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Introduction

This document is intended for use with IBM® Cognos® Business Intelligence. IBM Cognos BI is a Web-based business intelligence solution with integrated reporting, analysis, scorecarding, and event management features.

This document provides the information you need to install and configure IBM Cognos BI 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.

Audience

To use this guide, you should be familiar with:

- reporting concepts
- scorecarding concepts
- database and data warehouse concepts
- security issues
- basic Microsoft® Windows® operating system and/or UNIX® operating system 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. 99).
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 Business Intelligence

This guide describes how to install and configure IBM® Cognos® Business Intelligence on a single computer with default settings. IBM Cognos BI is a Web-based business intelligence solution with integrated reporting, analysis, scorecarding, and event management features.

IBM Cognos BI includes server and modeling components. Some components provided with IBM Cognos BI are not installed by default. For information about installing and configuring these components, see the IBM Cognos BI Installation and Configuration Guide.

Server components

Server components provide the user interfaces for reporting, analysis, scorecarding, and event management, as well as the server functionality for routing and processing user requests.

In the installation program, you can select to install the following server components:

- gateway
- Application Tier Components
- Content Manager

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

The IBM® Cognos® Business Intelligence applications tier contains one or more IBM Cognos BI servers. An IBM Cognos BI server runs requests, such as reports, analyses, and queries, that are forwarded by a gateway. An IBM Cognos BI server also renders the IBM Cognos Connection and studio interfaces.

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. It provides easy access to the overall management of the IBM Cognos environment and is accessible through IBM Cognos Connection.

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.

Professional reporting - Report Studio
Using Report Studio, report authors create, edit, and distribute a wide range of professional reports. They can also define corporate-standard report templates for use in Query Studio, and edit and modify reports created in Query Studio or Analysis Studio.

Ad hoc querying and self-service reporting - Query Studio
Using Query Studio, users with little or no training can quickly design, create and save reports to meet reporting needs not covered by the standard, professional reports created in Report Studio.

Exploring, analyzing, and comparing dimensional data - Analysis Studio
In Analysis Studio, users can explore, analyze, and compare dimensional data. Analysis Studio provides access to dimensional, OLAP (online analytical processing), and dimensionally modeled relational data sources. Analyses created in Analysis Studio can be opened in Report Studio and used to build professional reports.

Monitoring data for exceptional conditions - Event Studio
In Event Studio, you set up agents to monitor your data and perform tasks when business events or exceptional conditions occur in your data that must be dealt with. When an event occurs, people are alerted to take action. Agents can publish details to the portal, deliver alerts by email, run and distribute reports based on events, and monitor the status of events. For example, a support call from a key customer or the cancellation of a large order may trigger an event, sending an email to the appropriate people.

Analyzing metrics - Metric Studio
In Metric Studio, you can create and deliver a customized scorecarding environment for monitoring and analyzing metrics throughout your organization. Users can monitor, analyze, and report on time-critical information by using scorecards based on cross-functional metrics.

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.

**Microsoft Office compatibility - IBM Cognos for Microsoft Office**

Using IBM Cognos for Microsoft Office, Microsoft Office users can access data from IBM Cognos reporting products within Microsoft Office applications.

IBM Cognos for Microsoft Office components are included with IBM Cognos BI and must be installed separately.

For information about configuring IBM Cognos for Microsoft Office, see the *Installation and Configuration Guide*.

**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.

**Modeling Components**

Modeling components model data within data sources to structure and present data in a way that is meaningful to users. Modeling components include the following tools:

**Creating a business view of your data - Framework Manager**

Framework Manager is the IBM® Cognos® BI modeling tool for creating and managing business-related metadata for use in IBM Cognos BI analysis and reporting. Metadata is published for use by reporting tools as a package, providing a single, integrated business view of any number of heterogeneous data sources.

**Extracting data for scorecarding - Metric Designer**

Metric Designer is the IBM Cognos BI modeling tool used to create extracts for use in IBM Cognos BI scorecarding applications. Extracts are used to map and transfer information from existing metadata sources such as Framework Manager and Impromptu® Query Definition (.iqd) files.

**Multidimensional modeling - IBM Cognos Transformer**

IBM Cognos Transformer is the IBM Cognos BI modeling tool used to create PowerCubes for use in IBM Cognos BI. Secured IBM Cognos BI PowerCubes are not compatible with IBM Cognos Series 7.

For information about installing and configuring versions of Transformer that are earlier than 8.4, see the documentation provided with your edition of Transformer.
**Series 7 IQD Bridge**

The Series 7 IQD Bridge contains the connection information that IBM Cognos BI requires to use IBM Cognos Series 7 Impromptu® IQD data sources and IBM Cognos BI Framework Manager externalized queries in IBM Cognos Transformer. It also supports the multi-processing setting in Series 7 models that are imported into IBM Cognos Transformer.

**Import and manage maps - Map Manager**

Administrators and modelers use a Microsoft® Windows® operating system utility named Map Manager to import maps and update labels for maps in Report Studio. For map features such as country and city names, administrators and modelers can define alternative names to provide multilingual versions of text that appears on the map.

For information about using Map Manager, see the Map Manager *Installation and User Guide*.

**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 web site. 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.

**Online introductory training - IBM Cognos BI Quick Tours**

Quick tours are short online tutorials that illustrate key features in IBM Cognos product components. To view a quick tour, an administrator must download it from the IBM Cognos Customer Center Web site and then install it.
Other Components

In addition to the tools provided with IBM® Cognos® Business Intelligence, it requires the following additional components that are created using other resources.

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.

Metric store
A metric store is a relational database that contains content for metric packages. A metric store also contains Metric Studio settings, such as user preferences.

More than one metric store may be created. For example, one metric store may contain content for a sales application and another metric store may contain content for a finance application.

Data sources
Data sources, also known as query databases, are relational databases, dimensional or OLAP cubes, files, or other physical data stores that can be accessed through IBM Cognos BI. Application Tier Components use data source connections to access data sources.

Infrastructure Components

In addition to the business intelligence software, some offerings of IBM® Cognos® Business Intelligence include the following products.

IBM WebSphere Application Server
IBM WebSphere® Application Server can be used for the IBM Cognos BI report server components (Application Tier Components) and Content Manager. IBM WebSphere Application Server provides a secure and scalable application infrastructure for the IBM Cognos service-oriented architecture (SOA).

Scripts are provided to automate the process of creating distinct ports for multiple applications.
Chapter 1: IBM Cognos Business Intelligence

**IBM HTTP Server**

IBM HTTP Server is a Web server based on a partnership between IBM and the Apache Web server.

**IBM DB2 Universal Database**

IBM DB2 Universal Database provides the content store for your IBM Cognos BI data. DB2 provides industry leading performance, scalability, and reliability.

Scripts are provided to automate the process of creating and configuring a new content store.
Chapter 2: Installing and Configuring IBM Cognos BI on One Computer

This chapter provides the information you need to install and configure IBM® Cognos® Business Intelligence 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.

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

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

To install and configure IBM Cognos BI, you

- check the system requirements and supported environments
- install the server components
- set up the environment
- configure the server components
- start the IBM Cognos BI services
- test the server components
- create a metric package
- install Framework Manager
- test Framework Manager
- install Metric Designer
- test Metric Designer

You may also want to set up a samples database that contains sales and marketing information for a fictional company named the Great Outdoors. You can use IBM Cognos sample packages and reports to help you learn how to use IBM Cognos BI Reporting.

Check the System Requirements and Supported Environments

Before you install IBM® Cognos® Business Intelligence, 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 tables to check the minimum hardware and software requirements to install and run IBM® Cognos® Business Intelligence components on one computer. Additional resources may be required for distributed or production environments.

Hardware Requirements

<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>Operating system specifications</td>
<td>File descriptor limit set to 2048 on UNIX and Linux</td>
</tr>
<tr>
<td>Disk space</td>
<td>A minimum of 2.5 GB of free space is required to install the software and 4 GB of free space on the drive that contains the temporary directory used by IBM Cognos components. For all databases, the size will increase over time. Ensure that you have sufficient disk space for future requirements.</td>
</tr>
<tr>
<td>Printer</td>
<td>To ensure that reports print properly on Windows, Adobe® Reader requires that you configure at least one printer on the computer where you install the Application Tier Components. All reports, regardless of the print format that you choose, are sent as temporary PDF files to Adobe Reader for printing.</td>
</tr>
<tr>
<td>Other</td>
<td>To email reports, the system requires the ability to use and access a mail server.</td>
</tr>
</tbody>
</table>

Software Requirements

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web server</td>
<td>A Web server must be installed and started.</td>
</tr>
<tr>
<td>Requirement</td>
<td>Specification</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Java™ Runtime Environment (JRE)</td>
<td>An IBM JRE is installed automatically with IBM Cognos BI on Windows. If you are using an application server, use the JRE that is installed with it, if it is supported in IBM Cognos BI.</td>
</tr>
</tbody>
</table>
| Database             | Cognos Content Database can be installed and configured as the default content store database in a test or proof-of-concept system. You must have one of the following databases available to store IBM Cognos data in a production environment:  
  - Oracle  
  - DB2®  
  - Microsoft® SQL Server  
  - Sybase  
  - Informix  
  For IBM Cognos BI Metrics Manager, the following databases are supported for the metric store:  
  - Oracle  
  - DB2  
  - Microsoft SQL Server  
  TCP/IP connectivity is required for all database types. |
| Web browser          | For all Web browsers, the following must be enabled:  
  - cookies  
  - JavaScript  
  For Microsoft Internet Explorer only, the following must be enabled:  
  - Run ActiveX controls and plug-ins  
  - Script ActiveX controls marked safe for scripting  
  - Active scripting  
  - Allow META REFRESH |
| Other                | On Windows, Microsoft Data Access Component (MDAC) for use with product samples |
The following SAP Front-End components installed on each IBM Cognos BI server computer:

- SAP GUI
- BW Add-ons

**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/).

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 the Server Components**

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

The installation wizard for your IBM Cognos BI product is provided on the installation CDs. Run the installation wizard from the product disk to install that product.

You require two installation CDs to install your product: IBM Cognos Business Intelligence Server and IBM Cognos Business Intelligence Metric Server.

IBM Cognos Metrics Manager is available as a 32-bit installation only. If you install it with IBM Cognos BI server on a 64-bit computer, you must install IBM Cognos Metrics Manager in a separate directory from the IBM Cognos BI server components. Then you must configure IBM Cognos Metrics Manager to communicate with the IBM Cognos BI server components. For more information, see the topic about sharing resources with IBM Cognos BI server on 64-bit systems in the *Installation and Configuration Guide*.

**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 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, type `./issetup`
   - On 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 pfsd 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.
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:

   - On Windows, if no Welcome page appears, double-click the issetup.exe file.
   - On UNIX or Linux, type

     

     ./issetup

     Note: When you use the issetup command with XWindows, Japanese characters may be corrupted.

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 Quick Tours

The quick tours are accessible from the IBM® Cognos® Web site for users with Internet access. For users without Internet access, or if you prefer to install the quick tours locally, you can download them from the IBM Cognos Customer Center and install them in the same location as the Gateway
component. All language versions of the quick tours are available from the Web site and from the IBM Cognos Customer Center.

**Steps**


2. Search for the appropriate version of IBM Cognos Business Intelligence and then find the link for IBM Cognos Business Intelligence Quick Tours.

3. Follow the instructions to download the package and extract the contents.

4. Run the issetup file and follow the instructions in the installation wizard to install the language versions of the quick tours that you need on the IBM Cognos gateway computer in the `c10-location` directory.

**Install the IBM Cognos Business Intelligence Samples**

The IBM® Cognos® Business Intelligence 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. To use the samples, install them from the IBM Cognos Business Intelligence Samples disk.

**Steps**

1. 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® operating systems, mount the disk using Rock Ridge file extensions.
   On Microsoft® Windows® operating systems, 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:
   
   - On Windows, double-click the issetup.exe file.
   - On UNIX, type
     
     `.issetup`
   - On Linux, type
     
     `.issetup`

   The **Welcome** page of the installation wizard should appear.

3. 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.

4. Follow the directions in the installation wizard.
   
   Install the samples in the same location as the server components.
5. In the Finish page of the installation wizard, click Finish.

   
   On Windows, use the Start menu to start IBM Cognos Configuration from the shortcut folder.

   To set up and configure the IBM Cognos BI samples, see "Setting Up the Samples" (p. 71).

**Setting Up the Environment**

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

- Create the content store
- Create the metric store
- Set up database connectivity for the content store
- Set up database connectivity for the reporting database
- Update the Java™ environment (on UNIX® or Linux®)
- Set up database connectivity for the metric store
- Set environment variables on UNIX for the metric store
- Configure the Web server
- Configure Web browsers

**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.

A script named C8DB2.sh is provided to allow you to create a database in DB2® on Linux® operating system for System z that you can use for the content store. The script is located in the c10_location\C8SE directory after you install IBM Cognos Business Intelligence. For more information about using the script, see "Create a Database for a DB2 Content Store on Linux Using a Script" (p. 30).

**Database Properties**

You must create the content store database using one of the databases listed in the following table:
Character Encoding and Protocol Used by Databases

<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 of library files are needed must be listed first.

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

A script named C8DB2.sh is provided to allow you to create a database in DB2 on Linux operating system for System z that you can use for the content store. The script is located in the "c10_location\C8SE directory after you install IBM Cognos BI. For more information about using the script, see "Create a Database for a DB2 Content Store on Linux Using a Script" (p. 30).
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.</td>
</tr>
<tr>
<td></td>
<td>For example (replace ## with 32 or 64 as appropriate), LD_LIBRARY_PATH= $DB2_location/sqllib/lib##: $LD_LIBRARY_PATH</td>
</tr>
<tr>
<td></td>
<td>Examples (replace ## with 32 or 64 as appropriate):</td>
</tr>
<tr>
<td></td>
<td>For Solaris and Linux:</td>
</tr>
<tr>
<td></td>
<td>LD_LIBRARY_PATH= $DB2DIR/lib##: $LD_LIBRARY_PATH</td>
</tr>
<tr>
<td></td>
<td>For AIX®:</td>
</tr>
<tr>
<td></td>
<td>LIBPATH=$DB2DIR/lib##:LIBPATH</td>
</tr>
<tr>
<td></td>
<td>For HP-UX:</td>
</tr>
<tr>
<td></td>
<td>SHLIB_PATH=$DB2DIR/lib##:$SHLIB_PATH</td>
</tr>
<tr>
<td>DB2INSTANCE</td>
<td>The default database server connection.</td>
</tr>
<tr>
<td>DB2CODEPAGE</td>
<td>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.</td>
</tr>
</tbody>
</table>

- 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.
SettingProperty

If the application heap size value is too small, out of memory errors may occur when there are many users.

Lock timeout (locktimeout)

Do not set this to an infinite timeout value.

DB2 registry variable (DB2_INLIST_TO_NLJN)

Setting this variable to YES improves performance.

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
```
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. 30).

- 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:

    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. 23).

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, databaseName.baseTablespaceName</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>
<tr>
<td>CMSCRIPT_CS_ID</td>
<td>Specifies the instance identification for the content store database.</td>
</tr>
<tr>
<td></td>
<td>The ID must not be longer than two characters.</td>
</tr>
<tr>
<td>CMSCRIPT_TABLESPACE</td>
<td>Specifies the name of the tablespace that will contain all of the base tables in the content store.</td>
</tr>
<tr>
<td></td>
<td>Auxiliary tables are not included.</td>
</tr>
<tr>
<td></td>
<td>The name cannot be longer than six characters.</td>
</tr>
<tr>
<td>CMSCRIPT_LARGE_BP</td>
<td>Specifies the name of the large buffer pool allocated for especially large objects.</td>
</tr>
<tr>
<td>CMSCRIPT_REGULAR_BP</td>
<td>Specifies the name of the regular size buffer pool allocated for regular and large objects.</td>
</tr>
<tr>
<td>CMSCRIPT_USERNAME</td>
<td>Specifies the user account that accesses the content store database.</td>
</tr>
</tbody>
</table>
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.
Create the Metric Store Database

A metric store is a database that contains content for metric packages. A metric store also contains scorecarding application settings, such as user preferences. You must create a metric store database using Oracle, Microsoft® SQL Server, or DB2®. Although you run the command to create the metric store from the location where the Application Tier Components are installed, you can specify a different location for the metric store in the command parameters. If the metric store is on a different computer from the Application Tier Components, you must create an alias to the metric store in the Application Tier Components location.

You cannot use Cognos® Content Database as a metric store database.

Your database administrator must back up IBM® Cognos Business Intelligence databases regularly because they contain the IBM Cognos data. To ensure the security and integrity of databases, it is also important to protect them from unauthorized or inappropriate access.

Steps for DB2

1. In the Application Tier Components location, in the c10_location/configuration/schemas/cmm/db2 directory, run the cmm_create_db.cmd script by typing the following command:

   On a Microsoft® Windows® operating system, type
   
   `cmm_create_db dbinstance user_name password dbname drive dbalias`

   On a UNIX® operating system, type
   
   `cmm_create_db.sh dbinstance user_name password dbname drive dbalias`

   Use the values from the following table in your command.

<table>
<thead>
<tr>
<th>Value</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>dbinstance</td>
<td>The DB2 instance name where the database will be created.</td>
</tr>
<tr>
<td>user_name</td>
<td>The user ID with permissions to create the database. The user ID must have SYSADM or SYSCTRL privileges, and must have DBADM privileges to create the schema.</td>
</tr>
<tr>
<td>password</td>
<td>The password for the <code>username</code>.</td>
</tr>
<tr>
<td>dbname</td>
<td>The name of the database that will be created. The name must have a maximum of 8 characters, and it cannot start with a number.</td>
</tr>
<tr>
<td>drive/path</td>
<td>On Windows, the drive on which the database objects will be created. On UNIX, the path where the database objects will be created.</td>
</tr>
<tr>
<td>dbalias</td>
<td>The database alias name. This value is optional.</td>
</tr>
</tbody>
</table>
2. Determine which user account IBM Cognos Metrics Manager will use to access the database. The user account must have the following privileges.

- CREATETAB
- BINDADD
- CONNECT
- IMPLICIT_SCHEMA
- LOAD

**Steps for Microsoft SQL Server**

1. Determine which user account IBM Cognos Metrics Manager will use to access the database. This information is one of the parameters you can use when you run the command to create the database. The user account must be the database owner (dbo) or aliased to the database owner.

2. In the Application Tier Components location, in the `c10_location/configuration/schemas/cmm/sqlserver` directory, run the `cmm_create_db.cmd` script by typing the following command:

   ```
   path_to_script\cmm_create_db cmd host_name database_name user_name password
   [user_to_create]
   ```

   Use the values from the following table in your command.

<table>
<thead>
<tr>
<th>Value</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>host_name</td>
<td>The name of the computer where the database will be created.</td>
</tr>
<tr>
<td></td>
<td>If there are multiple instances of Microsoft SQL Server, specify <code>host_name\instance_name</code>.</td>
</tr>
<tr>
<td>database_name</td>
<td>The name of the database that will be created.</td>
</tr>
<tr>
<td>user_name</td>
<td>The user ID with permissions to create the database.</td>
</tr>
<tr>
<td></td>
<td>The user ID must have permission to create the database, such as the sa user. The user ID must also have a default language of English.</td>
</tr>
<tr>
<td>password</td>
<td>The password for the <code>username</code>.</td>
</tr>
</tbody>
</table>
Steps for Oracle If the Database Does Not Exist

1. Ensure that you are logged into the Oracle server as a user that is a member of the ORA_DBA user group on Windows or the dba group on UNIX.

2. Set the NLS_LANG (National Language Support) environment variable to the UTF-8 character set on the metric store computer by typing the following command:

   `NLS_LANG = language_territory.character_set`

   Examples are:
   - `NLS_LANG = AMERICAN_AMERICA.UTF8`
   - `NLS_LANG = JAPANESE_JAPAN.UTF8`

   The value of the variable determines the locale-dependent behavior of IBM Cognos BI. Error messages, sort order, date, time, monetary, numeric, and calendar conventions automatically adapt to the native language and locale.

3. Determine which user account IBM Cognos Metrics Manager will use to access the database. This information is one of the parameters you can use when you run the command to create the database. You must use a valid Oracle database username with the following permissions granted:
   - CREATE TABLE, CREATE VIEW, CREATE PROCEDURE, CREATE TRIGGER, CREATE TYPE, CREATE SEQUENCE, and CREATE SESSION
   - EXECUTE on DBMS_LOCK and DBMS_UTILITY packages

   The CREATE TABLE and CREATE TRIGGER permissions must be granted directly to the user account rather than to a role.

   You must grant these permissions only. If you grant fewer or more privileges than specified above, the metric store will not initialize.

4. In the Application Tier Components location, in the `c10_location/configuration/schemas/cmm/oracle` directory, run the `cmm_create_db.cmd` script by typing the following command:

   `path_to_script cmm_create_db sid path database_version [user_to_create]`

   Use the values from the following table in your command.

<table>
<thead>
<tr>
<th>Value</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>user_to_create</td>
<td>The user created by the script and given database owner permissions. This value is optional.</td>
</tr>
<tr>
<td>path_to_script</td>
<td>The path to the script. For example, <code>c10_location/configuration/schemas/cmm/oracle/</code></td>
</tr>
</tbody>
</table>
### Steps for Oracle If the Database Exists

1. Ensure that you are logged into the Oracle server as a user that is a member of the ORA_DBA user group on Windows or the dba group on UNIX.

2. Set the NLS_LANG (National Language Support) environment variable to the UTF-8 character set on the metric store computer by typing the following command:

   \[
   \text{NLS\_LANG} = \text{language\_territory}\text{.character\_set}
   \]

   Examples are:
   - \text{NLS\_LANG} = \text{AMERICAN\_AMERICA.UTF8}
   - \text{NLS\_LANG} = \text{JAPANESE\_JAPAN.UTF8}

   The value of the variable determines the locale-dependent behavior of IBM Cognos BI. Error messages, sort order, date, time, monetary, numeric, and calendar conventions automatically adapt to the native language and locale.

3. Determine which user account IBM Cognos Metrics Manager will use to access the database. You must use a valid Oracle database username with the following permissions granted:
   - \text{CREATE TABLE, CREATE VIEW, CREATE PROCEDURE, CREATE TRIGGER, CREATE TYPE, CREATE SEQUENCE, and CREATE SESSION}
   - \text{EXECUTE on DBMS\_LOCK and DBMS\_UTILITY packages.}

   The CREATE TABLE and CREATE TRIGGER permissions must be granted directly to the user account rather than to a role.

   You must grant these permissions only. If you grant fewer or more privileges than specified above, the metric store will not initialize.

4. Determine if the database is Unicode.

   **Tip:** One method is to type the following select statement:

   \[
   \text{select * from NLS\_DATABASE\_PARAMETERS}
   \]

   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. The cmm\_create\_db.cmd
script mentioned in "Steps for Oracle If the Database Does Not Exist" (p. 35) creates a database with AL32UTF8 character encoding.

**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. 48).

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. 38).

**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.DB2Jcc -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.

**Database Connectivity for the Reporting Database**

For IBM® Cognos® Business Intelligence, the query database (also known as the reporting database) is only accessed by the reporting engine that runs reports. The reporting engine is installed with Application Tier Components and is also used by Framework Manager, Metric Designer, and IBM Cognos Transformer. To support communication between Business Intelligence and the data sources, you must install additional software for your data sources on the same computer that hosts the report server. Depending on the data source and query mode, the required software might include database clients, or Java™ Database Connectivity (JDBC) driver files, or both.
**Setting Up Reporting Connectivity**

To access the relational databases and OLAP data sources for reporting, you must install the client API software that is provided by your data source vendor on the report server.

**Step**
- Ensure that you install the database API software for your relational databases and OLAP data sources on the computer that hosts the report server (where Application Tier Components are installed).

  On Microsoft® Windows® operating systems, the reporting engine supports either native database connectivity or ODBC. On UNIX® and Linux® operating systems, the reporting engine supports the native database connectivity.

  On UNIX, for Microsoft SQL Server only, the reporting engine supports the Data Direct ODBC driver. This driver is available from Data Direct.

  IBM® Cognos® Business Intelligence server requires TCP/IP connectivity with the Microsoft SQL Server.

**Set Up the Database Client for the Metric Store**

If you are using a database other than Microsoft® SQL as a metric store, you must install database client software and Java™ Database Connectivity (JDBC) drivers on each computer where you install the Application Tier Components for Cognos® Metrics Manager. Doing this allows Application Tier Components to access the metric store database.

**Steps for DB2**

1. Install the DB2® client software on the Application Tier Components computer.

2. If the metric store is on a different computer from the Application Tier Components, configure a database alias to the metric store by running the DB2 Client Configuration Assistant.

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

   If the metric store database and the Application Tier Components are on the same computer, the metric store name automatically becomes the alias.

3. 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 Microsoft® Windows® operating systems, db2jcc_license_cu.jar
     for DB2 on a z/OS® operating system, 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

If the directory contains a db2java.jar or db2java.zip file, delete the file.

**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 Application Tier Components are installed.

   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.

3. Install the SQL Loader utility on the computer where Application Tier Components are installed.

**Step for Microsoft SQL**

1. Install the bcp utility on every Windows computer where Application Tier Components for IBM® Cognos Metrics Manager are installed.

2. Add the location of the bcp utility to the path environment variable.

**Update the Java Environment**

**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.

**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:
   

**Setting Up Environment Variables on UNIX for the Metric Store**

For IBM® Cognos® Business Intelligence, you must specify environment variables on a UNIX® operating system before you can use a DB2® or Oracle database as the metric store.

The proper syntax for creating environment variables is shell dependent.

**DB2**

For IBM DB2 databases, you must set the database variables by running the environment setup scripts included with the IBM DB2 installation. For Bourne or Korn shells, run the following command or add it to the .profile script:

`DB2_installation_path/db2profile`

IBM Cognos BI Metrics Manager is only available in a 32-bit version. Ensure that the library path environment variable is pointing to the 32-bit libraries.

Contact your database or network administrator for the correct values for your system.

**Oracle**

For Oracle databases, you must set and export the database environment variables for the user of the metric store before you start the IBM Cognos processes. IBM Cognos BI uses these database variables to connect to your database. One way to set these environment variables is to include these commands in the .profile or .login script of the user who starts the IBM Cognos services.

When you set the load library paths, ensure that the 32-bit Oracle libraries are in the library search path, which is usually the $ORACLE_HOME/lib directory or the $ORACLE_HOME/lib32 directory if you installed a 64-bit Oracle client.

The following table describes environment variables for Oracle databases. Contact your database or network administrator for the correct values for your system.
## Environment Variables for Oracle

<table>
<thead>
<tr>
<th>Environment variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORACLE_HOME</td>
<td>The top level directory that contains the database client software or the entire database installation.</td>
</tr>
<tr>
<td></td>
<td>Example: /usr/oracle</td>
</tr>
<tr>
<td></td>
<td>You may be able to use an Oracle script to create the environment variables. For more information, see the Oracle documentation.</td>
</tr>
<tr>
<td></td>
<td>Example: /usr/local/bin/coraenv</td>
</tr>
<tr>
<td>TNS_ADMIN</td>
<td>The directory that contains the tnsnames.ora file, which allows calls to the Oracle database to determine the required server connections.</td>
</tr>
<tr>
<td></td>
<td>Example: $ORACLE_HOME/network/admin</td>
</tr>
<tr>
<td>PATH</td>
<td>The variable to locate executable files.</td>
</tr>
<tr>
<td></td>
<td>Example: $PATH:$ORACLE_HOME/bin</td>
</tr>
<tr>
<td>libraryPATH</td>
<td>The load library path. You must point to the 32-bit library files.</td>
</tr>
<tr>
<td></td>
<td>Examples:</td>
</tr>
<tr>
<td></td>
<td>For Solaris or Linux® operating system:</td>
</tr>
<tr>
<td></td>
<td>LD_LIBRARY_PATH=$ORACLE_HOME/lib32:$LD_LIBRARY_PATH</td>
</tr>
<tr>
<td></td>
<td>For AIX®:</td>
</tr>
<tr>
<td></td>
<td>LIBPATH=$ORACLE_HOME/lib32:$LIBPATH</td>
</tr>
<tr>
<td></td>
<td>For HP-UX:</td>
</tr>
<tr>
<td></td>
<td>SHLIB_PATH=$ORACLE_HOME/lib32:$SHLIB_PATH</td>
</tr>
<tr>
<td>NLS_LANG</td>
<td>The value of the variable determines the locale-dependent behavior of IBM Cognos BI. Error messages, sort order, date, time, monetary, numeric, and calendar conventions automatically adapt to the native language and locale.</td>
</tr>
</tbody>
</table>
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.

### Browser Settings Required for IBM Cognos BI Portal

<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>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>Metric Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PowerPlay® Studio</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>
<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>
</tbody>
</table>
### Cookie Table

<table>
<thead>
<tr>
<th>Cookie</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>userssessionid</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>
<td>Session temporary</td>
<td></td>
</tr>
<tr>
<td>PDFLayerDimension</td>
<td>Session temporary</td>
<td></td>
</tr>
<tr>
<td>PDFOPTS</td>
<td>Session temporary</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>

After upgrading or installing new software, restart the Web browser and advise users to clear their browser cache.

### 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
- 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 tablespaces, 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
     - Map files location
     - Temporary files location
   - Under Environment, Logging, File,
     - Log file location
   - Under Cryptography,
     - Common symmetric key store location
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- 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.

Before you can use Framework Manager or Metric Designer, you must start the IBM Cognos service. On Windows®, the IBM Cognos service is configured to start automatically by default. On UNIX® and Linux®, to start the IBM Cognos BI process automatically, you must configure the process as a daemon. For more information, see your operating system documentation.

You must install and configure both the server components of IBM Cognos BI and Framework Manager before you can use IBM Cognos BI for reporting.

Note: IBM Cognos BI cannot access any reporting data unless the data is first packaged in and published from Framework Manager.

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.

You must install and configure Framework Manager before you can use IBM Cognos BI for analysis. You can choose to install and configure Metric Designer if you want to create extracts for scorecarding.

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.

## Create a Metric Package

Before users can use IBM® Cognos® Metrics Manager, you must create at least one metric package using the New Metric Package wizard. A metric package is an IBM Cognos Connection representation of an IBM Cognos Metrics Manager application. A metric package contains connection information, reports, and metric management tasks for that application. The metric package content is stored in a metric store.

You open the New Metric Package wizard from the toolbar in IBM Cognos Connection and create a metric package using one of the following:

- a new data source connection to a metric store
- an existing data source connection to a metric store
- an existing metric store if the database was used with an earlier version of IBM Cognos Metrics Manager 8.1 or later

Use the wizard to define the metric package name and the data source connection to the metric store. For a new metric store, you also provide the information necessary to initialize the database, including the start and end dates of the fiscal year.

Before you can use the New Metric Package wizard, you must have access to a metric store used with Metrics Manager version 2.0 or later or you must create a database for a new metric store (p. 33). For data to be transferred successfully, the user account that is used to access the database must have a default language of English.

### Steps Using a New Data Source Connection

1. Open IBM Cognos Connection by connecting to the IBM Cognos Business Intelligence portal and clicking **IBM Cognos Content** on the **Welcome** page.

2. Click the **New metric package** button.

3. Type a name and description for the IBM Cognos Metrics Manager application to represent this metric package, and click **Next**.

4. Click **New data source**.

5. Type a name and description for the data source connection for the metric store that contains the content for this metric package, and click **Next**.

6. In the **Type** box, click the database type.

7. Select the isolation level, and click **Next**.

8. Specify the information required for your database type and click **Finish**.

- For a Microsoft® SQL Server database, type the name of the database server using the syntax `server_name` or `server_name\instance_name` (if there are multiple instances of
Microsoft SQL Server) or server_name,port (if using non-default ports). Type the database name. Select Signons, select the Password and Create a signon that the Everyone group can use check boxes, and type the user ID and password of the user account with access to the database.

The user account must have the default language set to English.

- For an Oracle database, type the connection string. Select User ID, select the Password and Create a signon that the Everyone group can use check boxes, and type the user ID and password of the user account with access to the database.

- For a DB2® database, type the name of the database as defined in the DB2 client. Select User ID, select the Password and Create a signon that the Everyone group can use check boxes, and type the user ID and password of the user account with access to the database.

The default configuration of the data source connection uses a Type 2 Java™ Database Connectivity (JDBC) connection. To configure Metrics Manager to use a Type 4 JDBC connection, set the connection string property to

JDBC_TYPE4_INFO=host:port/dbName

where host is the name of the server where the DB2 server is installed, port is the what the DB2 server uses to accept client connections, and dbName is the name of the database as defined on the database server.

In most cases, a collation sequence is not required. If you want to provide one, ensure the value you enter is the same as the collation sequence specified when the database was created. For information about collation sequences, see the database documentation.

Tip: To test whether the parameters are correct, click Test the connection.

9. Click the new data source and click Next.

10. Click Next and follow the prompts to provide the information necessary to initialize the database. When you see the page that summarizes the data source details and the metric store settings, click Initialize.

11. Select Open this package with Metric Studio after closing the wizard and then click Finish.

Metric Studio opens and the new metric package is displayed in IBM Cognos Connection. For information about managing the metric store, including how to load data, see the IBM Cognos BI Administration and Security Guide.

Steps Using an Existing Data Source Connection

1. Open IBM Cognos Connection by connecting to the IBM Cognos BI portal and clicking IBM Cognos Content on the Welcome page.

2. Click the New metric package button.

3. Type a name and description for the IBM Cognos Metrics Manager application to represent this metric package, and click Next.

4. Click New data source and click Next.
5. Click Next and follow the prompts to provide the information necessary to initialize the database. When you see the page that summarizes the data source details and the metric store settings, click Initialize.

6. Select Open this package with Metric Studio after closing the wizard and then click Finish.

Metric Studio opens and the new metric package is displayed in IBM Cognos Connection. For information about managing the metric store, including how to load data, see the IBM Cognos BI Administration and Security Guide.

Steps Using an Existing Metric Store

1. Open IBM Cognos Connection by connecting to the IBM Cognos BI portal and clicking IBM Cognos Content on the Welcome page.

2. Click the New metric package button.

3. Type the name and description for the IBM Cognos Metrics Manager application to represent this metric package and click Next.

4. Click New data source.

5. Type the name and description for the data source connection for the metric store that contains the content for this metric package, and click Next.

6. In the Type box, click the database type and click Next.

7. Specify the information required for your database type:

   - For a Microsoft® SQL Server database, type the name of the database server using the syntax server_name or server_name\instance_name (if there are multiple instances of Microsoft SQL Server) or server_name,port (if using non-default ports). Type the database name. Select Signons, select the Password and Create a signon that the Everyone group can use check boxes, and type the user ID and password of the user account with access to the database.

   The user account must have the default language set to English.

   - For an Oracle database, type the connection string. Under User ID, select the Password and Create a signon that the Everyone group can use check boxes, and type the user ID and password of the user account with access to the database.

   - For a DB2 database, type the name of the database and the connection string. Select User ID, select the Password and Create a signon that the Everyone group can use check boxes, and type the user ID and password of the user account with access to the database.

   In most cases, a collation sequence is not required. If you want to provide one, ensure the value you enter is the same as the collation sequence specified when the database was created. For information about collation sequences, see the database documentation.

   **Tip:** To test whether the parameters are correct, click Test the connection.

8. Click Next.
9. Select **Open this package with Metric Studio after closing the wizard** and then click **Finish**. Metric Studio opens and the new metric package is displayed in IBM Cognos Connection.

10. Click the new data source and click **Next**.

11. Click **Upgrade**.

   The wizard updates the database schemas and other information.

For information about managing the metric store, see the *Administration and Security Guide*.

---

**Install Framework Manager**

To install Framework Manager, use the installation wizard to copy all of the components to a Microsoft® Windows® operating system computer.

Framework Manager is available as a 32-bit installation only. If you install it with IBM® Cognos® Business Intelligence server on a 64-bit computer, you must install Framework Manager in a separate directory from the IBM Cognos BI server components. Then you must configure Framework Manager to communicate with the server components. For more information, see the *Installation and Configuration Guide*.

**Steps**

1. If IBM Cognos BI is also installed on the Windows computer, stop the IBM Cognos service.

2. Insert the disk for your IBM Cognos modeling product, and then open the installation menu. The **Welcome** page of the installation wizard appears. If the **Welcome** page does not appear, in the win32 directory on the disk, double-click issetup.exe.

3. Select the language to use.

4. Follow the directions in the installation wizard.

   Install Framework Manager to the same directory as other IBM Cognos BI components.

To ensure the security and integrity of IBM Cognos BI, it is also important to protect the installation directory from unauthorized or inappropriate access.

---

**Test Framework Manager**

Before you can use Framework Manager, you must start the IBM® Cognos® BI service.

**Steps**

1. Start the IBM Cognos service.

2. From the **Start** menu, click **Programs, IBM Cognos 8, Framework Manager**.

   You may be prompted to upgrade if the model schema version is older than the currently supported version.

   If you see the **Welcome** page of Framework Manager, your installation is working.
Install Metric Designer

To install Metric Designer, use the installation wizard to copy all of the components to a Microsoft® Windows® operating system computer.

Metric Designer is available as a 32-bit installation only. If you install it with IBM® Cognos® Business Intelligence server on a 64-bit computer, you must install Metric Designer in a separate directory from the IBM Cognos BI server components.

Steps
1. If IBM Cognos BI is also installed on the Windows computer, stop the IBM Cognos service.
2. Insert the disk for your IBM Cognos modeling product, and then open the installation menu. The Welcome page of the installation wizard appears. If the Welcome page does not appear, in the win32 directory on the disk, double-click issetup.exe.
3. Select the language to use.
4. Follow the directions in the installation wizard.

To ensure the security and integrity of IBM Cognos BI, it is also important to protect the installation directory from unauthorized or inappropriate access.

Test Metric Designer

Before you can use Metric Designer, you must start the IBM® Cognos® Business Intelligence service.

Steps
1. Start the IBM Cognos service.
2. From the Start menu, click Programs, IBM Cognos 10, IBM Cognos Metric Designer. You may be prompted to upgrade if the model schema version is older than the currently supported version.
   If you see the Welcome page of Metric Designer, your installation is working.

Uninstalling IBM Cognos BI

It is important to use uninstall programs to completely remove all files and modifications to system files.

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:

   ```
   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:
     ```
     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
     ```
     ./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.
Chapter 3: Samples

This section explains the purpose, content and location of IBM® Cognos® Business Intelligence samples. It also discusses the sample company, Great Outdoors, its structure, databases, model and packages.

For information about installing and setting up the sample databases, see "Install the IBM Cognos BI Samples" (p. 69) and "Setting Up the Samples" (p. 71).

For information about installing and setting up the sample databases, see "Install the IBM Cognos BI Samples" (p. 69) and "Setting Up the Samples" (p. 71).

The Great Outdoors Company 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. As you use the samples, you can connect to features in the product.

For examples related to different kinds of businesses, see the product blueprints at www.ibm.com. For information about specific installation choices and environments, see the IBM® Cognos® Architecture and Deployment Guide, or the Proven Practices and the IBM Cognos Implementation Roadmaps on www.ibm.com. For information about audit samples, see the IBM Cognos Administration and Security Guide. For information about Mobile samples, see the IBM Cognos Mobile Installation 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.

Where to Find the Samples

The samples are included with the product and the samples for each studio are described in the related user guide and online help. To use the samples, you must install, set up, and configure them or contact your administrator to find out where they are installed. For instructions on how to install the samples, see the IBM Cognos Installation and Configuration Guide. For instructions on how to set up and configure samples, see the IBM Cognos Administration and Security Guide or the IBM Cognos Installation and Configuration Guide.

Samples Outline

The samples consist of the following:

- Two databases that contain all corporate data, and the related sample models for query and analysis
- Five samples cubes and the related models
A metrics data source including associated metrics and a strategy map for the consolidated company, and a model for Metric extracts.

Reports, queries, query templates, and dashboards

To run interactive reports, scripts are required. To see all the reports included in the samples packages, copy the files from the samples content installation into deployment folder and then import the deployments into the IBM Cognos Business Intelligence product.

Security

Samples are available to everyone. To implement security, see the Installation and Configuration Guide.

The Great Outdoors Group of Companies

To make designing examples faster, especially financial examples, some general information about The Great Outdoors Company is useful. To look for samples that use particular product features, see the individual sample descriptions in this section.

Revenue for The Great Outdoors Company comes from corporate stores and from franchise operations. The revenues are consolidated from the wholly-owned subsidiaries. There are six distinct organizations, each with its own departments and sales branches. Five of these are regionally-based companies.

The sixth company, GO Accessories:

- Has its own collection of products, differentiated from the other GO companies by brand, name, price, color and size
- Sells from a single branch to all regions and retailers
- Functions both as an operating company based in Geneva, and as a part owner of the three GO subsidiaries in Europe

The diagram below illustrates the consolidated corporate structure, including the percentage changes in ownership for GO Central Europe, and shows the reporting currency and GL prefix for each subsidiary.
Each corporation has the same departmental structure and the same GL structure, shown in the table below. Divisions may not report in the same currencies. For example, the Americas subsidiary reports in US dollars, but the Corporate division local currency is Canadian dollars, and the Operations division local currency is pesos.

<table>
<thead>
<tr>
<th>Division (GL)</th>
<th>Department (GL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate (1700)</td>
<td>Sales (1720)</td>
</tr>
<tr>
<td></td>
<td>Marketing (1750)</td>
</tr>
<tr>
<td></td>
<td>IS&amp;T (1760)</td>
</tr>
<tr>
<td></td>
<td>Human Resources (1730)</td>
</tr>
<tr>
<td></td>
<td>Finance (1740)</td>
</tr>
<tr>
<td></td>
<td>Procurement (1710)</td>
</tr>
<tr>
<td>Operations (1800)</td>
<td>Production and Distribution (1820)</td>
</tr>
<tr>
<td></td>
<td>Customer Service (1820)</td>
</tr>
</tbody>
</table>

Each corporation has a complete chart of accounts. Most of the accounts, such as those under non-personnel expenses, are at the department level, and contain only summary amounts. For example, although each marketing department has expenses, the cost is unspecified at the transaction level where marketing promotions occur.
Employees

The Great Outdoors data contains a full list of employees in all divisions, departments, and locations. Data is available for reports about bonuses (Global Bonus report) and sales commissions (Sales Commissions for Central Europe report), training (Employee Training by Year report), and performance reviews and employee satisfaction surveys (Employee Satisfaction 2006). If you use Metric Studio, sample metrics for human resources are also available.

In the GO Data Warehouse (analysis) package, groups of measures and the related dimensions are organized into folders. The employees are organized in hierarchies for region and manager, to make different kinds of aggregation easy to report on. Aggregation has been defined for the Employee Position Summary measures, so that Position count and Planned position count aggregate correctly at each level of time: monthly, quarterly, or yearly. For example, see the Planned Headcount report.

The employees are also listed in a sample LDIF file (p. 64). This authentication directory is necessary for the Transformer 8 cubes and for IBM® Cognos® Planning samples. No other samples depend on security profiles. For more information, see the IBM Cognos Business Intelligence Installation and Configuration Guide.

Sales and Marketing

Data about sales and marketing is available for all of the companies in the Great Outdoors group. GO Accessories has richer details to support analysis examples. For example, see the Revenue vs % Profit Margin by Product Brand analysis, based on the Sales and Marketing cube. Marketing and sales campaigns are tied to the Great Outdoors regional companies.

Overall, the GO companies have experienced solid growth across most product lines (Sales Growth Year Over Year), in all regions (Revenue by GO Subsidiary 2005), because of factors like an increase in repeat business and new or improved products, such as the high margin sunglasses product line. In the product lines sold by the five regional companies (all but GO Accessories) promotions have had mixed success (Promotion Success by Campaign, Bundle and Quarter). If you use Metric Studio, this can also be seen in the sample metrics.

Customer Surveys

The data also contains information from customer surveys. For example, the product line that includes bug spray, sun screen, and so on has not been successful (Product Satisfaction - Outdoor Protection 2005) and a source of retailer dissatisfaction may be the level of customer service rather than the returns (Customer Returns and Satisfaction). If you use Metric Studio, this information can also be monitored in metrics.

Sales Outlets

Revenue from the corporate outlets is available at the transaction level. Revenue from the franchise outlets is available at the consolidated level only (Sales and Marketing cube). Metrics about retailers show that the number of new retail outlets has dropped over the time period covered by this data.

GO Accessories sells worldwide, and sells only accessories. Transaction data for GO Accessories is the primary source for analysis of product by brand, color and size. The other five subsidiaries in the group of companies are regional and sell all product lines for retailers in their region. For
example, the report Top 10 Retailers in 2005 uses sparklines and list data to review revenues at
the retailer level.

**Great Outdoors Database, Models, and Packages**

The Great Outdoors models illustrate modeling techniques and support the samples. The models
are based on the GO data warehouse and the GO sales transactional database and are the basis for
the sample reports and queries. Each model contains two packages for publishing analysis (dimen-
sional) and query views of the data.

For a description of each sample report or query, see the user guide for the studio that you open
the sample in. For more information about modeling techniques, see the *Guidelines for Modeling
Metadata*, or the IBM® Cognos® Framework Manager User Guide.

You must have access to Framework Manager, the modeling tool in IBM Cognos BI, to look at the
sample models. You may also need to set up the sample databases and connections. For instructions,
see the IBM Cognos Business Intelligence Administration and Security Guide or the IBM Cognos
Business Intelligence Installation and Configuration Guide.

**GO Data Warehouse**

The GO Data Warehouse model, great_outdoors_data_warehouse.cpf, is based on the database
GOSALESDW. It contains data about human resources, sales and marketing, and finance, grouped
into business areas. In the Database view, the three business areas are grouped into separate
namespaces. The Database view contains a fourth namespace (GO Data) for the common informa-
tion.

The Database view is very similar to the structure of the underlying database. All tables (database
query subjects) are unchanged. This enables IBM Cognos BI to retrieve metadata directly from the
package in most cases, instead of using a metadata call to the database. The following changes and
additions have been made in the Database view:

- Joins have been added as necessary.

- To allow for aggregation at different levels of granularity, some model query subjects have
  been created. For example, see the relationships between Time and Sales or Sales fact.

- To allow single joins to be made between the lookup tables and each level in a dimension,
  lookup tables have been copied. For example, see the Products look up tables.

The Business view contains only model query subjects, with no joins. The following changes and
additions have been made in the Business view:

- Calculations were added to the model query subjects. For example, the time dimension contains
  language calculations.

- Where the database has multiple hierarchies, new dimensions have been created to organize
each hierarchy. For example, see the employee hierarchies, where employees are organized by
  manager and region.
The GO Sales Transactional Database

The GO Sales model, great_outdoors_sales.cpf, is based on the GOSALES database, which is structured as a transactional database. It contains principally sales data.

The Database view is very similar to the underlying database structure. The following changes and additions have been made in the Database view:

- To make it possible to join the fact tables to the time dimension, model query subjects and multipart joins have been used.
- Other joins have been added as necessary.

The Business view contains only model query subjects, with no joins. The following changes and additions have been made in the Business view:

- Calculations were added to the model query subjects.
- Model query subjects that were created in the Database view to enable joins on the time dimension have been linked as reference shortcuts.
- Where the database has multiple hierarchies, new dimensions have been created to organize each hierarchy.
- Sales Staff is a subset of the slowly changing Employee dimension. There is no unique Employee key in GO Sales, so a filter retrieves the current record only. This model does not use historical data.

The Samples Power Cubes

The following cubes are delivered with the Great Outdoors samples in English, French, German, Japanese and Chinese:

- sales_and_marketing.mdc
- employee_expenses.mdc
- go_accessories.mdc
The Samples Packages

The Great Outdoors samples include six packages. Below is a brief description of each available package.

Go Data Warehouse (analysis) is a dimensionally modeled view of the GOSALESDW database. This package can be used in all studios, including Analysis Studio. Using this package you can drill up and down.

Go Sales (analysis) is a dimensionally modeled view of the GOSALES database. This package can be used in all studios, including Analysis Studio. Using this package you can drill up and down.

Go Data Warehouse (query) is a non-dimensional view of the GOSALESDW database. This package can be used in all studios except Analysis Studio, and is useful for reporting when there is no need for drilling up and down.

Go Sales (query) is a non-dimensional view of the GOSALES database. This package can be used in all studios except Analysis Studio, and is useful for reporting when there is no need for drilling up and down.

Sales and Marketing (cube) is an OLAP package, based on the sales_and_marketing.mdc cube.

Great Outdoor Sales (cube) is an OLAP package, based on the great_outdoors_sales_en.mdc cube.

Note: The OLAP packages, Great Outdoor Sales (cube) and Sales and Marketing (cube), are not multilingual. The IBM_Cognos_PowerCube.zip archive contains five versions of each package; one in English, French, German, Japanese and Chinese.

Install the IBM Cognos BI Samples

The IBM® Cognos® BI 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. If you want to use the samples, install them from the IBM Cognos Business Intelligence Samples disk or from the location where you downloaded and extracted the files.

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

The packages in the samples were created using compatible query mode. If you activated dynamic query mode in IBM Cognos Administration, you must switch back to compatible query mode to use the samples. For more information, see the Administration and Security Guide.

Steps for UNIX and Linux® Operating Systems

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/:$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 pfsd and pfs_mountd daemons to unmount the disk.

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

```
./issetup
```

**Note:** When you use the isetup command with XWindows, Japanese characters in messages and log files may be corrupted. When installing in Japanese on UNIX, first set environment variables `LANG=C` and `LC_ALL=C` (where C is the language code, for example `ja_JP.PCK` on Solaris), and then run an unattended installation. For more information, see the *Installation and Configuration Guide*.

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

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.

To set up and configure the IBM Cognos BI samples, see "Setting Up the Samples" (p. 71).

**Steps for Windows**

1. Insert the Samples disk or go to the location where the installation files were downloaded and extracted.

   The Welcome page of the installation wizard appears.

2. If no Welcome page appears, go to the operating system directory and double-click the isetup.exe file.

3. 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.

4. Follow the directions in the installation wizard to copy the required files to your computer. Install the samples in the same location as the server components.

5. In the Finish page of the installation wizard, click Finish.

6. Click Finish.

Use the Microsoft® Windows® operating system Start menu to start IBM Cognos Configuration from the shortcut folder.

### Setting Up the Samples

IBM Cognos BI provides sample databases for Microsoft SQL Server, Oracle, and DB2 that contain sales and marketing information for a fictional company named the Great Outdoors. You can use IBM Cognos sample packages and reports to help you learn how to use IBM Cognos BI, including Framework Manager and Metric Designer.

### Restore Backup Files for the Samples Databases

To use the samples, you must restore backup files for the samples databases. This action re-creates multilingual versions of the Great Outdoors databases.

The following sample databases and associated files are provided with IBM® Cognos® Business Intelligence. For Microsoft® SQL Server, each database is delivered as a Microsoft SQL Server backup file. For Oracle, you will need to unzip the file GS_DB_ORA.tar.gz. For DB2®, you will need to unzip the file GS_DB.tar.gz. The location for the databases are as follows.

<table>
<thead>
<tr>
<th>Databases</th>
<th>File Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle</td>
<td>GS_DB_ORA\data</td>
</tr>
<tr>
<td>DB2</td>
<td>DB2\data</td>
</tr>
</tbody>
</table>

### Microsoft SQL Server Databases and Files

<table>
<thead>
<tr>
<th>Database or schema description</th>
<th>File name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Outdoors sales</td>
<td>GOSALES.zip</td>
</tr>
<tr>
<td>Great Outdoors retailers</td>
<td>GOSALES.zip</td>
</tr>
<tr>
<td>Great Outdoors sales data warehouse</td>
<td>GOSALESDW.zip</td>
</tr>
<tr>
<td>Great Outdoors market research</td>
<td>GOSALES.zip</td>
</tr>
</tbody>
</table>
When restoring the samples databases, ensure that you do the following:

- Give the restored databases the same names as the backup or export file names.
  
  The names are case-sensitive.

  You use the correct username and password.

- Create users with select privileges for tables in multiple schemas.

  Setup for the GO Data Warehouse packages specifies a single connection object and user signon. This requires a single user named GOSALES with the select privilege to tables in four schemas: GOSALES, GOSALESHR, GOSALESMR, and GOSALESRT.
• Use the UTF-8 character set on the Microsoft Windows® operating system computer that is the Oracle or DB2 client to see reports in multiple languages.

  For DB2, you must set the DB2CODEPAGE environment variable to a value of 1208. For Oracle, you must set the NLS_LANG environment variable to a value that is specific to a region. For example, set NLS_LANG for Americas to American_America.UTF8.

• Have sufficient disk space available in the target location. Reserve 150MB for the GO Sales data (four schemas) and 200MB for the GO Data Warehouse data (one schema).

**Oracle Considerations**

To create foreign key constraints in tables that reference different schemas, you must run $gs_or_modify.sql$, found in the same folder as the .dmp files.

**Microsoft SQL Server Considerations**

If you restore the Microsoft SQL Server backup files, you must use Microsoft SQL Server 2000 or Microsoft SQL Server 2005. Ensure that TCP/IP connectivity is used for the Microsoft SQL Server.

**DB2 Considerations**

The data files for db2move and the scripts, to add constraints, are located in the data directory. The data directory is created when you unzip the GS_DB.tar.gz file.

If you use WinZip to extract the DB2 move file on Windows, ensure that the TAR file smart CR/LF conversion option is not selected.

After extracting the DB2 move file, restore the schemas to a database named GS_DB.

To add views, constraints, user privileges, and stored procedures to GS_DB, prepare and run the gs_db_modify files included with the samples in the following order:

• Update the user name and password at the top of the gs_db_modify.sql and save it.

• Execute gs_db_modify.bat

**Note:** If the script file attempts to create a stored procedure where the procedure does not exist an error is generated. This error does not affect the samples.

**Steps**

1. On the computer where IBM Cognos BI is installed, go to the sql server, oracle, or db2 directory located in c10_location/webcontent/samples/datasources.

2. If required, copy the backup files for the samples databases to your database backup directory.

   To ensure the security and integrity of IBM Cognos BI, copy the files to a directory that is protected from unauthorized or inappropriate access.

3. Restore the samples databases using your database management tool.

   **Tips:**

   • For SQL backup files, restore the database from a device, and ensure that the restore locations are correct for the .ldf and .mdf database files. For more information, see the
Microsoft SQL Server documentation or the IBM Cognos Knowledge Base on the IBM Cognos Customer Center (http://www.ibm.com/software/data/cognos/customercenter/).

- For DB2, when you create the GS_DB database, create a buffer pool with a page size of 16 KB and an associated tablespace.

4. For each database, create at least one user who has select permissions for all the tables in the restored databases.

You can now create the data source connections in the portal.

**Restore Backup Files for Sample Databases for DB2 Using Scripts**

You can use scripts to restore backup files for sample databases for DB2®. To set up the sample database, you must extract the GS_DB.tar.gz file, customize a configuration file, and run the setup script.

**Prerequisites for installing the Great Outdoors sample database for DB2 on Linux, UNIX and Windows**

Before you can install the sample databases, you must verify or configure privileges.

1. Extract the GS_DB.tar.gz file and retain the original directory structure. If you use WinZip to extract the DB2 move file on Microsoft® Windows® operating system, ensure that the TAR file smart CR/LF conversion option is not selected.

2. On Linux® and UNIX® operating systems, modify the file permissions on the setupGSDB.sh file so that it is executable: chmod u+x setupGSDB.sh.

3. Ensure that the user ID used to set up the database has DBADM authority or the following authorities in DB2:
   - CREATETAB
   - CREATE_NOT_FENCED_ROUTINE
   - LOAD

**Optional: Editing the configuration file**

The configuration file contains the default configuration options that are used when creating the GOSALES data. The default configuration settings are.

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOSALES_INST</td>
<td>GS_DB</td>
<td>Used to set the name or alias of the database.</td>
</tr>
<tr>
<td>GOSALES_CREATEDB</td>
<td></td>
<td>Optional: Causes an existing database with the same name to be dropped.</td>
</tr>
<tr>
<td>Configuration Setting</td>
<td>Default</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>GOSALES_DB_TERRITORY</td>
<td>US</td>
<td>When creating a database this is the territory of the UTF-8 database that is created.</td>
</tr>
<tr>
<td>GOSALES_BP</td>
<td>GOSALES_BP</td>
<td>Optional: Enter the buffer pool and tablespace name, if these are to be created by the script.</td>
</tr>
<tr>
<td>GOSALES_TS</td>
<td>GOSALES_TS</td>
<td></td>
</tr>
<tr>
<td>GOSALES_GRANTEEES</td>
<td>GOSALES, DB2ADMIN</td>
<td>Enter the list of users, groups or PUBLIC that will have CONTROL permissions for the GOSALES, GOSALESHR, GOSALESMR and GOSALESRT schemas. This string needs to follow the syntax of the GRANT command.</td>
</tr>
<tr>
<td>GOSALES-fw_GRANTEEES</td>
<td>GOSALES-fw</td>
<td>Enter the list of users, groups or PUBLIC that will have CONTROL permissions for the GOSALES-fw schema.</td>
</tr>
<tr>
<td>GOSALES-fw</td>
<td>N</td>
<td>Change to 'Y' if installing a database partitioned environment (DPF)</td>
</tr>
<tr>
<td>GOSALES_SCHEMA</td>
<td>GOSALES</td>
<td>Enter the names to be used for each schema.</td>
</tr>
<tr>
<td>GOSALESHR_SCHEMA</td>
<td>GOSALESHR</td>
<td></td>
</tr>
<tr>
<td>GOSALES-fmr_SCHEMA</td>
<td>GOSALES-fmr</td>
<td></td>
</tr>
<tr>
<td>GOSALESR-T_SCHEMA</td>
<td>GOSALESR-T</td>
<td></td>
</tr>
<tr>
<td>GOSALES-fw_SCHEMA</td>
<td>GOSALES-fw</td>
<td></td>
</tr>
</tbody>
</table>

You can customize the sample configuration file to use settings other than the default values.

The setup script creates the G5_DB database, table spaces, tables, views, grants privileges, and modifies the schema names for the sample database. In most situations, you can accept the default options. If you want to change the database name or modify the users or groups that have permissions on the data, you must update the GOSalesConfig configuration file.

Edit the configuration file by using a text editor.

**TIP:** If you edit UNIX shell scripts in a Windows environment, ensure that you preserve the UNIX line endings.
By default, the GS_DB database name is used and permissions are granted to the DB2ADMIN (Linux, UNIX, Windows) and GOSALES users.

**Running the setup script in interactive mode**

In interactive mode, the setupGSDB script prompts you to confirm or provide configuration information for the GS_DB database installation. You can accept the default settings or provide different settings to replace the defaults.

- Run the setup script for your operating system.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft® Windows</td>
<td>In a DB2 command window, change to the GS_DB/win directory and run the <code>setupGSDB.bat</code> script.</td>
</tr>
<tr>
<td>UNIX</td>
<td>From a shell prompt, source the <code>db2profile</code> change to the GS_DB/unix directory, and run the <code>setupGSDB.sh</code> script.</td>
</tr>
</tbody>
</table>

- Press Enter to proceed. The script displays a summary of your choices before you commit to changes to your environment. If you approve the choices, press Enter and the script makes the changes. For example:

  Please confirm the following settings:
  Database Name: GS_DB
  Drop and Recreate Database: Y
  DPF environment: N
  Create a 16k Bufferpool named: GOSALES_BP
  Create a 16k Tablespace named: GOSALES_TS
  GOSALES Grant users/groups: GOSALES, DB2ADMIN
  GOSALES DW Grant users/groups: GOSALES DW, DB2ADMIN
  Administration User Name: db2admin
  Import the sample data to the following schemas:
  GOSALES
  GOSALES SHR
  GOSALES MR
  GOSALES RT
  GOSALES DW
  WARNING: If the database GS_DB already exists it will be dropped
  Continue creating the sample data with these settings? (Y/N) Default=Y:

  The GS_DB database is set up.
Running the setup script with command line options

The *setupGSDB* script lets you provide information on the command line to reduce the number of prompts from the script.

From a command line, run the script for your operating system.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Script</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>setupGSDB.bat</td>
</tr>
<tr>
<td>UNIX</td>
<td>setupGSDB.sh</td>
</tr>
</tbody>
</table>

You can run the *setupGSDB* script with the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-createdb</td>
<td>Creates the database. This option drops any existing database with the same name. It creates the required buffer pool and table space.</td>
</tr>
<tr>
<td>-database database name</td>
<td>Specifies the name of the database. This value overrides the default value of GS_DB.</td>
</tr>
<tr>
<td>-userid administration_user_ID</td>
<td>Specifies the name of the DB2 administrator user ID that is used to create the database.</td>
</tr>
<tr>
<td>-password administration_user_ID</td>
<td>Specifies the password for the DB2 administrator user ID.</td>
</tr>
<tr>
<td>-noprompt</td>
<td>Indicates that no prompt will display. This option runs the script in silent mode. Any missing information causes the script to fail. You will not be prompted for any confirmations.</td>
</tr>
</tbody>
</table>

**Example 1:** You are a DB2 administrator and want to create the default GS_DB database on the local node. You run the following command:

```
setupGSDB -createDB -noprompt
```

**Example 2:** You want to create the tables in an existing database named GSDBY, and you want to use the administrator user ID db2admin. Run the following command:

```
setupGSDB -database GSDBY -userid db2admin
```

The script prompts you for the password when it connects to GSDBY. The script will replace any tables that already exist in the GSDBY database, unless you choose to drop the database.
Optional: Installing the sample data on a remote server

If the GS_DB sample database is installed on a remote server in your environment, you can link to it by cataloguing the remote database on your local computer and then running the setup script locally.

- If the sample database does not yet exist on the remote server, create it with the CREATE DATABASE command. The database requires a UTF-8 codeset and a default table space with a pagesize of 16 KB or larger. For example, on the remote server, create the database by running the following command:

  CREATE DATABASE GS_DB USING CODESET UTF-8 TERRITORY US PAGESIZE 16k

- On your local computer, catalog the remote database:

  db2
  catalog tcpip node nodename remote ipaddr server port_number
  db2 catalog database GS_DB as GS_DB at node nodename

- On your local computer, run the script:

  setupGSDB
  -database GS_DB -userid administration_user_ID

  You are prompted for a password to connect to the database.

Restore Backup Files for Sample Databases for Oracle Using Scripts

You can use scripts to restore backup files for sample databases for Oracle. To set up the sample database, you must extract the file GS_DB_ORA.tar.gz, customize a configuration file, and run the setup script.

Prerequisites for installing the Great Outdoors sample database for Oracle

Before you can install the sample databases, you must verify or configure privileges.

- Extract the GS_DB_ORA.tar.gz file and retain the original directory structure.

- On Linux® and UNIX® operating systems, modify the file permissions on the setupGSDB.sh file so that it is executable: chmod u+x setupGSDB.sh.

- Ensure that the user ID used to set up the Oracle database has authority to create users and run the import utility.

Editing the configuration file: Optional

The configuration file contains the default configuration options that are used when creating the GOSALES data. The default configuration settings are.

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOSALES_IMP_CMD</td>
<td>imp</td>
<td>If necessary can be modified to specify the complete path to the correct version of the import utility.</td>
</tr>
<tr>
<td>Configuration Setting</td>
<td>Default</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>GOSALES_INST</td>
<td></td>
<td>Oracle host string.</td>
</tr>
<tr>
<td>GOSALES_TS</td>
<td>GOSALES_TS</td>
<td>If users are created by scripts, used to enter the tablespace name to assign to users.</td>
</tr>
<tr>
<td>GOSALES_CREATE_TS</td>
<td></td>
<td>Optional: Used to create the default tablespace for users.</td>
</tr>
<tr>
<td>GOSALES_TEMP_TS</td>
<td></td>
<td>If users are created by scripts, used to name a temporary tablespace to assign to users. Leave blank to use the default temporary tablespace.</td>
</tr>
<tr>
<td>GOSALES_SCHEMA</td>
<td>GOSALES</td>
<td>Used to enter the username and password for the GOSALES user. You will be prompted for a password if not entered.</td>
</tr>
<tr>
<td>GOSALES_SCHEMA_PW</td>
<td>GOSALESPW</td>
<td></td>
</tr>
<tr>
<td>GOSALESHR_SCHEMA</td>
<td>GOSALESHR</td>
<td>Used to enter the username and password for the GOSALESHR user. You will be prompted for a password if not entered.</td>
</tr>
<tr>
<td>GOSALESHR_SCHEMA_PW</td>
<td>GOSALESHRPW</td>
<td></td>
</tr>
<tr>
<td>GOSALESMR_SCHEMA</td>
<td>GOSALESMR</td>
<td>Used to enter the username and password for the GOSALESMR user. You will be prompted for a password if not entered.</td>
</tr>
<tr>
<td>GOSALESMR_SCHEMA_PW</td>
<td>GOSALESMRPW</td>
<td></td>
</tr>
<tr>
<td>GOSALESRT_SCHEMA</td>
<td>GOSALESRT</td>
<td>Used to enter the username and password for the GOSALESRT user. You will be prompted for a password if not entered.</td>
</tr>
<tr>
<td>GOSALESRT_SCHEMA_PW</td>
<td>GOSALESRTPW</td>
<td></td>
</tr>
<tr>
<td>GOSALESDW_SCHEMA</td>
<td>GOSALESDW</td>
<td>Used to enter the username and password for the GOSALESDW user. You will be prompted for a password if not entered.</td>
</tr>
<tr>
<td>GOSALESDW_SCHEMA_PW</td>
<td>GOSALESDWPW</td>
<td></td>
</tr>
</tbody>
</table>
### Configuration Setting

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOSALES_GRANTEES</td>
<td>GOSALES</td>
<td>Used to enter the users that will have SELECT, INSERT, DELETE, UPDATE, and ALTER permissions for GOSALES, GOSALESHR, GOSALESMR and GOSALESRT schemas.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note</strong>: The owner of the GOSALES_SCHEMA will always be granted SELECT, INSERT, DELETE, UPDATE and ALTER privilege on all schemas.</td>
</tr>
<tr>
<td>GOSALESDW_GRANTEES</td>
<td>GOSALESDW</td>
<td>Used to enter the users that will have SELECT, INSERT, DELETE, UPDATE and ALTER permissions for GOSALESDW schema.</td>
</tr>
</tbody>
</table>

You can customize the sample configuration file to use settings other than the default values.

The setup script creates the users and schemas specified in the configuration file. In most situations, you can accept the default options. If you want to change the schema names or modify the users or groups that have permissions on the data, you must update the `GOSalesConfig` configuration file.

Edit the configuration file by using a text editor.

### File

<table>
<thead>
<tr>
<th>File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOSalesConfig.bat</td>
<td>Configuration file on Microsoft® Windows® operating system</td>
</tr>
<tr>
<td>GOSalesConfig.sh</td>
<td>Configuration file on UNIX</td>
</tr>
</tbody>
</table>

### Running the setup script in interactive mode

In interactive mode, the setupGSDB script prompts you to confirm or provide configuration information for the sample database installation. You can accept the default settings or provide different settings to replace the defaults.

- Run the setup script for your operating system.
In a DOS command window, change to the GS_DB_ORA\win directory and run the setupGSDB.bat script.

From a shell prompt, change to the GS_DB_ORA\unix directory, and run the setupGSDB.sh script.

Press Enter to proceed. The script will run the sample database setup and display a summary of your choices before you commit to changes to your environment. If you approve the choices, press Enter and the script makes the changes. For example:

- Please confirm the following settings:
  
  Instance Name is ORAINST123
  Create the following user accounts and import the data:
  GOSALES
  GOSALESHR
  GOSALESMR
  GOSALESRT
  GOSALESDW
  
  Default tablespace is GOSALES_TS
  Temporary tablespace is DEFAULT
  Administration User name is sys

  WARNING: If the users already exist they will be dropped

  Create a Tablespace named GOSALES_TS

  Grant select on the GOSALES schemas to GOSALES
  Grant select on the GOSALESDW schema to GOSALESDW

  Continue creating the sample data with these settings? (Y/N) Default=Y:

**TIP**: If you edit UNIX shell scripts in a Windows environment, ensure that you preserve the UNIX line endings.

**Running the setup script with command line options**

The setupGSDB script lets you provide information on the command line to reduce the number of prompts from the script.

From a command line, run the script for your operating system.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Script</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>setupGSDB.bat</td>
</tr>
<tr>
<td>UNIX</td>
<td>setupGSDB.sh</td>
</tr>
</tbody>
</table>

You can run the setupGSDB script with the following options:
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-createdb</td>
<td>Creates the users. This option drops any existing users with the same name.</td>
</tr>
<tr>
<td>-database database name</td>
<td>Specifies the name of the Oracle instance. This value overrides the default value specified in the configuration file.</td>
</tr>
<tr>
<td>-userid administration_user_ID</td>
<td>Specifies the name of the Oracle administrator user ID that is used to create the users.</td>
</tr>
<tr>
<td>-password administration_user_ID</td>
<td>Specifies the password for the Oracle administrator user ID.</td>
</tr>
<tr>
<td>-noprompt</td>
<td>Indicates that no prompt will display. This option runs the script in silent mode. Any missing information causes the script to fail. You will not be prompted for any confirmations.</td>
</tr>
</tbody>
</table>

**Example 1:** You are an Oracle administrator and want to create the default sample database schemas. You run the following command:

```bash
setupGSDB -createDB -noprompt
```

**Example 2:** You want to create the tables in the existing schemas specified in the configuration file, and you want to use the administrator user ID sys. Run the following command:

```bash
setupGSDB -YourOracleInstance -userid sys -sysdba
```

The script prompts you for the password when it connects to the Oracle instance. The script deletes any existing tables or views in the specified schemas and replaces them.

**Create Data Source Connections to the Samples Databases**

You must create data source connections to the samples databases that you restored. IBM® Cognos® Business Intelligence uses this information to connect to the samples databases and run the sample reports or use the sample package.

The DB2® database name that you type must use uppercase letters. Also, in Framework Manager, the schema names that you type for the DB2 data sources must use uppercase letters.

Before you create the data source connections, you must restore the backup files for the samples databases. Also, ensure that the IBM Cognos BI service is running.
To create data sources, you must have execute permissions for the Data Source Connections secured feature and traverse permissions for the Administration secured function. You must have write permissions for the Cognos namespace.

**Steps**

1. Open IBM Cognos Administration by connecting to the IBM Cognos BI portal and clicking Administer IBM Cognos Content on the Welcome page.

2. Click the Configuration tab.

3. Click the new data source icon.

4. In the Name box, type `great_outdoors_sales` and then click Next.

5. In the connection page, click the type of database that you restored and want to connect to, select an isolation level, and then click Next.

   The connection string page for the selected database appears.

   **Tip:** The user specified in the `great_outdoors_sales` data source must have select privileges on the tables in each of the GOSALES, GOSALESRT, GOSALESMR, AND GOSALESHR schemas (p. 71).

6. Do one of the following:
   - If you restored the samples databases in Microsoft® SQL Server, in the Server Name box, type the name of the server where the restored databases are located. In the Database name box, type GOSALES.
     
     IBM Cognos BI samples require TCP/IP connectivity with Microsoft SQL Server. Ensure the SQL Server Security is set to SQL Server and Microsoft Windows® operating system, instead of Windows Only. The samples use SQL Server security for authentication.

   - If you restored the samples databases in Oracle, in the SQL*Net connect string box, type the Oracle connection string.

   - If you restored the samples database in DB2, in the DB2 database name box, type GS_DB using uppercase letters. In the DB2 connect string box, type the DB2 connection string.

   - If you deployed the sample cube to IBM InfoSphere™ Warehouse Cubing Services, in the Name box, type sales_and_marketing_cs. On the Specify the connection page for the Type box, select IBM InfoSphere Warehouse cubing services (XMLA). On the Specify the connection string page for the Server URL box, type the name of the server and the XMLA port number for the cube, followed by /IBMXmlAnalysis. For example, myserver:1999/IBMXmlAnalysis.

7. Under Signons, select the both Password and Create a signon that the Everyone group can use check boxes, type the user ID and password for the user that you created when you restored the databases, and then click Finish.

   **Tip:** To test whether the parameters are correct, click Test the connection...
8. Click Finish.

9. Repeat steps 4 to 9 for the GOSALES DW samples database or schema, and type great_outdoors_warehouse in step 5.

10. If the GOSALES W model will be used by modelers in IBM Cognos Transformer, the connection string must be manually added to the cs7g.ini file.

The Great Outdoors data source connections appear as entries in Data Source Connections. You can now import the samples unless there is a syntax error in the connection string or an incorrect parameter.

Set Up Microsoft Analysis Services Cube Samples

IBM® Cognos® Connection or Framework Manager provides sample cubes for Microsoft® Analysis Services (MSAS).

For finance data, use the GO Finance Fact cube derived from the GOSALES DW database. This cube contains year-to-date and monthly financial data for all accounts so that you can create financial statements in Analysis Studio, Query Studio, and Report Studio. The data is in actual US dollars submissions for 2004, 2005, 2006, or 2007 (7 months actual data only).

The MSAS2000 version of the finance cube and database is in the GOFinanceFact_XX.cab file. The MSAS2005 version is in the GOFinanceFact_XX.abf file. XX represents the language. For example, XX is replaced with EN which indicates English. The MSAS2008 version of cubes also exists, with report content only for 2000 and 2005 versions.

For sales data, use the GOSalesFact cube derived from the GOSalesFact_XX Analysis Services database, based on the GOSALES DW SQLSERVER Database. The cube contains measures such as unit cost, unit price, quantity, and gross profit. Dimensions include Time, Product, and Retailers.

The MSAS2000 version of the sales cube and database is archived in the GOSalesFact_XX.cab. The MSAS2005 version is in the GOSalesFact_XX.abf restorable backup file.

The backup files are located in the c10_location/webcontent/samples/datasources/cubes/MSAS directory. The files must be restored to a Microsoft SQL Server database running the applicable Microsoft Analysis Services (p. 71) and hosting the GOSALES DW database.

Note: Both Microsoft XML 6.0 Parser and Microsoft SQL 2005 Analysis Services 9.00 OLEDB Provider must be installed on the local client to establish data source connections to MSAS cubes.

Steps

1. On the computer where IBM Cognos Business Intelligence is installed, go to the c10_location/webcontent/samples/datasources/cubes/MSAS/en directory.

2. Copy the GOSALES DW.cab and GOSALES DW.abf files to a directory that you can access from the Analysis Manager console in the Analysis Servers of Microsoft SQL Server.

3. Use the Microsoft Analysis Services Analysis Manager to restore the database from the GOSALES DW.cab and GOSALES DW.abf files.
You can now create the data source connections to these MSAS datasources in Cognos Administration by referencing either the GOSalesFact_XX or GOFinanceFact_XX cubes you restored. (p. 88).

**Set Up the InfoSphere Warehouse Cubing Services Sample**

Before you set up the InfoSphere™ Warehouse Cubing Services samples, you must restore the DB2® sample database.

**Steps to Use the IBM InfoSphere Warehouse Cubing Services File**

1. On the computer where IBM® Cognos® software is installed, go to the db2 directory located in c10_location/webcontent/samples/datasources/cubes/CubingServices/EN.

2. If required, copy the csgodw.xml file to your working directory.

3. In IBM InfoSphere Warehouse Design Studio, import the csgodw.xml metadata file into a data model based on the DB2 GS_DW schema.

4. Deploy the CSGODW cube to the DB2 GS_DW schema.

5. Use the IBM InfoSphere Warehouse Administration Console to add the new cube to a cube server, and run it.

   Note the XMLA port number for the cube, as this number is required for the data source connection.

You can now create the data source connections in the IBM Cognos Connection portal.

**Set Up the TM1 Samples**

To use the TM1® samples, you must do the following:

- set up the servers

- create a shortcut to the configuration file

- import the deployment files

- create the data source connections

To set up the TM1® Great Outdoors Server samples, unzip and install the greatoutdoors.zip files. To set up the TM1 FinanceFact Server, unzip and install the financefact.zip files. The default installation path for these files is: C:\Program Files\IBM\Cognos\c10\webcontent\samples\datasources\cubes\tm1.

**Steps**

1. Ensure that you have the TM1 software installed and the server started.

2. Create a desktop shortcut to the preconfigured location of the TM1s.cfg configuration file. The default location is: C:\Program Files\IBM\Cognos\TM1\bin\tm1s.exe -z "C:\ProgramFiles\IBM\Cognos\c10\webcontent\samples\datasources\cubes\tm1\greatoutdoors."

3. If the location of your configuration file is different, open the configuration file in a text editor and modify it. An example of a basic configuration file is as follows.
Security Mode

- If IntegratedSecurity Mode is set to 1. All clients must provide a database username and password.

- If IntegratedSecurity Mode is set to 2. The clients will have the choice to connect by providing a database username and password or use the single-login mechanism for authentication.

- If IntegratedSecurity Mode is set to 3. All clients must use the single-login mechanism for authentication.

**TM1S**

DataBaseDirectory=C:\ProgramFiles\IBM\Cognos\c10\webcontent\samples\datasources\cubes\tm1\greatoutdoors

LoggingDirectory=C:\ProgramFiles\IBM\Cognos\c10\webcontent\samples\datasources\tm1\greatoutdoors\LogFiles

ServerName=GreatOutdoors

PortNumber=33339

AdminHost=localhost

Language=eng

Protocol=tcp

NetworkFrame=

SaveTime=

DownTime=

RuleTraceOn=

For more information about setting up the configuration file and its parameters, see the *TM1 Operations Guide*.

4. To start the server, launch the desktop shortcut to TM1s.cfg.

5. To import the report deployment files, Sales_plan.zip, Sales_plan_TC.zip, and TM1_FinanceFact.zip, use IBM Cognos Administration.

The Financefact and Salesplan packages are created. These packages connect to the TM1_FinanceFact and TM1_SalesPlan data sources which you must now create in Cognos Administration.

The deployment packages refer to the following data sources.

**Tip:** For Traditional Chinese, use the x_TC packages.

<table>
<thead>
<tr>
<th>Application</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Outdoors</td>
<td>TM1_SalesPlan</td>
</tr>
</tbody>
</table>
The deployment packages refer to the following Report Studio reports.

<table>
<thead>
<tr>
<th>Packages</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>GreatOutdoors</td>
<td>Best Selling Products</td>
</tr>
<tr>
<td></td>
<td>Channel Pricing Comparison</td>
</tr>
<tr>
<td></td>
<td>Forecast Revenue by Region: Golf Shops</td>
</tr>
<tr>
<td></td>
<td>Golf Shop Sales Forecast - Americas versus Asia Pacific</td>
</tr>
<tr>
<td>FinanceFact</td>
<td>Balance Sheet - Americas</td>
</tr>
<tr>
<td></td>
<td>Balance Sheet - Central Europe</td>
</tr>
<tr>
<td></td>
<td>Income Statement</td>
</tr>
<tr>
<td></td>
<td>Source and Application of Funds (Central Europe)</td>
</tr>
</tbody>
</table>

**Set Up the Essbase Cube Sample**

To set up the Essbase cube sample, you must have Oracle Essbase and Essbase Integration Services Console installed.

Alternatively, you can set up the smaller Essbase cube GODBReduced.zip which is a filtered version of the full version, GODWENU. To set up the small version, unzip GODBReduced.zip, load the OTL and txt file in the Essbase environment, and perform the same steps shown below.

**Steps**

1. Go to the `c10_location\webcontent\samples\datasources\cubes\Essbase\Outlines_and_Raw_Data directory.```
This directory contains zip files for the different languages, such as EN.zip or JA.zip for English and Japanese, respectively.

2. Unzip the file for your language.

Each zip file contains the following two files:

- languageU_Data.txt, such as ENU_Data.txt or JAU_Data.txt.
- GODWlanguageU.otl, such as GODWENU.otl or GODWJAU.otl.

3. Using block storage in Essbase, create a Unicode application.

4. Within the application, create a new database.

   You can use GODWlanguageU, such as GODWENU or GODWJAU, as your database name, or use the name of your choice.

5. Copy and paste the GODWlanguageU.otl file in your database directory.

6. If the database name specified in step 4 is different than GODWlanguageU, rename the GODWlanguageU.otl file to match the database name that you created.

   Confirm that you want to overwrite the .otl file.

7. In Essbase Administration Services console, open your database outline and save it.

   Confirm that you want to save the outline even if it was not changed.

8. Copy the languageU_Data.txt file and paste it in the same directory as the .otl file.

9. In Essbase Administration Services console, right-click the database you created and select Load Data.

10. Browse to the languageU_Data.txt file in your database directory, select the file, and click OK.

11. After the data loads successfully, right-click the database and select Execute Calculation.

12. Select the default calculation, and click OK.

   The calculation process may take up to 5 hours, depending on the computer where Essbase OLAP Server is installed.

   You can now create a data source connection to the cube.

**Create Data Source Connections to OLAP Data Sources**

IBM® Cognos® Business Intelligence provides the following OLAP samples:

- GO Sales Fact and GO Finance Fact Microsoft® Analysis Services cubes
- Great Outdoors Company cubes which includes sales_and_marketing, employee_expenses, go_accessories, go_americas, go_asia_pacific, and great_outdoors_sales_en.
- Great Outdoors DB2 cube
You must create data source connections to the cubes to use the samples. You must set up the Microsoft Analysis Services cube samples or set up the Essbase cube sample, if you are using them, before creating data source connections.

You can increase the read cache size to improve query performance, although this setting has no effect on the initial time required to open a cube.

Samples are accessible to everyone by default. To create customized data sources, you must have execute permissions for the Data Source Connections secured feature, and traverse permissions for the Administration secured function. You must have write permissions for the Cognos namespace.

**Steps for PowerCubes**

1. Open IBM Cognos Administration by connecting to the IBM Cognos BI portal and clicking Administer IBM Cognos Content on the Welcome page.

2. Click the Configuration tab.

3. Click the new data source button.

   **Note:** You must add a data source connection for each cube.

4. To create a data source connection for the Sales and Marketing cube, type sales_and_marketing in the Name box, and then click Next.

5. In the connection page, under Type click IBM Cognos PowerCube, and then click Next.

   The connection string page for the selected database appears.

6. Optional: In the Read cache size (MB) box, type the cache size of the cube in megabytes.

   If you leave this field blank or type 0, IBM Cognos Connection uses the default value in the ppds_cfg.xml file in the configuration folder.

7. In the Windows location box, type the location and name of the sales_and_marketing.mdc file for the data source connection. For example, type c10_location/webcontent/samples/datasources/cubes/PowerCubes/En/Sales_and_Marketing.mdc

   You can define a Microsoft Windows® operating system path or a UNIX® operating system path.

   If you define a UNIX® path and you plan to use Framework Manager, you must also define the Windows path and ensure that the cube is also available in the Windows® location. Framework Manager can access cubes only from Windows locations.

8. To test whether the parameters are correct, do the following:

   - Click Test the connection.

   - Click Test.

   - When the test finishes, click Close twice.

9. Click Finish.
You can now import the sample package for the PowerCube to use this data source or you can create your own package using cube.

**Steps for Oracle Essbase Cubes**

1. Open Framework Manager.
2. Click Create a new project.
3. In the New Project page, specify a name and location for the project.
4. In the Select Language page, click the design language for the project.
5. Click OK.

The Metadata wizard appears.

6. In the connection page, under type click Oracle Essbase/IBM DB2 OLAP Server, select an isolation level, and then click Next.

The connection string page for the selected database appears.

7. In the Server name box, type the name of the server.
8. To test whether the parameters are correct, click Test.
9. Click Finish.

To use this data source, you must create a package using this data source in Framework Manager, and then publish the package.

**Steps for Microsoft Analysis Service Cubes**

1. Open IBM Cognos Administration by connecting to the IBM Cognos BI portal and clicking Administer IBM Cognos Content on the Welcome page.
2. On the Configuration tab, click New Data Source.
3. In the Name box, type the name of the data source connection, and then click Next.
   - For the GOFinanceFact cube, type GOFinanceFact_XX_MSAS2005.
   - For the GOSalesFact cube, type GOSalesFact_XX_MSAS2005.
4. In the Specify Connection page of the New Datasource Wizard, click Microsoft Analysis Services 2005 or click Microsoft Analysis Services (via ODBO) as appropriate to the cube you are accessing.
5. Click Next.
6. In the Server Name box, type the name of the server where the restored databases are located. Back slashes are not required.
7. Under Signon, select the Password check box and then select the Create a signon that the Everyone group can use check box. Type the user ID and password for the MSAS database. For MSAS2005, this is a network login.
8. Click **Test the connection**, and then click the **Test** button. Click **Close**.

9. Click **Finish**. You are now prompted to create a package. Alternatively, you can deploy an existing package from a sample deployment archive. The names of the deployment archives match the datasource connection names specified in step 4 and contain sample reports that work with the associated cubes.

In Content Administration on the Configuration tab in IBM Cognos Administration, click **New Import**. The New Import Wizard prompts you to select a deployment archive. When you select a deployment archive, it is important to click **Edit** and specify a target name for the package to prevent an existing package from being overwritten.

10. To create a package, check **Create a Package** and then click **OK**.

11. Specify a package name and then click **OK**.
   - For the GO Finance Fact cube, type **GOFinanceFact_XX_MSAS2005**.
   - For the GO Sales Fact cube, type **GOSalesFact_XX_MSAS2005**.

12. Specify the Analysis Services database you restored either GOFinanceFact_XX or GoSalesFact_XX:
   - For either the GOFinanceFact cube or the GOSalesFact cubes, type **GOSALESDW**.
   - For the GO Sales Fact cube, type **GO Sales Fact**.

13. Click the cube applicable to the database.

14. Click **Finish**.

**Set Up the Metric Studio Sample**

To set up the Metric Studio sample, do the following:

- Create a metric store named **GOMETRIC**.
- Create a new metric package named GO Metrics that uses the data source **go_metrics**.
  
  When prompted by the wizard, select the standard Gregorian calendar and accept the defaults for Years, Quarters, and Months. Select January 1, 2004 as the start date for a period that includes the current year. For example, if it is the year 2008, use a period of at least 5 years.
  
  For more information, see the section about metrics in the *Administration and Security Guide*.

- Set the import source.

- Import the metric data and files into the metric store.

**Steps to Set the Import Source**

1. Copy all text files from the appropriate folder to the folder `c10_location/deployment/cmm`:
   - For Microsoft® SQL Server or Oracle, copy from `c10_location/webcontent/samples/datasources/metricsdata/GOMetrics_Unicode`
For DB2®, copy from `c10_location/webcontent/samples/datasources/metricsdata/GOMetrics_UTF8`

For all databases, for English instead of the multilingual Unicode samples, copy from `c10_location/webcontent/samples/datasources/metricsdata/GOMetrics`.

**Tip:** You may need to create the `cmm` folder.

2. In Public Folders, click **GO Metrics**.

3. In Metric Studio, in the **Tools** list, click **Import Sources**.

4. Click the **Set Properties** icon in the **Actions** column next to the Default Import Source.

5. Under **Metric Deployment Location**, click `cmm` folder. This is the default deployment location.

6. Click **Include sub-directories**.

7. In the **File format** box, click 8.4.2.

8. Under **Character Set Encoding**, select the appropriate encoding and click **OK**.
   - For Microsoft SQL Server or Oracle, select **Unicode (UTF-16)**
   - For DB2, select **Unicode (UTF-8)**
   - For **GO Metrics** data set, select Western European (Windows-1252), or leave the data set empty by selecting **Other**.

You can now use the GO Metrics package in Metric Studio.

**Steps to Import Metric Data and Files into the Metric Store**

1. Choose whether to import the files into the metric store using IBM® Cognos® Connection or Metric Studio:
   - To use IBM Cognos Connection, in **Public Folders** or **My Folders**, open the GO Metrics package by clicking the view metric package contents icon in the **Actions** column. Click **Metric Maintenance**.
   - To use Metric Studio, in Metric Studio, in the **Tools** list, click **Metric Maintenance**.

2. Click the **Import and transfer data from files into metric store** metric task.

   **Tip:** If an error occurs, click **Clear staging area rejected data logs**, **Clear metric history data only**, and **Clear metric history and calendar data**.

You can now use the GO Metrics package in Metric Studio.

**Import the Samples**

To use the sample package and other content, you must import them from the sample deployment archive.

Before you import the `IBM_Cognos_Samples.zip`, `IBM_Cognos_Metrics.zip`, `IBM_Cognos_Mobile.zip`, `IBM_Cognos_Office.zip`, `IBM_Cognos_Audit.zip`, `IBM_Cognos_Statistics.zip`, `IBM_Cognos_
csgodw.zip or IBM_Cognos_DrillThroughSamples.zip deployment archives, you must restore the databases (p. 71). You must also create data source connections to the samples databases (p. 82). Every deployment requires a data source connection in order to run reports.

Before you import the IBM_Cognos_PowerCube.zip deployment archive, you must create a database connection to the appropriate PowerCube (p. 88) and select the language that you want to use. The language that you select must be supported by your locale.

**Steps**

1. Copy the zip file from the $c10_location/webcontent/samples/content directory to the directory where your deployment archives are saved.
   
   The default location is $c10_location/deployment. The location is set in the configuration tool. For information about changing the location, see the configuration tool online help.

2. Open IBM Cognos Administration by connecting to the IBM Cognos BI portal and clicking **Administer IBM Cognos Content** on the **Welcome** page.

3. On the **Configuration** tab, click **Content Administration**.

   **Note:** To access this area in IBM Cognos Administration, you must have the required permissions for the **Administration tasks** secured feature.

4. On the toolbar, click the **New Import** button.

   The **New Import** wizard appears.

5. In the **Deployment Archive** box select the archive: **IBM_Cognos_Samples**, **IBM_Cognos_PowerCube**, **IBM_Cognos_Metrics**, **IBM_Cognos_DrillThroughSamples**, **IBM_Cognos_Audit**, **IBM_Cognos_Mobile**, **IBM_Cognos_csgodw** or **IBM_Cognos_Office**.

6. Click **Next**.

7. Type a unique name and an optional description and screen tip for the deployment archive, select the folder where you want to save it, and then click **Next**.

8. In the **Public Folders Content** box, select the folders that you want to import.

   The IBM_Cognos_Samples deployment archive has a single folder named Samples with subfolders: Models and Sample Template. The Models folder contains the following packages or folders:

   - **GO Data Warehouse (analysis)**, **GO Data Warehouse (query)**, **GO Sales (analysis)**, **GO Sales (query)**.

   - **Dashboard Folder**, **Dashboard Objects**, **Business Insight Samples**, **Interactive Samples**

   **Note:** The Business Insight Advanced folder from the **GO Data Warehouse (analysis)** package contains reports used for external data.

   The IBM_Cognos_PowerCube deployment archive has packages or folders for the following languages:

   - **English - Sales and Marketing (cube)**
French - localized packages
German - localized packages
Japanese - localized packages
Simplified Chinese - localized packages

The **IBM_Cognos_Metrics** deployment archive has the following packages or folders:

- **GO Metrics**

The **IBM_Cognos_Mobile** deployment contains:

- **Sales and Marketing (cube)** folder in five languages: English, French, German, Japanese and Chinese

For the IBM_Cognos_Mobile deployment archive, you must set up a data source connection for the following data source:

- the Sales and Marketing cube. A separate connection is required for each language. For more information, see "Create Data Source Connections to OLAP Data Sources" (p. 88)

The **IBM_Cognos_Office** deployment contains:

- **GO Data Warehouse (analysis)**, **GO Data Warehouse (query)**, **GO Sales (analysis)** and **Sales and Marketing cube** packages

The **IBM_Cognos_DrillThroughSamples** deployment archive has the following packages and folders:

- **Sales and Marketing (cube)** package in five languages: English, French, German, Japanese, and Chinese
- **GO Data Warehouse (analysis)** and **GO Data Warehouse (query)** package

For the IBM_Cognos_DrillThroughSamples deployment archive, you must set up data source connections for the following data sources:

- the sales and marketing cube. A separate connection is required for each language. For more information, see "Create Data Source Connections to OLAP Data Sources" (p. 88)
- the great_outdoors_sales. The database name is GOSALES. For more information, see "Create Data Source Connections to the Samples Databases" (p. 82).
- the great_outdoors_warehouse. The database name is GOSLAESDW. For more information, see "Create Data Source Connections to the Samples Databases" (p. 82).

9. Select the options you want, along with your conflict resolution choice for options that you select, and then click Next.

10. In the **Specify the general options** page, select whether to include access permissions and references to external namespaces, and who should own the entries after they are imported.

11. Click Next.

The summary information appears.
12. Review the summary information and click Next.

13. Select the action that you want:
   - To run once now or later, click Save and run once. Click Finish, specify the time and date for the run, then click Run. Review the run time and click OK.
   - To schedule at a recurring time, click Save and schedule. Click Finish, and then select frequency and start and end dates. Click OK.
     Tip: To temporarily disable the schedule, select the Disable the schedule check box.
   - To save without scheduling or running, click Save only and click Finish.

14. When the import is submitted, click Finish.

You can now use the sample packages to create reports and analyses in Report Studio, Query Studio, and Analysis Studio, view extracts in Metric Designer, or create agents in Event Studio. You can also run the sample reports that are available on the Public Folders tab in the portal.

Sample Database Models

The following sample models provide information for the fictional company, the Great Outdoors and are provided with IBM® Cognos® Business Intelligence:

- great_outdoors_sales, which refers to the samples database GOSALES
- great_outdoors_warehouse, which refers to the database GOSALES DW
- gosales_scriptplayer, which refers to the samples databases GOSALES

You can use sample database models on different platforms. For information about moving models from one platform to another, see the Framework Manager User Guide.

Note: Transformer uses some of the reports in the GO Data warehouse (query) package as source data for various cubes. These reports are meant to be simple list reports with no formatting. The description information for the reports indicates if the report was developed to be source data for Transformer.

GO Sales Model

This model contains sales analysis information for the fictional company, The Great Outdoors. It also has the query items required by the Event Studio samples. The model accesses three schemas and has two packages. One package is based on the dimensional view and the other is based on the query (relational) view.

GO Data Warehouse Model

This model contains financial, human resources, and sales and marketing information for the fictional company, The Great Outdoors. The model accesses a dimensional relational data source. The model has two packages. One package is based on the dimensional view, the other is based on the query (relational) view.
**GO Sales Scriptplayer**

These files can be used to run the action logs in sequence. This action generates a model named gosales_scriptplayer, and publishes a package to the content store.

**Example - Running the Sample ELM Returns Agent Against Changed Data**

You can change data in the GOSALES database if an Event Studio user wants to test the sample agent ELM Returns Agent. The Event Studio user can then run the sample agent twice and detect a new event. For more information, see the Event Studio User Guide.

Running the sample agent against changed data involves the following steps:

- The Event Studio user runs the sample agent against the default data and then asks you to change the data.
- You simulate the occurrence of some initial events and then ask the Event Studio user to run the sample agent a second time.
- The Event Studio user runs the sample agent against the changed data. The Event Studio user informs you when the agent has completed running.
- You simulate the passage of time and the resolution of some events and then ask the Event Studio user to run the sample agent a third time.
- The Event Studio user runs the sample agent for the final time. The Event Studio user informs you when the agent has completed running.
- You modify the data so that the ELM Returns Agent detects no events.

**Example - Simulate the Occurrence of Initial Events**

Run part of the Event_Studio_ELM_Agent_Modify_GOSALES.sql script to simulate the following data changes:

- change the date to the current date
- change the follow-up code to -1 in four records. A code of -1 indicates that follow-up is required.

**Steps**

1. In SQL Query Analyzer, from the File menu, click Open.
2. Go to c10_location/webcontent/samples/datasources/sqlserver and double-click the Event_Studio_ELM_Agent_Modify_GOSALES.sql file.
3. In the toolbar, from the list of databases, click GOSALES.
4. In the Query window, under Part 1, select all sixteen lines of code.
5. From the Query menu, click Execute.

The database is updated with the changes.
Example - Simulate the Passage of Time and the Resolution of Some Events

Run part of the Event_Studio_ELM_Agent_Modify_GOSALES.sql script to simulate data changes. First, change it so that two days elapsed since the ELM Returns Agent sample was last run. Second, for three of the four event instances found the last time that the ELM Returns Agent sample ran, change the follow-up code from -1 to +1. This indicates that only one of these event instances still requires follow-up and the other instances are resolved.

Steps
1. In SQL Query Analyzer, from the File menu, click Open.
2. Go to c10_location/webcontent/samples/datasources/sqlserver and double-click the Event_Studio_ELM_Agent_Modify_GOSALES.sql file.
3. On the toolbar, click GOSALES from the list of databases.
4. In the Query window, under Part 2, select all lines of code that appear after the comments.
5. From the Query menu, click Execute.

The database is updated with the changes.

Example - Modify the Data So That the ELM Returns Agent Detects No Events

When the Event Studio user finishes running the sample ELM Returns Agent against changed data, they should notify you. You can then modify the GOSALES database so that the agent no longer detects any event instances.

Step
- Run the following sql commands:
  - `UPDATE GOSALES.RETURNED_ITEM SET FOLLOW_UP_CODE = 0`
  - `UPDATE GOSALES.RETURNED_ITEM SET ASSIGNED_TO = 0`
  - `UPDATE GOSALES.RETURNED_ITEM SET DATE_ADVISED = NULL`

The data is modified. The sample ELM Returns Agent is ready to be used by another Event Studio User.

Remove the Samples Databases from IBM Cognos BI

After you finish using the sample reports to learn about IBM® Cognos® Business Intelligence, including Framework Manager, you can delete the packages on which the samples are based. This action permanently removes the samples from the content store.

Steps
1. Open IBM Cognos Connection by connecting to the IBM Cognos BI portal and clicking IBM Cognos Content on the Welcome page.
2. Click the Public Folders tab.
3. Select the check box for the sample package you want to delete.
4. Click the delete button on the toolbar, and click **OK**.
   
   To use the samples again, you must **set up the samples**.
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 in 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>
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</table>
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