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Introduction

This document provides the information you need to install and configure IBM® Cognos® PowerPlay® on a single-server with default settings. These installations are suitable when you are setting up a test or evaluation environment, or for small production environments. This installation is the quickest and easiest way to get started.

For information about how to upgrade or install and configure PowerPlay on more than one computer or in a distributed installation, see the PowerPlay Installation and Configuration Guide on the disk.

For information about migration and about the differences between IBM Cognos Series 7 PowerPlay and IBM Cognos PowerPlay, see the PowerPlay Migration and Administration Guide.

Audience
To use this guide, you should be familiar with:
- database and data warehouse concepts
- security issues
- basic Windows® administration skills
- the existing server environment and security infrastructure in your organization

Finding information
To find IBM® Cognos® product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers at http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp. Updates to Release Notes are published directly to Information Centers.

You can also read PDF versions of the product release notes and installation guides directly from IBM Cognos product disks.

Using quick tours
Quick tours are short online tutorials that illustrate key features in IBM Cognos product components. To view a quick tour, start IBM Cognos Connection and click the Quick Tour link in the lower-right corner of the Welcome page. Quick Tours are also available in IBM Cognos Information Centers.

Accessibility Features
Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. This product has accessibility features. For information on these features, see "Keyboard Shortcuts for the Installation Wizard" (p. 59).
Forward-looking statements
This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Samples disclaimer
The Great Outdoors Company, GO Sales, any variation of the Great Outdoors name, and Planning Sample depict fictitious business operations with sample data used to develop sample applications for IBM and IBM customers. These fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values is coincidental. Other sample files may contain fictional data manually or machine generated, factual data compiled from academic or public sources, or data used with permission of the copyright holder, for use as sample data to develop sample applications. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.
Chapter 1: IBM Cognos PowerPlay

This chapter describes the components used by IBM® Cognos® PowerPlay®.

PowerPlay includes server, migration, and client components. Some components provided with PowerPlay are not installed by default.

Server Components

Server components provide the user interfaces for reporting and data exploration, as well as the server functionality for routing and processing user requests.

Web communication - gateway

Web communication in IBM® Cognos® Business Intelligence is typically through gateways, which reside on one or more Web servers. A gateway is an extension of a Web server program that transfers information from the Web server to another server.

Gateways are often CGI programs, but may follow other standards, such as Internet Server Application Program Interface (ISAPI), Apache Modules (apache_mod), or as a servlet implementation.

Application Tier Components

Some server components are provided with all IBM® Cognos® Business Intelligence products. Common server components include the following tools:

Configuring and managing the product - IBM Cognos Configuration

IBM Cognos Configuration is a tool that you use to configure IBM Cognos BI, and to start and stop its services.

Publishing, managing, and viewing content - IBM Cognos Connection

IBM Cognos Connection is a Web portal provided with IBM Cognos BI, providing a single access point to the corporate data available for its products. It provides a single point of entry for querying, analyzing, and organizing data, and for creating reports, scorecards, and events. Users can run all their Web-based IBM Cognos BI applications through IBM Cognos Connection. Other business intelligence applications, and URLs to other applications, can be integrated with IBM Cognos Connection.

Central administration - IBM Cognos Administration

IBM Cognos Administration is a central management interface that contains the administrative tasks for IBM Cognos BI and IBM Cognos PowerPlay®. It provides easy access to the overall management of the IBM Cognos BI environment and is accessible through IBM Cognos Connection. IBM Cognos Administration also provides access to cube and report settings for PowerPlay.
IBM Cognos PowerPlay Studio

PowerPlay Studio lets users view, explore, and distribute reports using a web browser.

Viewing and interacting with published content - Cognos Viewer

Cognos Viewer is a portlet in which you can view and interact with any type of published IBM Cognos content. It is accessible through IBM Cognos Connection and any existing enterprise portal.

Facilitating decision-making - IBM Cognos Business Insight

In IBM Cognos Business Insight, you can create sophisticated interactive dashboards using IBM Cognos content, as well as external data sources such as TM1® Websheets and CubeViews, according to your specific information needs. You can view and open favorite dashboards and reports, manipulate the content in the dashboards, and email your dashboards. You can also use comments and activities for collaborative decision making.

Managing Application Data - Content Manager

Content Manager is the IBM® Cognos® BI service that manages the storage of customer application data, including security, configuration data, models, metrics, report specifications, and report output. Content Manager is needed to publish packages, retrieve or store report specifications, manage scheduling information, and manage the Cognos namespace.

Content Manager stores information in a content store database.

Optional Server Components

The following optional components are available to install on the server to extend the functionality of IBM® Cognos® Business Intelligence.

Preconfigured application database - Cognos Content Database

Cognos Content Database is an instance of an Apache Derby database. It is a selectable installation component, and is not installed by default. If you install it in the same location as Content Manager, Cognos Content Database is configured as the default content store for IBM Cognos Business Intelligence.

Use Cognos Content Database in a test or proof-of-concept environment only.

Apache Derby is open source software whose license terms can be found on the Apache Derby website. Modifying the Apache Derby database or using it with other products is not supported. Any modifications that you make to the Apache Derby database are at your own risk.

You can use Cognos Content Database as a content store or notification database, but not as a query database.

Learning and troubleshooting using sample data - IBM Cognos BI Samples

The IBM Cognos BI samples illustrate product features and technical and business best practices using data from a fictitious company, Great Outdoors. You can also use them for experimenting with and sharing report design techniques, and for troubleshooting.
Migration Components

The IBM® Cognos® Business Intelligence migration components are used to migrate content from IBM Cognos Series 7 to IBM Cognos BI. They are also used to migrate PowerPlay® Studio reports to Analysis Studio and Report Studio.

For more information about the migration components, see the PowerPlay Migration and Administration Guide.

The migration components include the following:

Migration Assistant
Administrators use the Migration Assistant to migrate IBM Cognos Series 7 PowerPlay content from PowerPlay Enterprise Server, Upfront, and IBM Cognos Connection to IBM Cognos PowerPlay.

Migration Services
Migration services support the migration of PowerPlay content from IBM Cognos Series 7 to IBM Cognos PowerPlay. An IBM Cognos PowerPlay installation includes the migration service by default. The IBM Cognos PowerPlay CD also includes the migration service that you install on the IBM Cognos Series 7 computer.

Bookmark Conversion Utility
The bookmark conversion utility converts PowerPlay Enterprise Server bookmarks into a format that can be read by IBM Cognos PowerPlay Studio.

Report Conversion Macro
IBM Cognos PowerPlay does not support ppr format reports created with IBM Cognos Series 7. IBM Cognos PowerPlay provides a macro named ppr2ppx.mac to allow you to convert ppr format reports to ppx format.

Report Upgrade Macro
If you have local .ppx files that access remote cubes, IBM Cognos PowerPlay provides a macro you can use to change the cube reference in the report to an IBM Cognos BI package reference. Also, the macro converts the report encoding to UTF-8.

Migration to Analysis Studio and Report Studio
Analysis Studio and Report Studio are server components that are available in IBM Cognos BI. Users can open PowerPlay reports and migrate them to Analysis Studio or Report Studio by using the Open with Analysis Studio or Open with Report Studio functionality. This functionality, which the PowerPlay administrator can disable, uses the IBM Cognos BI migration service to migrate the reports.

Other Components

In addition to the tools provided with IBM® Cognos® PowerPlay®, other components are required.
**Content store**

The content store is a relational database that contains data that your IBM Cognos BI product needs to operate, such as report specifications, published models, and the packages that contain them; connection information for data sources; information about the external namespace, and the Cognos namespace itself; and information about scheduling and bursting reports.

Your IBM Cognos BI product includes an embedded database, Cognos Content Database, that you can use to get your product running quickly in a test or proof-of-concept system. When you are ready to set up a production environment with your IBM Cognos BI product, set up the content store to use a supported database that can be secured and tuned for performance and stability. The administration portal provides features that you can use to back up and archive the data from Cognos Content Database before moving to the new content store database in your production environment. For more information, see the topic about deploying the entire content store in the *Administration and Security Guide*.

Design models and log files are not stored in the content store.

The IBM Cognos service that uses the content store is named Content Manager.

**Data Sources**

PowerPlay supports PowerCube data sources. Other IBM Cognos Business Intelligence components support other types of data sources. For more information, see the IBM Cognos BI *Administration and Security Guide*.
Chapter 2: Installing and Configuring IBM Cognos PowerPlay on One Computer

This chapter provides the information you need to install and configure IBM® Cognos® PowerPlay® on a single server with default settings. These installations are suitable when you are setting up a test or evaluation environment, or for small production environments. This installation is the quickest and easiest way to get started.

For information about how to upgrade or install and configure PowerPlay on more than one computer or in a distributed installation, see the PowerPlay Installation and Configuration Guide on the CD.

IBM Cognos BI migration components are included with the PowerPlay installation. These components support the migration of PowerPlay content from IBM Cognos Series 7 to IBM Cognos BI. Also, if you install PowerPlay with IBM Cognos BI, the migration components support the option to open a PowerPlay Studio report in Analysis Studio or Report Studio.

IBM Cognos Series 7 migration components are available with IBM Cognos PowerPlay. To migrate content from IBM Cognos Series 7 PowerPlay to IBM Cognos PowerPlay, you must install the IBM Cognos Series 7 migration components on the computer where IBM Cognos Series 7 PowerPlay Enterprise Server is installed. If you want to migrate PowerPlay content from Upfront, you must also install the IBM Cognos Series 7 migration components on the computer where Upfront is installed.

Like other IBM Cognos products, the installation process creates log files that include information such as details about transferred files and installation errors. The log files are located in the \c8_location\instlog directory.

To follow these instructions, your Web server must be installed on the computer where you install IBM Cognos PowerPlay.

If you are installing IBM Cognos PowerPlay with IBM Cognos Business Intelligence Server, install and configure IBM Cognos BI Server first. Both IBM Cognos PowerPlay and the IBM Cognos BI components must be the same version. For more information, see the IBM Cognos BI Installation and Configuration Guide.

Use the following checklist to guide you through the installation tasks:

- Verify the system requirements.
- Install the IBM Cognos PowerPlay components.
- Set up the environment.
- Configure IBM Cognos PowerPlay components.
- Start IBM Cognos PowerPlay services.
- Test IBM Cognos PowerPlay server components.
Install and configure IBM Cognos Series 7 migration components.

Check the System Requirements and Supported Environments

Before you install IBM® Cognos® PowerPlay®, ensure that your computer meets the software and hardware requirements. The hardware requirements depend on your IBM Cognos environment. You may require additional resources, such as disk space.

Verify System Requirements

Use the following table to check the minimum hardware and software requirements to install and run IBM® Cognos® BI components on one computer.

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating system</td>
<td>Microsoft® Windows®</td>
</tr>
<tr>
<td></td>
<td>UNIX®</td>
</tr>
<tr>
<td></td>
<td>Linux®</td>
</tr>
<tr>
<td></td>
<td>Some IBM Cognos BI components are not supported under Linux.</td>
</tr>
<tr>
<td>RAM</td>
<td>Minimum: 2 GB</td>
</tr>
<tr>
<td>Disk space</td>
<td>Minimum: 2.5 GB of free space to install the software and 4 GB of free space</td>
</tr>
<tr>
<td></td>
<td>on the drive that contains the temporary directory used by IBM Cognos components.</td>
</tr>
<tr>
<td>Web server</td>
<td>A Web server installed and started</td>
</tr>
<tr>
<td>Java™ Runtime Environment</td>
<td>An IBM JRE is installed automatically with IBM Cognos BI on Windows.</td>
</tr>
<tr>
<td>Database</td>
<td>One of the following databases available to store IBM Cognos data.</td>
</tr>
<tr>
<td></td>
<td>• DB2</td>
</tr>
<tr>
<td></td>
<td>• Oracle</td>
</tr>
<tr>
<td></td>
<td>• Microsoft® SQL Server</td>
</tr>
<tr>
<td></td>
<td>• Sybase</td>
</tr>
<tr>
<td></td>
<td>TCP/IP connectivity is required for all database types.</td>
</tr>
<tr>
<td>Requirement</td>
<td>Specification</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Web browser</td>
<td>For all Web browsers, the following enabled:</td>
</tr>
<tr>
<td></td>
<td>● cookies</td>
</tr>
<tr>
<td></td>
<td>● JavaScript</td>
</tr>
<tr>
<td></td>
<td>For Microsoft Internet Explorer only, the following enabled:</td>
</tr>
<tr>
<td></td>
<td>● Run ActiveX controls and plug-ins</td>
</tr>
<tr>
<td></td>
<td>● Script ActiveX controls marked safe for scripting</td>
</tr>
<tr>
<td></td>
<td>● Active scripting</td>
</tr>
<tr>
<td></td>
<td>● Allow META REFRESH</td>
</tr>
<tr>
<td>Other</td>
<td>On Windows, Microsoft Data Access Component (MDAC) for use with product samples</td>
</tr>
<tr>
<td></td>
<td>If you want to email reports, the ability to use a mail server</td>
</tr>
</tbody>
</table>

**Review Supported Environments**

To ensure that your product works properly, apply all minimum required operating system patches and use only the versions of other software that are supported for an IBM® Cognos® product.

To review an up-to-date list of environments supported by IBM Cognos products, such as operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the IBM Cognos Customer Center ([www.ibm.com/software/data/cognos/customercenter/](http://www.ibm.com/software/data/cognos/customercenter/)).

It is important to note that the Linux® operating system is available in a number of distributions and supports a number of hardware platforms. Ensure that the combination of the operating system and hardware that you are using is supported.

**Install IBM Cognos PowerPlay Server**

To install IBM® Cognos® PowerPlay® components, use the installation wizard to copy all the components to your computer.

**Steps**

1. Set the JAVA_HOME environment variable to point to the installation location of your Java™ Runtime Environment (JRE).
   
   IBM Cognos BI requires a JVM, such as IBM Java, to run on Linux®.

2. Insert or mount the IBM Cognos product disk or go to the location where the installation files were downloaded and extracted.
   
   On UNIX® or Linux, mount the disk using Rock Ridge file extensions.

   On Microsoft® Windows®, the installation wizard starts automatically from the product disk.
3. To manually start the installation wizard, go to the operating system directory and then do the following:
   - On Windows, double-click the issetup.exe file.
   - On UNIX or Linux, type `./issetup`

4. Select the language to use for the installation.
   The language that you select determines the language of the user interface. You can change the language of the user interface to any of the installed languages after installation.

5. Follow the directions in the installation wizard.
   For a complete installation of the server components, you need all the components that are installed by default. To install only some components, or for a distributed installation, see the *Installation and Configuration Guide* on the disk.

6. When you are prompted about installing non-English product documentation, click OK to continue.

7. In the Finish page of the installation wizard, choose how to proceed:
   - If you plan to install the IBM Cognos BI samples, do not select any options and then click Finish.
   - If you do not plan to install the IBM Cognos BI samples, click Start IBM Cognos Configuration and then click Finish.

8. On UNIX, append the `c8_location/bin` directory to the appropriate library path environment variable:
   - For AIX, LIBPATH
   - For HP-UX, SHLIB_PATH
   - For Solaris, LD_LIBRARY_PATH
   - For Linux, LD_LIBRARY_PATH

   If a fix pack is available, install the fix pack before configuring the components.

   If you installed in a language other than English and want to see user documentation in the same language, you must install the translated user documentation from the Supplementary Language Documentation disk.

   If you want to use the samples that are available for IBM Cognos BI, install the IBM Cognos BI samples.

---

### Installing Fix Packs

IBM® provides interim maintenance packages that contain updates to one or more components in your IBM Cognos® product. If a fix pack is available when you are installing or upgrading your product, you must install it after you install the IBM Cognos Business Intelligence components.

**IMPORTANT:** Fix packs are not standalone installations. You must install them on computers that have IBM Cognos BI server components installed. Install the fix pack or packs that are appropriate for your product version. To check your version, open the component list file at c10_location\cmplst.txt and check the line that starts with C8BISRVR_version=.

### Steps for the Microsoft Windows Operating System

1. Insert the disk for the Microsoft® Windows® operating system fix pack or go to the location where you downloaded and extracted the files.
   
   If more than one fix pack is available, install the fix pack with the lowest version number first.

2. On the disk or in the download location, go to the win32 directory and double-click the issetup.exe file.

3. Follow the directions in the installation wizard, installing in the same location as your existing IBM Cognos BI server components.
   
   The issetup program prompts you to allow the fix pack to create a backup copy in the installation folder before copying new files.

4. If an updater is available, do the following:
   
   - To install from a disk, insert the updater disk for the Windows operating system.
   
   - To install from a download, follow the instructions on the support site and then go to the location where you downloaded and extracted the files.
   
   - Within the updater directory on the disk or download location, go to the win32 directory and double-click the issetup.exe file.
   
   - Follow the directions in the installation wizard.

### Steps for the UNIX and Linux Operating Systems

1. If using a disk, mount the fix pack disk that is appropriate for your UNIX® or Linux® operating system, using Rock Ridge file extensions.

   **Important:** To mount the IBM Cognos disk on HP-UX, do the following:
   
   - Add the pfs_mount directory in your path.
   
   For example,
   
   PATH=/usr/sbin:/$PATH
   
   export PATH
   
   - To start the required NFS daemons and run the daemons in the background, type bg pfs_mountd and then type bg pfsd
   
   - To mount the drive, type
   
   pfs_mount -t rrip <device><mount_dir> -o xlat=unix
   
   For example,


```
pfs_mount /dev/dsk/c0t2d0 /cdrom -o xlat=unix
```

You can now install or copy files as a non-root user using an IBM Cognos disk from this drive.

- When the installation is complete, type `pfs_umount /cdrom` and kill the pfss and pfs_mountd daemons to unmount the disk.

2. If using a download, go to the location where you downloaded and extracted the fix pack files. If more than one fix pack is available, install the fix pack with the lowest version number first.

3. To start the installation wizard, type

```
./issetup
```

If you do not use XWindows, run an unattended installation. For more information, see the `Installation and Configuration Guide`.

4. Follow the directions in the installation wizard to install to the same location as your existing IBM Cognos BI server components.

   The issetup program prompts you to allow the fix pack to create a backup copy in the installation folder before copying new files.

5. If an updater is available, do the following:

   - To install from a disk, mount the updater disk that is appropriate for your operating system, using Rock Ridge file extensions.
   
     **Important:** To mount the disk on HP-UX, follow the bulleted instructions in step 1.

   - To install from a download, go to the location where you downloaded and extracted the updater files.

   - To start the installation wizard, type

     ```
     ./issetup
     ```

     If you do not use XWindows, run an unattended installation. For more information, see the `Installation and Configuration Guide`.

   - Follow the directions in the installation wizard to install to the same location as your existing IBM Cognos BI server components.

---

### Setting Up the Environment

To set up your environment, you must do the following:

- Create the content store
- Set up database connectivity for the content store
- Update the Java™ environment (on UNIX® or Linux®)
- Configure the Web server
Guidelines for Creating the Content Store

The content store is a database that Content Manager uses to store global configuration data, global settings (such as the language and currency formats shown in the user interface), connections to data sources, and product-specific content. You must use one of the supported enterprise-level databases as the content store in a production environment.

Do not use Cognos Content Database for the content store in a production environment. Cognos Content Database is provided to help you quickly set up a test or proof-of-concept system.

Design models and log files are not stored in the content store.

You must create the content store before you can use your IBM® Cognos® Business Intelligence product.

Database Properties

You must create the content store database using one of the databases listed in the following table:

<table>
<thead>
<tr>
<th>Database</th>
<th>Character Encoding</th>
<th>Protocol</th>
</tr>
</thead>
<tbody>
<tr>
<td>DB2</td>
<td>UTF-8</td>
<td>TCP/IP</td>
</tr>
<tr>
<td>Oracle</td>
<td>AL32UTF8 or AL32UTF16</td>
<td>TCP/IP</td>
</tr>
<tr>
<td>Microsoft® SQL Server</td>
<td>UTF-8 or UTF-16</td>
<td>TCP/IP</td>
</tr>
<tr>
<td>Informix®</td>
<td>UTF-8</td>
<td>TCP/IP</td>
</tr>
<tr>
<td>Sybase</td>
<td>UTF-8</td>
<td>TCP/IP</td>
</tr>
<tr>
<td>Cognos Content Database</td>
<td>pre configured</td>
<td>pre configured</td>
</tr>
</tbody>
</table>

If you plan to use the Cognos Content Database as your content store, a database is created and pre configured when the installation is complete.

Collation Sequence

Note that Cognos BI uses a single sort order that specifies the rules used by the database to interpret, collect, compare, and present character data. For example, a sort order defines whether the letter A is less than, equal to, or greater than the letter B; whether the collation is case sensitive; and whether the collation is accent sensitive. For more information about collation and collation sequences, see the database documentation.
Suggested Settings for Creating the Content Store in DB2 on Linux, Windows and UNIX

The database you create on the Microsoft® Windows®, Linux®, or UNIX® operating system for the content store must contain the specified configuration settings.

To ensure a successful installation, use the following guidelines when creating the content store. Use the same guidelines to create a database for log messages.

Library Files for DB2

Ensure that you use the appropriate library files for the version of the IBM® Cognos® Business Intelligence server that you install. IBM Cognos BI requires 32-bit library files when running in a 32-bit application server and it requires 64-bit library files when running in a 64-bit application server. Depending on the version of DB2® that you have installed, you may have to change the library files or change the order in which the library files are listed so that IBM Cognos BI server can find the correct files. Whichever version of library files are needed must be listed first.

Guidelines for Creating the Content Store in DB2 on Linux, UNIX, or Windows

If you create your own content store, use the following checklist to help you set up the content store on DB2.

☐ If you use type 2 JDBC connectivity, set the appropriate environment variables for DB2, which are as shown in the following table.

<table>
<thead>
<tr>
<th>Environment variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DB2DIR</td>
<td>The top level directory that contains the database client software or the entire database installation.</td>
</tr>
<tr>
<td>LD_LIBRARY_PATH</td>
<td>The load library path. You must add the driver location and indicate the 32-bit or 64-bit library files as appropriate for your application server. For example (replace ## with 32 or 64 as appropriate), LD_LIBRARY_PATH= $DB2_location/sqlib/lib##: $LD_LIBRARY_PATH Examples (replace ## with 32 or 64 as appropriate): For Solaris and Linux: LD_LIBRARY_PATH= $DB2DIR/lib##: $LD_LIBRARY_PATH For AIX®: LIBPATH=$DB2DIR/lib##:$LIBPATH For HP-UX: SHLIB_PATH=$DB2DIR/lib##:$SHLIB_PATH DB2INSTANCE</td>
</tr>
</tbody>
</table>
Setting this optional environment variable to a value of 1208 provides support for multilingual databases. For information about whether to use this environment variable, see the DB2 documentation.

Use UTF-8 as the code set value when you create the database.

To check if your database has the correct code set, using the command line interface, type the following at the command prompt:

db2 get database configuration for database_name

The code set value should be UTF-8 and the code page value should be 1208.

Ensure that you set the configuration parameters as shown in the following table.

<table>
<thead>
<tr>
<th>Property</th>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application heap size</td>
<td>1024 KB</td>
<td>If the application heap size value is too small, out of memory errors may occur when there are many users.</td>
</tr>
<tr>
<td>(applheapsz)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lock timeout (locktimeout)</td>
<td>240 seconds</td>
<td>Do not set this to an infinite timeout value.</td>
</tr>
<tr>
<td>DB2 registry variable (DB2_INLIST_TO_NLJN)</td>
<td>YES</td>
<td>Setting this variable to YES improves performance.</td>
</tr>
</tbody>
</table>

Create a buffer pool with a page size of 32 KB, and a second one with a page size of 4 KB.

Create a system temporary tablespace using the 32 KB buffer pool you created in the previous step.

Create a user temporary tablespace using the 4 KB buffer pool you created. Global temporary tables will be created in the user temporary tablespace.

Create a regular user tablespace using the 4 KB buffer pool you created. If you are also creating a logging database, create an additional regular user tablespace with a page size of 8 KB.

Grant the following database privileges for the user account IBM Cognos BI will use to access the database:
connect to database
create tables
create schemas implicitly

**Tip:** If you want to host more than one content store on your DB2 instance and you will use both at the same time, use a different user account for each content store to ensure that each IBM Cognos BI instance is fully isolated from the other.

- Ensure that the user account has use privileges for the user temporary tablespace and other appropriate tablespaces associated with the database.
- Create a schema for the user account IBM Cognos BI will use to access the database, and ensure the user has create, drop, and alter permissions for the schema.
- Create a profile that sources the sqllib/db2profile from the DB2 user's home directory. For example, the content of your .profile will be similar to the following:

```bash
if [ -f /home/db2user/sqllib/db2profile ]; then
  /home/db2user/sqllib/db2profile
fi
```

- Your database administrator must back up IBM Cognos BI databases regularly because they contain the IBM Cognos data. To ensure the security and integrity of databases, protect them from unauthorized or inappropriate access.

### Suggested Settings for Creating the Content Store in DB2 on z/OS

The database you create for the content store must contain the specified configuration settings. To ensure a successful installation, use the following guidelines when creating the content store.

#### Guidelines for Creating the Content Store in DB2 on z/OS

Use the following checklist to help you set up the content store in DB2 on z/OS.

- Log on to the z/OS system as a user with administrator privileges in DB2 (DBADM authority) in z/OS.
- Create a database instance, storage group, and a user account for the content store. A user must have permissions to create and delete tables in the database. IBM® Cognos® Business Intelligence uses the credentials of the user account to communicate with the database server.
- Ensure you reserve a buffer pool with a page size of 32 KB, and a second one with a page size of 4 KB for the database instance.
- Administrators must run a script to create tablespaces to hold Large Objects and other data for the content store and grant user rights to the tablespaces. For information about running the script, see "Create Tablespaces for a DB2 Content Store on z/OS" (p. 25).
Your database administrator must back up IBM Cognos BI databases regularly because they contain the IBM Cognos data. To ensure the security and integrity of databases, protect them from unauthorized or inappropriate access.

**Suggested Settings for Creating the Content Store in Oracle**

The database you create for the content store must contain the specified configuration settings. To ensure a successful installation, use the following guidelines when creating the content store. Use the same guidelines to create a database for log messages.

**Guidelines for Creating the Content Store in Oracle**

Use the following checklist to help you set up the content store on Oracle.

- Ensure that the parameter for the database instance compatibility level of the content store database is set to 9.0.1 or higher.
  
  For example, you can check the COMPATIBLE initialization parameter setting by issuing the following SQL statement:

  ```sql
  SELECT name, value, description FROM v$parameter WHERE name='compatible';
  ```

  For information about changing an instance configuration parameter, see the Oracle documentation.

- Determine if the database is Unicode.
  
  Tip: One method is to type the following select statement:

  ```sql
  select * from NLS_DATABASE_PARAMETERS
  ```

  If the result set returns an NLS_CHARACTERSET that is not Unicode, create a new database and specify AL32UTF8 for the database character set parameters.

- Determine which user account will be used to access the database.

- Ensure that the user account that accesses the database has permission to do the following:
  
  - connect to the database
  - create, alter, and drop triggers, views, procedures, and sequences
  - create and alter tables
  - insert, update, and delete data in the database tables

- Your database administrator must back up IBM Cognos BI databases regularly because they contain the Cognos data. To ensure the security and integrity of databases, protect them from unauthorized or inappropriate access.

**Suggested Settings for Creating the Content Store in Microsoft SQL Server**

The database you create for the content store must contain the specified configuration settings. To ensure a successful installation, use the following guidelines when creating the content store. Use the same guidelines to create a database for log messages.
Suggested Settings for Microsoft SQL Server

Use the following checklist to help you set up the content store on Microsoft® SQL Server.

- Ensure that the collation sequence is case-insensitive.

  In a Custom installation, you choose a collation, which includes character sets and sort order, during the Microsoft SQL Server setup. In a Typical installation, the installation uses the locale identified by the installation program for the collation. This setting cannot be changed later.

- When connecting to Microsoft SQL Server Management Studio to create the database, use Microsoft SQL Server authentication.

  If you connect using Microsoft® Windows® operating system authentication, the database that you create will also use Windows authentication. In this situation, you must configure the database connection using a database type of SQL Server database (Windows Authentication) in IBM® Cognos® Configuration.

- For the user account that will be used to access the database, create a new login under Security and use the following settings:
  - Select SQL Server authentication.
  - Clear the Enforce password policy check box.

  Tip: If you want to host more than one content store on your Microsoft SQL Server instance and you will use both at the same time, use a different user account for each content store to ensure that each IBM Cognos Business Intelligence instance is fully isolated from the others.

- For Microsoft SQL Server 2008, grant EXECUTE permission to the user account that accesses the database.

- For the content store database, create a new database under Databases.

- Under Security for the new database, create a new schema and assign a name to it.

- Under Security for the new database, create a new user with the following settings:
  - For Login name, specify the new login that you created for the user account.
  - For Default schema, specify the new schema.
  - For Owned Schemas, select the new schema.
  - For Role Members, select db_datareader, db_datawriter, and db_ddladmin.

Suggested Settings for Creating the Content Store in the IBM Informix Dynamic Server Database

The database that you create for the content store must contain specific configuration settings. Use the following guidelines when creating the content store. Use the same guidelines to create a database for log messages.
**Suggested Settings for the Informix Dynamic Server Database**

Use the following checklist to help you set up the content store on the IBM® Informix® Dynamic Server database.

- Set the following environment variables:
  - `GL_USEGLU` - To enable International Components for Unicode (ICU) functionality in Informix Dynamic Server, set the value to 1.
  - `DB_LOCALE` - To set the database locale to Unicode, specify `en_us.utf8`.
- In the file `ONCONFIG.instance_name`, set the property `SHMBASE` to `0x14000000L`.
- Create two sbspaces named `CMDATASPACE` and `CMOBJPROPS7SPACE`, with the logging turned on.
- Create a database in mode ANSI and with logging turned on.
- For the user account that you use to access the database, grant the DBA database privilege.

**Important:** If you host more than one database on your Informix instance and use them at the same time, use a different user account for each database. You must also define the user account in each instance of the IBM Cognos® Configuration application by creating an advanced property parameter and specifying the user account as the value. For multiple content store databases, name the property `CMSCRIPT_CS_ID`. For multiple logging databases, name the property `IPFSCRIPTIDX`.

**Suggested Settings for Creating the Content Store in Sybase**

The database you create for the content store must contain the specified configuration settings.

To ensure a successful installation, use the following guidelines when creating the content store.

Use the same guidelines to create a database for log messages.

**Suggested Settings for Sybase**

Use the following checklist to help you set up the content store on Sybase.

- On the Sybase server, create a server instance with an 8 KB server page size.
  
  For instructions, see the Sybase documentation.

- If required, install jConnect 6.
  
  This tool sets up the communication between the JDBC driver and the Sybase Adaptive Server instance.
  
  For instructions, see the Sybase documentation.
  
  If your version of Sybase does not include JConnect 6, you must download the installer from Sybase’s Web site.

- Add the UTF-8 character set to the server instance.

- If required, make UTF-8 the default character set on the server.

- Create a database device.
Tip: Set log_segment to a minimum of 10 MB.

- Set the new database device as the default.
  Information about the new database will be stored in the new database device. Keep a backup of the database device for recovery purposes.

- Create the database.

- Determine which user account will be used to access the database.
  Tip: If you want to host more than one content store on your Sybase instance and you will use them at the same time, use a different user account for each content store to ensure that each IBM® Cognos® Business Intelligence instance is fully isolated from the others.

- Ensure that the user account has the following privileges for the database: create default, create procedure, create rule, create table, and create view.

- Ensure that the database has the following settings and is restarted:
  - create and drop table privileges for the user account
  - Select into property is set to True

Create a Database for a DB2 Content Store on Linux Using a Script

A script named C8DB2.sh is provided to allow you to create a content store database in DB2® on Linux® operating systems. The script is located in the c10_location/C8SE directory after you install IBM® Cognos® Business Intelligence.

DB2 must be installed and configured before you run the script. The script creates and configures a database that you can use as your content store. For more information about the minimum settings for a DB2 content store, see "Suggested Settings for Creating the Content Store in DB2 on Linux, Windows and UNIX" (p. 18).

Permissions

To run the script you must be a member DB2 group named dasadm1. When you run the script you are prompted for a user account that will be given the required privileges to access and write to the database. When you configure the content store connection information for IBM Cognos BI, use the user account that you enter when you run the script, not the user account you use to run the script.

The script creates the database in the first DB2 instance in your path. If you have more than one DB2 instance, ensure that the DB2 instance in which you want to create the content store appears first in your path.

Steps

1. From the c10_location/C8SE directory where you installed IBM Cognos BI, copy the C8DB2.sh script to your database server.

2. On your database server computer, change to a user who is a member of the DB2 group named dasadm1.
3. Run the script using the following command:

```
./C8DB2.sh
```

You are prompted for the following information:

- a name for the content store database
- a user who will be granted the required privileges to access and write to the content store database

When you set the database connection properties for the content store, you must enter this user in the **User ID and password** property.

When the script has finished, a database will be created in DB2 that you can use as your content store database.

**Create Tablespaces for a DB2 Content Store on z/OS**

A database administrator must run a script to create a set of tablespaces required for the content store database. The script must be modified to replace the placeholder parameters with ones that are appropriate for your environment.

If you are using the same DB2® database on z/OS® for both the content store and notification (the default setup), then you must run scripts to create the notification tablespaces at the same time that you create the content store tablespaces.

Ensure that you use the naming conventions for DB2 on z/OS. For example, all names of parameters must start with a letter and the length must not exceed eight characters. For more information, see the IBM® DB2 Information Center.

**Steps**

1. Connect to the database as a user with privileges to create and drop tablespaces and to allow execution of SQL statements.

2. Go to the directory that contains the scripts:

   `c10_location/configuration/schemas/content/db2zOS`

3. Open the `tablespace_db2zOS.sql` script file and use the following table to help you to replace the generic parameters with ones appropriate for your environment.

   Not all of the parameters listed are in the script, but may be added in the future.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMSCRIPT_CREATE_IN</td>
<td>Specifies the base tables location</td>
</tr>
<tr>
<td></td>
<td>For example, <code>databaseName.baseTablespaceName</code></td>
</tr>
<tr>
<td>CMSCRIPT_STOGROUP</td>
<td>Specifies the name of the storage group.</td>
</tr>
<tr>
<td>CMSCRIPT_DATABASE</td>
<td>Specifies the name of the content store database.</td>
</tr>
</tbody>
</table>

```
```
### Parameter Name | Description
---|---
CMSCRIPT_CS_ID | Specifies the instance identification for the content store database.
  
  The ID must not be longer than two characters.
CMSCRIPT_TABLESPACE | Specifies the name of the tablespace that will contain all of the base tables in the content store.
  
  Auxiliary tables are not included.
  
  The name cannot be longer than six characters.
CMSCRIPT_LARGE_BP | Specifies the name of the large buffer pool allocated for especially large objects.
CMSCRIPT_REGULAR_BP | Specifies the name of the regular size buffer pool allocated for regular and large objects.
CMSCRIPT_USERNAME | Specifies the user account that accesses the content store database.

4. Save and run the script.

5. Grant the IBM Cognos® user rights to the tablespaces that were created when you ran the `tablespace_db2zOS.sql` file script:
   - In the remote access tool, open the `rightsGrant_db2zOS.sql` script file and replace the placeholder parameters with values that are appropriate for your environment.
     
     **Tip:** Ensure that you use the same values that you used when you allocated resources to the buffer pools and user account.
     
     - Save and run the file.

6. Replace placeholder parameters in the following scripts and run them:
   - `dbInitTest_db2zOS.sql`
   - `dbInitMeta_db2zOS.sql`
   - `dbInitScript_db2zOS.sql`
   - `dbInitLock_db2zOS.sql`

7. If you are using the same database for notification that you use for the content store (the default setup), perform the remaining steps.

8. Open the `NC_TABLESPACES.sql` script file and use the following table to help you to replace the placeholder parameters with ones that are appropriate for your environment.
   
   For parameters that are not in the script, add them.
<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCCOG</td>
<td>Specifies the name of the content store database.</td>
</tr>
<tr>
<td>DSN8G810</td>
<td>Specifies the name of the storage group used for the content store database.</td>
</tr>
<tr>
<td>BP32K</td>
<td>Specifies the name of the buffer pool used for the tablespaces.</td>
</tr>
</tbody>
</table>

9. Save and run the script.

10. Open the NC_CREATE.sql script file and replace the NCCOG placeholder parameter with the name of the content store database.

11. Save the script.

The Job and Scheduling Monitor services will automatically run the script. However, you may choose to run it yourself.

The content store database is created. You can now configure a database connection.

**JDBC Driver Options for Using DB2 Database as a Content Store**

IBM® Cognos® Business Intelligence uses Java™ Database Connectivity (JDBC) to access the database used for the content store.

If you use DB2® on a Microsoft® Windows®, Linux®, or UNIX® operating system as your content store you must choose whether to use the type 2 or type 4 JDBC driver depending on how you want to connect to the content store.

If you are using a DB2 database on z/OS® for the content store, you must use a type 4 JDBC connection.

You specify the driver type to use in IBM Cognos Configuration.

**Configuration Options for the Universal Driver**

DB2 introduced a universal JDBC driver that contains both type 2 and type 4 JDBC driver support. The universal driver, db2jcc.jar, replaces the deprecated type 2 JDBC driver, db2java.zip.

If you are upgrading, you can continue to use a type 2 JDBC connection with no configuration change required. If you want to use a type 4 JDBC connection, you must change your configuration to include the host name and port number of the database server.

For information about configuration requirements, "Set Database Connection Properties for the Content Store" (p. 35).

For both a type 2 and type 4 JDBC connection, however, you must copy the new universal driver, db2jcc.jar, and the accompanying license file, db2jcc_license_*.jar, to your IBM Cognos BI installation location.

For more information, see "Set Up Database Connectivity for the Content Store Database" (p. 28).
Using the Type 2 JDBC Driver

Type 2 JDBC drivers are comprised of a native-API component and a Java™ component.

The connection to the DB2 database occurs through the DB2 CLI libraries, which comprise the native component that communicates with the database server.

Because type 2 JDBC drivers require common client code and rely on the native code of the product, a DB2 client must be installed to use this driver. For example, a DB2 client must be installed on the computer where you have Content Manager installed.

Using the Type 4 JDBC Driver

Type 4 JDBC drivers are pure Java drivers which provide direct access to DB2 database features through network communication.

The type 4 driver is considered an independent product. It does not require the DB2 client to be installed.

Set Up Database Connectivity for the Content Store Database

If you are using a database other than Cognos® Content Database as the content store, you may have to install database client software, or Java™ Database Connectivity (JDBC) drivers, or both, on each computer where you install Content Manager. Doing this allows Content Manager to access the content store database.

Steps for DB2

1. If you are using a type 2 JDBC connection, install the DB2® client software on the Content Manager computers.

   If you are using a type 4 JDBC connection for DB2, you are not required to install the DB2 client software where Content Manager is installed. If you use a DB2 database on z/OS® for the content store, you must use a type 4 JDBC connection.

2. If you are using a type 2 JDBC connection, and the content store is on a different computer than Content Manager, configure a database alias to the content store.

   On Microsoft® Windows® operating systems, run the DB2 Client Configuration Assistant.

   On UNIX® or Linux® operating systems, use the DB2 command line interface.

   If the content store database and Content Manager are on the same computer, the content store name automatically becomes the alias.

   When you configure the Content Manager computers, ensure that they are all configured to use the same content store.

3. On Windows, stop the DB2 services and the HTML Search Server.

4. Copy the following files from DB2_installation/sqlib/java directory to the c10_location/webapps/p2pd/WEB-INF/lib directory.

   ● the universal driver file, db2jcc.jar
   ● the license file
for DB2 on Linux, UNIX, or Windows, db2jcc_license_cu.jar
for DB2 on z/OS, db2jcc_license_cisuz.jar

If you are connecting to DB2 on z/OS, use the driver version from Linux, UNIX, or Windows version 9.1 fix pack 5 or version 9.5 fix pack 2.

Tip: To check the driver version, run the following command:
java -cp path\db2jcc.jar com.ibm.db2.jcc.DB2Jjcc -version

5. On Windows, restart the DB2 services and the HTML Search Server.
6. On UNIX, if you are using a type 2 JDBC connection, ensure that the 32-bit DB2 libraries are in the library search path, which is usually the $DB2DIR/lib directory or the $DB2DIR/lib32 directory.

You can tune the database to take advantage of DB2 features. For more information, see the Installation and Configuration Guide.

**Steps for Oracle**

1. On the computer where the Oracle client is installed, go to the ORACLE_HOME/jdbc/lib directory.
2. Copy the ojdbc5.jar file to the `c10_location/webapps/p2pd/WEB-INF/lib` directory on computers where Content Manager is installed and where notification is sent to an Oracle database.

   If the directory contains the classes12.jar file or ojdbc14.jar file, delete it before installing the ojdbc5.jar file.

   The driver is available from an Oracle client or server install, and it can also be downloaded from the Oracle technology Web site.

**Steps for Informix**

1. On the computer where Informix® is installed, go to the `Informix_location/sqllib/java` directory.
2. Copy the following files to the `c10_location/webapps/p2pd/WEB-INF/lib` directory on every computer where Content Manager is installed.
   - the universal driver file, db2jcc.jar
   - the license file, db2jcc_license_cisuz.jar

**Steps for Sybase**

1. On the computer where Sybase is installed, go to the `Sybase_location/jConnect-6/classes` directory.
2. Copy the jconn3.jar file to the `c10_location/webapps/p2pd/WEB-INF/lib` directory on every computer where Content Manager is installed and where notification is sent to a Sybase database.
Update the Java Environment

You can use an existing Java™ Runtime Environment (JRE) or the JRE that is provided with IBM® Cognos® Business Intelligence. To support the cryptographic services in IBM Cognos BI, you may be required to update or set a JAVA_HOME environment variable. Depending on your security policy, you may also have to install the unrestricted Java Cryptography Extension (JCE) policy file.

You can use an existing Java™ Runtime Environment (JRE) or the JRE that is provided with IBM® Cognos® BI. To support the cryptographic services in IBM Cognos BI, you may be required to update or set a JAVA_HOME environment variable. Depending on your security policy, you may also have to install the unrestricted Java Cryptography Extension (JCE) policy file.

JAVA_HOME

If you want to use your own JRE and have JAVA_HOME set to that location on Microsoft® Windows® operating system or if you are installing on a UNIX® or Linux® operating system, you must update JAVA_HOME for the cryptographic services.

On Windows, you can set JAVA_HOME as a system variable or a user variable. If you set it as a system variable, it may be necessary to restart your computer for it to take effect. If you set it as a user variable, set it so that the environment in which Tomcat (or other application server) is running can access it.

If you do not have a JAVA_HOME variable already set on Windows, the JRE files provided with the installation will be used, and you do not have to update any files in your environment. If JAVA_HOME points to a Java version that is not valid for IBM Cognos BI, you must update JAVA_HOME with the path to a valid Java version.

If you do not have a JAVA_HOME variable already set on Windows, the JRE files provided with the installation will be used, and you do not have to update any files in your environment. If JAVA_HOME points to a Java version that is not valid for IBM Cognos BI, you must update JAVA_HOME with the path to a valid Java version.

Unrestricted JCE Policy File

Whether you use the default Windows JRE or download a JRE for UNIX or Linux, the JRE includes a restricted policy file that limits you to certain cryptographic algorithms and cipher suites. If your security policy requires a wider range of cryptographic algorithms and cipher suites than are shown in IBM Cognos Configuration, you can download and install the unrestricted JCE policy file.

Steps

1. Ensure that the JAVA_HOME environment variable is set to the JRE location.
   For example, to set JAVA_HOME to a JRE that you are already using, the path is Java_location/bin/jre/version.

2. If your security policy requires it, download and install the unrestricted JCE policy file.
   For Java that is provided by IBM, the unrestricted JCE policy file is available from the following location:
Configure the Web Server

Before you use Web pages generated by IBM® Cognos® Business Intelligence, you must configure your Web server. You must set up virtual directories, also known as Web aliases, for the directories that contain the HTML and Web files for IBM Cognos BI.

Steps to Create Virtual Directories

1. Create the virtual directories shown in the following table:

<table>
<thead>
<tr>
<th>Alias</th>
<th>Location</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>ibmcognos</td>
<td>c10_location/webcontent</td>
<td>Read</td>
</tr>
<tr>
<td>ibmcognos/cgi-bin</td>
<td>c10_location/cgi-bin</td>
<td>Execute</td>
</tr>
</tbody>
</table>

You can use a name other than ibmcognos in the aliases. However, you must use cgi-bin as the second part of the alias and you must change the virtual directory in the Gateway URI property to match the new IBM Cognos alias.

If you are upgrading from ReportNet® or an earlier version of IBM Cognos BI, you can continue to use the existing aliases. If you install IBM Cognos BI reporting components in a different location from the earlier version, change the existing aliases to include the new location. If you have more than one version of ReportNet or IBM Cognos BI on one computer, you must use different alias names for IBM Cognos BI.

For Apache Web Server, ensure that you define the ibmcognos/cgi-bin alias before the ibmcognos alias in the httpd.conf file located in the Apache_installation/conf directory. The ibmcognos/cgi-bin alias must be defined as a ScriptAlias.

2. If you want to use the Report Studio image browser, enable Web Distributed Authoring and Versioning (WebDAV) on your Web server.

   If you use Apache Web Server, specify a directory in which to enable WebDAV. For information about configuring WebDAV, see your Web server documentation.

   If you use Microsoft® Internet Information Services (IIS), enable the Read and Directory Browsing properties for the URL you want to access.

3. For IBM Cognos BI for reporting, set the content expiry on the c10_location/webcontent/pat/images virtual directory in your Web server.

   Each time a user opens Report Studio, their Web browser checks with the Web server to determine if images are current. Because there are over 600 images, this can result in excess network traffic. You can postpone this check until a specified date by using the content expiry feature of the Web server.

   For information on setting content expiry, see the documentation for your Web server.

   Note: When you upgrade, Report Studio users must clear their Web browser cache to get the latest images.
Configure Web Browsers

IBM® Cognos® Business Intelligence products use default browser configurations. Additional required settings are specific to the browser.

The following table shows the settings that must be enabled.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Setting</th>
<th>IBM Cognos component</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer® (settings for studios and portals)</td>
<td>Allow Cookies</td>
<td>IBM Cognos Connection</td>
</tr>
<tr>
<td></td>
<td>Allow Active Scripting</td>
<td>IBM Cognos Administration</td>
</tr>
<tr>
<td></td>
<td>Allow META REFRESH</td>
<td>Cognos Viewer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Report Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Query Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Analysis Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Event Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PowerPlay® Studio</td>
</tr>
<tr>
<td>Internet Explorer (settings for some studios)</td>
<td>Run ActiveX controls and plugins</td>
<td>Report Studio</td>
</tr>
<tr>
<td></td>
<td>Script ActiveX controls marked safe for scripting</td>
<td>Query Studio</td>
</tr>
<tr>
<td>Internet Explorer (settings for a single studio)</td>
<td>Binary and script behaviors</td>
<td>Analysis Studio</td>
</tr>
<tr>
<td></td>
<td>Allow programmatic clipboard access</td>
<td></td>
</tr>
<tr>
<td>Firefox®</td>
<td>Allow Cookies</td>
<td>IBM Cognos Connection</td>
</tr>
<tr>
<td></td>
<td>Enable Java™</td>
<td>IBM Cognos Administration</td>
</tr>
<tr>
<td></td>
<td>Enable JavaScript</td>
<td>Cognos Viewer</td>
</tr>
<tr>
<td></td>
<td>Load Images</td>
<td>Report Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Query Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Analysis Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PowerPlay Studio</td>
</tr>
</tbody>
</table>

Report Studio and Query Studio use the native Microsoft® Internet Explorer XML support, which is a component of the browser. ActiveX® support must be enabled because Microsoft applications implement XML using ActiveX. IBM Cognos BI does not provide or download ActiveX controls. Only the ActiveX controls that are installed as part of Internet Explorer are enabled through this configuration.
If Adblock Plus is installed with Firefox, disable it using the per-page option. Adblock Plus prevents some IBM Cognos Connection resources from working properly.

If you use Microsoft Internet Explorer Version 8, you may receive Adobe™ link errors when you open PDF documents in the IBM Cognos portal. To prevent these errors, in Internet Explorer, from the Tools menu, select Manage Add-ons, and disable Adobe PDF Reader Link Helper.

If you use a Microsoft Internet Explorer Web browser, then you can add the URL for your gateway(s) to the list of Trusted sites. For example, http://<server_name>:<port_number>/ibmcognos. This enables automatic prompting for file downloads.

For more information, see the topic about configuring IBM Cognos Application Firewall in the Installation and Configuration Guide.

IBM Cognos BI uses the following cookies to store user information.

### Cookies Used by IBM Cognos BI Components

<table>
<thead>
<tr>
<th>Cookie</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>AS_TICKET</td>
<td>Session temporary</td>
<td>Created if IBM Cognos BI is configured to use an IBM Cognos Series 7 namespace</td>
</tr>
<tr>
<td>caf</td>
<td>Session temporary</td>
<td>Contains security state information</td>
</tr>
<tr>
<td>Cam_passport</td>
<td>Session temporary</td>
<td>Stores a reference to a user session stored on the Content Manager server</td>
</tr>
<tr>
<td>cc_session</td>
<td>Session temporary</td>
<td>Holds session information that is specific to IBM Cognos Connection</td>
</tr>
<tr>
<td>cc_state</td>
<td>Session temporary</td>
<td>Holds information during edit operations, such as cut, copy, and paste</td>
</tr>
<tr>
<td>CRN</td>
<td>Session temporary</td>
<td>Contains the content and product locale information, and is set for all IBM Cognos users</td>
</tr>
<tr>
<td>CRN_RS</td>
<td>Persistent</td>
<td>Stores the choice that the user makes for the &quot;view members folder&quot; in Report Studio</td>
</tr>
<tr>
<td>PAT_CURRENT_FOLDER</td>
<td>Persistent</td>
<td>Stores the current folder path if local file access is used, and is updated after the Open or Save dialog box is used</td>
</tr>
<tr>
<td>pp_session</td>
<td>Session temporary</td>
<td>Stores session information that is specific to PowerPlay Studio</td>
</tr>
</tbody>
</table>
### Configuring the Server Components

After you install the IBM® Cognos® Business Intelligence server components, some of the following configuration tasks are required:

- Configure a user account for IBM Cognos BI
- Set the database connection properties for the content store
- Configure a mail server account and notification database
- Update file location properties, if installing on Microsoft® Windows® operating system Vista

---

<table>
<thead>
<tr>
<th>Cookie</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>qs</td>
<td>Persistent</td>
<td>Stores the settings that the user makes for user interface elements such as menus and toolbars</td>
</tr>
<tr>
<td>userCapabilities</td>
<td>Session temporary</td>
<td>Contains all capabilities and the signature for the current user</td>
</tr>
<tr>
<td>usersessionid</td>
<td>Session temporary</td>
<td>Contains a unique user session identifier, valid for the duration of the browser session.</td>
</tr>
<tr>
<td>FrameBorder</td>
<td>Session temporary</td>
<td>These cookies store the preferences for export to PDF.</td>
</tr>
<tr>
<td>PageOrientation</td>
<td>Session temporary</td>
<td></td>
</tr>
<tr>
<td>PageSize</td>
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</tr>
<tr>
<td>PDFLayerDimension</td>
<td></td>
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</tr>
<tr>
<td>PDFOPTS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DimTreeToolbarVisible</td>
<td>Persistent</td>
<td>Stores the setting that determines whether to show or hide the dimension viewer toolbar.</td>
</tr>
<tr>
<td>cea-ssa</td>
<td>Session temporary</td>
<td>Stores the setting that determines whether the user session information is shared with other IBM Cognos BI components.</td>
</tr>
<tr>
<td>BRes</td>
<td>Session temporary</td>
<td>Stores information used to determine the screen resolution to use to render charts.</td>
</tr>
</tbody>
</table>
If you want to migrate security information or secured content from IBM Cognos Series 7 to IBM Cognos BI, you must configure a namespace in IBM Cognos BI that is identical to the IBM Cognos Series 7 namespace. Later, you can manually change the migration configuration for IBM Cognos Series 7, such as namespace name and service port number, if required.

Configure a User Account or Network Service Account for IBM Cognos Business Intelligence

You can configure either a user account or a network service account for IBM® Cognos® Business Intelligence.

The user or network service account under which IBM Cognos BI runs must:

- have access to all required resources, such as printers
- have the rights to log on as a service and act as part of the operating system

In addition, the user account must be a member of the local administrator group.

For example, to print reports using a network printer, the account must have access to the network printer, or you must assign a logon account to the IBM Cognos service.

Configure a User Account

For Microsoft® Windows® operating system, assign a logon account to the IBM Cognos service.

You can configure the IBM Cognos service to use a special user account by selecting the IBM Cognos service from the list of services shown in the Services window in Windows. You can then define the user account properties.

For UNIX® or Linux® operating system, create a new UNIX or Linux group named ibmcognos. This group must contain the user that owns the IBM Cognos files. Change the group ownership of the IBM Cognos files to the ibmcognos group and change the file permissions for all IBM Cognos files to GROUP READABLE/WRITABLE/EXECUTABLE.

You must configure the Web Server to use aliases. For more information, see the IBM Cognos BI Installation and Configuration Guide.

Configure a Network Service Account

The network service account is the built-in account NT AUTHORITY\NetworkService in the operating system. Administrators do not need to manage a password or maintain the account.

Use an account with administrator privileges if you are installing on Windows Server 2008

You must configure the Web server to use the application pool. For more information, see the IBM Cognos BI Installation and Configuration Guide. You also need the appropriate write permissions to install to the directory.

Set Database Connection Properties for the Content Store

You must specify the database server information to ensure that Content Manager can connect to the database you use for the content store. Content Manager uses the database logon to access the content store. After you set the database connection properties, you can test the connection between Content Manager and the content store.
If you installed Cognos® Content Database, the database connection properties use the Cognos Content Database by default. You do not have to change the default connection properties. However, Cognos Content Database is for test or proof-of-concept systems only. When you move to a production environment, you must use an enterprise-level database for your content store.

If you are upgrading from ReportNet® or an earlier version of IBM Cognos BI, configure IBM Cognos BI to point to a copy of the existing content store database. After you save the configuration and start the IBM Cognos service, the data in the content store is automatically upgraded and cannot be used by the earlier version. By using a copy of the original database with the new version, you can keep ReportNet or the earlier version running with the original data.

**Steps for DB2® on Linux®, UNIX®, or Microsoft® Windows® Operating Systems**

1. In the location where you installed Content Manager, start IBM Cognos Configuration.

2. In the Explorer window, under Data Access, Content Manager, click Content Store.

3. In the Properties window, for the Database name property, type the name of the database or the database alias.

4. Change the logon credentials to specify a valid user ID and password:
   - Click the Value box next to the User ID and password property and then click the edit button when it appears.
   - Type the appropriate values and click OK.

5. To use a type 4 JDBC connection, for the Database server and port number property, type a value, using host:port syntax.
   
   If you leave this property blank, a type 2 JDBC connection is used.

6. From the File menu, click Save.
   
   The logon credentials are immediately encrypted.

**Steps for DB2 on z/OS**

1. In the location where you installed Content Manager, start IBM Cognos Configuration.

2. In the Explorer window, under Data Access, Content Manager, click Content Store.

3. In the Properties window, for the Database name property, type the name of the database or the database alias.

4. Change the logon credentials to specify a valid user ID and password:
   - Click the Value box next to the User ID and password property and then click the edit button when it appears. Ensure that you specify the same user ID as the value you specified for CMSCRIPT_USERNAME when you created the tablespaces.
   - Type the appropriate values and click OK.

5. To use a type 4 JDBC connection, for the Database server and port number property, type a value, using host:port syntax.
To connect to DB2® on z/OS®, you must use a type 4 JDBC connection.

6. In the Explorer window, click Local Configuration.

7. In the Properties window, next to Advanced properties, click inside the Value box, and then click the edit button.

   The Value - Advanced properties dialog box appears.

8. To add the parameters that you used to create the table spaces, click Add.

   All of the parameters except CMSCRIPT_USERNAME are added.

9. From the File menu, click Save.

   The logon credentials are immediately encrypted.

**Steps for Microsoft SQL Server, Oracle, Informix, and Sybase**

1. Start IBM Cognos Configuration.

2. In the Explorer window, under Data Access, Content Manager, right-click Content Store and click Delete.

   This deletes the connection to the default resource. Content Manager can access only one content store.

3. Right-click Content Manager, and then click New resource, Database.

4. In the Name box, type a name for the resource.

5. In the Type box, select the type of database and click OK.

   **Tip:** If you want to use an Oracle Net8 keyword-value pair to manage the database connection, select Oracle database (Advanced).

6. In the Properties window, provide values depending on your database type:

   - If you use a Microsoft® SQL Server database, type the appropriate values for the Database server with port number or instance name and Database name properties.
     
     For a Microsoft SQL Server database, you can choose to use a port number, such as 1433, or a named instance as the value for the Database server with port number or instance name property.
     
     For the Database server with port number or instance name property, include the instance name if there are multiple instances of Microsoft SQL Server.

     To connect to a named instance, you must specify the instance name as a Java™ Database Connectivity (JDBC) URL property or a data source property. For example, you can type localhost\instance1. If no instance name property is specified, a connection to the default instance is created.

     Note that the properties specified for the named instance, along with the user ID and password, and database name, are used to create a JDBC URL. Here is an example:

     `jdbc:JSQLConnect://localhost\instance1/user=sa/more properties as required`
To connect to a named instance, you must specify the instance name. For example, you can type localhost\instance1. If an instance name is not specified, a connection to the default instance is created.

- If you use an Oracle database, type the appropriate values for the Database server and port number and Service name properties.
- If you use an advanced Oracle database, for the Database specifier property, type the Oracle Net8 keyword-value pair for the connection.

Here is an example:
(description=(address=(host=myhost)(protocol=tcp)(port=1521)(connect_data=(sid=(orcl)))))

When you select the advanced Oracle database, IBM Cognos BI uses enterprise-oriented Oracle features to select a listener, switch to another listener if the first listener fails, automatically reconnect to the database if the connection fails, balance connection requests among listeners, and balance connection requests among dispatchers.

- If you use an Informix® database, type the appropriate values for the Database server and port number and Database name properties.
- If you use a Sybase database, type the appropriate values for the Database server and port number and Database name properties.

7. To configure logon credentials, specify a user ID and password:
   - Click the Value box next to the User ID and password property and then click the edit button when it appears.
   - Type the appropriate values and click OK.

8. If you host more than one content store database on an Informix instance, create the advanced property CMSCRIPT_CS_ID and specify the account under which the instance runs:
   - In the Explorer window, click Local Configuration.
   - In the Properties window, click the Value column for Advanced properties and then click the edit button.
   - In the Value - Advanced properties dialog box, click Add.
   - In the Name column, type CMSCRIPT_CS_ID
   - In the Value column, type the user ID of the account under which the instance of the content store runs.
     Use a different user account for each instance of Informix content store database.

9. From the File menu, click Save.
   The logon credentials are immediately encrypted.
Content Manager can now create the required tables in the content store when you start the IBM Cognos service for the first time. If the connection properties are not specified correctly, you cannot start the IBM Cognos services.

Specify a Connection to a Mail Server Account

If you want to send reports by email, you must configure a connection to a mail server account. You must also change the host name portion of the Gateway URI from localhost to either the IP address of the computer or the computer name. Otherwise the URL in the email will contain localhost and remote users will not be able to open the report.

Steps

1. In the location where Content Manager is installed, start IBM® Cognos® Configuration.
2. In the Explorer window, under Data Access, click Notification.
3. In the Properties window, for the SMTP mail server property, type the host name and port of your SMTP (outgoing) mail server.

   Tips
   To be able to open reports that are sent as links, ensure that the Gateway URI on report servers and notification servers specifies an accessible Web server hosting IBM Cognos content. If you have mobile users accessing links remotely, consider using an external URI.
4. Click the Value box next to the Account and password property and then click the edit button when it appears.
5. Type the appropriate values in the Value - Account and password dialog box and then click OK.

   Tip: If logon credentials are not required for the SMTP server, remove the default information for the Account and password property. When you are prompted for confirmation to leave this property blank, click Yes. Ensure that the default user name has been removed. Otherwise, the default account is used and notifications will not work properly.
6. In the Properties window, type the appropriate value for the default sender account.
7. Test the mail server connections. In the Explorer window right-click Notification and click Test.

   IBM Cognos Business Intelligence tests the mail server connection.

If you do not plan to send reports by email, or do not want to set up a mail server account immediately, you are not required. However, when you save the configuration and then you start the services in IBM Cognos Configuration, you will see a warning message when the mail server connection is tested. You can safely ignore the warning.

Update File Location Properties on Windows Vista

If you install IBM® Cognos® Business Intelligence modeling components on Microsoft® Windows® operating system Vista, you must change file locations properties in IBM Cognos Configuration so
that IBM Cognos BI can use a single data location for all users. IBM Cognos BI modeling components include Framework Manager, Transformer, and Metric Designer.

Windows Vista has a security enhancement that restricts multiple users from sharing data locations. You can define environment variables and use them in IBM Cognos Configuration when specifying file locations. This allows you to direct applicable files to an area that will be accessible by IBM Cognos BI users. On Windows, two environment variables are preset for users: one for all users and one for the specific user.

Because the environment variables represent system root locations, include the root directory name of the installation location when you specify file locations in IBM Cognos Configuration. The default root directory for IBM Cognos BI is c8.

**Steps**

1. Start IBM Cognos Configuration.
2. In the Explorer window, click Environment.
3. In the Properties window, click Deployment files location.
4. Replace the relative path element, “..”, with the appropriate environment variable and root directory:
   - On Windows XP, use the preset environment variables as follows:
     - For a single user, use %APPDATA%
     - For all users, use %ALLUSERSPROFILE%
   - On Windows Vista, use the preset environment variables as follows:
     - For a single user, use %LOCALAPPDATA%
     - For all users, use %PUBLIC%
   - On UNIX®, use the environment variables that you set in advance.

   For example,
   - On Windows XP, to set a single file location for all users, specify %ALLUSERSPROFILE%/c8/deployment.
   - On UNIX, if you set an environment variable such as MYHOME for single users, specify $MYHOME/c8/deployment.
5. Repeat step 4 for the following properties:
   - Under Environment, Data files location
   - Under Environment, Data files location
   - Under Environment, Map files location
   - Under Environment, Log file location
   - Under Environment, Temporary files location
   - Under Environment, Logging, File, Log file location
• Under Cryptography,
  - Common symmetric key store location
• Under Cryptography, IBM Cognos,
  - Certificate location
  - Signing key store location
  - Encryption key store location

6. From the File menu, click Save.

The environment variables are resolved when the file locations are accessed during system activities.

Start IBM Cognos services

To register the IBM® Cognos® BI service so that users can access it through IBM Cognos Connection, you must start the services. Before you start the services, test the configuration by using the test feature in IBM Cognos Configuration.

Steps
1. Start IBM Cognos Configuration.
2. Ensure that you save your configuration, otherwise you cannot start the IBM Cognos service.
3. From the Actions menu, click Test.
   IBM Cognos Configuration checks the CSK availability, tests the namespace configuration, and tests the connections to the content store and logging database.
   If you are using the notification database and the mail server, they are tested as well.
   Tip: If Test is not available for selection, in the Explorer window, click Local Configuration.
4. If the test fails, reconfigure the affected properties and then test again.
   Do not start the service until all tests pass.
5. From the Actions menu, click Start.
   It may take a few minutes for the IBM Cognos service to start.
   This action starts all installed services that are not running. If you want to start a particular service, select the service node in the Explorer window and then click Start from the Actions menu.

Test the Server Components

You can test your configuration settings by running the test feature before you start the IBM® Cognos® Business Intelligence service. Then you can test the installation by starting the IBM Cognos service and then opening IBM Cognos Connection. On Microsoft® Windows® operating systems, the IBM Cognos service is configured to start automatically by default.
On UNIX® and on Linux® operating systems, to start the IBM Cognos BI process automatically, you must configure the process as a daemon. For more information, see your operating system documentation.

**Steps**

1. Start IBM Cognos Configuration.

2. Ensure that you save your configuration, otherwise you will not be able to start the IBM Cognos service.

   If you are upgrading, a message appears indicating that configuration files were detected and upgraded to the new version.

3. From the **Actions** menu, click **Test**.

   IBM Cognos Configuration checks the CSK availability, tests the namespace configuration, and tests the connections to the content store, logging database, notification database, and the mail server.

   **Tip:** If **Test** is not available for selection, in the **Explorer** window, click **Local Configuration**.

4. If any test fails, reconfigure the affected properties and then test again.

   Do not start the service until all tests pass.

5. From the **Actions** menu, click **Start**.

   It may take a few minutes for the IBM Cognos service to start.

   This action starts all installed services that are not running. If you want to start a particular service, select the service node in the **Explorer** window and then click **Start** from the **Actions** menu.

6. Open a Web browser.

7. Test the connection to the IBM Cognos BI portal by typing the **Gateway URI** value from IBM Cognos Configuration. For example,

   
   http://host_name:port/ibmcognos

   The default value for **host_name:port** is localhost:80 and ibmcognos is the virtual directory you created when you configured the Web server.

   It may take a few minutes for the Web page to open. If you see the **Welcome** page of IBM Cognos Connection, your IBM Cognos BI installation is working.

---

**Test IBM Cognos Migration Service**

You can test the installation of the IBM® Cognos® migration service by checking that the Migration Assistant icon appears in IBM Cognos Administration.

**Steps**

1. In IBM Cognos Connection, from the toolbar, click **Launch, IBM Cognos Administration**.
2. Click the Configuration tab.

3. Click Content Administration.

The migration assistant button appears on the toolbar.

Administrators can now use the Migration Assistant which guides you through the process of migrating IBM Cognos Series 7 content from Upfront, PowerPlay Enterprise Server, and IBM Cognos Connection. For more information, see the PowerPlay Migration and Administration Guide.

**Installing and Configuring Migration on IBM Cognos Series 7 Computers**

Before you can use the Migration Assistant in IBM® Cognos® PowerPlay® to migrate IBM Cognos Series 7 content from PowerPlay Enterprise Server, Upfront, or IBM Cognos Connection, you must install migration components on IBM Cognos Series 7 computers. The IBM Cognos Series 7 migration components are available on Microsoft® Windows® and UNIX®, on the IBM Cognos PowerPlay Server CD.

Use the following checklist to guide you through the tasks to install and configure IBM Cognos Migration.

- Install IBM Cognos Series 7 migration components.
- Configure the IBM Cognos Series 7 migration components, if required.
- Start the IBM Cognos Series 7 migration service.

For information about migrating content from IBM Cognos Series 7 to IBM Cognos BI, including configuration recommendations for the migration process, see the IBM Cognos PowerPlay Migration and Administration Guide.

**Install IBM Cognos Series 7 Migration Components**

Ensure that your IBM Cognos Series 7 installations are working correctly before installing the IBM Cognos Series 7 migration components. This includes ensuring that the IBM Cognos Series 7 PowerPlay Enterprise Server service and the Upfront services, including the IBM Cognos Upfront Administration Service, IBM Cognos Upfront Data Store and the IBM Cognos Upfront Dispatcher services, are running.

You install IBM Cognos Series 7 migration components on the IBM Cognos Series 7 computers.

- To migrate content from a PowerPlay Enterprise Server you must install IBM Cognos Series 7 migration components on the PowerPlay Enterprise Server computer. If Upfront is located on the same computer you can also migrate content from Upfront. Installing migration components on the PowerPlay Enterprise Server computer also supports the migration of PowerPlay content that was published to Cognos Connection.

- To migrate content from Upfront you must install IBM Cognos Series 7 migration components on the Upfront computer. When Upfront and PowerPlay Enterprise Server are installed on separate computers, you must install IBM Cognos Series 7 migration components on the both
the PowerPlay Enterprise Server computer and the Upfront computer. Also, you must set up and configure a shared network location to support migration processing.

**Steps**

1. Insert the IBM Cognos PowerPlay Server CD that is appropriate for your operating system. On UNIX, you must mount the CD using Rock Ridge file extensions.

2. If the **Welcome** page does not appear, do one of the following:
   - On Windows, in the win32 directory on the CD, double-click the issetup.exe file.
   - On UNIX, in the directory that is appropriate for your operating system, type `./issetup`

3. Select the language to use for the installation.
   The language that you select determines the language of the installation wizard.

4. Follow the directions in the installation wizard.

5. On the **Component Selection** page, clear all components except **IBM Cognos Series 7 Migration Components**.

6. In the **Multiple Installation Locations** page, specify the IBM Cognos Series 7 location to install the components.

   You must install IBM Cognos Series 7 migration components in the same directory as IBM Cognos Series 7 version 4 (7.4).

   If you are installing the IBM Cognos Series 7 migration components on a Microsoft Windows computer, the installation location must be a physical drive and not a mapped drive. Otherwise, you will not be able to start the migration service.

   If you are prompted for an IBM Cognos BI installation location, you can accept the default location or enter a new local location. This location is used to write install files. You do not have to enter the path to an IBM Cognos BI installation on a different computer and you do not require IBM Cognos BI components on the IBM Cognos Series 7 computer.

7. In the **Migration Configuration Information** page, for the **Migration Service Port Number**, type a port number that the IBM Cognos Series 7 migration service will use. The default is 21567.

8. In the **Finish** page, click **Finish**.

   Like other IBM Cognos products, the installation process creates log files that include information such as details about transferred files and installation errors. The log files are located in the `installation_location\instlog` directory.

**Configure the IBM Cognos Series 7 Migration Service for Migrations from Upfront in Distributed IBM Cognos Series 7 Installations**

If you installed IBM Cognos Series 7 migration components on both a PowerPlay Enterprise Server computer and a separate Upfront computer, you must set up and configure a shared network location. The migration service writes temporary files to this location during migration processing.
The following limitations apply for migration from Upfront when PowerPlay Enterprise Server and Upfront are on separate computers.

**Notes**
- PowerPlay Enterprise Server and Upfront must access PowerCubes using the same path, such as `\machine_name\cubes`. If the cubes are located on the same computer as PowerPlay Enterprise Server, PowerPlay Enterprise Server will access the cubes using a local path and Upfront will access the cubes using a path that includes the PowerPlay Enterprise computer name. Migration from Upfront will not work in this situation.

**Steps**
1. Create a folder in a shared network location that is accessible from both the PowerPlay Enterprise Server computer and the Upfront computer.

   Ensure that the services for PowerPlay Enterprise Server, Upfront, and IBM Cognos Series 7 migration run under named accounts that have write access to the folder.

2. Complete the following steps on each computer that includes IBM Cognos Series 7 migration components.
   - From the `installation_location/mig7service`, open the `migs7service_configuration.xml` file in an XML or text editor.
   - Edit the `series7-shared-location description` line to specify the network location and activate the line (remove comment tags). For example,
     ```xml
     <series7-shared-location description="Path to shared folder">\bott93\share\s7migration</series7-shared-location>
     ```
   - Save and close the file.

3. Restart the IBM Series 7 migration service.

The configuration to support migration from separate PowerPlay Enterprise Server and Upfront computers is complete.

**Start the IBM Cognos Series 7 Migration Service**

Before you can migrate content from IBM Cognos Series 7 PowerPlay to IBM Cognos PowerPlay, you must start the migration service for IBM Cognos Series 7. On Windows, the migration service for IBM Cognos Series 7 starts automatically when it is first installed.

**Step**
- Start the migration service:
  - On Windows, if the service is stopped, then restart the migration service using the **IBM Cognos Migration Series 7 Service** entry in the **Services** list under **Administrative Tools**.
  - On UNIX, go to the `c10_location/mig7` directory and start the service by typing
    ```bash
    ./configure.sh --start
    ```
Uninstall IBM Cognos PowerPlay

If you no longer require IBM® Cognos® PowerPlay®, uninstall all PowerPlay components.

If you installed more than one component in the same location, the uninstall wizard lets you choose the packages to uninstall. You must uninstall all components. You must repeat the uninstallation process on each computer that contains IBM Cognos BI components.

It is not necessary to back up the configuration and data files on Microsoft® Windows®. These files are preserved during the uninstallation.

Close all programs before you uninstall IBM Cognos BI. Otherwise, some files may not be removed. Uninstalling does not remove any files that changed since the installation, such as configuration and user data files. Your installation location remains on your computer, and you retain these files until you delete them using Windows Explorer.

Uninstall IBM Cognos Business Intelligence on UNIX or Linux

If you no longer require IBM® Cognos® Business Intelligence or if you are upgrading on your UNIX® or Linux® operating system, uninstall IBM Cognos BI.

Uninstalling does not remove any files that changed since the installation, such as configuration and user data files. Your installation location remains on your computer, and you retain these files until you delete them manually.

Steps

1. If the console attached to your computer does not support a Java™-based graphical user interface, determine the process identification (pid) of the IBM Cognos BI process by typing the following command:
   ```bash
   ps -ef | grep cogbootstrapservice
   ```

2. Stop the IBM Cognos BI process:
   - If you run XWindows, start IBM Cognos Configuration, and from the Actions menu, click Stop.
   - If you do not run XWindows, type:
     ```bash
     kill -TERM pid
     ```

3. To uninstall IBM Cognos BI, go to the $c10_location/uninstall directory and type the appropriate command:
   - If you use XWindows, type
     ```bash
     ./uninst -u
     ```
   - If you do not use XWindows, do an unattended uninstallation. For more information, see the Installation and Configuration Guide.

4. Follow the prompts to complete the uninstallation.

5. Delete all temporary Internet files from the Web browser computers.
Uninstall IBM Cognos Business Intelligence on Windows

If you no longer require IBM® Cognos® Business Intelligence or if you are upgrading, uninstall all IBM Cognos BI components and the IBM Cognos service.

If you installed more than one component in the same location, you can choose the packages to uninstall using the uninstall wizard. All components of the package will be uninstalled. You must repeat the uninstallation process on each computer that contains IBM Cognos BI components.

It is not necessary to back up the configuration and data files on a Microsoft® Windows® operating system. These files are preserved during the uninstallation.

Close all programs before you uninstall IBM Cognos BI. Otherwise, some files may not be removed.

Uninstalling does not remove any files that changed since the installation, such as configuration and user data files. Your installation location remains on your computer, and you retain these files until you delete them. Do not delete the configuration and data files if you are upgrading to a new version of IBM Cognos BI and you want to use the configuration data with the new version.

Steps

1. From the Start menu, click Programs > IBM Cognos 10 > Uninstall IBM Cognos > Uninstall IBM Cognos.

   The Uninstall wizard appears.

   Tip: IBM Cognos BI is the default name of the Program Folder that is created during the installation. If you chose another name, go to that folder to find the program.

2. Follow the instructions to uninstall the components.

   The cognos_uninst_log.htm file records the activities that the Uninstall wizard performs while uninstalling files.

   Tip: To find the log file, look in the Temp directory.

3. Delete all temporary Internet files from the Web browser computers.

   For more information, see your Web browser documentation.

Uninstall the Migration Components

The IBM® Cognos® BI migration components are uninstalled when you uninstall IBM Cognos BI. You can not uninstall only the migration components from your IBM Cognos BI installation.

You can uninstall the IBM Series 7 migration components separately from your IBM Cognos Series 7 installation. After you complete the migration from IBM Cognos Series 7, you can choose to uninstall the migration components from each IBM Cognos Series 7 computer. However, the migration components are only active during a migration and will not affect your IBM Cognos Series 7 installation if you choose to not uninstall the migration components.

Step

- On the IBM Cognos Series 7 computers, uninstall the IBM Cognos Report Migration from Series 7 component.
For more information about uninstalling IBM Cognos Series 7 components, see the IBM Cognos Series 7 Solution Installation Guide.
Chapter 3: Install and Configure Optional Components

Optional components provide extended functionality for users. After you install and configure IBM® Cognos® PowerPlay®, you can install the following optional components.

- IBM Cognos BI Samples
- Translated Product Documentation
- Additional fonts for Japanese and Korean currency symbols

PowerPlay Samples

The Great Outdoors Company samples illustrate product features and technical and business best practices. You can also use them for experimenting with and sharing report design techniques and for troubleshooting. The samples include PowerCubes and reports that you can use in IBM® Cognos® PowerPlay® to try the following features:

- Migrate sample cubes and reports from IBM Cognos Series 7 to IBM Cognos PowerPlay
  To support migration, some samples must be copied to your IBM Cognos Series 7 PowerPlay servers.
  For more information about using the samples to test the migration process, see the IBM Cognos PowerPlay Migration and Administration Guide.

- View published IBM Cognos PowerPlay reports in PowerPlay Studio and PowerPlay Client
  For more information about using the sample reports, see the IBM Cognos PowerPlay Studio User Guide and the IBM Cognos PowerPlay Client User Guide.

- Drill through from an IBM Cognos PowerPlay report to other reports and cubes
  For more information about using drill through in IBM Cognos PowerPlay, see the IBM Cognos PowerPlay Migration and Administration Guide.

The Great Outdoors Company, or GO Sales, or any variation of the Great Outdoors name, is the name of a fictitious business operation whose sample data is used to develop sample applications for IBM and IBM customers. Its fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values, is coincidental. Unauthorized duplication is prohibited.

Before you can use the samples, your IBM Cognos Business Intelligence product must be installed, configured, and running.

If your IBM Cognos environment includes Report Studio, Analysis Studio, Metric Studio, or IBM Cognos Transformer, you can set up other IBM Cognos samples to use with them. For information
about setting up the other IBM Cognos BI samples, see the Samples topic in the Installation and Configuration Guide for your other IBM Cognos BI products.

### Install the IBM Cognos BI Samples

Install the samples from the IBM® Cognos® Business Intelligence Samples CD.

The IBM Cognos Samples installation includes a variety content, data sources, models, cubes, reports, and other types of content, to support all IBM Cognos BI components. Only some of the samples content is of interest to PowerPlay® users. Instead of adding the entire IBM Cognos Samples installation to the PowerPlay computer, install the samples to a shared network location and then copy relevant content to the PowerPlay computer. Users of other IBM Cognos BI components can copy samples from the same network location.

#### Steps for UNIX and Linux

1. Mount the IBM Cognos product disk using Rock Ridge file extensions or go to the location where the installation files were downloaded.

   To mount the IBM Cognos disk on HP-UX, do the following:
   - Add the pfs_mount directory in your path.
     
     For example,
     ```
     PATH=/usr/sbin:/sbin
     export PATH
     ```
   - To start the required NFS daemons and run the daemons in the background, type `bg pfs_mountd` and then type `bg pfsd`
   - To mount the drive, type
     ```
     pfs_mount -t rrip <device><mount_dir> -o xlat=unix
     ```
     For example,
     ```
     pfs_mount /dev/dsk/c0t2d0 /cdrom -o xlat=unix
     ```
     You can now install or copy files as a non-root user using an IBM Cognos disk from this drive.
   - When the installation is complete, type `pfs_umount /cdrom` and kill the pfsd and pfs_mountd daemons to unmount the disk.

2. To start the installation wizard, go to the operating system directory and type
   ```
   ./issetup
   ```

3. Follow the directions in the installation wizard and copy the required files to your computer.
   Install the samples in the same location as the server components.
4. In the Finish page of the installation wizard, click Finish.

Steps for Windows
1. Do one of the following:
   - Insert the IBM Cognos BI Samples disk.
     If the installation wizard does not open automatically, go to the operating system directory, and double-click issetup.exe.
   - Go to the location where the installation files were downloaded and extracted and double-click issetup.exe.
2. Select the language to use for the installation.
   The language that you select determines the language of the user interface. You can change the language to any of the installed languages after installation.
3. Follow the directions in the installation wizard to copy the required files to your computer.
   Install the samples in the same location as the other PowerPlay components. In a distributed installation, install them on the gateway computer.
4. In the Finish page of the installation wizard, click Finish.

Setting Up the IBM Cognos PowerPlay Samples
After you install the samples from the IBM® Cognos® Business Intelligence Samples CD, use the following checklist to guide you through the tasks of setting up the samples.

- Create a data source connection to the sample PowerCube.
- Import the sample reports.
- Set up PowerCubes and reports for drill-through examples and migration.

Create a Data Source Connection to the Sample PowerCube
Before you can open the sample reports in PowerPlay® Studio, you must create a data source connection to the sample PowerCube.

Steps
1. Connect to the IBM Cognos BI portal.
2. Start IBM Cognos Administration:
   - In the Welcome page, click Administer IBM Cognos Content.
   - In IBM Cognos Connection, from the toolbar, click Launch, IBM Cognos Administration.
3. In IBM Cognos Administration, click the Configuration tab.
4. Click the new data source button.
5. In the Name box, type great_outdoors_sales_en and then click Next. The name must be all lowercase and include the underscore characters.

6. In the Type box, select IBM Cognos PowerCube and then click Next.

7. In the location box, type the path and file name for the great_outdoors_sales_en.mdc PowerCube. For example, if you are creating a connection to samples installed to the default installation location on the local computer, type C:\Program Files\ibm\cognos\c10\webcontent\samples\datasources\cubes\PowerCubes\EN\great_outdoors_sales_en.mdc

8. To confirm that you entered all parameters correctly, click Test the Connection. After you test the connection, click Close on both the View the Results and Test the Connection pages to return to the connection string page.

9. Click Finish.

10. On the Finish page click OK. Do not select Create a Package. The great_outdoors_sales_en entry appears on the Data Source Connections list.

Import the Sample Reports
You can make the sample reports available for use in Cognos Viewer or PowerPlay Studio by importing them using a deployment archive. The sample PowerPlay data is packaged in a deployment archive for PowerPlay and migration and a deployment archive for drill-through examples. You import the deployment archives in IBM Cognos Administration before users can access the reports. Before you import the content, ensure that you set up the sample PowerCube (p. 51).

Steps to Import the PowerPlay and Migration Samples
1. On the computer where the samples are installed, go to the c10_location\webcontent\samples\content directory.
   
   For example, if the samples were installed to the default installation location, the path is C:\Program Files\ibm\cognos\c10\webcontent\samples\content

2. Copy IBM_Cognos_PowerPlay.zip to the c10_location\deployment directory on the computer where the Content Manager component is installed.

3. Connect to the IBM Cognos BI portal.

4. Start IBM Cognos Administration:
   
   • In the Welcome page, click Administer IBM Cognos Content.
   
   • In IBM Cognos Connection, from the toolbar, click Launch, IBM Cognos Administration.

5. Click the Configuration tab.

6. Click Content Administration.

7. Click the new import button.
8. Select IBM_Cognos_PowerPlay and click Next.

9. Keep the default name and location and then click Next.

10. Select the Samples folders and click Next.

11. Keep the default options and click Next.

12. Review the summary and click Next.

13. Select save and run once and click Finish.


15. Click OK.

IBM_Cognos_PowerPlay appears in Administration and a Samples folder appears in Public Folders in IBM Cognos Connection.

Steps to Import the Drill-through Samples
1. On the computer where the samples are installed, go to the c10_location\webcontent\samples\content directory.
   For example, if the samples were installed to the default installation location, the path is C:\Program Files\ibm\cognos\c10\webcontent\samples\content

2. Copy IBM_Cognos_DrillThroughSamples.zip to the c10_location\deployment directory on the computer where the Content Manager component is installed.

3. Connect to the IBM Cognos BI portal.

4. Start IBM Cognos Administration:
   - In the Welcome page, click Administer IBM Cognos Content.
   - In IBM Cognos Connection, from the toolbar, click Launch, IBM Cognos Administration.

5. Click Configuration.

6. Click Content Administration.

7. Click the new import button.

8. Select IBM_Cognos_DrillThroughSamples and click Next.

9. Keep the default name and location and then click Next.

10. Select the Samples folder and click Next.

11. Keep the default options and click Next.

12. Review the summary and click Next.

13. Select save and run once and click Finish.

15. Click OK.

IBM_Cognos_DrillThroughSamples appears in Administration. Two folders are added to Public Folders, Samples, Models folder: Go Data Warehouse (analysis) and Go Data Warehouse (query). You must have Analysis Studio or Query Studio installed to view these drill-through samples.

**Test a Sample Report**

You can test the import by opening a sample report in Cognos Viewer or PowerPlay Studio. Cognos Viewer is the default viewer when you open a report in IBM Cognos Connection.

**Steps to Test a Report in Cognos Viewer**

1. Connect to the IBM Cognos BI portal.
2. Start IBM Cognos Connection:
   - In the Welcome page, click IBM Cognos content.
   - In IBM Cognos Administration, from the toolbar, click Launch, IBM Cognos Connection.
3. In the Public Folders list, open Samples, PowerPlay.
4. Click great_outdoors_sales_en.
5. Click any report in the list.
   The report opens in IBM Cognos Viewer.

**Steps to Test a Report in PowerPlay Studio**

1. Connect to the IBM Cognos BI portal.
2. Start IBM Cognos Connection:
   - In the Welcome page, click IBM Cognos content.
   - In IBM Cognos Administration, from the toolbar, click Launch, IBM Cognos Connection.
3. Go to Public Folders, Samples, PowerPlay.
4. Click More beside the great_outdoors_sales_en entry.
5. Click View package contents.
6. Click the Open with PowerPlay Studio button for any report in the list.
   The report opens in PowerPlay Studio.

**Set Up the Sample PowerCubes and Reports for Migration**

Before you can do a sample migration from IBM® Cognos® Series 7 to IBM Cognos PowerPlay®, you must copy the IBM Cognos Series 7 PowerCube and sample reports from the IBM Cognos BI Samples installation to the IBM Cognos Series 7 PowerPlay Enterprise Server computer.
After you set up the sample PowerCube and reports, you can migrate the reports. After the migration, users can then view the reports in Cognos Viewer or PowerPlay Studio. By default, the migrated reports are in PDF format.

For information about running a migration, see the Migration and Administration Guide.

Steps

1. From the computer where the IBM Cognos BI Samples are installed, copy the following content to the IBM Cognos Series 7 computer.
   - all reports from the `c10_location\webcontent\samples\powerplay_reports\powerplay_7\reports_for_remote_cubes\language` directory
   - `great_outdoors_7.mdc` from the `c10_location\webcontent\samples\datasources\cubes\PowerCubes\language` directory

2. In IBM Cognos Series 7 PowerPlay Administration, add the cube and reports to PowerPlay Enterprise Server.
   For more information, see the IBM Cognos Series 7 PowerPlay Enterprise Server Guide.

3. To update the cube mapping, in IBM Cognos Series 7 PowerPlay Client, open each report using a remote connection to `great_outdoors_7.mdc`, and then save the report.

   The cube and reports are now ready for use in IBM Cognos Series 7.

Install Translated Product Documentation

The product installation includes a limited set of translated documentation for some languages, such as installation guides and release notes. To access a complete set of translated documentation, you must install it from IBM® Cognos® BI Supplementary Language Documentation.

Before installing the Supplementary Language Documentation, ensure that

- IBM Cognos BI is installed and configured correctly
- adequate disk space is available to install supplementary language documentation
  
  You need at least 220 MB of disk space.
- your software environment is supported

Steps

1. In the location where the Gateway component is installed, insert the IBM Supplementary Language Documentation disk or go to the directory where the installation files were downloaded and extracted.

   On UNIX® or Linux® operating systems, mount the disk using Rock Ridge file extensions.

   On Windows®, the installation wizard starts automatically from the product disk.

2. To manually start the installation wizard, go to the operating system directory and do the following:
3. Follow the instructions in the installation wizard to copy the required files to the same location where you installed gateway components for IBM Cognos BI.

   Install in a directory that contains only ASCII characters in the path name. Some Web servers do not support non-ASCII characters in directory names.

   The supplementary languages documentation components is selected by default.

4. Choose the option you want in the Finish page of the installation wizard.

---

### Install and Configure Additional Language Fonts

To add support for the Japanese Yen or Korean Won character, you must install additional fonts from IBM® Cognos® BI Supplementary Language Documentation.

The Unicode code point “U+005C” is officially assigned to the backslash. However, in Japan and Korea, that code point is historically assigned to their currency symbols and many people still prefer to see a yen or won sign in certain parts of software, for example in file paths. To accommodate this, you can install the “Andale WT J” and “Andale WT K” fonts.

Before installing the additional fonts, ensure that

- IBM Cognos BI is installed and configured correctly
- adequate disk space is available to install additional fonts
  You need at least 220 MB of disk space.
- your software environment is supported

**Steps**

1. In the location where Application Tier Components are installed, insert the IBM Cognos BI Supplementary Language Documentation disk.
   
   On UNIX® or Linux® operating systems, mount the disk using Rock Ridge file extensions.

2. Go to the directory on the disk that is appropriate for your operating system.

3. Start the installation wizard by typing the following command:
   
   - On Windows®,
     
     `issetup`
   
   - On UNIX or Linux,
     
     `/issetup`
Note: When you use the issetup command with XWindows, Japanese characters may be corrupted.

4. Follow the instructions in the installation wizard to copy the required files to the same location where you installed Application Tier Components.

Install in a directory that contains only ASCII characters in the path name. Some Web servers do not support non-ASCII characters in directory names.

When you are prompted to select components, clear IBM Cognos Business Intelligence Supplementary Languages Documentation. expand Additional Language Fonts, and then select the font.

These fonts are copied to the $c10_location/bin/fonts directory. This font location is defined in the Physical fonts location property value in IBM Cognos Configuration under Environment. If you move the fonts to another location, ensure that the new location is added to the Physical fonts location property value.

Fonts used to display data in a report are selected using a matching process between the fonts requested when the report is designed and the fonts that are available when the report is rendered. For PDF output and charts, this process occurs on the server where all fonts on the server that generates the report can be used.

5. Choose the option you want in the Finish page of the installation wizard.

After you install the additional fonts, you must configure support for them. For more information, see "Configure Support for Japanese Yen and Korean Won Characters" (p. 57).

**Configure Support for Japanese Yen and Korean Won Characters**

For Japanese and Korean currency characters to display correctly, you must define the additional fonts in the global style sheet.

Before you configure these fonts, you must install them from the IBM® Cognos® BI Supplementary Language Documentation disk.

**Steps to Configure the Fonts for Yen and Won Characters**


   The GlobalReportStyles.css style sheet is located in the $c10_location\bin directory.

2. Enable one of the following sections and modify it as shown below:

   - /* For Japanese: */
     
     .pg,
     .pp
     {
       font-family: 'MS UI Gothic', 'Andale WT J', Tahoma, arial, geneva, helvetica, sans-serif;
     }
   - /* For Korean: */
Chapter 3: Install and Configure Optional Components

```
.pg,
.pp
{
font-family: Gulim, 'Andale WT K', Tahoma, arial, geneva, helvetica, sans-serif;
}
```

The PDF generator uses the first available font on the server and includes all the characters in the string to be displayed. If you prefer to use other fonts on your server, you can insert them into the list.


4. Restart the IBM Cognos BI server.

Any changes that you make to the style sheet are overwritten if you upgrade IBM Cognos BI. You must repeat this procedure following an upgrade.
Chapter 4: Keyboard Shortcuts for the Installation Wizard

Keyboard shortcuts, or shortcut keys, provide you with an easier and often faster method of navigating and using software.

The installation wizard uses standard Microsoft® Windows® operating system navigation keys in addition to application-specific keys.

Note: The following keyboard shortcuts are based on US standard keyboards.

The following table lists the keyboard shortcuts that you can use to perform some of the main tasks in the installation wizard on the Windows operating system.

<table>
<thead>
<tr>
<th>To do this</th>
<th>Press</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move to the next field on a page</td>
<td>Tab</td>
</tr>
<tr>
<td>Return to the previous field on a page</td>
<td>Shift+Tab</td>
</tr>
<tr>
<td>Close the installation wizard</td>
<td>Alt+F4</td>
</tr>
<tr>
<td>Move to the next configuration step</td>
<td>Alt+N</td>
</tr>
<tr>
<td>Return to the previous configuration step</td>
<td>Alt+B</td>
</tr>
<tr>
<td>Move to the next selection in a list</td>
<td>Down arrow</td>
</tr>
<tr>
<td>Move to the previous selection in a list</td>
<td>Up arrow</td>
</tr>
</tbody>
</table>

The following table lists the keyboard shortcuts you can use to perform some of the main tasks in the installation wizard on the UNIX® or Linux® operating system.

<table>
<thead>
<tr>
<th>To do this</th>
<th>Press</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move to the next field on a page</td>
<td>Tab</td>
</tr>
<tr>
<td>Return to the previous field on a page</td>
<td>Shift+Tab</td>
</tr>
<tr>
<td>Close the installation wizard</td>
<td>Alt+F4</td>
</tr>
<tr>
<td>Move to the next selection in a list</td>
<td>Down arrow</td>
</tr>
<tr>
<td>Move to the previous selection in a list</td>
<td>Up arrow</td>
</tr>
</tbody>
</table>
The following table lists the keyboard shortcuts you can use to perform some of the main tasks in the License Agreement page of the installation wizard.

<table>
<thead>
<tr>
<th>To do this</th>
<th>Press</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept the license agreement</td>
<td>Alt+A</td>
</tr>
<tr>
<td>Decline the license agreement</td>
<td>Alt+D</td>
</tr>
<tr>
<td>Quit the installation wizard</td>
<td>Alt+x</td>
</tr>
</tbody>
</table>
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