# **IIT Cognos Portal Librarian Guide**

#### 1.0 About the Cognos Portal

The IIT Cognos Portal allows users to access reports and perform analysis based on data stored in the SunGard Banner Operation Data Store (ODS) and Enterprise Data Warehouse (EDW). Reports and queries can be authored using the Cognos tool set (i.e., Query Studio, Analysis Studio, and Report Studio).

The IIT Cognos Portal is organized into four distinct tabs: My Folders, Report Libraries, Shared Reports and Resources. Users of the Portal are assigned a role within the system. The role determines which tools the user has access to.

Data required to run and author reports is made available through various data packages (ODS) and data cubes (EDW). Security access to these SunGard Banner packages and cubes will determine which data a user has access to.

This document describes the Cognos user roles and how to use the four portal tabs. It also includes step-by-step instructions for changing the order of the tabs, changing your view preferences for each tab, deleting files from the tabs, creating and deleting folders, and creating and deleting shortcuts.

#### 2.0 Cognos User Roles

IIT has established four Cognos user roles. Each role has access to different report tools. The roles are Report Viewer, Query User, Report Author and Report Librarian. These roles are combined with security access to data packages, cubes and folders to define a user's overall access to the system.

- **Report Viewer** Can only run existing reports and queries. Does not have access to create new reports or queries using the Cognos reporting tools.
- **Query User** Has access to Query Studio, Report Studio Express and Analysis Studio. Can create queries and reports in Query Studio and Analysis Studio.
- **Report Author** Has access to Report Studio, Query Studio and Analysis Studio.
- **Report Librarian** Has access to Report Studio, Query Studio and Analysis Studio.

The Report Librarians also perform tasks such as adding reports to the Report Libraries from the Shared Reports tab, developing and storing new reports for the university in the Report Libraries, managing the content of the Shared Reports tab, setting up new users in Cognos and providing security access to data packages and data cubes. More information about security access to data packages and cubes can be found in the next section of this document. The identify of the Report Librarians and the data packages assigned to each librarian is available at: http://oii.iit.edu/ods/ and will soon be accessible from the Cognos Portal Resources tab (described in section 5.4 below).

Individual users were assigned to roles based on the number of licenses available and in consultation with department heads. If a department wishes to purchase additional licenses, a person with budget authority in the department should send an email to the IIT Office of Technology Services (OTS) Support Desk (<u>support@iit.edu</u>) to request additional Cognos licenses. The email should include the type of license (i.e., Report Studio or Query/Analysis Studio), the name of the user for each license, and the fund, organization, account and program (FOAP) codes to which the licenses are to be charged.

# 3.0 Access to Data Packages and Cubes

Security access to data packages from the Banner Operational Data Store (ODS) and data cubes from the Banner Enterprise Data Warehouse (EDW) is obtained by request to the Data Security Team. The identity of the Data Security Team members is available at: http://oii.iit.edu/ods/ and will soon be accessible from the Cognos Portal Resources tab (described in section 5.4 below).

The following sections describe the responsibilities of IIT Employees who have access to IIT administrative data.

#### 4.0 Confidentiality (FERPA) Guidelines and Responsibilities of IIT Employees

The guidelines set forth below define the responsibilities of everyone accessing and managing data for IIT. Offices may have individual guidelines that supplement, but do not supplant or contradict, the guidelines set forth below. Data entrusted to IIT by other organizations (e.g., testing companies, lenders, and government agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed upon terms shall be governed by the guidelines set forth below.

#### 4.1 Confidentiality Guidelines

In accordance with the 1974 Family Education Rights and Privacy Act (FERPA), and to ensure maximum safeguards against indiscriminate distribution of information contained in students' records, only authorized IIT personnel will disclose information of a confidential nature (i.e., information not normally available to the general public). This information may be disclosed only to the student himself or herself, to a parent or guardian claiming that student as a dependent (as demonstrated by providing a copy of the parent or guardian's most recent Federal income tax return), or to a third party upon receipt of a written release signed by the

student.

Certain exceptions to this include IIT school officials<sup>1</sup> who have a legitimate educational interest<sup>2</sup> in the records, organizations conducting studies for educational and governmental agencies or offices in connection with the student's application for receipt of financial aid, governmental officials as identified by Public Law 93-380, and an appropriate official in response to a court order or subpoena. Without a signed release, the university can make only "directory information<sup>3</sup>" available for public use in campus directories and publicity of events.

#### 4.2 Responsibilities of IIT Employees with Respect to Institutional Data

Employees must adhere to any applicable Federal and state laws covering storage, retention, use, release, and destruction of data. All department heads are responsible for ensuring that staff members in their department know what these laws require and adhere to these requirements.

Supervising administrators shall ensure a secure office environment with regard to all institutional information systems. Administrators shall validate the access requirements of their staff according to job functions before submitting requests for the provision of data access on behalf of their staff. Except as described in the Confidentiality Guidelines set forth in Section 2.1 above, under no circumstances shall anyone use institutional electronic data (in detail or summary) in any publication, seminar, or professional presentation, or otherwise release data, in any form, outside the university without prior written approval from an appropriate security officer. Data should never be left on any system to which access is not controlled.

Electronic data are owned by the university and are vital assets. All institutional data, whether maintained in the central database or copied into other data systems, including personal computers, remain the property of IIT. Access to data is not approved for use outside an individual's office university responsibilities. Computerized institutional data shall be used only for the legitimate business of IIT. Institutional computing services and facilities shall be used only as required in the performance of job functions.

As a general principle of access, university data (regardless of who collects or maintains it) shall be shared among those employees whose work can be done

<sup>&</sup>lt;sup>1</sup> School officials shall be deemed to include member of the IIT's faculty and administrative staff who have a legitimate educational interest in such records and other personnel whose duties involve establishment and maintenance of such records and development of institutional reports.

<sup>&</sup>lt;sup>2</sup> A "legitimate educational interest" shall be deemed to mean having a direct involvement in establishing or reviewing a student's academic record or performance.

<sup>&</sup>lt;sup>3</sup> The following constitutes directory information: name of student, date and place of birth, dates of attendance at IIT, local address, phone number and email address of student, home address and phone number of student, positions held, place of employment, and extension number of students currently employed at IIT, department of specialization and educational level (undergraduate, non-degree-seeking student, graduate student in Master or Ph.D. program), membership in officially recognized campus organizations and on teams, offices held in such organizations, degrees earned and special awards and recognition given, photograph of student.

more effectively by knowledge of such information. Although the university must protect the security and confidentiality of data, the procedures to allow access to data must not unduly interfere with the efficient conduct of university business.

All information systems owned by IIT shall be constructed to assure that:

- **1.** Accuracy and completeness of all system contents are maintained during storage and processing.
- 2. System capabilities can be re-established within an appropriate time after loss or damage by accident, malfunction, breach of security, or natural disaster.
- **3.** Actual or attempted breaches of security can be detected promptly and controlled.

All who use IIT institutional data have the right to expect the data to be accurate.

#### 5.0 Logging in to Cognos

Users who have been granted access to one or more of the Cognos suite of tools (i.e., Viewer, Query Studio, Analysis Studio, or Report Studio) can log into Cognos through myIIT.

- С
- 1. Click the Cognos icon at the top of the screen.

			100 100	i di	TTTT I STOL			
e-mail	calendar	groups	Bb	web for students	PeopleAdmin peopleadmin ots support	library e- resources	C	logout

2. On the log in screen, enter your myIIT user name and password.



Log on			
Please type your credentials for authentication.			
Namespace: prod_ldap			
User ID:			
1			
Password:			
OK Cancel			

#### 3. Click OK.

4. Select My home. You will be taken to the portal tabs.

COGNOS® 8	
My Content	
My home	
Go to your home page.	

#### 6.0 How to Use the Cognos Portal Tabs

#### 6.1 My Folders

My Folders tab is a private tab that only the logged-in user has access to. This tab is to be used to store report queries created by the user. It can also be used to save shortcuts to other reports and save any other personal content desired. However, to maintain the performance of the Cognos server, users are strongly encouraged to save the output of report queries to another server. To protect the confidentiality of data (see section 4.0 for a discussion of data confidentiality and the responsibilities of IIT employees), users are not to save data that contains individual identifying information on their desktop or laptop computers.

Users may create folders to further organize the items stored in My Folders.

Cognos Connection			
My Folders	Report Libraries	Shared Reports	Resources
My Folders			
□   Name ♦			

#### 6.2 Report Libraries

Report Libraries is a public tab that contains a Library of official University reports. These reports are organized into folders. These folders are named according to the Banner package that is the source of the reports.

Access to the various folders in the library is controlled through Cognos security. Only folders to which the user has been granted access can be viewed by the user.

Users can run reports from this location but they cannot edit the reports. The report Librarian is responsible for managing the reports in the Report Libraries. Report Librarians are the only ones able to save reports to this location. If a user needs to save a report for personal use it should be saved to the My Folders tab. If the report will be shared with other users that have access to the same data package, the report should be saved to the Shared Reports tab.

Cognos Connection			
My Folders	Report Libraries	Shared Reports	Resources
Cognos Navigator			? 💶 🗖 Cognos Viewer
Report Libraries 🖻			
Name ⇔		Actions	
EDW →		More	
DDS →		More	

#### 6.3 Shared Reports

Shared Reports is a public tab that allows users to share reports with other users. The reports are organized into folders and the folders are named according to the Banner source package.

The folders which the user has access to is controlled through Cognos security. Only folders, to which the user has been granted access, can be viewed by that user. In order for another user to access a report in this tab, that other user must have access to the same folders (and data packages) within the tab.

The main difference between the Report Shared Reports tab and the Libraries tab is that the users create and manager the contents of the Shared Reports tab.

Cognos Connection			
My Folders	Report Libraries	Shared Reports	Resources
Cognos Navigator			? 💶 🗖 Cognos Viewer
Shared Reports 🕀			
Name		Actions	
EDW →		More	
CDS →		More	

#### 6.4 Resources

Resources is also a public tab that provides access to Metadata, User Guides, Report Templates and Policies & Procedures for data access and reporting. The content of this tab is controlled by the university and cannot be edited by users.

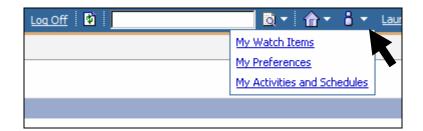
Cognos Connection train20Fn train20Ln Log	off   🖻   🚺 🔹 🔂 🕇
My Folders Report Libraries	Shared Reports Resources
	E*
Quick Links	Quick Links
Metadata 🖻	User Guides
Name   Actions	Cognos Connection
No entries.	🕅 Report Studio Professional Authoring
No entries.	III Report Studio Express Authoring
Click to open ?	🕅 <u>Query Studio</u>
Report Templates 🕑	Analysis Studio
Name   Actions	
IIT Report Template 1 More	Quick Links ?
	Policies and Procedures
	🛗 Data Standards Manual

#### 7.0 Step-by-Step Instructions for Using the IIT Cognos Portal

# 7.1 Modifying the Sequence of the Tabs in Your Cognos Portal

To modify the sequence or order in which the tabs appear in your Cognos Portal:

1. Click on the down arrow beside the My Area icon to expand the My Area menu.



- 2. Click on My Preferences.
- 3. Open the Portal Tabs tab.

Set preferences					
General	Personal	Portal Tabs			
Select the entries to include as tabs in your portal.					

4. Click on Modify the sequence... in the lower right-hand side of the screen.

Entries: 1	- 4	
<u>Add</u>	Remove	Modify the sequence

5. Highlight the tab you wish to move and use the Up, Down, To top, and To bottom buttons to change its position in the tab sequence.

Modify the sequence of tabs
Specify the order you want your tabs to follow.
Tabs:
Report Libraries Shared Reports My Folders Resources
Up Down To top To bottom
OK Cancel

6. When the tab names appear in the desired sequence, click OK.

#### 7.2 Modifying Your View Preferences for a Tab

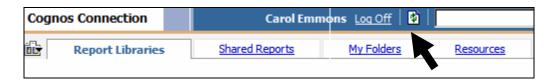
To modify your preferences for a tab:

1. Under the Cognos Navigator channel, click on the Edit icon.

Cogn	os Navigator	? 🖆 🗕 🗆
Repo	rt Libraries 🖻	
	Name 🕀	Actions
	<u>EDW</u> →	More
	<u>ODS</u> →	More

- 2. Scroll to the bottom of the Set the Properties Cognos Navigator page.
- 3. Click on the drop-down box under Separators.
- 4. Click on Alternating Backgrounds.
- 5. Click on OK.

6. Click the Refresh icon on the top toolbar to see changes.



#### 7.3 Creating a Folder in a Tab

To create a folder in Cognos Navigator channel:

1. Under the Cognos Navigator channel, click on the arrow next to the channel name (e.g., Report Libraries). A separate window should pop up.

Cognos Navigator	? 🖆 💶 🗆
Report Libraries 🖻	
Name 😂	Actions
EDW →	More
	More
-	

2. Click on the New Folder icon.

Add to my portal tabs	Close and return to my portal tabs
III 🕄 🖆 😻 👪 🖩	i 🔏 🖻 🖻 🗙 🛃 💏
Entrie 1	- 2

- 3. Enter the name of the new folder in the Name field.
- 4. Click Finish.
- 5. Click the Refresh icon on the top toolbar to see changes.

Cognos Connection		Carol Emmons Log Off 🛛 🔯 🛛		
	Report Libraries	Shared Reports	My Folders	Resources

# 7.4 Deleting a Folder from a Tab

To delete a folder from a tab:

1. Under the Cognos Navigator channel, click on the More link next to the folder you wish to delete.



- 3. Click Delete.
- 4. Click OK.
- 5. Click the Refresh icon on the top toolbar to see changes.

Carol Emmons Log Off		
Shared Reports	My Folders	Resources
	Shared Reports	Shared Reports My Folders

# 7.5 Creating a Shortcut in a Tab:

To create a shortcut in a tab to a report in a different tab:

1. Under the Cognos Navigator channel, click on ODS.

Cogn	os Navigator	201	٦
Share	ed Reports 🖻		
	Name 😂	Actions	
	<u>EDW</u> →	(留) More	l
	<u>ODS</u> →	😭 <u>More</u>	

- 2. Click on Student Detail package.
- 3. Identify Test Report.

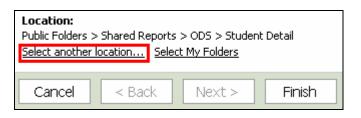
4. Click on the More link next to the report name.



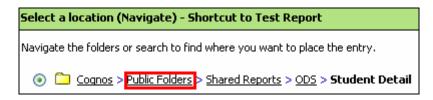
5. Click on Create a shortcut to this entry in the Available actions menu.

Pe	rforn	n an action - Test Report	
•	Available actions:		
-	Tanai	Die actions.	
	r	<u>Set properties</u>	
_		Run with options	
	۶	Open with Query Studio	
		Open with Report Studio	
	E3	New schedule	
	<b>*</b>	Alert me about new versions	
	∎ <u>`</u>	Do not alert any about new versions	
	ł	Move	
	Ēþ	Сору	
	ľ	Create a shortcut to this entry	
	==	Create a report view of this report	
	<u>a</u> k	Add to bookmarks	
	×	<u>Delete</u>	

6. Under Location, click on Select another location.



7. Click on Public Folders in the crumb trail.



8. Click on Report Libraries.

	Name 🖨
$\circ$	Packages
0	Portal Published Content
$\circ$	Portal Tabs
0	Providence Contraction Report Libraries
$\circ$	Shared Reports

9. Click on the Test Report folder.

	Name 🖨
0	🗀 EDW
0	🗀 <u>ods</u>
$\circ$	🗀 Test Folder

- 10. Click OK.
- 11. Click Finished.
- 12. Click on the tab to see changes.

#### 7.6 Deleting a Shortcut from a Tab

To delete a shortcut in the Cognos Navigator channel:

1. Under the Cognos Navigator channel, click on the Test Folder.

Cognos Navigator ?		
Repor	t Libraries 🖻	
	Name 😄	Actions
	<u>EDW</u> →	[1] More
	<u>ODS</u> →	🚰 <u>More</u>
	<u>Test Folder</u> →	🚰 <u>More</u>

2. Click on the More link to the right of the Shortcut to Test Report.

Cognos Navigator	?⊠_□
Report Libraries > Test Folder ∋	
Name 😂	Actions
Shortcut to Test Report	😭 🕨 🌂 🔡 🐻 More

- 3. Click Delete from the Available actions menu.
- 4. Click OK.
- 5. Click the Refresh icon on the top toolbar to see changes.

🔹 Laura Davis 🛛 Log Off 🕴 🚱 🗍	<u></u> <u></u> <u></u> • <u></u> • <u></u> • <u></u> • <u></u> • <u></u> • <u></u>	8 -	Launch 🔻	? •
	•			
			2 <b>*</b>	R

# 7.7 Deleting a Report from a Tab

To delete a report from a tab:

1. Click the More link to the right of the report you wish to delete.

Cognos Navigator	20-0
<u>Report Libraries</u> > <u>ODS</u> > <b>Student Detail</b> ∋	
Name 🕀	Actions
N Test Report	🖆 🕨 🌂 🖽 🐻 More

2. The Available actions menu will appear. Click on Delete.

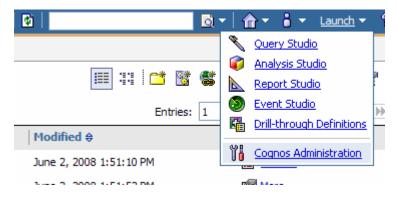
Perform an action - Test Report		
Available actions:		
Atalia	ble actions.	
r	<u>Set properties</u>	
	Run with options	
×.	Open with Query Studio	
	Open with Report Studio	
to the second se	New schedule	
<b>[</b> #]	Alert me about new versions	
r 🖄	Do not alert any about new versions	
	Move	
Ēþ	Сору	
Ż	Create a shortcut to this entry	
=*	Create a report view of this report	
	Add to bookmarks	
×		

3. Click OK.

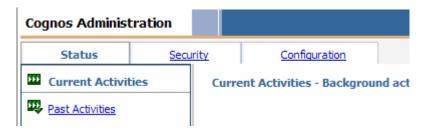
#### Setup User Account for the Portal

#### Step-by-Step setup for a Report Viewer account

1. Go to Launch and click Cognos Administration



2. Click Security tab



3. In the Directory window click Cognos namespace



4. Navigate in the Cognos namespace to the IIT\_R\_ReportViewer role and click properties icon

Cognos Administ	tration		Dian	ne Dai 🛛 Log Off 🚯 🚹 🕇 🕤	💧 🔻 Launch 🔫
Status	Secur	ity <u>Configur</u>	tion		
🖷 Users, Groups,	and Roles	<u>Directory</u> > Cognos		Ci 📽 😻 🐰 🗈 🛍	× 🖻 🏛 🔍
Capabilities User Interface Pr	ofiles			Entries: 84 - 98 🔘	
		🔄   🔶   Name 🔺		Modified <b></b> ♦	Actions
		IIT_R_Librari	in	June 5, 2008 12:38:02 PM	More
		IIT_R_Query	Jser	June 5, 2008 12:38:20 PM	More
		IIT_R_Repor	Author	June 5, 2008 12:38:28 PM	More
		IIT_R_Repor	Viewer	June 5, 2008 12:38:39 PM	More

5. Click Members tab then click Add...

Cognos Adminis	stration				Dianne Dai	Log Off 🕴 🚯	<b>@</b> • ti	<mark>å</mark> ▼ <u>Laun</u>	<u>dh</u> 🔻 ? '
<u>Status</u>	Security	/	Configuration						•
🖷 Users, Groups	s, and Roles	Set propertie	s - IIT_R_Repo	ortViewer				l	Help X
Capabilities		General	Members	Permissions					
User Interface P	Profiles	Select the mem	bers of this entr	у.					
					E	Entries: 1	- 3		
		□  > Name				Туре			
		🗖 📅	IIT_R_QueryUser			Role			
		🗖 🛱 …	B > IIT_R_ReportAuthor			Role			
		🗖 👪	> IIT_R_Librariar	ı			Role		
								<u>Add</u>	Remove
		ОК	Cancel						

6. Click on LDAP namespace (this example is taken from Test and the namespace is called test\_Idap) that contains the desired user account

Cognos Adminis	stration		Dianne D
<u>Status</u>	Secur	ity	Configuration
🖷 Users, Groups	s, and Roles	Select	t entries (Navigate) - IIT_R_ReportViewer
Capabilities			ate the folders, search, or type the names of the use
User Interface F	Profiles		ck the arrow button to update the Selected entries lis
			lable entries ctory
		<u> </u>	Show users in the list
		Ent	ntries: 1 - 2 💽   I I M 🕨 🕨
			Name
			Cognos
			🛃 test Idap

7. Click Search

Cognos Administration		Dianne	Dai Log Off 🛛 🔯 🗌 🏠 🔫 📩	🗧 🛨 Launch 👻 💡		
Status Secu	rity Configuration					
🖷 Users, Groups, and Roles	Select entries (Navigate) - IIT_R_ReportViewer			<u>Help</u>		
Capabilities	havigate the folders, search, or type the names of the users, groups, and foles to add, select the entries you want					
User Interface Profiles	and dick the arrow button to update the Selected entries list					
	Available entries <u>Directory</u> > test_ldap	2	Selected entries			
	Show users in the list	<b>→</b>	> Name			
	Entries: 1 - 13 💽   H H H H					
	Name Name					
	AccessGroups		No entries.			
	CourseGroups					

8. Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.

Cognos Administration		Dianne Dai Log Off 🛛 🖥 🛉 🛧 👈 🔹 Launch 🔻 📍 🔹
Status Secu	ity <u>Configuration</u>	٩
💼 Users, Groups, and Roles	Select entries (Search) - IIT_R_ReportViewer	Help X
Capabilities User Interface Profiles	Navigate the folders, search, or type the names of the users, groups, and roles to add. Select the entrie Selected entries list.	es you want and click the arrow button to update the <u>Type Navigate</u>
	Available entries Directory > test_ldap Find text in: <u>Name field</u> ▼	Selected entries Entries: 1 - 1 0   (((())))
	train20 Search 🔯 Advanced 🗞	→ □ □ ···> Name
	Method: <u>Contains the exact string</u> Type: <u>Any</u> Scope: <u>This folder and its subfolders</u>	<sup>a</sup> ··· > train20Fn train20Ln (train20) <u>Remove</u>
	Results: Entries: 1 - 1 🔘      (()    )	
	□  > Name	
	strain20Fn train20Ln (train20)	
	OK Cancel	

9. The user is now a member of the IIT\_R\_ReportViewer role. Click OK.

Cognos Administration	Dianne Da	i Log Off 🛛 🚯 🛛 🏠 🖛 👈 🖁 👻 Launch 👻 📍 👻
Status Secu	rity <u>Configuration</u>	
🖷 Users, Groups, and Roles	Set properties - IIT_R_ReportViewer	Help X
Capabilities User Interface Profiles	General Members Permissions Select the members of this entry.	
		Entries: 1 - 4 🔘   I 🐗 🕨 🕨
	□  > Name	Туре
	IIT_R_QueryUser	Role
	IIT_R_ReportAuthor	Role
	IIT_R_Librarian	Role
	🔲 🧯 > train20Fn train20Ln (train20)	User
		Add Remove
	OK Cancel	

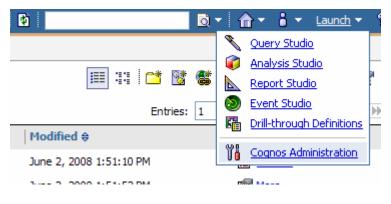
10. Repeat steps 4 through 9 adding the same user account as a member of the desired package group(s). The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_ Active Registration has access to the Active Registration package. All of the package groups are located in the Cognos namespace.

IMPORTANT NOTE: Do not add the user to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report Librarians are members of. These groups have write permission to the Report Libraries folder structure.

11. This completes the required steps to create a user with the Report Viewer role for the Cognos application.

#### Steps to Add Portal Tabs to User Account

1. Go to Launch and click Cognos Administration



2. Click Security tab

Cognos Administ	tration			
Status	Secu	rity	Configuration	
D Current Activit	ties	Curre	ent Activities - Backgro	und act
Past Activities				

 In the Directory window click test\_ldap namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account

Cognos Adminis	tration		
<u>Status</u>	Secu	rity	Configuration
🖷 Users, Groups	s, and Roles	Direc	ctory
Capabilities			
🗐 User Interface F	Profiles		
			♦ Name ▲
		6	Cognos
		6	🔏 <u>test Idap</u>
		Last refr	esh time: June 5, 2008 12:42:13 PM

4. Click on the search icon

Cognos Adminis	stration		John Mcgivney 🛛 Log Off 🛛 🔯 🛔 🕈 🖛 🕯 🔹 🖞	Launch 🔻 💡
Status	Security	Configuration		
🖷 Users, Groups	s, and Roles	<u>Directory</u> > test_ldap		🖻 🔍
Capabilities			Entries: 1 - 13 🔘   [4]	
User Interface P	ronies	□   \u0097   Name ▲	Modified   Ac	ctions
		AccessGroups		More
		CourseGroups	1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	More
		Courses	1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 -	More
		C Department	Pri	More

5. Use search to locate the user that the portal tabs will be added to. Click the properties icon.

Cognos Administration		John Mcgivney Log Off 🛛 👔 🕇 🖛 📩 🖌 Launch 🕶 📍 🕶
Status Secu	rity <u>Configuration</u>	
Users, Groups, and Roles	<u>Directory</u> > <u>test_idap</u> - Search	<b>(b</b> )
User Interface Profiles	Search: <u>Name field</u> <del>↓</del> train16	Search Advanced &
	Method: Contains the exact string	<ul> <li>Type: <u>Any</u> →</li> <li>Scope: <u>This folder and its subfolders</u> →</li> </ul>
		Entries: 1 - 1 💽    44)
	🔲 🕴> Name	Actions
	🔓 > <u>train 16Fn train 16Ln (tra</u>	ain 16) 😭 More
	Last refresh time: June 6, 2008 10:58:26 AM	

6. Click the Portal Tabs tab and click Add...

Cognos Adminis	tration					John №	1cgivney	Log Off	🕸   🏠 🗸	<b>3</b> 8-	Launch <del>-</del>	? -
<u>Status</u>	Secu	rity	Configuration									
🖶 Users, Groups	, and Roles	Set propert	ties - train16Fn traiı	116Ln							<u>Help</u>	×
Capabilities		General	Preferences	Personal	Portal Tabs	Permissions						
User Interface P	Profiles	Select the e	ntries to include as tab	s in the portal.								
							Er	ntries: 1	- 1	0		
			> Name									
			> User's personal t	folders							.1	
						A	dd Public Fol	iders Ad	d Remove	Modify	the sequen	ce
		ОК	Cancel									

7. Browser into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.

Cognos Administra	ation			John Mc	cgivney Log Off	😫   🏠 - 🗧	1 👌 🔻 Launch 🔻	? -
Status	Security	Configuration						
🖷 Users, Groups, a	nd Roles Sele	ct portal tabs (Navigate) -	My Pages				Help	×
Capabilities User Interface Prof	unda	gate the folders or search to fin te the Selected entries list.	nd the entries to include as p	ortal tabs. Select the	entries you want and	dick the arrow l	button to <u>Se</u>	<u>arch</u>
		ailable entries nos > Public Folders > Portal Entries: 1 - 3 Name Report Libraries Resources Shared Reports	Tabs	→	Selected entries:         1           Entries:         1           > Nan           > Rep           > Rep           > Rep           > Rep           > Sha	ort Libraries ources		
		OK Cancel					Ke	move

# 8. Click Modify the sequence...

Cognos Administra	ation					John Me	<b>givney</b> <u>Loq</u>	off   🚺	<b>î</b> • •	<b>z 8 -</b>	Launch 🗸	- ? -
Status	Security	,	Configuration									
🖷 Users, Groups, ar	nd Roles	Set prope	rties - train16Fn tr	ain16Ln							<u>Help</u>	×
Capabilities		<u>General</u>	Preferences	Personal	Portal Tabs	Permissions						
User Interface Profi	iles	Select the	entries to include as	abs in the porta	l.							
							Entries	8: 1	- 4	$\bigcirc$		
			> Name									
			> User's person	al folders								
			> Report Librar	ies								
			> Resources									
			> Shared Repo	rts								
						Ad	d Public Folders	<u>Add</u>	Remove	Modify t	the sequen	nce
	[	OK	Cancel									

9. Use the UP and Down buttons to order the tabs as follows:

Report Libraries Shared Reports User's personal folders Resources

Click OK and click OK on the next screen.

Cognos Adminis	stration			John Mcgivney	Log Off 🛛 🚯 🕴 🏠 👻
<u>Status</u>	Security	Configuration	]		
🖷 Users, Groups	s, and Roles M	odify the sequence of tabs			
Capabilities		Specify the order you want your t	abs to follow.		
🚇 User Interface F	Profiles	abs:			
		Report Libraries			
		Shared Reports User's personal folders Resources			
				<u>Up</u> D	own <u>To top</u> <u>To bottom</u>
		OK Cancel			

10. The tab setup for the user account is complete.

# Step-by-Step setup for a Query User

1. Go to Launch and click Cognos Administration

	Q	<u>▼                                     </u>
		N Query Studio
		🕡 Analysis Studio
III 🖽 🖼	5	Report Studio
Entries:	1	🔊 Event Studio
	-	🛛 🖬 🛛 <u>Drill-through Definitions</u> 📛
Modified ⇔		0.90
June 2, 2008 1:51:10 PM	Cognos Administration	
3		riel Mana

2. Click Security tab

Cognos Adminis	tration		
Status	Secu	rity	Configuration
Current Activit	ties	Curre	ent Activities - Background ac
🐯 Past Activities			

3. In the Directory window click Cognos namespace

Cognos Adminis	tration		
<u>Status</u>	Secu	rity	Configuration
🖷 Users, Groups	, and Roles	Direc	tory
Capabilities			
📴 User Interface F	Profiles		
			🗧 Name 🔺
		6	Cognos
		6	👌 <u>test Idap</u>
		Last refr	esh time: June 5, 2008 12:42:13 PM

4. Navigate in the Cognos namespace to the IIT\_R\_QueryUser role and click properties icon

Cognos Adminis	stration			Dianne Dai Log Off 🔯 🛉 🕇 🖛 📩 🕇 🛨 Launch 🔻
Status	Secu	ʻity	Configuration	
🖷 Users, Groups, and Roles		Director	<u>v</u> > Cognos	C" 🐮 🐹 🐰 🗈 🛍 🗙 🖅 🧱 🔍
Capabilities User Interface Profiles				Entries: 84 - 98 💽   K K 🍽 🕨
			Name 🔺	Modified
		88	IIT_R_Librarian	June 5, 2008 12:38:02 PM
		03	IIT_R_QueryUser	June 5, 2008 12:38:20 PM 📓 More
		<b>0</b> 3	IIT_R_ReportAuthor	June 5, 2008 12:38:28 PM 🖀 More
		🗖 වී්	IIT_R_ReportViewer	June 5, 2008 12:38:39 PM 🛛 🕍 More

5. Click Members tab then click Add...

Cognos Administra	ation		Di	ianne Dai	Log Off	🖻   🖞	rint (Alt+R)	Launch 🕶	? -
Status	Security	Configuration							
🖷 Users, Groups, a	nd Roles Set pr	operties - IIT_R_Quer	yUser					<u>Help</u>	×
Capabilities	Ger	eral Members	Permissions						
User Interface Prof	files Select	the members of this entry							
				E	intries:	-			
		> Name				Т	уре		
				No entrie	s.				
								Add Rem	
								Auu Kem	love
		OK Cancel							

6. Click on LDAP namespace (this example is taken from Test and the namespace is called test\_Idap) that contains the desired user account

Cognos Adminis	stration			
<u>Status</u>	Secu	rity	Configuration	1
🖷 Users, Groups	s, and Roles	Select	entries (Navigate)	) - IIT_R_QueryUser
Capabilities				, or type the names of the users, grou
🖳 User Interface P	Profiles		outton to update the S	Selected entries list.
		Avail Direc	able entries —— tory	
		<u>s</u>	how users in the list	
			Entries: 1	- 2
			Name	
			Cognos	
			🛃 <u>test Idap</u>	

7. Click Search

Cognos Administration		Dianne Dai Log Off   🔯   🏠 🖛 📩 👻 Launch 🕶
Status Se	curity Configuration	
💼 Users, Groups, and Rol	Select entries (Navigate) - IIT_R_QueryUser	Help
Capabilities User Interface Profiles	Selected entries list.	nd roles to add. Select the entries you want and click the arrow button to update the <u>Type Search</u>
	Available entries <u>Directory</u> > test_ldap Show users in the list	Selected entries
	Entries: 1 - 13 O   R H	No entries.

8. Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.

Cognos Administration		Dianne Dai Log Off 🔯 🛉 🎓 🖛 🕯 👻 Launch 💌 🖓 🔹
Status Secu	rity Configuration	
🖷 Users, Groups, and Roles	Select entries (Search) - IIT_R_QueryUser	Help X
Capabilities User Interface Profiles	Navigate the folders, search, or type the names of the users, groups, and roles to add. Select the entries you v Selected entries list.	want and click the arrow button to update the <u>Type</u> <u>Navigate</u>
	Available entries Directory > test_jdap Find text in: <u>Vane field</u> ▼	Selected entries Entries: 1 - 1 O   ((()))
	train19 Search (a) Advanced ↔	Name
	Method: <u>Contains the exact string</u> Type: <u>Any</u> Scope: <u>This folder and its subfolders</u>	B ··· > train 19Fn train 19Ln (train 19)      Remove
	Results: Entries: 1 - 1 🔘	
	□  > Name	
	🔲 🧯 > train 19Fn train 19Ln (train 19)	
	OK Cancel	

9. The user is now a member of the IIT\_R\_QueryUser role. Click OK.

Cognos Adminis	stration					Dianne Dai	Log Off	8)   🏠 🔻	<b>€</b> 1 8	▼ <u>Launch</u> ▼	? -
<u>Status</u>	Secu	rity	9	Configuration							
Users, Groups	, and Roles	Set	properties	s - IIT_R_Quei	yUser					Help	×
Capabilities		G	General	Members	Permissions						
User Interface F	Profiles	Sele	ect the mem	bers of this entr	y.						
						E	Entries: 1	- 1	0		
			]   ;	> Name				Тур	e		
			3 🔒 🚥	> train19Fn train	19Ln (train 19)			User			
										Add Re	move
			ОК	Cancel							

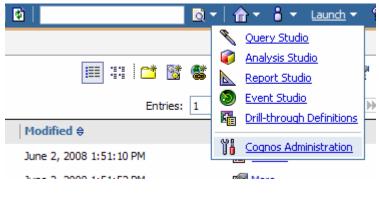
10. Repeat steps 4 through 9 adding the same user account as a member of the desired package group(s). The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_ Active Registration has access to the Active Registration package. All of the package groups are located in the Cognos namespace.

IMPORTANT NOTE: Do not add the user to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report Librarians are members of. These groups have write permission to the Report Libraries folder structure.

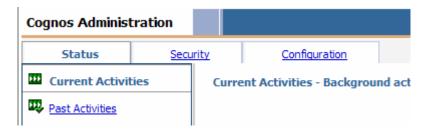
11. This completes the required steps to create a user with the Query User role for the Cognos application.

#### Steps to Add Portal Tabs to User Account

1. Go to Launch and click Cognos Administration



2. Click Security tab



 In the Directory window click test\_Idap namespace (this example is taken from Test and the namespace is called test\_Idap) that contains the desired user account



4. Click on the search icon

Cognos Adminis	tration			John Mcgivney	Log Off   🔮   🏠 🔻 🕤	å ▼ <u>Launch</u> ▼ §
Status	Secu	rity	Configuration			
💼 Users, Groups	s, and Roles	Direc	tory > test_ldap			🛒 🔍
Capabilities User Interface F	Profiles			Ent	ries: 1 - 13 🔘	
			⇔ Name ▲		Modified	Actions
			AccessGroups			More
			CourseGroups			More
			Courses			More
			Constment			More

5. Use search to locate the user that the portal tabs will be added to. Click the properties icon.

Cognos Administration		John Mcgivney Log Off 🛛 🚯 🛛 🏠 🖛 📩 🕇 🛨 Launch 🕶 📍 🕶
Status Secu	rity <u>Configuration</u>	4 Þ
🖷 Users, Groups, and Roles	<u>Directory</u> > <u>test_ldap</u> - Search	<b>(</b> \$
Capabilities	Search: Name field 🗸	_
User Interface Profiles	train16	Search 👰 Advanced 🗞
	Method: Contains the exact string -	Type: <u>Any</u> ▼ Scope: <u>This folder and its subfolders</u> ▼
		Entries: 1 - 1 💽   1 📢 🕪 🕨
	□    > Name	Actions
	In train 16Fn train 16Ln (train 16	5) 🖆 <u>More</u>
	Last refresh time: June 6, 2008 10:58:26 AM	

6. Click the Portal Tabs tab and click Add...

Cognos Adminis	tration						Jol	hn Mcgivney	Log Of	f 🚺	<b>☆</b> - ·	ካ 8	▼ <u>Launch</u> ▼	? -
Status	Secur	ity		<b>Configuration</b>										•
💼 Users, Groups	, and Roles	Set	propertie	es - train16Fn tra	ain16Ln								<u>Help</u>	×
Capabilities			General	Preferences	Personal	Portal Tabs	Permission	ns						
堕 User Interface P	rofiles	Sel	ect the ent	tries to include as ta	abs in the port	al.								
									Entries:	1	- 1	$\bigcirc$		
			]   -	> Name										
			- 👔	> User's persona	al folders									
								Add Public F	Folders	<u>Add</u>	Remove	Modify	y the sequen	<u>ce</u>
			ОК	Cancel										

7. Browser into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.

Cognos Adminis	tration				John Me	cgivney	Log Off	🙆   🏫 -	₩ 8	▼ <u>Launch</u> ▼ ? ▼			
<u>Status</u>	Secur	ity	Configuration							4			
🖷 Users, Groups	, and Roles	Selec	t portal tabs (Navigate) -	· My Pages						<u>Help</u> X			
Capabilities User Interface F	Profiles		Navigate the folders or search to find the entries to include as portal tabs. Select the entries you want and click the arrow button to update the Selected entries list.										
			ilable entries ios > Public Folders > Portal Entries: 1 - 3 Name Report Libraries Resources Shared Reports OK Cancel	ITabs	<b>→</b>		📲 > Res	oort Libraries		[4] (4) (14) (14)			

8. Click Modify the sequence...

Cognos Adminis	tration						John	Mcgivney	<u>Log Of</u>	[ 🚺	<b>☆</b> • •	<b>1 6 -</b> !	Launch 🔻	? -
Status	Secur	ity	9	Configuration										
🖷 Users, Groups	, and Roles	Set	properties	s - train16Fn tra	in16Ln								<u>Help</u>	×
Capabilities		ç	General	Preferences	Personal	Portal Tabs	Permissions							
User Interface P	Profiles	Sel	ect the entri	ies to include as ta	bs in the portal.									
		_							Entries:	1	- 4			•
			_    >	> Name										
				> User's personal	l folders									
				> Report Librarie	s									
				> Resources										
				> Shared Report	s									
								Add Public F	olders	<u>Add</u>	Remove	Modify th	e sequen	ce
			ОК	Cancel										

9. Use the UP and Down buttons to order the tabs as follows:

Report Libraries Shared Reports User's personal folders Resources

Click OK and click OK on the next screen.

Cognos Adminis	stration				John Mcgivne	<b>v</b> Log Off	1	<u>ہ</u> ۔
<u>Status</u>	Security	,	Configuration					
🖷 Users, Groups	s, and Roles	Modify	the sequence of tabs					
Capabilities	-	Specify	the order you want your to	abs to follow.				
User Interface F	Profiles	Tabs:						
		Repo	rt Libraries		 			
		User'	ed Reports 's personal folders urces					
					U	<u>Down</u> <u>To t</u>	op <u>To t</u>	oottom
		O	K Cancel					

10. The tab setup for the user account is complete.

# Step-by-Step setup for a Report Author

1. Go to Launch and click Cognos Administration

🖻 🛛 🖻	<u>▼                                    </u>
	🔪 Query Studio
	Analysis Studio
🔳 🕸 📑 👹	Report Studio
Entries: 1	🔊 Event Studio 📊
	Drill-through Definitions
Modified 😂	WI Cospec Administration
June 2, 2008 1:51:10 PM	Cognos Administration
1 0. 2000 1-F1-F0 PM	

2. Click Security tab

Cognos Administration								
Status	Secu	rity	Configuration					
Current Activit	ties	Curre	ent Activities - Background	act				
Past Activities								

3. In the Directory window click Cognos namespace

Cognos Adminis	tration		
<u>Status</u>	Secu	rity	Configuration
🖷 Users, Groups	, and Roles	Direc	tory
Capabilities			
📴 User Interface F	Profiles		
			🗧 Name 🔺
		6	Cognos
		6	🔓 <u>test Idap</u>
		Last refr	esh time: June 5, 2008 12:42:13 PM

4. Navigate in the Cognos namespace to the IIT\_R\_ReportAuthor role and click properties icon

Cognos Adminis	stration			Dianne Dai Log Off 🛛 🔂 🛔 🏠 🖛 📩 🕇 🛨 Launch 🔻
Status	Secur	ity	Configuration	
🛅 Users, Groups, and Roles		Directo	ory > Cognos	Ci 📽 👪 🐰 🖻 🛍 🗙 🖅 🏢 🔍
				Entries: 84 - 98 🔘   I I I I I I I
			🗧 Name 🔺	Modified \(\Rightarrow Actions
		8	🖥 IIT_R_Librarian	June 5, 2008 12:38:02 PM
		8	IIT_R_QueryUser	June 5, 2008 12:38:20 PM
		0	IIT_R_ReportAuthor	June 5, 2008 12:38:28 PM
			IIT_R_ReportViewer	June 5, 2008 12:38:39 PM

5. Click Members tab then click Add...

Cognos Adminis	tration				Dianne Dai	Log Off	🕸   🏫	- 🕤	<b>å</b> -	Launch	- ? -
Status	Secu	ity	Configuration								
🖷 Users, Groups,	, and Roles	Set pr	operties - IIT_R_Repo	ortAuthor						Help	<u>x</u>
Capabilities		Gen	eral Members	Permissions							
User Interface P	rofiles	Select	the members of this entry	<i>(</i> .							
					E	Entries:	-		$\bigcirc$		•
			> Name				1	Гуре			
					No entries						
									A	.dd <u>R</u> e	emove

6. Click on LDAP namespace (this example is taken from Test and the namespace is called test\_Idap) that contains the desired user account

Cognos Adminis	tration							
<u>Status</u>	Secu	rity	Configuration					
🖷 Users, Groups	, and Roles	Select	entries (Navigate) -	IIT_R_ReportAuthor				
Capabilities				or type the names of the use				
User Interface F	Profiles		and click the arrow button to update the Selected entries lis					
		Avail Direc	able entries tory					
		<u>s</u>	how users in the list					
		En	tries: 1 - 2					
			Name					
			🔁 <u>test Idap</u>					

7. Click Search

Cognos Administration		Dianne I	Dai Log Off 📴 🏦 🖛 坑 🖁 🔻 Launch 🖛 🕯
Status Secu	Configuration		
🖑 Users, Groups, and Roles	Select entries (Navigate) - IIT_R_ReportAuthor		Help
Capabilities User Interface Profiles	Navigate the folders, search, or type the names of the u and click the arrow button to update the Selected entries		add. Select the entries you want <u>Type</u> <u>Search</u>
	Available entries <u>Directory</u> > test_Idap Show users in the list		Selected entries Entries: - O I I I I I I I I I I I I I I I I I I
	Entries: 1 - 13 O   M M P		
	AccessGroups     CourseGroups     Courses		No entries.
	Department		<u>Remove</u>

8. Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.

Cognos Administration	Dianne Dai Log Off 🔯 🔒 🖛 📩 🖬 🖛 Laundi 🕶 🤗
Status Secu	rity Configuration
💼 Users, Groups, and Roles	Select entries (Search) - IIT_R_ReportAuthor Heb X
Capabilities User Interface Profiles	Navigate the folders, search, or type the names of the users, groups, and roles to add. Select the entries you want and dick the arrow button to update the Selected entries list.
	Available entries Directory > test_dap Find text in: <u>Name field</u> ▼
	train17 Search (2) Advanced ≈ → □ · · · Name
	Method: Contains the exact string 👻 Type: Any 💌 🗌 🖥 …> train17/m train17/m (train17)
	Scope: This folder and its subfolders -
	Results:         Entries:         1         0                   (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         (         )         (         (         )         (         )         (         )         )         )
	□  > Name
	🗌 🧯> train 17Fn train 17Ln (train 17)
	OK Cancel

9. The user is now a member of the IIT\_R\_ReportAuthor role. Click OK.

Cognos Adminis	stration					
<u>Status</u>	Secu	rity	9	Configuration		
🖷 Users, Groups	s, and Roles	Set pro	opertie	s - IIT_R_Repo	ortAuthor	
Capabilities		Gene	eral	Members	Permissions	
User Interface Profiles		Select the members of this entry.				
				> Name > train17Fn train Cancel	17Ln (train17)	

10. Repeat steps 4 through 9 adding the same user account as a member of the desired package group(s). The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_ Active Registration has access to the Active Registration package. All of the package groups are located in the Cognos namespace.

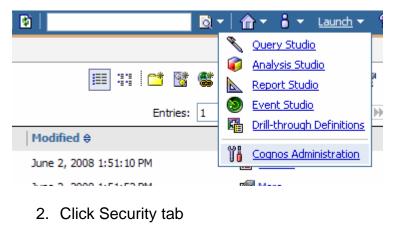
IMPORTANT NOTE: Do not add the user to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report

Librarians are members of. These groups have write permission to the Report Libraries folder structure.

11. This completes the required steps to create a user with the Report Author role for the Cognos application.

#### Steps to Add Portal Tabs to User Account

1. Go to Launch and click Cognos Administration



Cognos Administration						
Status Secu		<u>rity</u>	Configuration			
D Current Activit	ties	Current Activities - Background act				
Past Activities						

3. In the Directory window click test\_ldap namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account

Cognos Administration									
<u>Status</u>	Securi	y	Configuration						
🖷 Users, Groups	, and Roles	Direc	tory						
Capabilities									
🗐 <u>User Interface</u> P	Profiles								
			🗧 Name 🔺						
		6	Cognos						
		6	🔏 <u>test Idap</u>						
		Last refr	esh time: June 5, 2008 12:42:13 PM						

4. Click on the search icon

Cognos Adminis	tration		John Mcgivney 🛛 Log Off 🛛 👔 🛉 🕇 🕇 🕇	å ▼ <u>Launch</u> ▼ 1
Status	Secu	rity Configuration		
🖷 Users, Groups	s, and Roles	<u>Directory</u> > test_ldap		🛃 🔍
Capabilities User Interface F	Profiles		Entries: 1 - 13 🔘	
		□   \$   Name ▲	Modified	Actions
		AccessGroups		More
		CourseGroups		More
		Courses		More
		C Department		More More

5. Use search to locate the user that the portal tabs will be added to. Click the properties icon.

Cognos Adminis	stration				John Mcgivne	y Log Off	8   <b>A -</b> 🕤 🕯	▼ <u>Launch</u> ▼	? -
<u>Status</u>	Secu	rity	Configuration						
Users, Groups	s, and Roles	Director	<u>y</u> > <u>test_ldap</u> Search						\$
Capabilities		Searc	ch: <u>Name field</u> ▼						
User Interface F	Profiles	train	16				Search 🗟	Advanced 🛠	
		Meth	od: Contains the exact strin	<u>19</u> •	Type: Scope:	Any <del>、</del> This folder and i	its subfolders 🔻		
						Entries: 1	- 1		
			> Name				Actions		
		1	••• > <u>train 16Fn train 16Ln</u>	<u>(train 16)</u>			More		
		Last refre	esh time: June 6, 2008 10:58:26 /	AM					

6. Click the Portal Tabs tab and click Add...

Cognos Administra	ation			John Mcgivney	Log Off 🕴 🚯	⋒ -	1 🖁 👻 Launch	- ? -
Status	Security	Configuration						
🖷 Users, Groups, ar	nd Roles	5et properties - train16Fn trai	n16Ln				Hel	⊵ ×
Capabilities		General Preferences	Personal Portal Tabs	Permissions				
User Interface Profi	iles	Select the entries to include as tab	is in the portal.					
					Entries: 1	- 1		P 1
		🗌 🗌> Name						
		🔲 📑> User's personal	folders					
				Add Public F	olders <u>Add</u>	Remove	Modify the seque	nce
	[	OK Cancel						

7. Browser into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.

Cognos Adminis	tration				Johr	n Mcgivne	y Log Off	🖄   🏠 🗸 🤇	ት 8 -	Launch 👻 ? 👻
Status	Securi	ty	Configuration	]						4
Users, Groups	, and Roles	Select	portal tabs (Navigate) -	- My Pages						<u>Help</u> X
Capabilities User Interface P	Profiles		te the folders or search to fi the Selected entries list.	ind the entries to include as p	oortal tabs. Select	the entries	you want and	dick the arrow	/ button t	o <u>Search</u>
			able entries       ss > Public Folders > Portal       Entries:     1       Image: State of the	ITabs	<b>→</b>		Reso	ort Libraries		IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII

8. Click Modify the sequence...

Cognos Adminis	tration					John M	1cgivney Lo	oq Off 🕴 🚺	🏫 🕶 🕈	l 👌 🗕 Laur	<u>nch</u> • ? •
Status	Secur	ity	Configuration								
🖷 Users, Groups	, and Roles	Set p	roperties - train16Fn train	16Ln							<u>Help</u> X
Capabilities		Ge	neral Preferences	Personal I	Portal Tabs	Permissions					
User Interface P	Profiles	Selec	t the entries to include as tab	s in the portal.	L.						
							Ent	ries: 1	- 4		┫┣┣
			> Name								
			📲 > User's personal f	olders							
			📰 > Report Libraries								
			📰 > Resources								
			📰 🚥 > Shared Reports								
						Α	dd Public Folde	ers Add	Remove	Modify the se	quence
			OK Cancel								

9. Use the UP and Down buttons to order the tabs as follows:

Report Libraries Shared Reports User's personal folders Resources

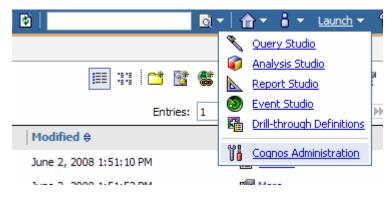
Click OK and click OK on the next screen.

Cognos Adminis	stration			John Mcgivney	Log Off 🛛 🚯 🕴 🏠 👻
<u>Status</u>	Security	Configuration	]		
🖷 Users, Groups	s, and Roles M	odify the sequence of tabs			
Capabilities		Specify the order you want your t	abs to follow.		
🚇 User Interface F	Profiles	abs:			
		Report Libraries			
		Shared Reports User's personal folders Resources			
				<u>Up</u> D	own <u>To top</u> <u>To bottom</u>
		OK Cancel			

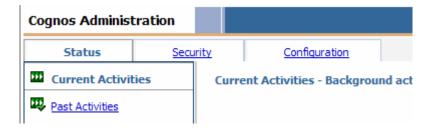
10. The tab setup for the user account is complete.

## Step-by-Step setup for a Report Librarian

1. Go to Launch and click Cognos Administration



2. Click Security tab



3. In the Directory window click Cognos namespace



4. Navigate in the Cognos namespace to the IIT\_R\_Librarian role and click properties icon

Cognos Adminis	stration			Dianne Dai Log Off 🛛 🗃 🕇 🕇 🕇 🕇 Launch 🔻
Status	Secur	ity	Configuration	
🖷 Users, Groups, and Roles		Direct	ory > Cognos	CT 🐮 🐹 🐰 🖻 🛍 🗙 🛒 🔍
Capabilities	Profiles			Entries: 84 - 98 💽   14 📢 🕨 🕅
			🗧 🛛 Name 🔺	Modified ⇔ Actions
			IIT_R_Librarian	June 5, 2008 12:38:02 PM
			IIT_R_QueryUser	June 5, 2008 12:38:20 PM 🖀 More
			IIT_R_ReportAuthor	June 5, 2008 12:38:28 PM 🖀 More
		🗖 🗖	IIT_R_ReportViewer	June 5, 2008 12:38:39 PM 🛛 🕍 More

5. Click Members tab then click Add...

Cognos Administration		Dianne Dai Log Off 🛛 👔 🛉 🛨 🕇 🛨 Launch 🔻 📍
Status Secu	rity <u>Configuration</u>	٩
🖷 Users, Groups, and Roles	Set properties - IIT_R_Librarian	Help X
Capabilities	General Members Permissions	
User Interface Profiles	Select the members of this entry.	
		Entries: -
	□  > Name	Туре
	No entries.	
		Add Deserve
		Add Remove
	OK Cancel	

6. Click on LDAP namespace (this example is taken from Test and the namespace is called test\_Idap) that contains the desired user account

Cognos Adminis	stration			
<u>Status</u>	Secu	rity	Configuration	
🖷 Users, Groups	s, and Roles	Select	entries (Navigate)	- IIT_R_Librarian
Capabilities		-		or type the names of the users, gro
User Interface	Profiles		utton to update the Se	elected entries list.
		Avail Direc	able entries tory	
		<u>s</u>	how users in the list	
			Entries: 1	- 2
			Name	
			Cognos	
			🛃 <u>test Idap</u>	

7. Click Search

Cognos Administration				Dianne Dai Log Off	f   🕅   🏠 🕆 🕤	å ▼ <u>Launch</u> ▼ 1
Status Secu	ity <u>Configuration</u>					
🖷 Users, Groups, and Roles	Select entries (Navigate) -	IIT_R_Librarian				<u>Help</u>
Capabilities		or type the names of the users,	groups, and roles to ac	dd. Select the entries y	ou want and click	Type Search
User Interface Profiles	the arrow button to update the Available entries Directory > test_Idap Show users in the list Entries: 1 -		<b>→</b>	Selected entries - Entries:	e -	
	AccessGroups     CourseGroups     Courses				No entries.	
	Department					Remove

8. Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.

Cognos Administration		Dianne Dai Log Off 🔯 🛉 👉 🕆 🕇 👻 Launch 👻 📍
Status Secu	rity Configuration	
Users, Groups, and Roles	Select entries (Search) - IIT_R_Librarian	Help ×
<ul> <li><u>Capabilities</u></li> <li><u>User Interface Profiles</u></li> </ul>	Navigate the folders, search, or type the names of the users, groups, and roles to add. Select the e Selected entries list.	entries you want and click the arrow button to update the <u>Type Navigate</u>
	Available entries Directory > tes_Idap Find text in: <u>Name field</u> <del>-</del>	Selected entries Entries: 1 - 1 0   IIII
	train16 Search 🔯 Advanced 🛠	
	Method: <u>Contains the exact string</u> Type: <u>Any</u> Scope: <u>This folder and its subfolders</u>	Remove
	Results:         Entries:         1         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I         I	
	□  > Name	
	🔲 🧯 > train16Fn train16Ln (train16)	
	OK Cancel	

9. The user is now a member of the IIT\_R\_Librarian role. Click OK.

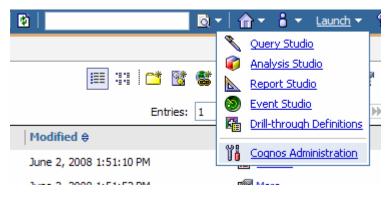
Cognos Adminis	stration				Dianne Dai	Log Off 🕴 😵	<b>≙</b> - •	<b>ð</b> 8 -	▼ <u>Launch</u> ▼	? -
<u>Status</u>	Secu	rity	Configuration							
🖶 Users, Groups	s, and Roles	Set proper	ties - IIT_R_Libra	irian					<u>Help</u>	×
Capabilities		General	Members	Permissions						
User Interface F	Profiles	Select the r	nembers of this entr	у.						
					E	Entries: 1	- 1	$\bigcirc$		
			> Name				Туре			
		🗆 🚨	> train 16Fn train	16Ln (train16)			User			
								4	Add Rem	<u>iove</u>
		OK	Cancel							

10. Repeat steps 4 through 9 adding the same user account as a member of the desired package groups. The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_ Active Registration has access to the Active Registration package. Librarians also need to be added to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report Librarians are members of. These groups have write permission to the Report Libraries folder structure. The Librarian needs to be a member of both package groups, the one that ends in \_L and the one that doesn't, to have all of the required access permissions. All of the package groups are located in the Cognos namespace.

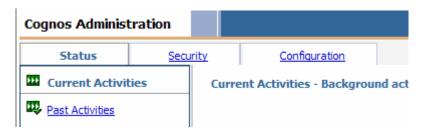
11. This completes the required steps to create a user with the Report Librarian role for the Cognos application.

## Steps to Add Portal Tabs to User Account

1. Go to Launch and click Cognos Administration



2. Click Security tab



3. In the Directory window click test\_ldap namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



4. Click on the search icon

Cognos Adminis	tration			John Mcgivney	Log Off   🔮   🏠 🔻 🕤	å ▼ <u>Launch</u> ▼ §
Status	Secu	rity	Configuration			
💼 Users, Groups	s, and Roles	Direc	tory > test_ldap			🛒 🔍
Capabilities User Interface F	Profiles			Ent	ries: 1 - 13 🔘	
			⇔ Name ▲		Modified	Actions
			AccessGroups			More
			CourseGroups			More
			Courses			More
			Constment			More

5. Use search to locate the user that the portal tabs will be added to. Click the properties icon.

Cognos Administration		John Mcgivney 🛛 Log Off 🛛 🔯 🛉 🛧 坑 🕯 🔻 Launch 🕶 📍 🕶
Status Secu	rity <u>Configuration</u>	4 Þ
🖷 Users, Groups, and Roles	<u>Directory</u> > <u>test_ldap</u> - Search	<b>(</b> \$
Capabilities	Search: Name field 🗸	_
User Interface Profiles	train16	Search 👰 Advanced 🗞
	Method: Contains the exact string -	Type: <u>Any</u> ▼ Scope: <u>This folder and its subfolders</u> ▼
		Entries: 1 - 1 💽   1 📢 🕪 🕨
	□    > Name	Actions
	train16Fn train16Ln (train16	5) 🖆 More
	Last refresh time: June 6, 2008 10:58:26 AM	

6. Click the Portal Tabs tab and click Add...

Cognos Adminis	tration				John Mcgivney	Log Off 🛛 🕵	<b>☆</b> - +	) 👌 🔻 Laun	<u>ich</u> • ? •
Status	Secu	ity	Configuration						4
💼 Users, Groups	, and Roles	Set pro	operties - train16Fn trai	n16Ln					Help ×
Capabilities		Gen	eral Preferences	Personal Portal Tabs	Permissions				
User Interface P	Profiles	Select	the entries to include as tab	s in the portal.					
					I	Entries: 1	- 1		
			> Name						
			User's personal	folders					
					Add Public F	olders Add.	<u>Remove</u>	Modify the se	quence
		C	K Cancel						

7. Browser into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.

Cognos Adminis	tration				John Me	cgivney	Log Off	🙆   🏫 -	₩ 8	▼ <u>Launch</u> ▼ ? ▼		
<u>Status</u>	Secur	ity	Configuration							4		
🖷 Users, Groups	, and Roles	Select portal tabs (Navigate) - My Pages <u>He</u>										
Capabilities User Interface F	Profiles	Navigate the folders or search to find the entries to include as portal tabs. Select the entries you want and dick the arrow button to update the Selected entries list.										
			ilable entries ios > Public Folders > Portal Entries: 1 - 3 Name Report Libraries Resources Shared Reports OK Cancel	ITabs	<b>→</b>		📲 > Res	oort Libraries		[4] (4) (14) (14)		

8. Click Modify the sequence...

Cognos Adminis	stration						John	Mcgivney	Log Off	1	<b>☆</b> • •	<b>3</b> 8 -	Launch	- ? -
Status	Secur	ity	9	Configuration										
🖷 Users, Groups	s, and Roles	Set	properties	s - train16Fn tra	ain16Ln								<u>Help</u>	<u>x</u>
Capabilities User Interface F	Profiles	_	<u>General</u> ect the entri	Preferences ies to include as to	Personal abs in the portal	Portal Tabs	Permissions							
									Entries:	1	- 4	0		•
				<ul> <li>Name</li> <li>User's personal</li> <li>Report Libraria</li> </ul>										
				<ul> <li>Resources</li> <li>Shared Report</li> </ul>										
								Add Public F	olders	<u>Add</u>	Remove	Modify	the sequer	nce
			OK	Cancel										

9. Use the UP and Down buttons to order the tabs as follows:

Report Libraries Shared Reports User's personal folders Resources

Click OK and click OK on the next screen.

Cognos Adminis	stration				John Mcgivne	<b>v</b> Log Off	1	<u>ہ</u> ۔
<u>Status</u>	Security	,	Configuration					
🖷 Users, Groups	s, and Roles	Modify	the sequence of tabs					
Capabilities	-	Specify	the order you want your to	abs to follow.				
User Interface F	Profiles	Tabs:						
		Repo	rt Libraries		 			
		User'	ed Reports 's personal folders urces					
					U	<u>Down</u> <u>To t</u>	op <u>To t</u>	oottom
		O	K Cancel					

10. The tab setup for the user account is complete.

### **Folder Structure**

The content of the Report Libraries, Shared Reports and Resources tabs is stored in the Public Folders directory structure. There are 5 root folders used by the portal. They're named Packages, Portal Published Content, Portal Tabs, Report Libraries and Shared Reports.

## **Root folders for Portal tabs**



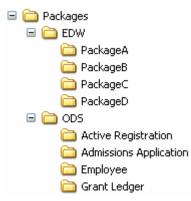
The folders displayed in the Report Libraries and Shared Reports tabs is controlled by assigning permissions to groups and adding users to these groups. The root level folder permissions are assigned to the IIT\_R\_ReportViewer role. This role is given Traverse access and allows its members to browser through the directory structure. All users are members of this role.

The root level folders have subfolders which are named the same as their corresponding package (*There are intermediate folders in most of the structures between the root level folders and the package named folders. In most of the structures the package folders are found under the ODS or EDW folders. ODS and EDW are the names of the two main data sources for reporting.*). Permissions from the root folder are overridden at this level and assigned to a package group. There are two package group types. The first type is named IIT\_P\_Package Name (Package Name is replaced with the actual name of the package) and is assigned Read, Execute and Traverse permissions. Users that require access to that particular package are added as members to these groups. The second type is named IIT\_P\_Package Name\_L. Only the Librarians are members of these groups), Execute and Traverse access to the difference between the two groups), Execute and Traverse access to the directories required to manage the content of the Report Libraries tab.

**Public Folders\Packages** – Folder structure is used to store all of the Banner published packages. The Cognos Administrator is responsible for maintaining this folder structure, the packages and the corresponding security. When new Packages are created a folder is added to the directory structure. The new package will be stored in this folder.

As a Report Librarian it is important to understand how the packages are organized in this structure. To create a report based on a package a report author will need access to the folder and the package contained therein. See the Setup User Account section for Step-by-Step directions for granting package access.

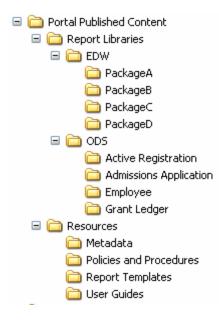
Public Folders\Packages Folder Structure



**Public Folders\Portal Published Content** – Folder structure is used to store the source reports for the Report Libraries tab. Shortcuts to these reports are stored in the Public Folders\Report Libraries folder structure (This is a separate directory structure - **NOT** the Public Folders\Portal Published Content\Report Libraries folder structure). A Cognos Administrator is responsible for maintaining this folder structure and the corresponding security.

As a Report Librarian, you are responsible for adding new reports to the Report Libraries tab. To add a report you will save the new report to this directory structure. The report will be stored in the folder that corresponds to the package it was created from. For example, if the report was created from the Active Registration package the report would be stored in the Portal Published Content\Report Libraries\ODS\Active Registration folder. Once the report is stored in the folder a short-cut to the report is created and stored in the Report Libraries structure.

## Public Folders\Portal Published Content Folder Structure



**Public Folders\Portal Tabs** – Contains the portal tabs. A Cognos Administrator is responsible for maintaining this folder and the tabs within. The administrator will create, modify and control security for the portal tabs.

As a Report Librarian you will add these tabs to a Cognos User during the User Account Setup process. See the Setup User Account section for Step-by-Step directions for adding Portal Tabs to an account.

#### Public Folders\Portal Tabs Folder Structure

🚞 Portal Tabs

Public Folders > Portal Tabs



Public Folders\Report Libraries – Folder structure contains all of the shortcuts to reports which are available on the Report Libraries tab. The source reports are located in the Portal Published Content directory structure. A Cognos Administrator is responsible for maintaining this folder structure and the corresponding security. When new Packages are created a folder is added to the directory structure to store the report short-cuts.

As a Report Librarian you will create short-cuts to new reports and store them in the Report Libraries folder structure. The short-cut points to the source report that is stored in the Portal Published Content folder structure. For example, if the report was created from the Active Registration package the source report would be stored in the Portal Published Content\Report Libraries\ODS\Active Registration folder. Once the report is stored in the folder a short-cut to the report is created and stored in Report Libraries\ODS\Active Registration folder.

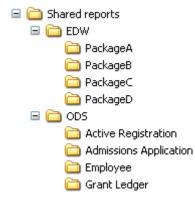
Public Folders\Report Libraries Folder Structure

🖃 🚞 Report Libraries
🖃 🚞 EDW
🚞 PackageA
🚞 PackageB
🚞 PackageC
🚞 PackageD
🖃 🚞 ODS
🚞 Active Registration
🚞 Admissions Application
🚞 Employee
🚞 Grant Ledger

**Public Folders\Shared Reports** – Location to save reports that will be shared with other users. Both users must have access to the same package and the same folder. This is the source for the Shared Reports tab. Users directly access this folder structure through the Shared Reports tab. A Cognos Administrator is responsible for maintaining this folder structure and the corresponding security. When new Packages are created a folder is added to the directory structure to store reports.

As a Report Librarian you will monitor the content of the shared folders. You will help organize the reports by creating sub-directories in the package named folders and remove unnecessary reports. Users also have access to store reports and create folders in this location. It is the librarian's responsibility to maintain order and organization to ensure the shared location does not get filled with erroneous content.

#### Public Folders\Shared Reports Folder Structure



## Step-by-Step Directions to Publish a Report to the Report Libraries tab

**Note:** Directions assume a report has been created and saved to a package folder that is located in the Public Folders\Portal Published Content folder structure. A report created from the Active Registration package is used in these directions.

1. Log-on to Cognos with a Librarian account

Log on
Please type your credentials for authentication.
Namespace: prod_ldap
User ID:
cognoslibrarian
Password:
••••
OK Cancel

2. In the Cognos Navigator box click the blue arrow next to Report Libraries

Cogn	os Connection Cog	n <mark>os Librarian</mark> Log O	ff 🚺		<u>o</u> -	<b>⋒</b> ∙ <b>8</b> •	Launch 👻   ?
	Report Libraries	Shared Repo	<u>rts</u>	My Folders	Resources		4 •
							=* 55
Cogno	os Navigator	? _ 🗆	Cognos	Viewer			? _ 🗆
Repor	t Libraries 🖻						
	Name ⇒       EDW ⇒       ODS ⇒	Cognos Connection		Ready to pro	cess requests from o	ther portlets.	

3. A new window opens into the Report Libraries folder structure.

Cognos Connection Cognos Librarian Log	off 🛛 😫 🗍	Q ▼ A ▼ B ▼ Launch ▼ ?
📴 📗 Public Folders	Add to my po	rtal tabs Close and return to my portal tabs
Public Folders > Report Libraries	III II 🖆 🔢	" 📽 🕺 🖻 🖻 🗙 🛃 💏
	Entries	: 1 - 2 🔕     ( () )
□    Name ≑	Modified ⇔	Actions
	May 29, 2008 2:11:20 PM	More
	June 5, 2008 2:01:03 PM	More

 Browse to the report to be published in the Portal Published Content folder structure. Click Public Folders, click Portal Published Content, click Report Libraries, click ODS and click Active Registration. The source report should already be stored in this folder (The report Active Registration – Report 1 will be used in this example. Active Registration – Report 1 was created from the Active Registration package.). Click the **More...** link to the far right of Active Registration – Report 1.

Cognos Connection	Cognos Librarian Log Off	⊠ ▼   <b>≙</b> ▼ i ▼ Launch ▼ ? ▼
📴 📗 Public Folders	Add to	my portal tabs <u>Close and return to my portal tabs</u>
Public Folders > Portal Published Conter	nt > <u>Report Libraries</u> > <u>ODS</u> > Active Registration	1 🕅 🏶 🖬 🐰 🖻 🖻 🗙 🛒
	1	Entries: 1 - 1 💽   🛛 🕬 🕨
□   Name ♦	Modified 😂	Actions
Active Registration - Repo	June 3, 2008 2:11:34 PM	🖆 🕨 陆 More

# 5. Click Create a shortcut to this entry...

Perform an action - Active Registration - Report 1				
Available actions:				
Available actions.				
F	Set properties			
	Run with options			
	Open with Report Studio			
1	Alert me about new versions			
	Move			
Ēþ	Сору			
Ż	Create a shortcut to this entry			
=*	Create a report view of this report			
<u>ek</u>	Add to bookmarks			
$\mathbf{X}$	Delete			
Cancel				

6. Rename the shortcut to match the name of the source report. In this example the shortcut is renamed to Active Registration – Report 1. Click **Select another location...** link.

Specify a name and description - New Shortcut wizard				
Specify a name and location for this entry. You can also specify a description and screen tip.				
Name:				
Active Registration - Report 1				
Description:				
Screen tip:				
Location: Public Folders > Portal Published Content > Report Libraries > ODS > Active Registration				
Select another location Select My Folders				
Cancel < Back Next > Finish				

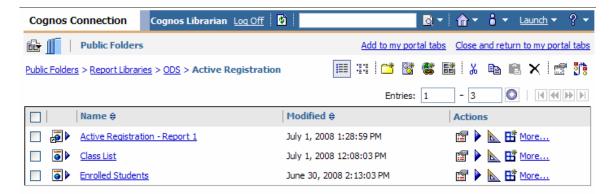
7. Browse to the Report Libraries folder structure found at the root of Public Folders. Click **Public Folders**, click **Report Libraries**, click **ODS** and click **Active Registration**. Click **OK**.

Select a location (Navigate) - Active Registration - Report 1		<u>Help</u> X		
Navigate the folders or search to find where you want to place the entry.				
ODS > Active Registration				
	Entries: -			
Name ⇔				
No entries.				
		New folder		
OK Cancel				

8. The shortcut has been renamed and will be saved into the Public Folders\Report Libraries\ODS\Active Registration folder. Click **Finish**.

Specify a name and description - New Shortcut wizard				
Specify a name and location for this entry. You can also specify a description and screen tip.				
Name:				
Active Registration - Report 1				
Description:				
×				
Screen tip:				
Location:				
Public Folders > Report Libraries > ODS > Active Registration				
Select another location Select My Folders				
Cancel < Back Next > Finish				

9. Browse to Public Folders\Report Libraries\ODS\Active Registration. The short-cut is now available and the report publishing process has been completed.



Note: A Report shortcut icon has a small arrow located in the bottom left corner.

