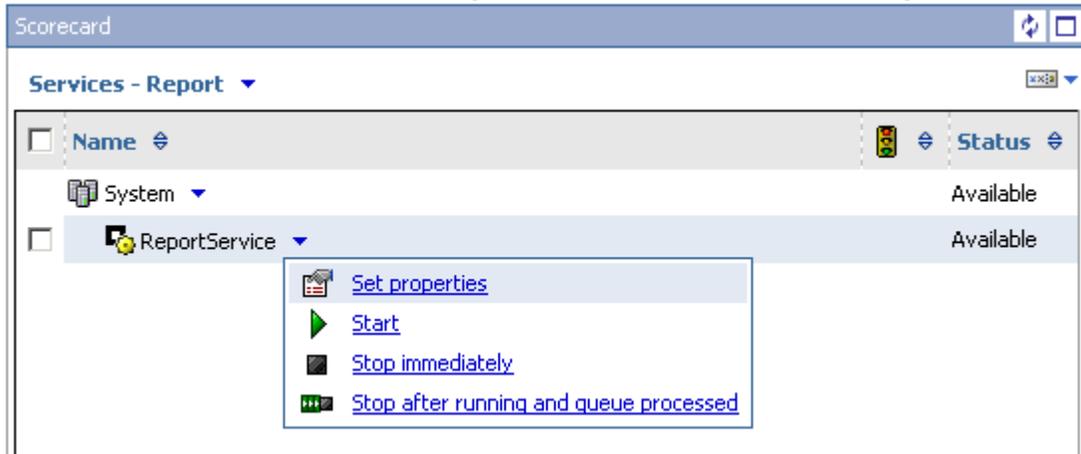
3. Return to Cognos Connection and try to run a report. You should receive an error that the dispatcher is unavailable. (Note: that if the everyone group is a member of the system administrators role, the report will run as normal).
4. Return to **Cognos Administration – Status** tab and click the down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



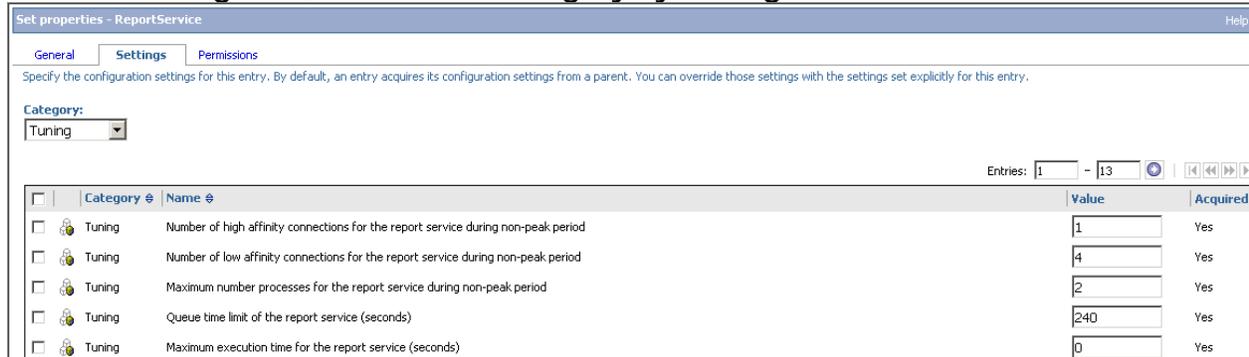
Steps

Follow these steps to set service properties.

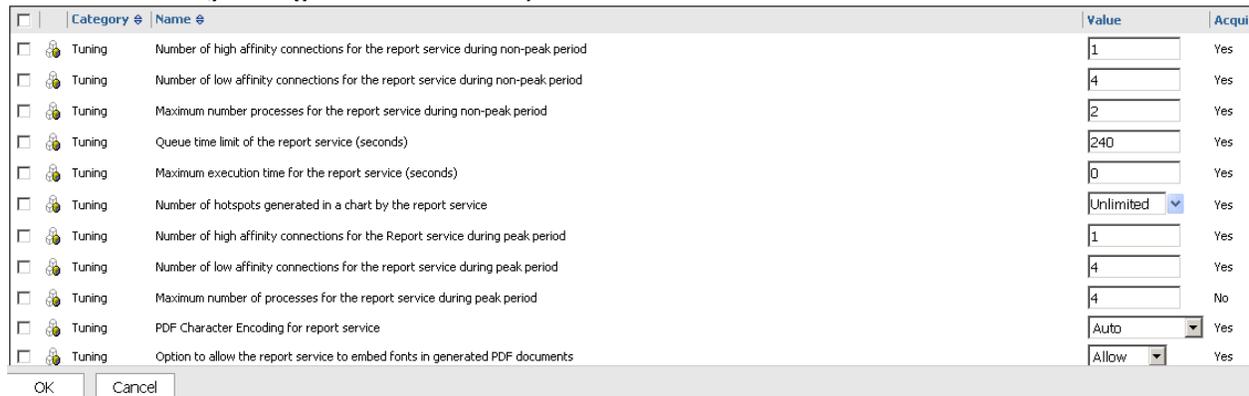
1. Click the down arrow next to the **ReportService**, and select **Set Properties**.



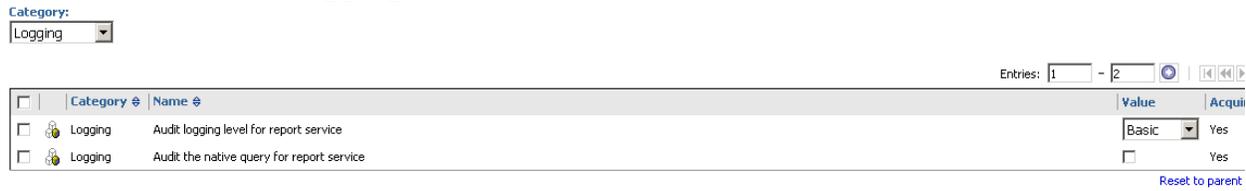
2. Click the **Settings** tab, and filter the **Category** by **Tuning**.



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.)



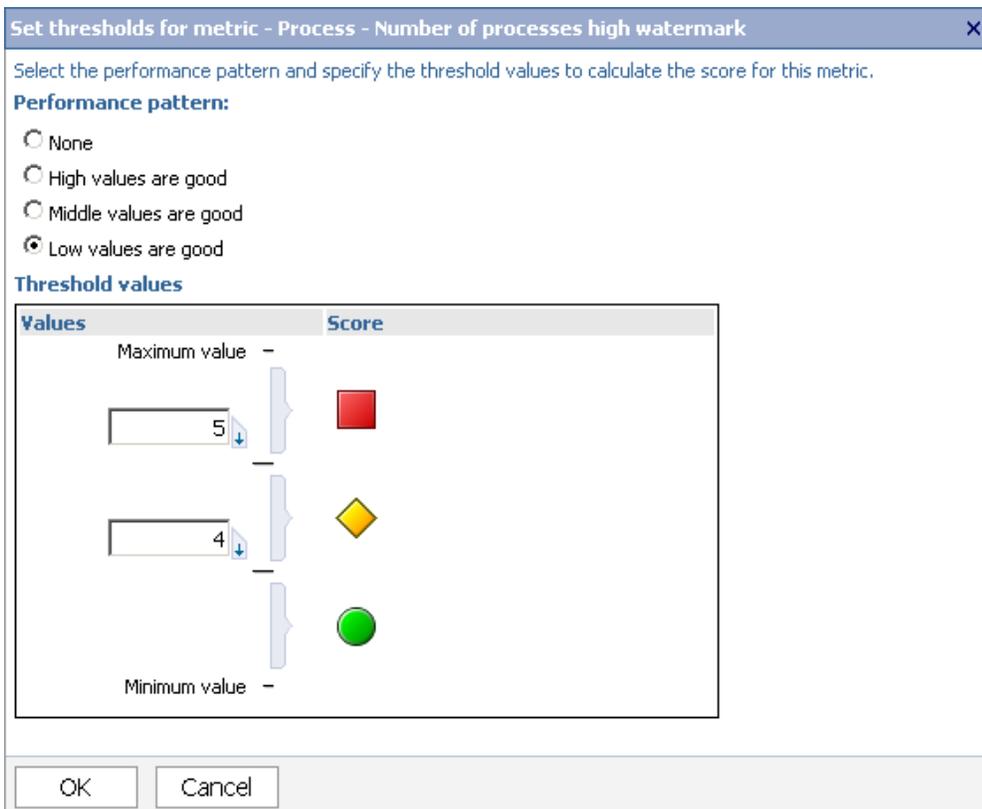
- Filter the Category to **Logging**. Click **Ok**.



- 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.



- 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.

The screenshot displays the Cognos Administrator interface. On the left, the 'Scorecard' view shows a tree structure under 'Services - Report'. The 'ReportService' is listed with a green status indicator and the word 'Available'. On the right, the 'Metrics - ReportService' view shows a table of performance metrics. The 'Process' section is expanded, showing the following values:

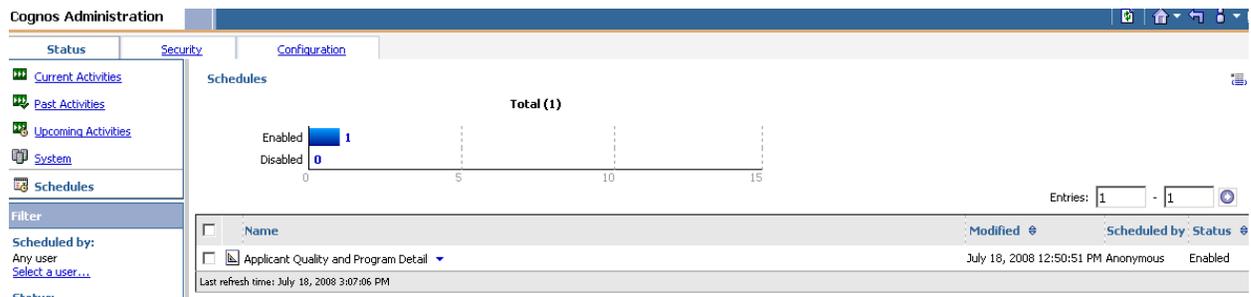
Name	Value
Number of configured processes	-- 4
Number of processes	-- 0
Number of processes high watermark	● 2
Number of processes low watermark	0

Below the 'Process' section, the 'Queue' and 'Request' sections are also visible, both showing a value of 0.

Monitor Schedules

Introduction

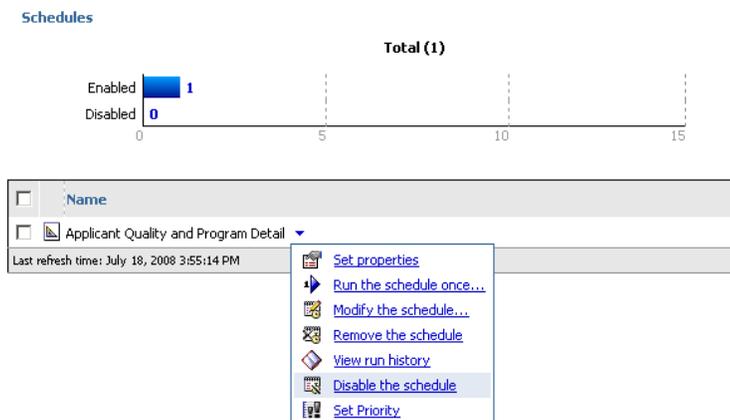
The **Schedules** link in Cognos Administration provides you with the ability to what will be running on the system in the future. You can set properties, set priority, modify, remove, and disable schedules.



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)

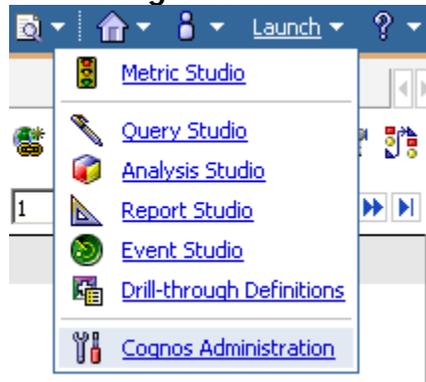
Introduction

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).

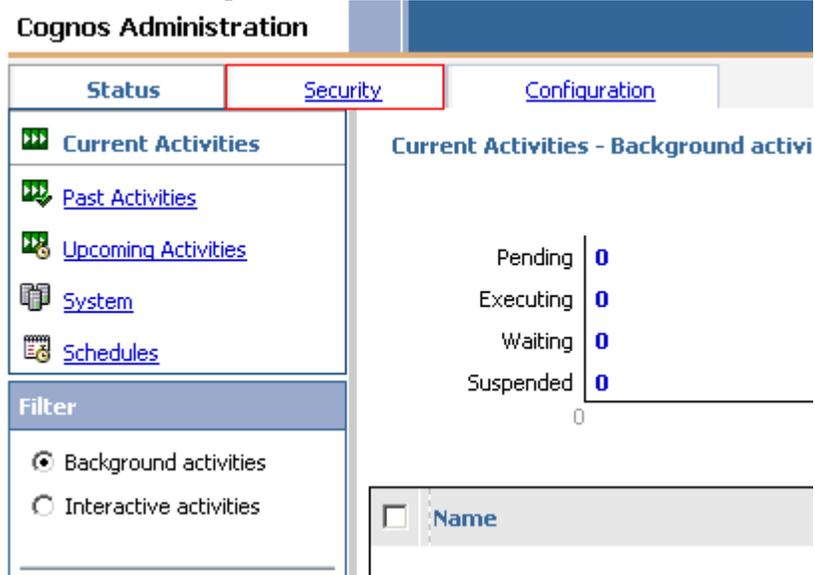
Steps

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.



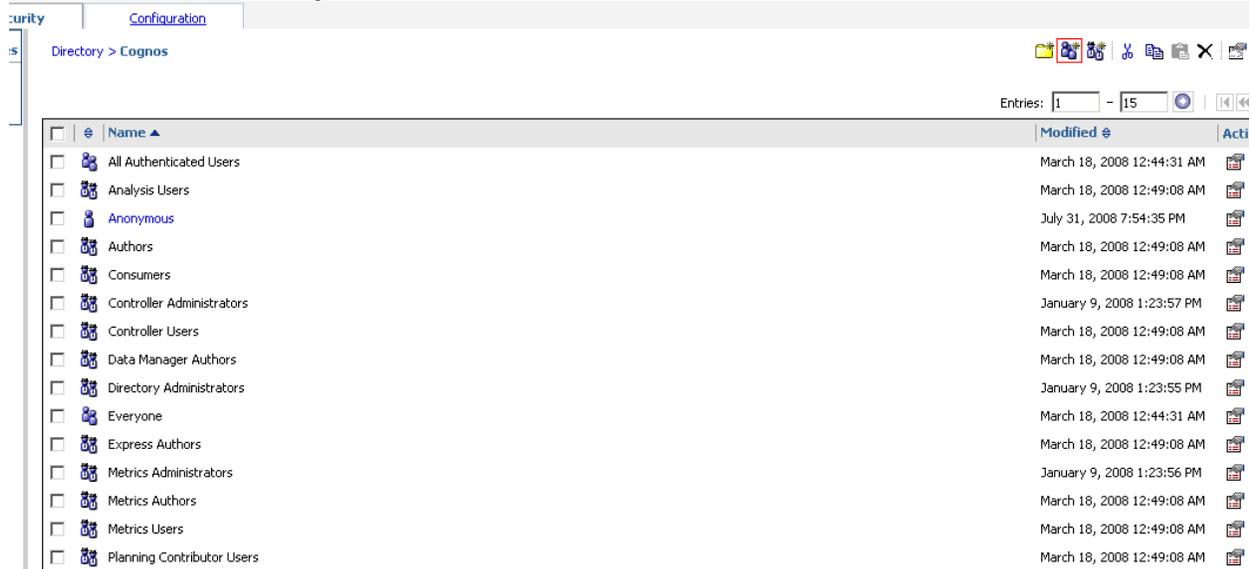
2. Click the **Security** tab.



3. Click the **Cognos** namespace.



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



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

Cognos Administration

[Status](#) **Security** [Configuration](#)

[Users, Groups, and Roles](#)
[Capabilities](#)
[User Interface Profiles](#)

Specify a name and description - New Group wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

Description:

Screen tip:

Location:
Directory > Cognos
[Select another location...](#)

Assign Users to Groups

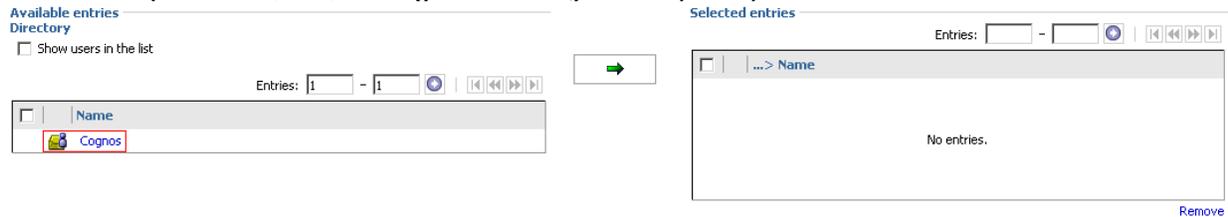
Steps

Follow these steps to assign users to groups.

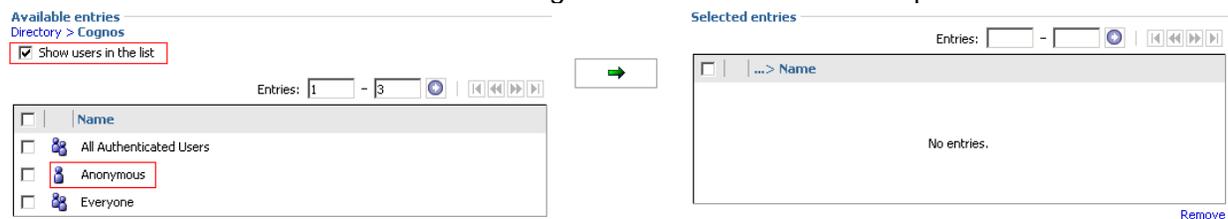
1. Click **Add...** to assign a user to the new group.



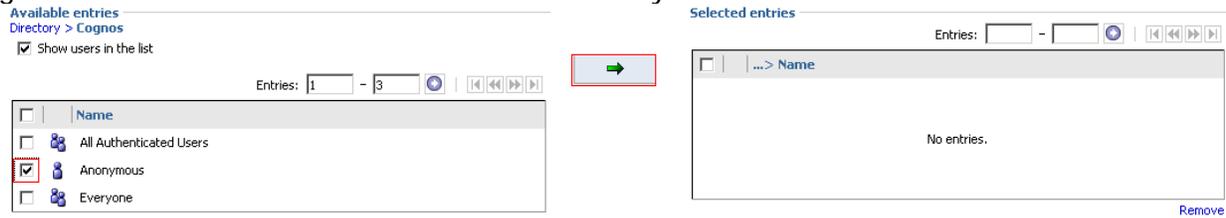
2. From the list of available entries on the left, select the namespace where the users exist (i.e. LDAP, AD, or Cognos security namespaces).



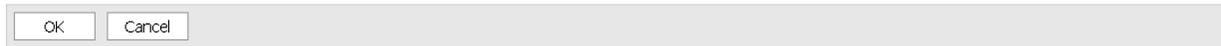
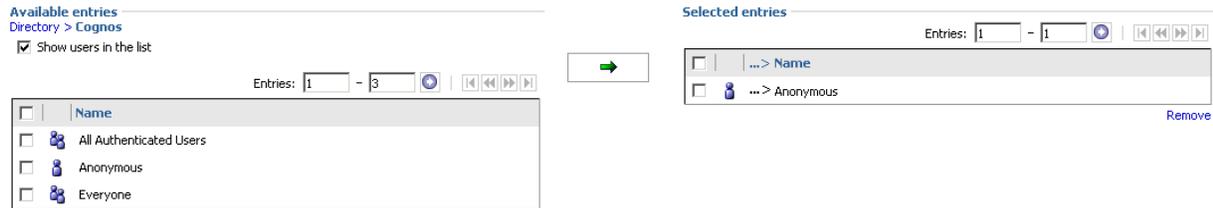
3. Check the **Show users in the list** box to get user accounts to show up.



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.



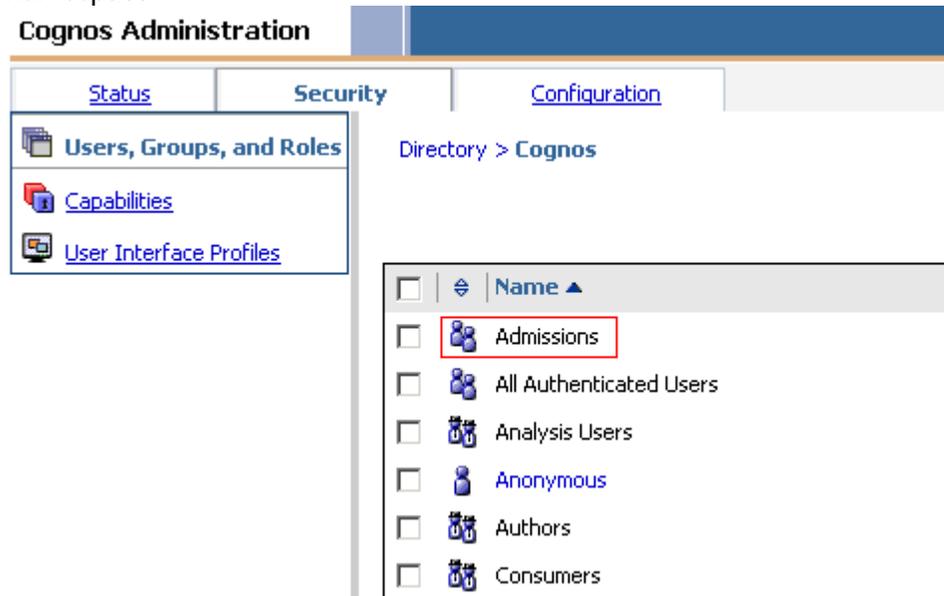
5. Click the **Ok** button.



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.

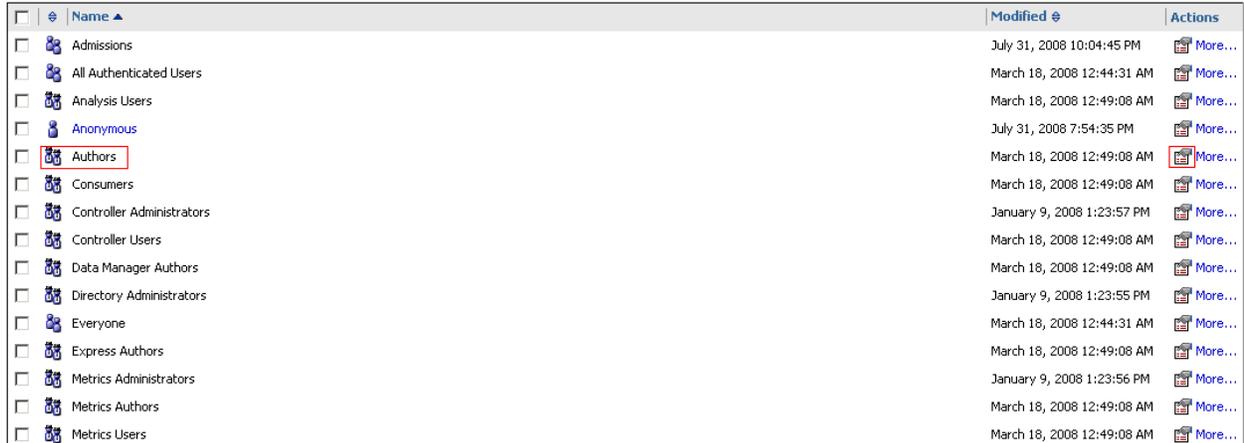


Assign Groups to Roles

Steps

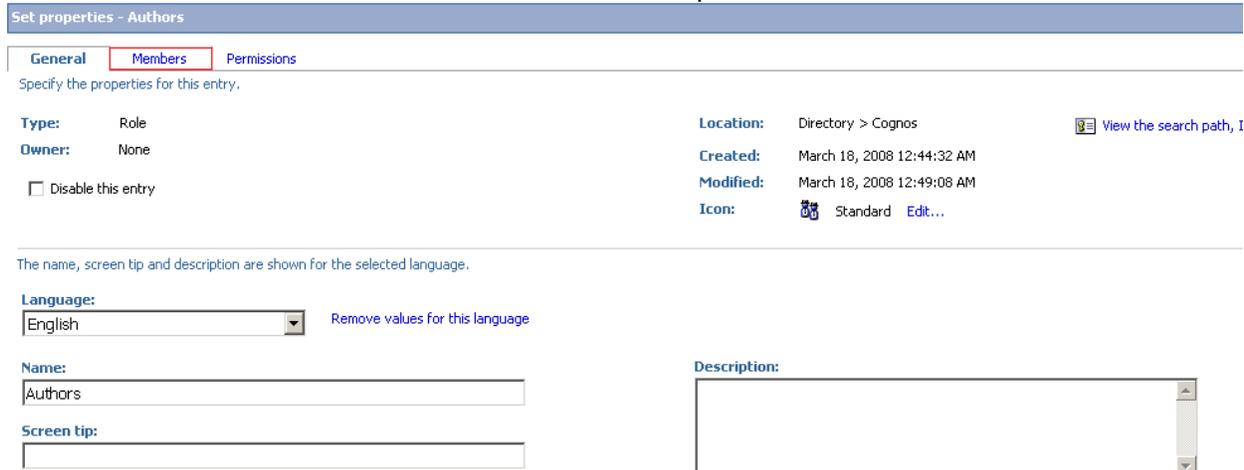
Follow these steps to assign groups to roles.

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



Name	Modified	Actions
<input type="checkbox"/> Admissions	July 31, 2008 10:04:45 PM	More...
<input type="checkbox"/> All Authenticated Users	March 18, 2008 12:44:31 AM	More...
<input type="checkbox"/> Analysis Users	March 18, 2008 12:49:08 AM	More...
<input type="checkbox"/> Anonymous	July 31, 2008 7:54:35 PM	More...
<input type="checkbox"/> Authors	March 18, 2008 12:49:08 AM	More...
<input type="checkbox"/> Consumers	March 18, 2008 12:49:08 AM	More...
<input type="checkbox"/> Controller Administrators	January 9, 2008 1:23:57 PM	More...
<input type="checkbox"/> Controller Users	March 18, 2008 12:49:08 AM	More...
<input type="checkbox"/> Data Manager Authors	March 18, 2008 12:49:08 AM	More...
<input type="checkbox"/> Directory Administrators	January 9, 2008 1:23:55 PM	More...
<input type="checkbox"/> Everyone	March 18, 2008 12:44:31 AM	More...
<input type="checkbox"/> Express Authors	March 18, 2008 12:49:08 AM	More...
<input type="checkbox"/> Metrics Administrators	January 9, 2008 1:23:56 PM	More...
<input type="checkbox"/> Metrics Authors	March 18, 2008 12:49:08 AM	More...
<input type="checkbox"/> Metrics Users	March 18, 2008 12:49:08 AM	More...

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



Set properties - Authors

General **Members** Permissions

Specify the properties for this entry.

Type: Role **Location:** Directory > Cognos [View the search path, I...](#)
Owner: None **Created:** March 18, 2008 12:44:32 AM
 Disable this entry **Modified:** March 18, 2008 12:49:08 AM
Icon: Standard [Edit...](#)

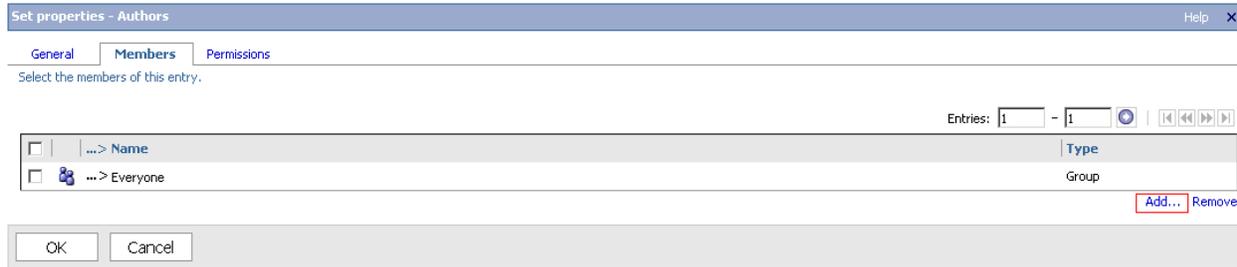
The name, screen tip and description are shown for the selected language.

Language: English [Remove values for this language](#)

Name: Authors **Description:**

Screen tip:

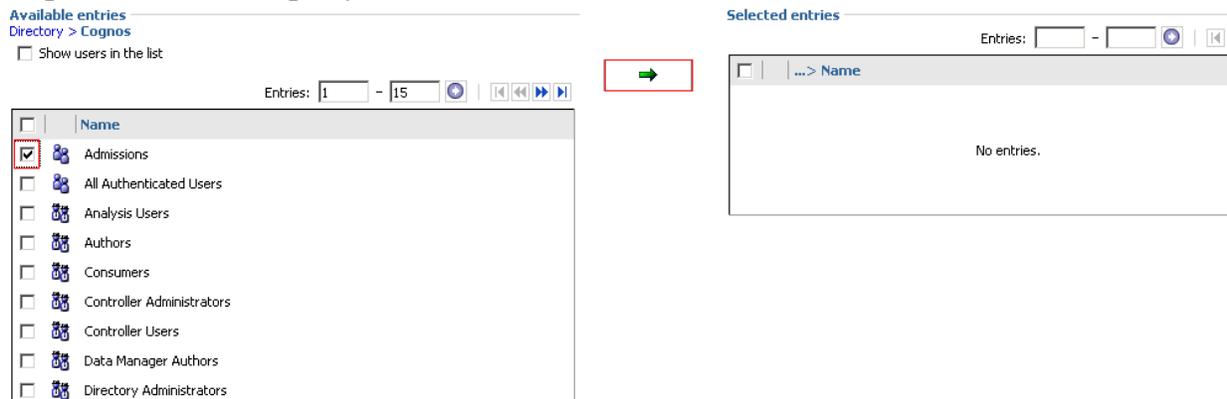
- Click the **Add...** button to assign a new member.



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



- 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**.

Available entries
Directory > Cognos

Show users in the list

Entries: 1 - 15

<input type="checkbox"/>	Name
<input type="checkbox"/>	Admissions
<input type="checkbox"/>	All Authenticated Users
<input type="checkbox"/>	Analysis Users
<input type="checkbox"/>	Authors
<input type="checkbox"/>	Consumers
<input type="checkbox"/>	Controller Administrators
<input type="checkbox"/>	Controller Users
<input type="checkbox"/>	Data Manager Authors
<input type="checkbox"/>	Directory Administrators
<input type="checkbox"/>	Everyone
<input type="checkbox"/>	Express Authors
<input type="checkbox"/>	Metrics Administrators
<input type="checkbox"/>	Metrics Authors
<input type="checkbox"/>	Metrics Users

OK Cancel

Selected entries

Entries: 1 - 1

<input type="checkbox"/>	Name
<input type="checkbox"/>	...> Admissions

7. Click **Ok** again.

Set properties - Authors

General **Members** Permissions

Select the members of this entry.

Entries: 1 - 2

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	...> Everyone	Group
<input type="checkbox"/>	...> Admissions	Group

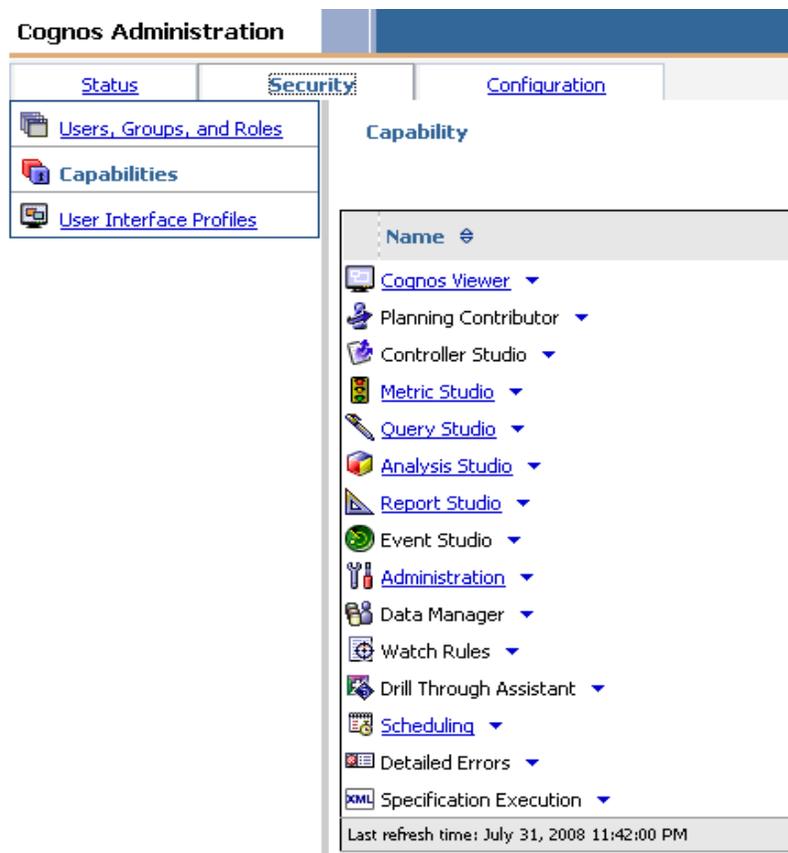
OK Cancel

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.

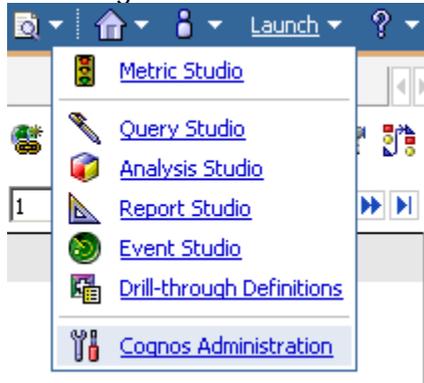


The screenshot displays the 'Cognos Administration' interface. At the top, there are three tabs: 'Status', 'Security' (which is active), and 'Configuration'. On the left side, there is a navigation pane with three items: 'Users, Groups, and Roles', 'Capabilities' (which is selected), and 'User Interface Profiles'. The main content area is titled 'Capability' and contains a list of capabilities, each with an icon and a dropdown arrow. The list includes: Cognos Viewer, Planning Contributor, Controller Studio, Metric Studio, Query Studio, Analysis Studio, Report Studio, Event Studio, Administration, Data Manager, Watch Rules, Drill Through Assistant, Scheduling, Detailed Errors, and Specification Execution. At the bottom of the list, it shows 'Last refresh time: July 31, 2008 11:42:00 PM'.

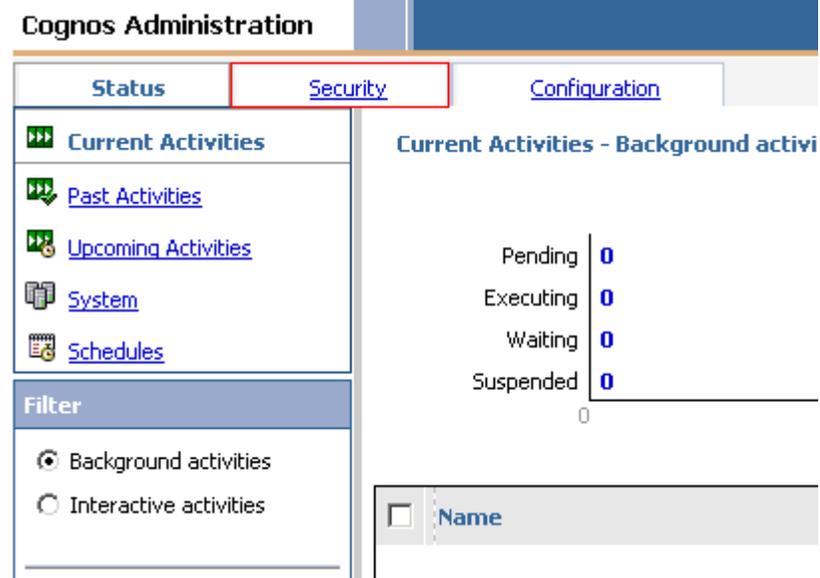
Steps

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

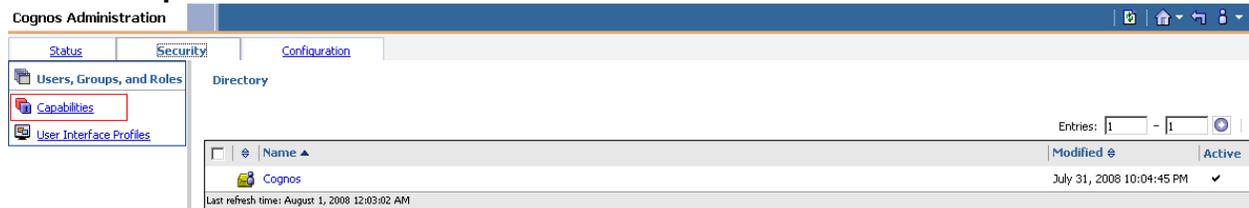
1. From Cognos Connection click **Launch**. Select **Cognos Administration**.



2. Click the **Security** tab.



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



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

The screenshot displays the Cognos Administration interface. At the top, the title bar reads "Cognos Administration". Below it are three tabs: "Status", "Security", and "Configuration". On the left side, there is a navigation pane with three items: "Users, Groups, and Roles", "Capabilities", and "User Interface Profiles". The "Capabilities" item is selected, and its content is displayed in the main area. The main area is titled "Capability" and contains a list of capabilities, each with an icon and a dropdown arrow. The "Administration" capability, represented by a wrench and screwdriver icon, is highlighted with a red rectangular box. Other capabilities in the list include Cognos Viewer, Planning Contributor, Controller Studio, Metric Studio, Query Studio, Analysis Studio, Report Studio, Event Studio, Data Manager, Watch Rules, Drill Through Assistant, Scheduling, Detailed Errors, and Specification Execution. At the bottom of the list, it says "Last refresh time: August 1, 2008 12:31:04 AM".

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

The screenshot shows the Cognos Administration console interface. At the top, there is a header bar with the text "Cognos Administration". Below this, there are three tabs: "Status", "Security", and "Configuration". The "Configuration" tab is active. On the left side, there is a navigation pane with three items: "Users, Groups, and Roles", "Capabilities", and "User Interface Profiles". The main content area shows a breadcrumb trail: "Capability > Administration". Below this, there is a list of administrative tasks, each with a red icon and a dropdown arrow. The tasks are: "Run activities and schedules", "Configure and manage the system", "Users, Groups, and Roles", "Set capabilities and manage UI profiles", "Data Source Connections", "Administration tasks", "Distribution Lists and", "Printers", "Styles and portlets", "Planning Administration", "Controller Administration", and "Metric Studio Administration". The "Administration tasks" item is expanded, and a sub-menu is visible with the item "Set properties" highlighted with a blue border. At the bottom of the main content area, there is a status bar that reads "Last refresh time: August 1, 2008 12:36:39 AM".

6. Click the **Permissions** tab.

Set properties - Administration tasks

General **Permissions**

Specify the properties for this entry.

Type: Secured feature
Owner: None

Disable this entry

The name, screen tip and description are shown for the selected language.

Language:
English

Name:
Administration tasks

Screen tip:

- Click the **Add...** button.

Set properties - Administration tasks

General | **Permissions**

Specify access permissions for this entry. By default, an entry acquires its access permissions from a parent. You can override those permissions.

The execute permissions control access to the functionality associated with this entry.

Override the access permissions acquired from the parent entry

<input type="checkbox"/>	...	Name	Type	Permissions
<input type="checkbox"/>	...	Server Administrators	Role	Read [🔓] Write [✍️] Execute [🔑] Set Policy [🔑] Traverse [🔑]
<input type="checkbox"/>	...	Report Administrators	Role	Read [🔓] Write [✍️] Execute [🔑] Set Policy [🔑] Traverse [🔑]
<input type="checkbox"/>	...	Metrics Administrators	Role	Read [🔓] Write [✍️] Execute [🔑] Set Policy [🔑] Traverse [🔑]
<input type="checkbox"/>	...	Controller Administrators	Role	Read [🔓] Write [✍️] Execute [🔑] Set Policy [🔑] Traverse [🔑]
<input type="checkbox"/>	...	Directory Administrators	Role	Read [🔓] Write [✍️] Execute [🔑] Set Policy [🔑] Traverse [🔑]

Apply

	Grant	Deny
Read [🔓]	<input type="checkbox"/>	<input type="checkbox"/>
Write [✍️]	<input type="checkbox"/>	<input type="checkbox"/>
Execute [🔑]	<input type="checkbox"/>	<input type="checkbox"/>
Set Policy [🔑]	<input type="checkbox"/>	<input type="checkbox"/>
Traverse [🔑]	<input type="checkbox"/>	<input type="checkbox"/>

Add... Remove

OK **Cancel**

- Select the **Cognos** namespace.

Available entries

Directory

Show users in the list

Entries: 1 - 1

<input type="checkbox"/>	Name
<input type="checkbox"/>	Cognos

Selected entries

Entries: -

<input type="checkbox"/>	...	Name
No entries.		

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

Available entries

Directory > Cognos

Show users in the list

Entries: 1 - 15

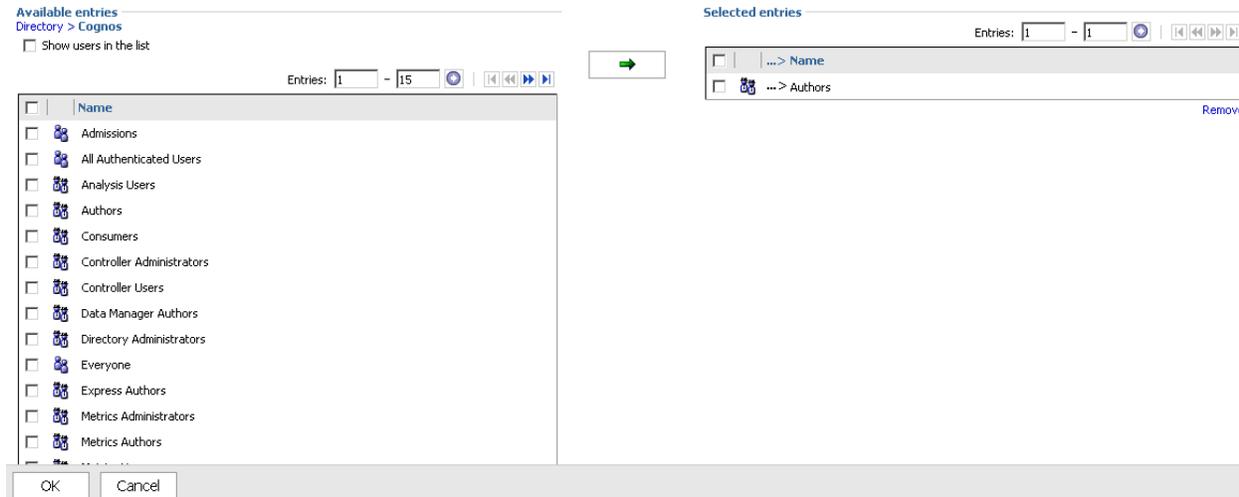
<input type="checkbox"/>	Name
<input type="checkbox"/>	Admissions
<input type="checkbox"/>	All Authenticated Users
<input type="checkbox"/>	Analysis Users
<input checked="" type="checkbox"/>	Authors
<input type="checkbox"/>	Consumers
<input type="checkbox"/>	Controller Administrators
<input type="checkbox"/>	Controller Users
<input type="checkbox"/>	Data Manager Authors
<input type="checkbox"/>	Directory Administrators

Selected entries

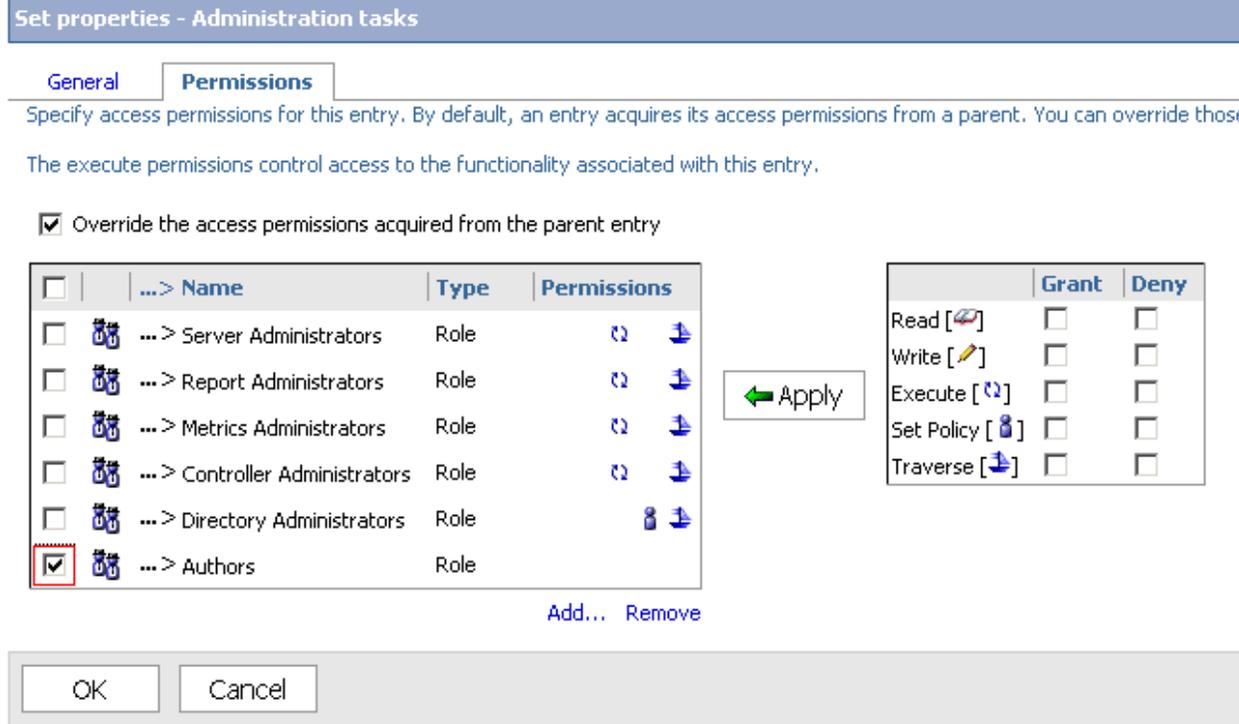
Entries: -

<input type="checkbox"/>	...	Name
No 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.



- 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.

Set properties - Administration tasks

General **Permissions**

Specify access permissions for this entry. By default, an entry acquires its access permissions from a parent. You can override those

The execute permissions control access to the functionality associated with this entry.

Override the access permissions acquired from the parent entry

<input type="checkbox"/>	...> Name	Type	Permissions
<input type="checkbox"/>	...> Server Administrators	Role	
<input type="checkbox"/>	...> Report Administrators	Role	
<input type="checkbox"/>	...> Metrics Administrators	Role	
<input type="checkbox"/>	...> Controller Administrators	Role	
<input type="checkbox"/>	...> Directory Administrators	Role	
<input checked="" type="checkbox"/>	...> Authors	Role	

Apply

	Grant	Deny
Read [<input type="checkbox"/>	<input type="checkbox"/>
Write [<input type="checkbox"/>	<input type="checkbox"/>
Execute [<input checked="" type="checkbox"/>	<input type="checkbox"/>
Set Policy [<input type="checkbox"/>	<input type="checkbox"/>
Traverse [<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add... Remove

OK

Cancel

13. Click **Ok**.

Set properties - Administration tasks

General | **Permissions**

Specify access permissions for this entry. By default, an entry acquires its access permissions from a parent. You can override those permissions.

The execute permissions control access to the functionality associated with this entry.

Override the access permissions acquired from the parent entry

<input type="checkbox"/>	...	Name	Type	Permissions
<input type="checkbox"/>		Server Administrators	Role	
<input type="checkbox"/>		Report Administrators	Role	
<input type="checkbox"/>		Metrics Administrators	Role	
<input type="checkbox"/>		Controller Administrators	Role	
<input type="checkbox"/>		Directory Administrators	Role	
<input type="checkbox"/>		Authors	Role	

[Add...](#) [Remove](#)

	Grant	Deny
Read []	<input type="checkbox"/>	<input type="checkbox"/>
Write []	<input type="checkbox"/>	<input type="checkbox"/>
Execute []	<input type="checkbox"/>	<input type="checkbox"/>
Set Policy []	<input type="checkbox"/>	<input type="checkbox"/>
Traverse []	<input type="checkbox"/>	<input type="checkbox"/>

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

Create Data Source Connections

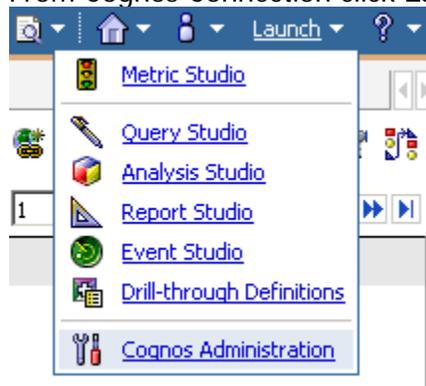
Introduction

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.

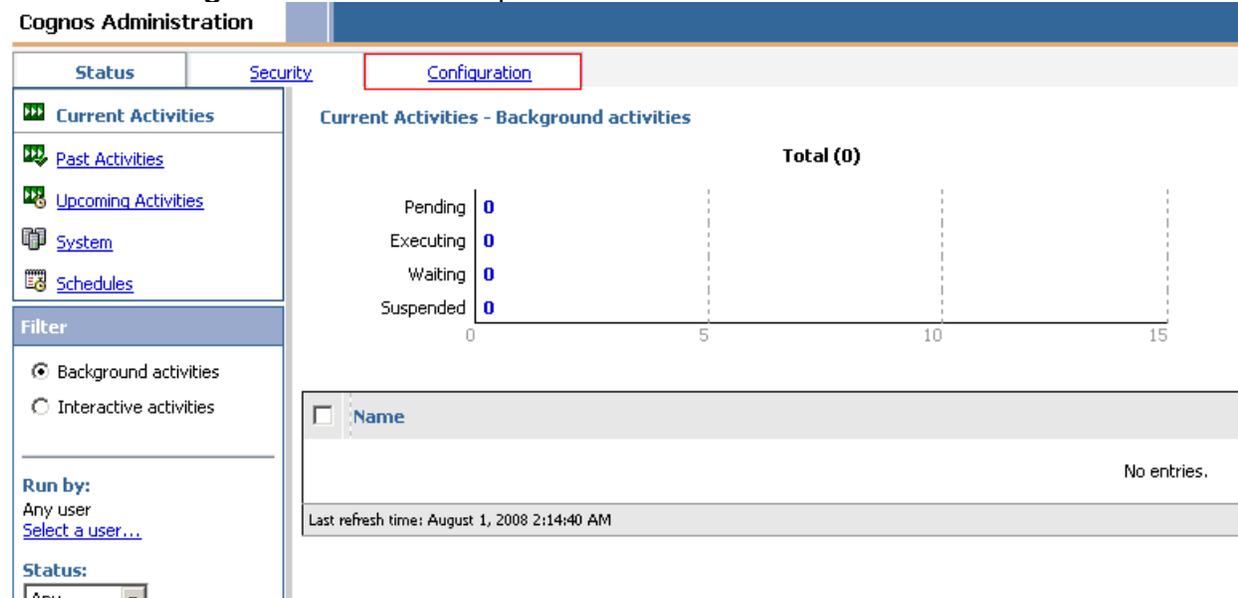
Steps

Follow these steps to create a Data Source Connection.

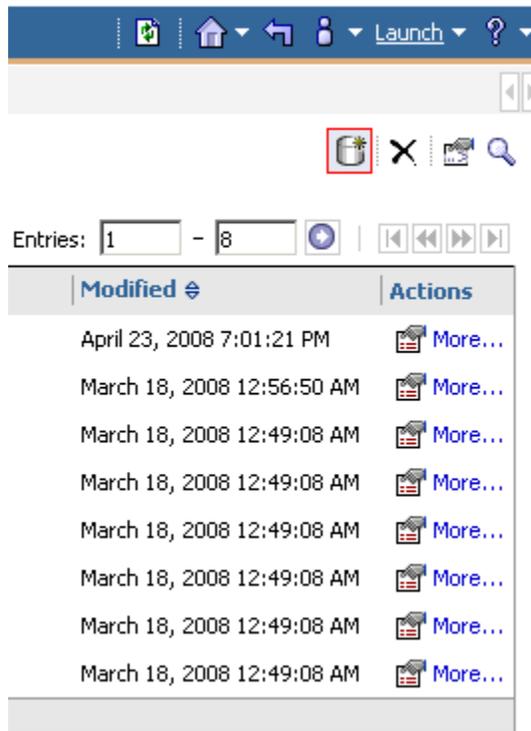
1. From Cognos Connection click **Launch**. Select **Cognos Administration**.



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



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



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

Specify a name and description - New Data Source wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

Description:

Screen tip:

Location:
 Directory > Cognos

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

Specify the connection - New Data Source wizard

Specify the parameters for the connection of this new data source. The na

Type:
Oracle

Isolation level:

Use the default object gateway

Specify a value:
Cursor stability

Cancel < Back Next > Finish

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.

Specify the Oracle connection string - New Data Source wizard

Edit the parameters to build an Oracle connection string.

SQL*Net connect string:

EDW

Collation sequence:

Signon

Select whether a user ID and password is required in the connection string and, if so, whether

User ID

Password

Create a signon that the Everyone group can use:

User ID:

EDWMGR

Password:

••••••

Confirm password:

••••••

Testing

Test the connection...

Cancel

< Back

Next >

Finish

7. Click the **Test button**.

Test the connection - New Data Source wizard

Test the parameters that make up the database connection.

Connection string:
^User ID:^?Password:;LOCAL;OR;ORACLE@%s@EDW/%s@COLSEQ=

Test

Dispatcher:
http://rdk:9300/p2pd (Configuration)

Test the connection using:

User ID:
EDWMGR

Password:
●●●●●●●●

Close

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

View the results - Test the connection

Name	Status
...> http://rdk:9300/p2pd	Succeeded

Close

9. Click **Close** again.

Test the connection - New Data Source wizard

Test the parameters that make up the database connection.

Connection string:

^User ID:^?Password;;LOCAL;OR;ORACLE@%s@RDK/%s@COLSEQ=

Test

Dispatcher:

http://rdk:9300/p2pd (Configuration)

Test the connection using:

User ID:

EDWMGR

Password:

●●●●●●●●

Close

10. Click **Finish**.

Specify the Oracle connection string - New Data Source wizard

Edit the parameters to build an Oracle connection string.

SQL*Net connect string:

RDK

Collation sequence:

Signon

Select whether a user ID and password is required in the connection string and, if so, w

User ID

Password

Create a signon that the Everyone group can use:

User ID:

EDWMGR

Password:

●●●●●●●●

Confirm password:

●●●●●●●●

Testing

Test the connection...

Cancel < Back Next > Finish

11. Click **OK**.

Finish - New Data Source wizard



The New Data Source wizard successfully created a data source and a first connection in the Cognos 8 server.

Create a Metric Package

OK

Export and Import Data

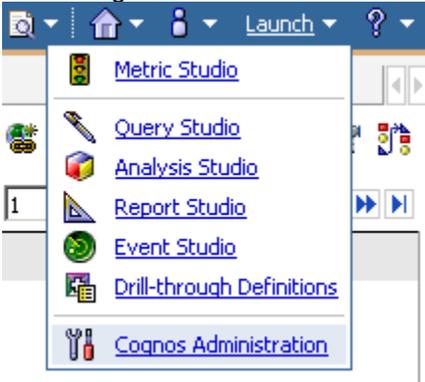
Introduction

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.

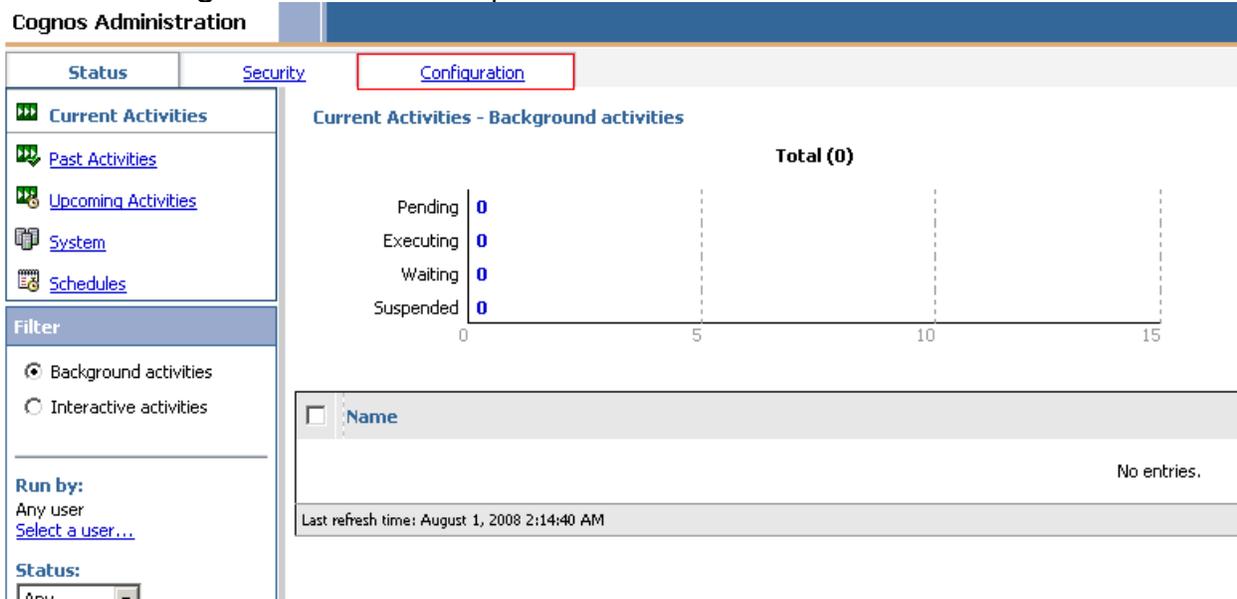
Steps – Export Data

Follow these steps to create an export.

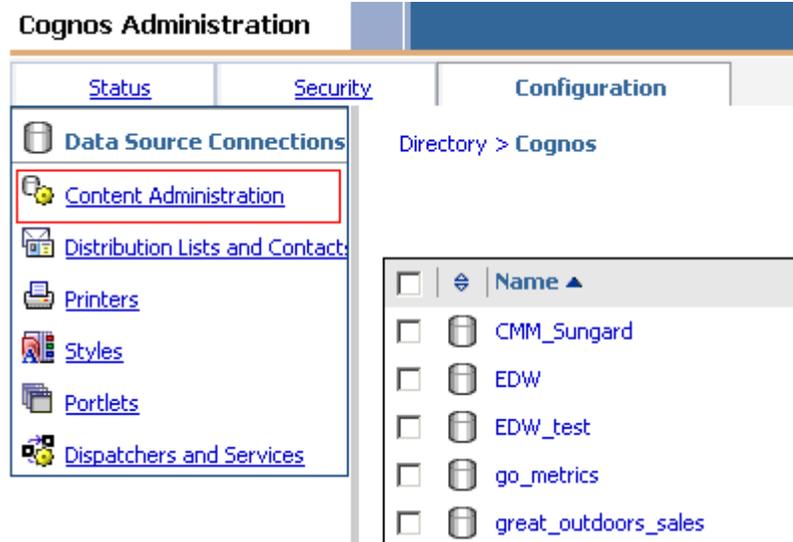
1. From Cognos Connection click **Launch**. Select **Cognos Administration**.



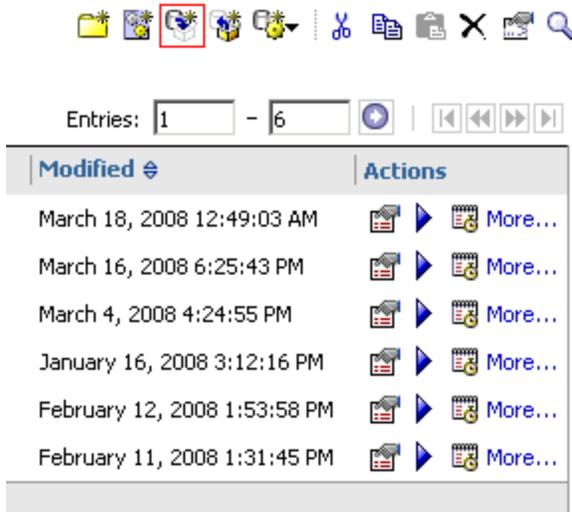
2. Click the **Configuration** tab at the top.



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



- Click the **New Export** button.



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

Specify a name and description - New Export wizard

Specify a name and location for the deployment specification. You can also specify a description and screen tip.

Name:

Description:

Screen tip:

Location:
Administration
[Select another location...](#)

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

Choose a deployment method - New Export wizard

Choose to deploy public folders and directory content or to deploy the entire Content Store.

Deployment method:

Select public folders and directory content

Select the entire Content Store

Include user account information

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

Select the public folders content - New Export wizard

Select the packages or folders and select the options to include in the export.

Public folders content

Change the target name of packages and folders if you do not want to overwrite them in the target with packages and folders from the deployment archive.
Disable the packages and folders if you do not want users to access them in the target after the import.

<input type="checkbox"/>	...> Name	...> Target name	<input type="checkbox"/> Disable after import
No entries.			

[Add...](#) [Remove](#)

Options

Include report output versions

Conflict resolution:

Keep existing entries

Replace existing entries

Include run history

Conflict resolution:

Keep existing entries

Replace existing entries

Include schedules

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.

Select entries (Navigate) - New Export wizard

Navigate the folders or search to find the entries to include in your archive. Select the entries you want and click the arrow button to update the Selected entries list.

Available entries

Public Folders > Performance Management > Performance Management Reports

Entries: 1 - 2

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Analyze Enrollment Funnel
<input checked="" type="checkbox"/>	Manage Applicants

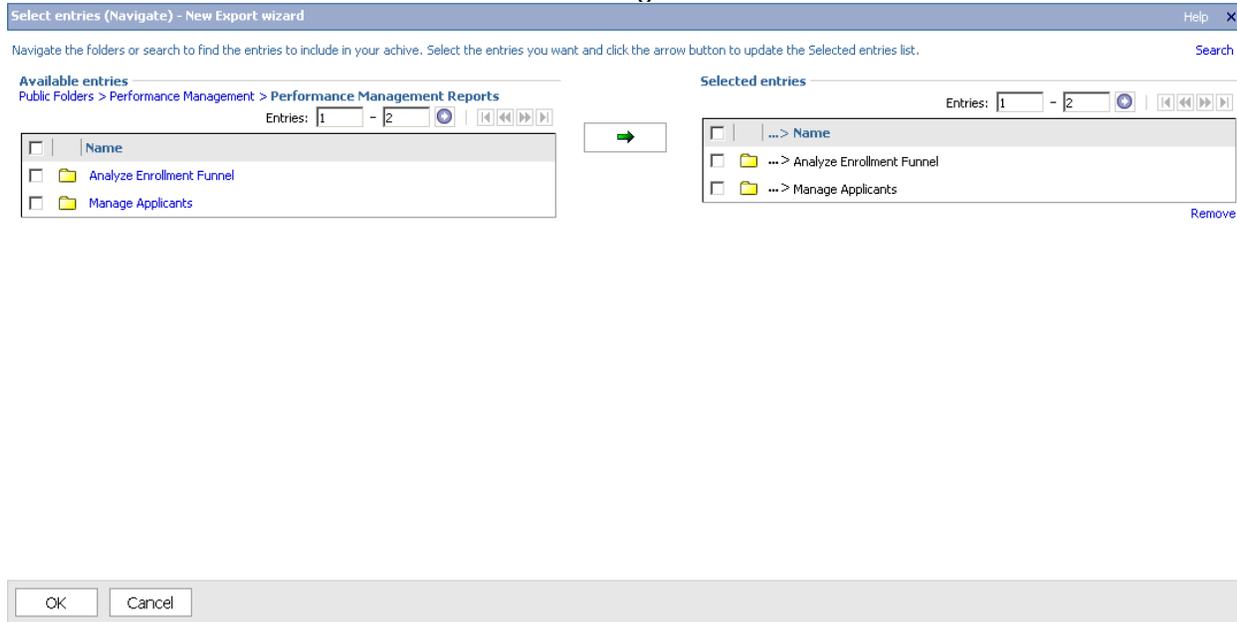
Selected entries

Entries: -

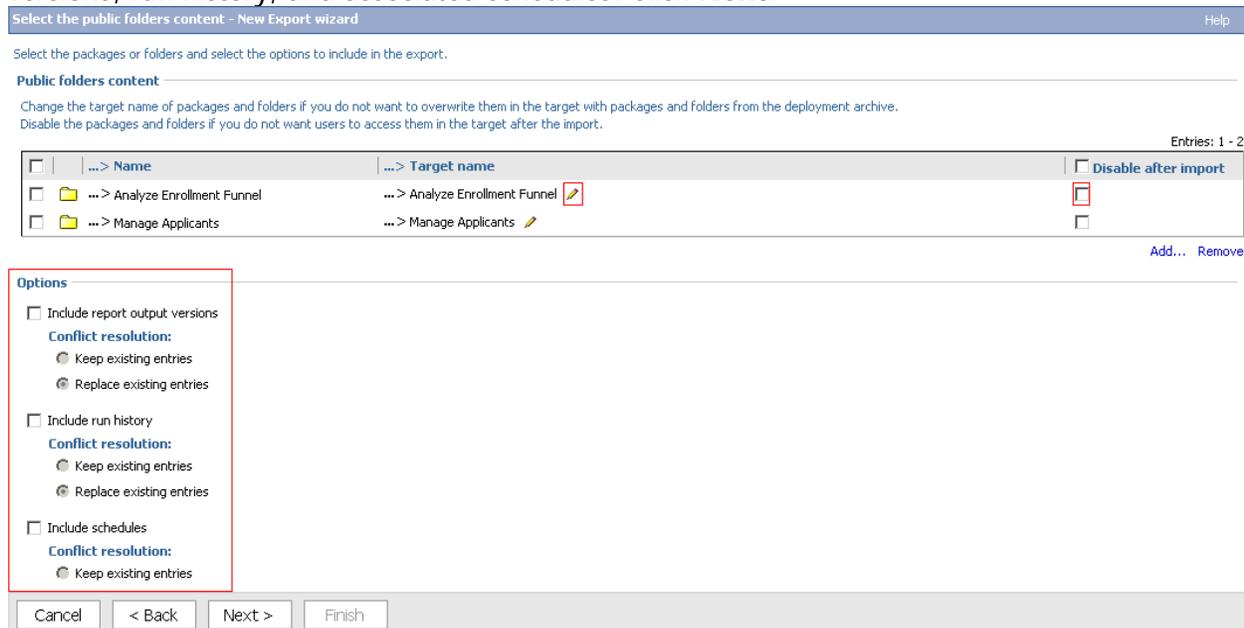
<input type="checkbox"/>	...> Name
No entries.	

[Remove](#)

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.

Select the directory content - New Export wizard

Select the directory content and options to include in the export.

Directory content

- Include Cognos groups and roles

Conflict resolution:

- Keep existing entries
 Replace existing entries

- Include distribution lists and contacts

Conflict resolution:

- Keep existing entries
 Replace existing entries

- Include data sources and connections

- Include signons

Conflict resolution:

- Keep existing entries
 Replace existing entries

Cancel < Back Next > Finish

12. Specify the general options of the export.

Specify the general options - New Export wizard

Specify the options applicable to all the entries in the export. You can also select the options applicable to the deployment record.

Access permissions

- Include access permissions
 - Apply to new entries only
 - Apply to new and existing entries

External namespaces

- Include references to external namespaces
- Do not include references to external namespaces

Entry ownership

Set the owner to:

- The owner from the source
- The user performing the import

Apply to:

- New entries only
- New and existing entries

Deployment record

Recording level:

Select the level of detail to save in the deployment record.

Basic ▾

Cancel

< Back

Next >

Finish

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

Specify a deployment archive - New Export wizard

Select from the existing deployment archives or type a new deployment archive name. Select whether to encrypt the content of the archive.

Deployment archive

The location of the deployment archive is set using the deployment files location in Cognos Configuration.

Entries: 1 - 1

Name ▲
<input type="radio"/> full_backup

New archive:

Test Export

Encryption

You can encrypt the content of the archive by setting a password. This password is required to decrypt the archive during import.

Encrypt the content of the archive

[Set the encryption password...](#)

Cancel

< Back

Next >

Finish

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

Review the summary - New Export wizard

The Export wizard is ready to export to the deployment archive.

If you want to change any settings, click Back.

If you are satisfied with the settings and want to select whether to run, schedule, or save only, click Next.

Deployment specification

Name:
Test Export

Description:

Deployment archive

Name:
Test Export

Encryption:
Do not encrypt the content of the archive

Public folders content

...> Name	Target name
...> Analyze Enrollment Funnel	...> Analyze Enrollment Funnel
...> Manage Applicants	...> Manage Applicants

Options:

Do not include report output versions
Do not include run history
Do not include schedules

Directory content

Do not include Cognos groups and roles
Do not include distribution lists and contacts
Do not include data sources and connections

Cancel

< Back

Next >

Finish

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

Select an action - New Export wizard

Select whether you want to run, schedule, or save only, when the wizard closes.

Action:

- Save and run once
- Save and schedule
- Save only

Cancel

< Back

Next >

Finish

16. Click **Run**.

Run with options - Test Export

Select when you want to run this export.

Time:

Now

Later:

Aug 5, 2008 

1 : 57 AM 

Content:

Name
<input checked="" type="checkbox"/> Content store
<input checked="" type="checkbox"/> Public Folders
<input checked="" type="checkbox"/> ... > Analyze Enrollment Funnel
<input checked="" type="checkbox"/> ... > Manage Applicants

17. Click **OK**.

Cognos 8



You selected to run 'Test Export' as follows:
Time: now

View the details of this export after closing this dialog

Click OK to run the export or click Cancel to return to your selection.

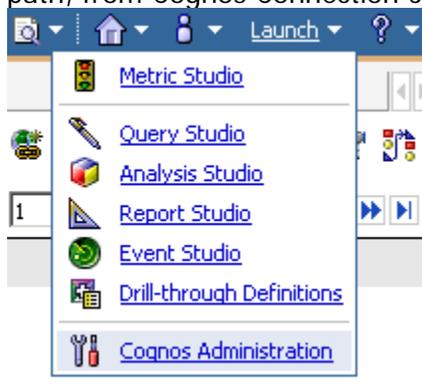
18. Notice that a Zip file was created in your Cognos_installation_path/deployment path.

```
File Edit View Terminal Tabs Help
[root@RDK deployment]# pwd
/u01/cognos/c8/deployment
[root@RDK deployment]# ls
full_backup.zip Sungard_University Sungard_University_2 Test Export.zip
[root@RDK deployment]# █
```

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.

The screenshot shows the Cognos Administration interface with the **Configuration** tab selected. The left sidebar contains navigation links: **Current Activities**, **Past Activities**, **Upcoming Activities**, **System**, and **Schedules**. Below these is a **Filter** section with radio buttons for **Background activities** (selected) and **Interactive activities**. A **Run by:** section shows "Any user" and a link to "Select a user...". A **Status:** dropdown menu is also visible.

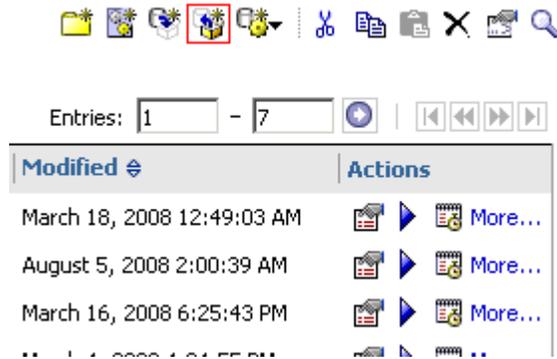
The main content area is titled "Current Activities - Background activities" and displays a bar chart showing the count of activities in different states: Pending (0), Executing (0), Waiting (0), and Suspended (0). The total count is 0. Below the chart is a table with a header "Name" and a checkbox. The table is currently empty, with the text "No entries." displayed. At the bottom, it shows "Last refresh time: August 1, 2008 2:14:40 AM".

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

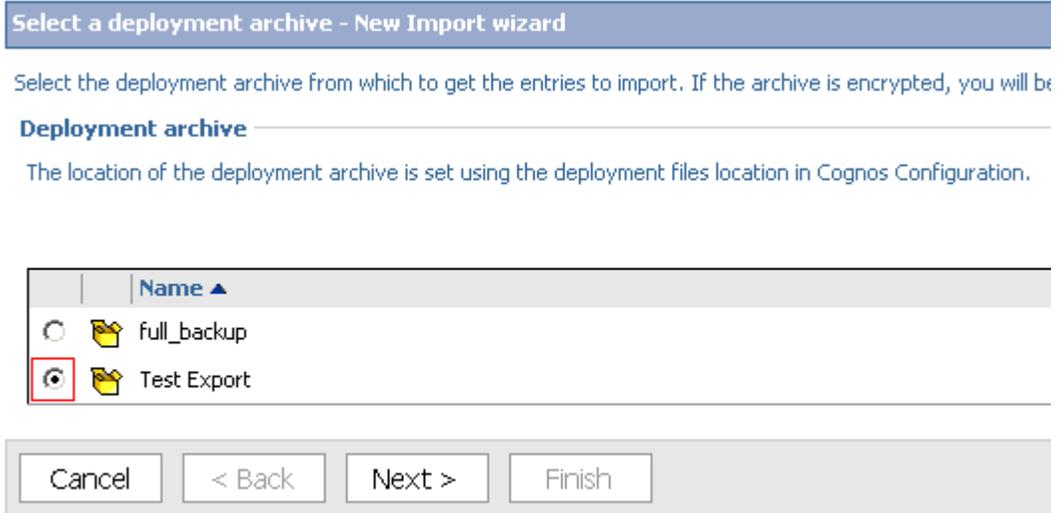
The screenshot shows the Cognos Administration interface with the **Configuration** tab selected. The left sidebar contains navigation links: **Data Source Connections**, **Content Administration** (highlighted with a red box), **Distribution Lists and Contact**, **Printers**, **Styles**, **Portlets**, and **Dispatchers and Services**.

The main content area is titled "Directory > Cognos" and displays a list of data sources. The list has a header "Name" and a checkbox. The data sources listed are: CMM_Sungard, EDW, EDW_test, go_metrics, and great_outdoors_sales.

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.

Specify a name and description - New Import wizard

Specify a name and location for the deployment specification. You can also specify a description and screen tip.

Name:

Test Import

Description:

Screen tip:

Location:

Administration

[Select another location...](#)

Cancel

< Back

Next >

Finish

7. Click **Next**.

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

Set properties - Test Import

General | **Import** | Permissions

Specify the deployment archive options, select the packages, folders and directory content to import, and specify the options for the import.

Deployment archive:
Test Export [Change the deployment archive...](#)

Public folders content

Change the target name of packages and folders if you do not want to overwrite them in the target with packages and folders from the source.
Disable the packages and folders if you do not want users to access them in the target after the import.

<input type="checkbox"/>	...	Name	...	Target name
<input type="checkbox"/>		... > Analyze Enrollment Funnel		... > Analyze Enrollment Funnel
<input type="checkbox"/>		... > Manage Applicants		... > Manage Applicants

Options

Include report output versions

Conflict resolution:

Keep existing entries

Replace existing entries

Include run history

Conflict resolution:

Keep existing entries

Replace existing entries

OK Cancel

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

Specify the target location and the multilingual target name - Test Import

Specify a name for each language to use in the target environment.

Location:

Public Folders > Performance Management > Performance Management Reports

[Select another location...](#)

Language:

English (United States)

Source name:

Manage Applicants

Target name:

Manage Applicants Test

OK

Cancel

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

Set properties - Test Import

General | **Import** | Permissions

Specify the deployment archive options, select the packages, folders and directory content to import, and specify the c

Deployment archive:
Test Export [Change the deployment archive...](#)

Public folders content

Change the target name of packages and folders if you do not want to overwrite them in the target with packages and
Disable the packages and folders if you do not want users to access them in the target after the import.

<input type="checkbox"/>	...> Name	...> Target name
<input checked="" type="checkbox"/>	...> Analyze Enrollment Funnel	...> Analyze Enrollment Funnel Test
<input checked="" type="checkbox"/>	...> Manage Applicants	...> Manage Applicants Test

Options

Include report output versions
Conflict resolution:
 Keep existing entries
 Replace existing entries

Include run history
Conflict resolution:
 Keep existing entries
 Replace existing entries

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

Specify the general options - New Import wizard

Specify the options applicable to all the entries in the import. You can also select th

Access permissions

Include access permissions

- Apply to new entries only
- Apply to new and existing entries

External namespaces

- Include references to external namespaces
- Do not include references to external namespaces

Entry ownership

Set the owner to:

- The owner from the source
- The user performing the import

Apply to:

- New entries only
- New and existing entries

Deployment record

Recording level:
Select the level of detail to save in the deployment record.

Basic ▾

Cancel < Back Next > Finish

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

Review the summary - New Import wizard

The Import wizard is ready to import into the target environment.

If you want to change any settings, click Back.

If you are satisfied with the settings and want to select whether to run, schedule, or save only, click Next.

Deployment specification

Name:

Test Import

Description:

Deployment archive

Name:

Test Export

Public folders content

...> Name	Target name	Disable after import
...> Analyze Enrollment Funnel	...> Analyze Enrollment Funnel	
...> Manage Applicants	...> Manage Applicants	

Options:

Do not include report output versions

Do not include run history

Do not include schedules

Directory content

Do not include Cognos groups and roles

Do not include distribution lists and contacts

Do not include data sources and connections

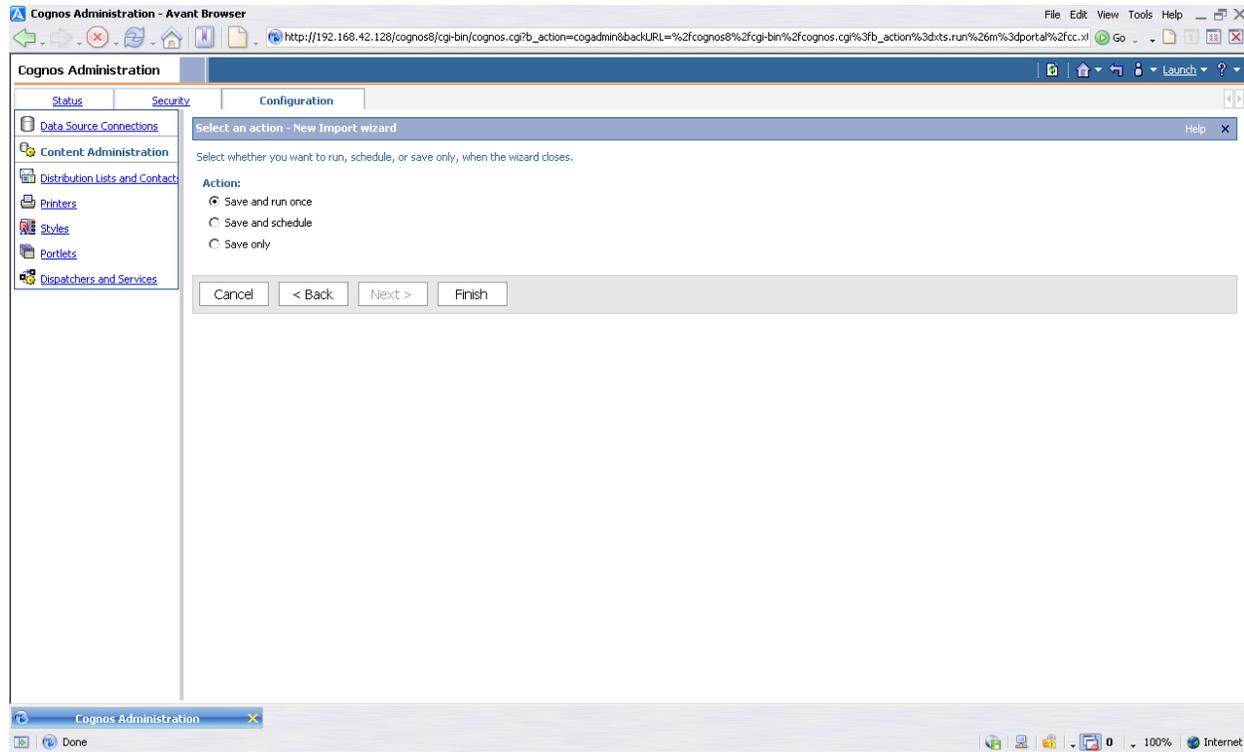
Cancel

< Back

Next >

Finish

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



14. Click **Run**.

Run with options - Test Import

Select when you want to run this import.

Time:

Now

Later:

Aug 5, 2008 

2 : 37 AM 

Content:

Name
<input checked="" type="checkbox"/> Content store
<input checked="" type="checkbox"/> Public Folders
<input checked="" type="checkbox"/> ... > Analyze Enrollment Funnel
<input checked="" type="checkbox"/> ... > Manage Applicants

Report specification upgrade

You may want to keep existing report specification versions for compatibility with existing applications.

Upgrade all report specifications to the latest version

Keep the existing report specification versions

15. Click **OK**.

Cognos 8

 You selected to run 'Test Import' as follows:
Time: now
Report specification upgrade: Keep the existing report specification versions

View the details of this import after closing this dialog

Click OK to run the import or click Cancel to return to your selection.

16. Navigate to the imported directory.

The screenshot displays the Cognos Connection interface. At the top, there is a header bar with the text "Cognos Connection". Below this, there are two tabs: "Public Folders" and "My Folders". The "Public Folders" tab is active. Below the tabs, there is a breadcrumb navigation path: "Public Folders > Performance Management > Performance Management Reports". Below the breadcrumb, there is a table with a header row containing a checkbox and the text "Name". The table lists four folders, each with a checkbox and a folder icon:

<input type="checkbox"/>	Name
<input type="checkbox"/>	Analyze Enrollment Funnel
<input type="checkbox"/>	Analyze Enrollment Funnel Test
<input type="checkbox"/>	Manage Applicants
<input type="checkbox"/>	Manage Applicants Test

Create Distribution List and Contacts

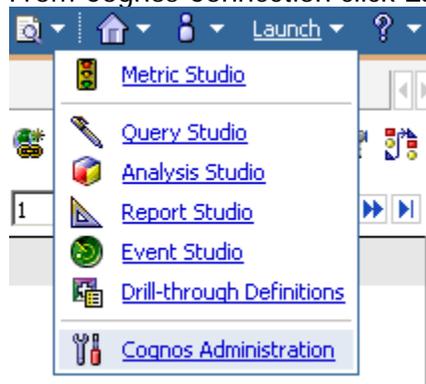
Introduction

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**.



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

The screenshot shows the Cognos Administration interface with the **Configuration** tab selected. The left sidebar contains navigation links for **Current Activities**, **Past Activities**, **Upcoming Activities**, **System**, and **Schedules**. Below these is a **Filter** section with radio buttons for **Background activities** (selected) and **Interactive activities**. A **Run by:** section shows "Any user" and a link to "Select a user...". A **Status:** dropdown menu is also visible.

The main content area is titled **Current Activities - Background activities** and displays a bar chart showing the count of activities in different states: Pending (0), Executing (0), Waiting (0), and Suspended (0). The total count is **Total (0)**. Below the chart is a table with a header **Name** and a message "No entries." at the bottom right. A footer note indicates "Last refresh time: August 1, 2008 2:14:40 AM".

- Click **Distribution List and Contacts**.

The screenshot shows the Cognos Administration interface with the **Configuration** tab selected. The left sidebar contains navigation links for **Data Source Connections**, **Content Administration**, **Distribution Lists and Contacts** (highlighted with a red box), **Printers**, **Styles**, **Portlets**, and **Dispatchers and Services**.

The main content area is titled **Directory > Cognos** and displays a list of data sources. The list has a header **Name** and contains the following entries:

<input type="checkbox"/>	Name ▲
<input type="checkbox"/>	CMM_Sungard
<input type="checkbox"/>	EDW
<input type="checkbox"/>	EDW_test
<input type="checkbox"/>	go_metrics

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

The screenshot shows the Cognos Administration console. At the top, there are three tabs: **Status**, **Security**, and **Configuration**. The **Security** tab is active. On the left side, there is a navigation pane with several links: **Data Source Connections**, **Content Administration**, **Distribution Lists and Connections**, **Printers**, **Styles**, **Portlets**, and **Dispatchers and Services**. The main content area is titled **Directory** and contains a table with one entry: **Cognos**. The entry is highlighted with a red box. Below the table, it says "Last refresh time: August 5, 2008 3:09:30 AM".

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

The screenshot shows the Cognos Administration console. At the top, there is a toolbar with several icons. The **New Distribution List** icon, which is a document with a star, is highlighted with a red box. Below the toolbar, there is a section for **Entries** with two input fields and a search icon. Below that, there is a table with two columns: **Modified** and **Actions**. The table is currently empty.

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

Specify a name and description - New Distribution List wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

Description:

Screen tip:

Location:
Directory > Cognos
[Select another location...](#)

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

Select the members - New Distribution List wizard Help X

Select the members of this entry.

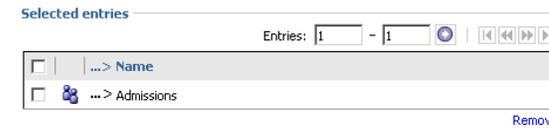
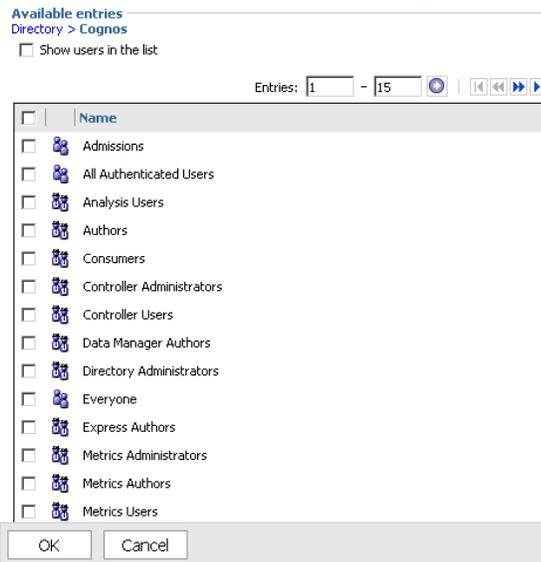
Entries: - |

<input type="checkbox"/>	...> Name	Type
No entries.		

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**.

Select the members - New Distribution List wizard

Select the members of this entry.

<input type="checkbox"/>			...> Name
<input type="checkbox"/>			...> Admissions

Cancel	< Back	Next >	Finish
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The Distribution List can now be used when a report is scheduled with a delivery option to email.