

Deltek Costpoint Enterprise Reporting 7.2.1

Installation Guide for Full Installations and New Users

December 19, 2018

While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

This publication contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek, Inc.

This edition published December 19, 2018.

© 2018 Deltek, Inc.

Deltek's software is also protected by copyright law and constitutes valuable confidential and proprietary information of Deltek, Inc. and its licensors. The Deltek software, and all related documentation, is provided for use only in accordance with the terms of the license agreement. Unauthorized reproduction or distribution of the program or any portion thereof could result in severe civil or criminal penalties.

All trademarks are the property of their respective owners.

Contents

| | |
|---|----|
| Overview..... | 5 |
| Get Installation Help..... | 5 |
| If You Need Assistance..... | 6 |
| Customer Services..... | 6 |
| Deltek Support Center Site..... | 6 |
| Additional Documentation..... | 7 |
| Downloading Deltek Products using Deltek Software Manager..... | 9 |
| Accessing DSM from within the Deltek Support Center Site..... | 9 |
| DSM Documentation and Troubleshooting..... | 10 |
| System Compatibility Requirements..... | 11 |
| Client Workstation (Cognos Administrator)..... | 11 |
| Client Workstation (Cognos User)..... | 12 |
| Cognos Server..... | 13 |
| Database Servers..... | 14 |
| Getting Organized..... | 16 |
| Required Cognos Downloads..... | 16 |
| Required Deltek Download for Costpoint Enterprise Reporting..... | 16 |
| Creating the Cognos Analytics Content Store..... | 17 |
| Content Store in Microsoft SQL Server..... | 17 |
| Creating the Content Store Using Oracle..... | 18 |
| Installing Cognos Analytics..... | 20 |
| Cognos Analytics in 64-bit Environment..... | 20 |
| Install Cognos Analytics Server 11..... | 20 |
| Replace the JSQL Driver for MS SQL Server with MS JDBC Driver (For MS SQL Server Users only)..... | 22 |
| Replace the ODBC Driver for Oracle Server (for Oracle 12 Server Users only)..... | 23 |
| Install Costpoint Enterprise Reporting 7.2.1 Software..... | 23 |
| Installing the Cognos Framework Manager..... | 26 |
| Install Cognos Framework Manager 11..... | 26 |
| Configure IBM Cognos Framework Manager..... | 27 |
| Configuring Microsoft IIS with Cognos Analytics..... | 29 |
| Install URL Rewrite 2.1..... | 29 |
| Install ARR 3.0 x64..... | 29 |

| | |
|--|----|
| Edit and Run the CA_IIS_Config.bat Script..... | 30 |
| CER URL..... | 30 |
| Copy Deployment Files..... | 31 |
| Configuring the Cognos Analytics Data Access from Cognos Configuration..... | 32 |
| Configure the Data Access Object for Microsoft SQL Server..... | 32 |
| Configuring the Data Access Object for Oracle..... | 33 |
| Configuring Data Sources Using Cognos Administration..... | 35 |
| Configure Microsoft SQL Server Data Sources..... | 35 |
| Configure Oracle Data Sources..... | 37 |
| Importing Deltek Content into Cognos Analytics..... | 45 |
| Import Deltek Content..... | 45 |
| Testing Configuration..... | 46 |
| Test Configuration of Data Sources from Framework Manager..... | 46 |
| Test Configuration by Navigating to the Cognos Analytics Portal..... | 47 |
| Costpoint Authentication Provider..... | 48 |
| Set Up the Costpoint Authentication Provider in Costpoint..... | 51 |
| Set Up the Costpoint Authentication Provider in Cognos..... | 53 |
| CAP Troubleshooting..... | 60 |
| Troubleshoot Your Installation..... | 61 |
| Cognos Error During Installation Process..... | 61 |
| Enable TCP IP Protocol..... | 61 |
| Non-Domain Administrator in MS Server 2012..... | 62 |
| Run Internet Explorer in Compatibility Mode..... | 62 |
| Mixed Active Content..... | 62 |
| Cannot Retrieve Data from Data Set..... | 63 |
| Special Topic: Deploying Reports to a Location Other Than the Standard Location..... | 64 |
| Redefine Links to Drill Reports..... | 64 |
| Special Topic: Hiding and Displaying the Common Library Report..... | 65 |
| Make a Common Library Report Visible in Cognos Analytics..... | 65 |

Overview

The Costpoint Enterprise Reporting New User Installation Guide includes instructions for installing and configuring the software for Costpoint Enterprise Reporting 7.2.1.

The sections of this guide follow the proper installation order. Follow the steps in this guide in the order in which they appear.

Get Installation Help

Deltek strongly recommends that you contact the Deltek Consulting Sales Group for assistance when you run your Deltek Costpoint Enterprise Reporting installation.

While Deltek has worked hard to ensure a step-by-step installation, Costpoint Enterprise Reporting, which leverages IBM® Cognos® Analytics software, is a complex enterprise application, and these installation instructions are just one possible installation solution. Deltek's team of technical consultants can assist you with your installation in a timely manner. Deltek's involvement ensures that all applications are installed properly, regardless of the complexity of the deployment scenario.

You can ask for assistance in your installation and send an email to ConsultingSalesRequest@deltek.com.

If You Need Assistance

Deltek can help you in the implementation of CER in your organization.

If you need assistance installing, implementing, or using Costpoint Enterprise Reporting, Deltek makes a wealth of information and expertise readily available to you through various customer services and the Deltek Support Center site.

To access the Deltek Support Center site:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.



If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

Customer Services

There are different customer services that Deltek provides.

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center
- Phone and email support from Support Center analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training



Find out more about these and other services from the Deltek Support Center site.

Deltek Support Center Site

Deltek provides a Web portal for customers.

The Deltek Support Center site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center site provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers

- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud specific documents and forums
- Review comprehensive listing of product compatibilities
- Review product lifecycle information to check on schedule for versions moving to sustaining support.
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Customer Care analyst online



For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

You need your Deltek Support Center (formerly known as Customer Care Connect) **Username** and **Password** to access the site.

To access the Deltek Support Center site, complete the following steps:

1. Go to <http://support.deltek.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Log In**.



If you do not have a username and password for the Deltek Support Center site, contact your firm's Costpoint Enterprise Reporting Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

Deltek provides a variety of documentation for this release of Costpoint Enterprise Reporting.

Except where noted, all the user guides and quick reference guides listed in the table are available for download from the Deltek Support Center site.

| Document Name | Description |
|---|--|
| Deltek Costpoint Enterprise Reporting 7.2.1 Menu Maps | This document includes the menu location of the reports in Costpoint Enterprise Reporting 7.1.4 and their corresponding location in Costpoint Enterprise Reporting 7.2.1. |
| Deltek Costpoint Enterprise Reporting 7.2.1 Model spreadsheets | There are several model spreadsheets that are provided in this release. The spreadsheets show the objects found in the different models supported by this release. |
| Deltek Costpoint Enterprise Reporting 7.2.1 Reports Guide | This document provides a list of the reports in each reporting package and references to the Costpoint Enterprise Reporting guides that contain report descriptions and related information. |
| Deltek Costpoint Enterprise Reporting 7.2.1 Report List | This document includes the list of all reports that are provided in this release. |
| Deltek Costpoint Enterprise Reporting 7.2.1 Release Notes | This document provides release information, such as new features, resolved software issues, and support resources, about Costpoint Enterprise Reporting 7.2.1 |
| Deltek Costpoint Enterprise Reporting 7.2.1 Post Installation and Configuration Guide | This document includes configuration procedures to be done after the successful installation of Costpoint Enterprise Reporting 7.2.1. |
| Deltek Costpoint Enterprise Reporting 7.2.1 Upgrade Installation Guide | This document provides instructions on how to upgrade to Costpoint Enterprise Reporting 7.2.1 from an earlier version or from Costpoint Enterprise Reporting. |
| IBM Cognos Analytics 11.0.x Product Documentation | <p>IBM provides extensive documentation for Cognos Analytics, the underlying foundation for Costpoint Enterprise Reporting.</p> <p>In addition to the Cognos documentation provided with Costpoint Enterprise Reporting, you can find all of the most current Cognos documentation on the IBM Support website.</p> |



Cognos Analytics 11 documentation is also available in the online help of the Welcome portal.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, and sub-releases.

You can access DSM directly or through the Deltek Support Center site.

When you access DSM directly, you will be prompted to log on before you can access the application. If you access DSM from within the Deltek Support Center site, you do not have to log on since you are already logged into the Support Center site.

Accessing DSM from within the Deltek Support Center Site

You can access DSM within the Deltek Support Center site in a few easy steps.

To access DSM from within the Deltek Support Center site:

1. In your Web browser, go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login**.
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.



When you log on for the first time, DSM asks you to select a default folder where Deltek products are to be downloaded.

You can change this folder anytime in the Settings dialog box.

6. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download. Options include:
 - **Complete**
 - **Cumulative Updates**
 - **HotFixes**
 - **Sub-Release**
8. In the table, select the check box that corresponds to the Deltek product that you want to download.

The right pane displays a message stating that the product has been added to the download queue.



To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

DSM Documentation and Troubleshooting

There are several reference materials that can help you use DSM such as the online help, tutorial, and troubleshooting information.

- To view the online help for Deltek Software Manager, click [here](#).
- To view a tutorial on how to use Deltek Software Manager, click [here](#).
- To view more information on troubleshooting Deltek Software Manager, click [here](#).



When you click a link, you will be asked to log into DSM if you are not already logged in.

System Compatibility Requirements

Before installing Cognos software, make sure that your workstations and servers meet the requirements for Cognos to operate efficiently.

The following tables list the software requirements for installing and using Costpoint Enterprise Reporting. The specifications listed in this section are the minimum requirements. If you process a large amount of data, run a large number of reports, or have a large number of users, then your servers must exceed these requirements.



A more comprehensive and updated compatibility list is available on the Deltek Support Center site at https://deltek.custhelp.com/app/answers/detail/a_id/38499. For more specific hardware requirements, please contact your account manager to receive the technical specification document for this product and a conference call to discuss, if required.

For more information about the supported software for IBM Cognos Analytics 11, see the [IBM Cognos Analytics 11.0.0 Supported Software Environments](#).

Client Workstation (Cognos Administrator)

A Cognos administrator uses the Framework Manager to create, modify, and publish metadata models.

| Requirement | Specification |
|------------------|---|
| Operating System | <ul style="list-style-type: none"> Windows Server 10 Education Windows 10 Enterprise, Windows 10 Pro Windows 8.1 Professional, Windows 8.1 Standard (64-Bit) Windows 7 Enterprise (64-Bit), Windows 7 Home Premium (64-Bit) Windows 7 Professional (64-Bit), Windows 7 Ultimate Windows 8 Enterprise (64-Bit), Windows 8 Professional (64-Bit) Windows 8 Standard (64-Bit) Windows Server 2008 R2 Datacenter Edition Windows Server 2008 R2 Enterprise Edition Windows Server 2008 R2 Standard Edition Windows Server 2008 R2 Web Edition Windows Server 2012 Datacenter Edition |

| Requirement | Specification |
|----------------------|---|
| | <ul style="list-style-type: none"> Windows Server 2012 R2 Datacenter Edition Windows Server 2012 Essentials Edition Windows Server 2012 R2 Essentials Edition Windows Server 2012 Foundation Edition Windows Server 2012 Standard Edition Windows Server 2012 R2 Standard Edition Windows Server 2016 Datacenter Edition Windows Server 2016 Essentials Edition Windows Server 2016 Standard Edition |
| Web Browser | <p>Apple Safari 9 and future fix packs</p> <p>Apple Safari on IOS 10.x and future fix packs</p> <p>Google Chrome (latest release) and future fix packs</p> <p>Microsoft Internet Explorer 11 and future packs</p> <p>Mozilla Firefox ESR 45 and future fix packs</p> |
| Application Software | <p>IBM Cognos BI Framework Manager 11 (required)</p> <p>IBM Cognos 11.0.6.0 (required)</p> <p>Latest IBM Cognos 11 Fix Pack (if available)</p> |

Client Workstation (Cognos User)

Using Cognos requires only a Web browser and users do not need powerful workstations.

| Requirement | Specification |
|------------------|---|
| Operating System | <p>For Desktops:</p> <ul style="list-style-type: none"> Windows 10 Education Windows 8.1 Enterprise (32-Bit or 64-Bit) Windows 10 Enterprise Windows 10 Pro Windows 8.1 Professional (32-Bit or 64-Bit) Windows 8.1 Standard (32-Bit or 64-Bit) Windows 7 Enterprise (32-Bit or 64-Bit) Windows 7 Home Premium (32-Bit or 64-Bit) |

| Requirement | Specification |
|----------------------|---|
| | <ul style="list-style-type: none"> Windows 7 Professional (32-Bit or 64-Bit) Windows 7 Starter (32-Bit) Windows 7 Ultimate (32-Bit or 64-Bit) Windows 8 Enterprise (32-Bit or 64-Bit) Windows 8 Professional (32-Bit or 64-Bit) Windows 8 Standard (32-Bit or 64-Bit) <p>For Mobiles:</p> <ul style="list-style-type: none"> Android 4.4 Android 5.0 Android 5.1 Android 6.0 Android 7.0 iOS 10 |
| Web Browser | <p>Apple Safari 9 and future fix packs</p> <p>Apple Safari on iOS 10.x and future fix packs</p> <p>Google Chrome (latest release) and future fix packs</p> <p>Microsoft Internet Explorer 11 and future fix packs</p> <p>Mozilla Firefox ESR 52 and future fix packs</p> |
| Application Software | None. |



If you have Microsoft Windows Server 2012 and use Internet Explorer 11, you need to run the compatibility mode when you access Cognos Connection. See section, Run Internet Explorer in Compatibility Mode.

While Deltek has tested the applications on Internet Explorer, other browsers have been tested by IBM Cognos and are compatible with some CER applications. See the full compatibility list on the Deltek Support Center site.

Cognos Server

The Cognos server must be a powerful server-class machine in order to provide satisfactory response time to users creating and executing reports. A Microsoft® Windows workstation will not provide satisfactory performance if it is used as a report server.

| Requirement | Specification |
|------------------|---|
| Operating System | <ul style="list-style-type: none"> Windows Server 2008 R2 Datacenter Edition |

| Requirement | Specification |
|----------------------|--|
| | <ul style="list-style-type: none"> Windows Server 2008 R2 Enterprise Edition Windows Server 2008 R2 Standard Edition Windows Server 2008 R2 Web Edition Windows Server 2012 Datacenter Edition Windows Server 2012 R2 Datacenter Edition Windows Server 2012 Essentials Edition Windows Server 2012 R2 Essentials Edition Windows Server 2012 Foundation Edition Windows Server 2012 Standard Edition Windows Server 2012 R2 Standard Edition Windows Server 2016 Datacenter Edition Windows Server 2016 Essentials Edition Windows Server 2016 Standard Editio |
| Web Browser | Microsoft Internet Explorer 11 |
| Application Software | IBM Cognos Analytics 11.0.6.0 IBM Cognos Analytics Framework Manager 11.0.6.0 |
| Web Server Software | Microsoft Internet Information Services (IIS) 7.5, 8.0, 8.5, or 10.0 and future fix packs Apache HTTP Server 2.2, or 2.4.10 and future fix packs IBM HTTP Server 8.5, 8.5.5, or 9.0 and future fix packs |



Framework Manager must be installed on this computer because some Framework Manager models may require more resources than the administrator workstation can provide. Also, with Framework Manager installed on the server, the administrator can perform all Cognos administrative functions at the server.

Database Servers

Cognos must have access to the Deltek databases. In addition, Cognos requires a database of its own. This database is used for the Cognos Content Store, which contains all Cognos settings, published models, and saved reports.

| Requirement | Specification |
|-------------------|---|
| Database Platform | Microsoft SQL Server® 2012, 2014, 2016, 2017 and future fix packs Oracle® 11g, 12c |

| Requirement | Specification |
|--|---|
| Deltek Application Databases compatibility | <p>Deltek Costpoint 7.1.1</p> <p>Deltek Time & Expense™ 9.0.1, 10.0</p> <p>Deltek Costpoint Budgeting and Planning 7.0</p> <p>Deltek Shop Floor Time 1.2, 1.3</p> |

Getting Organized

You need to install the necessary Cognos applications to be able to use Deltek Costpoint Enterprise Reporting 7.2.

Required Cognos Downloads

To use Costpoint Enterprise Reporting 7.2.1, you need to download and install the required Cognos applications and updates.

While additional Cognos applications are available for downloading from the Deltek Support Center site (<https://support.deltek.com>), these are the only required applications:

- **Cognos Analytics Server Version 11.0.11** — Use the contents of this download to install the Cognos Analytics Server. The Cognos Analytics Server includes Lifecycle Manager. Workspace and legacy studios such as Analysis Studio, Event Studio, and Query Studio are included as well.
- **Cognos Analytics Framework Manager 11.0.11** — Use the contents of this download to install the Cognos Analytics Modeling software (Framework Manager and Map Manager).
- **Latest fix pack for Cognos Analytics 11.0.11** (if available) — Use the contents of this download to install the latest updates from IBM for your version of Cognos Analytics.

Required Deltek Download for Costpoint Enterprise Reporting

The required Deltek download from the Product Downloads page of the Deltek Customer Care Connect site is the Costpoint Enterprise Reporting 7.2.1 installer.

Deltek also recommends that you download the Costpoint Enterprise Reporting 7.2.1 documentation. Like the software itself, the documentation is available from the Product Downloads page.

Creating the Cognos Analytics Content Store

Before installing the Cognos Analytics software, you must configure the Content Store. The Content Store is the database used with Cognos Analytics.

You create your Content Store on your database server. You can create the Content Store as a Microsoft SQL Server database or an Oracle database.

This section provides detailed instructions for creating the Content Store using Microsoft SQL Server or Oracle.

Content Store in Microsoft SQL Server

You must have Microsoft SQL Server 2012, 2014, or 2016 installed and configured correctly prior to creating the content store.

Use the following settings and guidelines on your Microsoft SQL Server:

- UTF-8 or UTF-16 encoding is used. Please see the Microsoft SQL Server documentation for more information about character sets, encoding, and collation.
- The collation sequence is case-insensitive. In a Custom installation, you choose a collation, which includes character sets and sort order, during the 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.
- The authentication mode for the database is set to SQL Server and Windows. For more information, see knowledge base article 269587 on the Microsoft Web site.
- The TCP/IP protocol is enabled. Cognos requires this protocol.

Creating the Content Store Using Microsoft SQL Server

To create the Cognos Analytics Content Store database, use the SQL Server Management Studio application.



This procedure applies to Microsoft SQL Server 2012.

To create the Cognos Analytics Content Store, complete the following steps:

1. On the computer that you will use as your database server, select **Programs » Microsoft SQL Server [XXXX] » SQL Server Management Studio** from the Windows Start menu.
2. On the Connect to Server dialog box, log into SQL Server Management Studio using the **sa** (system administrator) account username and password.
3. In the Object Explorer pane, right-click **Database**, and select **New Database**.
4. On the New Database dialog box, enter **cm** in the **Database name** field, and click **OK**. The new cm database is created.
5. Create a user account (Login) called **cognos** and grant it public and db_owner access to the cm database:

- a) In the **Object Explorer** pane on the left, expand the **Security** tree.
- b) Right-click **Login** and select **New Login**.
- c) On the Login – New dialog box, create the new user by entering or selecting the following information:
 - **Login name** — Enter **cognos**.
 - **SQL Server authentication** — Select this option and enter a password in the **Password** field. Enter it again in the **Confirm Password** field.
 - **Enforce password policy** — Clear this check box.
 - **Default database** — Select **cm** (the database you created earlier in these instructions) from the list.
6. In the **Select a page** pane on the left, click **User Mapping**.
7. In the **Users mapped to this login** table, select **cm**. Then select **db_datareader**, **db_datawriter**, **db_ddladmin**, **db_owner** and **public** in the **Database role membership for: cm** list.
8. Click **OK**.
9. Close SQL Server Management Studio.

Creating the Content Store Using Oracle

If you use an Oracle database, you need to create the Cognos Analytics Content Store using Oracle.

The following list contains important information and steps for creating the Content Store in Oracle:

- Create the Content Store on the machine you will use as your database server.
- Create an Oracle database that uses a Unicode character set. This is required in the setup for Cognos and the Costpoint Enterprise Reporting software.
 - `NLS_CHARACTERSET = AL32UTF8`
 - `NLS_NCHAR_CHARACTERSET = AL16UTF16`

Use this statement to verify that you are using the correct character set in the instance you use for the Cognos Content Store.

```
SELECT * FROM NLS_DATABASE_PARAMETERS;
```
- Create the **cognos** user as the account that will access the database.
- Ensure that the user account that accesses the database has permission to do the following tasks:
 - Connect to the database
 - Create, alter, and drop tables, triggers, views, procedures, and sequences
 - Insert, update, and delete data in the database tables

For example, grant the CONNECT and RESOURCE roles to the cognos11 account.
- Size the database as appropriate. Database sizing depends on variables such as concurrent users and saved reports.



For details, see the *IBM Cognos Business Intelligence Architecture and Deployment Guide* (Crn_arch.pdf) for the version of Cognos Analytics that you use.

- Install the 32-bit client. Cognos Analytics does not support the 64-bit Oracle client.
- Use the following guidelines when installing the Oracle client:
 - Install the Oracle Administrator Client Utilities on the Cognos BI server.
 - You cannot connect to the Content Store using Oracle without first installing these utilities.
 - Establish a connection to the Oracle server where you have created the Content Store schema using the Oracle Configuration Assistant.
 - Install the Oracle Net Configuration Assistant.
 - After you install Cognos BI (see Installing Cognos BI Server), perform the following:
Copy the necessary jar file from the ORACLE_HOME/jdbc/lib directory to <Cognos install location>\drivers directory.
 - For Oracle 11g, you must copy ojdbc5.jar.
 - For Oracle 12c, you must copy ojdbc7.jar.

These files are available from an Oracle client or server install. You can also download jar files for your version of Oracle in the Oracle technology Web site.



The different JDBC drivers also depend on the version of Java that you are using.

- If you are running Cognos with Java Runtime Environment (JRE) 1.5, use ojdbc5.jar.
- If you are running JRE 1.6, use ojdbc6.jar

Installing Cognos Analytics

When you install the Cognos Analytics 11 software on your application server, the installation includes the Cognos Workspace, Reporting, Lifecycle Manager, and Data Modeling components.

This section includes instructions for installing the Cognos Analytics 11 software on your application server.

One of the components that is included in your Cognos Analytics 11 installation is the Lifecycle Manager.



Costpoint Enterprise Reporting leverages on Cognos Analytics software, which is a complex enterprise application. The installation instructions in this section are just one of many possible installation solutions. These instructions are not intended as best practices. In certain situations, the Costpoint Enterprise Reporting installation can be complex, and may require special consideration. The complexity of your installation can increase depending on multiple variables (for example, with multiple server installation, load balancing, database replication, or firewall and DMZ deployments).



If you are performing an advanced installation, refer to the *IBM Cognos Analytics Version 11.0 Installation and Configuration (inst_cr_winux.pdf)*. It is also recommended that you contact ConsultingSalesRequest@deltek.com for assistance.

Cognos Analytics in 64-bit Environment

You can install Cognos Analytics in a 64-bit environment.

The default installation folder of Cognos Analytics 11 is C:\Program Files\ibm\cognos\analytics.



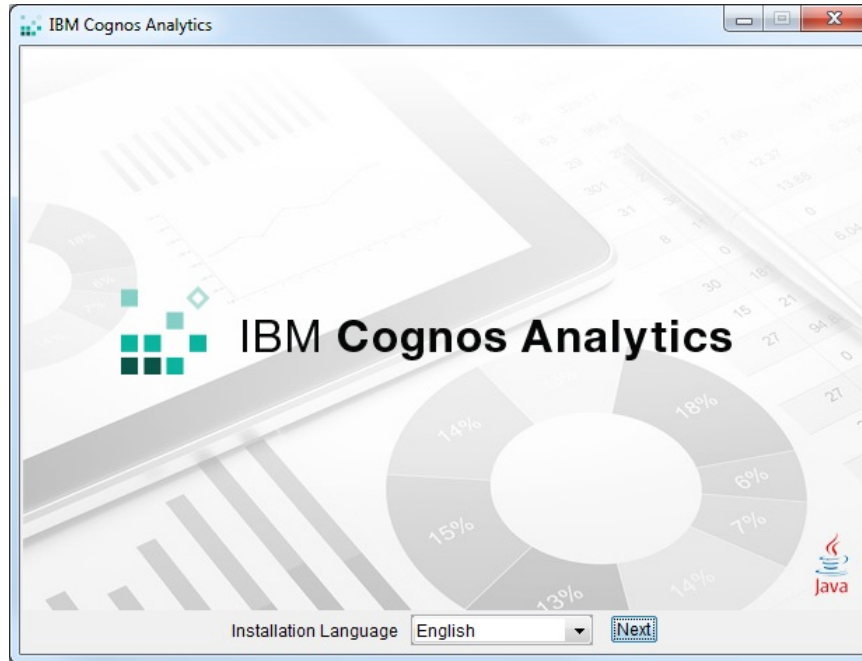
- Cognos Analytics Server components are the only true 64-bit components of Cognos Analytics. The 64-bit Cognos Analytics Server component must be installed on a 64-bit server.
- Cognos Analytics components (Framework Manager and Lifecycle Manager) are not 64-bit components, but they can be installed on the 64-bit server or on a separate 32-bit computer. If you install them on the 64-bit server, however, they must be in a separate directory from the 64-bit components.

Install Cognos Analytics Server 11

Install Cognos Analytics Server 11 software in your application server.

To install Cognos Analytics Server 11, complete the following steps:

1. Go to the location of the **ca_server_win64_11.0.x.exe** (IBM Cognos Analytics Server 11.0.x Microsoft Windows Multilingual) that you downloaded from Deltek Software Manager.
2. Run the **ca_server_win64_11.0.x.exe** file.
3. Select the language that you want to use for the installation process, click **Next**.



4. On the **Let's get started!** screen, select **IBM Cognos Analytics** and click **Next**.



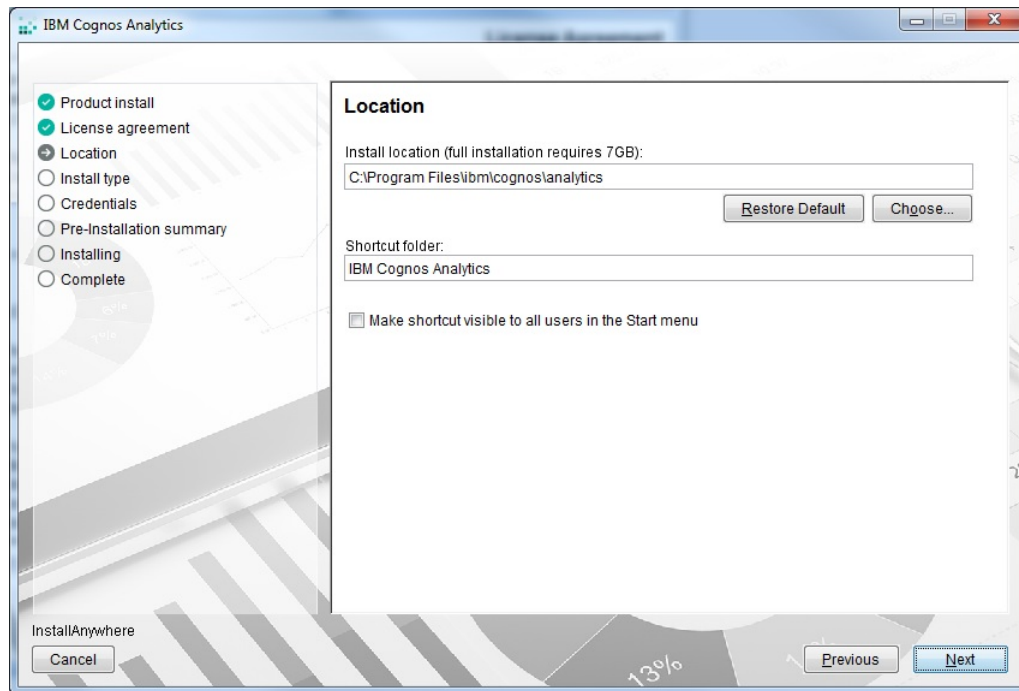
The **IBM Cognos Analytics tools** option lets you install the Lifecycle Manager. You can select it once you have installed the IBM Cognos Analytics server.

5. On the **License Agreement** screen, read the agreement, select the **I accept the terms of the License Agreement** check box, and click **Next**.
6. On the **Location** screen, enter or select the folder in which you want to install the Cognos Analytics Server. Click **Next**.



Take note of the installation path that you use. You will need it for other installation and configuration tasks, such as configuring Microsoft IIS.

The default folder will depend on the environment you are using.



7. On the **Installation Type** screen, select **Custom**. Click **Next**.



When you select **Custom**, it enables you to install Query studio and other legacy studios. The said studios will launch if you use Internet Explorer and select **New » Other** on the Welcome portal. Selecting **Custom** will also let you set up Microsoft's Internet Information Services (IIS) for Single Sign-On (SSO).

8. Select **First Install**, and click **Next**.
9. On the **Choose components** screen, make your selections. Click **Next**.



Select the **Optional Gateway** check box if you plan to use IIS and/or SSO.

10. On the **Pre-Installation Summary** screen, review the information, and click **Next**.

The installation progress displays at the bottom of the Installation Progress screen. When the installation is complete, the Finish screen displays.

11. Click **Done** to complete the installation.

Replace the JSQL Driver for MS SQL Server with MS JDBC Driver (For MS SQL Server Users only)

The JSQL driver for Microsoft SQL Server has been replaced with Microsoft JDBC driver starting in IBM Cognos Analytics 11.0.5.

For Cognos Analytics 11.0.8 and later, use **sqljdbc42.jar**. Download the **sqljdbc42.jar** file from Microsoft and copy to your Cognos server's *install location*\drivers directory.

For example, copy **sqljdbc42.jar** to **C:\Program Files\ibm\cognos\analytics\drivers**.

To learn more about other configuration actions, see the IBM website, [Critical Configuration Actions](#).

Replace the ODBC Driver for Oracle Server (for Oracle 12 Server Users only)

For Oracle 12 users, copy the **odbc7.jar** file from Oracle into the **C:\Program Files\ibm\cognos\analytics\drivers** folder in your Cognos server.

Install Costpoint Enterprise Reporting 7.2.1 Software

There are default folder locations when you install CER 7.2.1.

Default Installation Locations for Costpoint Enterprise Reporting 7.2.1 Models

The Costpoint Enterprise Reporting (CER) installation copies various files into the default directory location or a location that you specify.

The default CER installation location for both 32-bit and 64-bit installations is **C:\Program Files (x86)\Deltek\CostpointEnterpriseReporting\CER721**.

The following types of files are copied into the default CER installation location or a location that you specify.

| Folder | Files |
|---------------------------------|--|
| /Administration | Model files for Costpoint Enterprise Reporting for Costpoint Administration |
| /Branding | Deltek branding files |
| /Budgeting and Planning | Model files and security script for Costpoint Enterprise Reporting for Budgeting and Planning |
| /Costpoint Enterprise Reporting | Model files (.cpf and .xml files) for Costpoint Enterprise Reporting |
| /Deploy | Deployment Files |
| /Fixed Assets | Model files for Costpoint Enterprise Reporting for Fixed Assets |
| /HR and Payroll | Model files for Costpoint Enterprise Reporting for Human Resources and Payroll |
| /ICS | Grant scripts and model files for Incurred Cost Submission (ICS) Reporting |
| /Planning | Model file for Project Planning Reporting and Analysis |
| /Project Manufacturing | Model files for Costpoint Enterprise Reporting for Project Manufacturing and Part Data Security script |
| /Projects | Model files for Project Reporting and Analysis |

| Folder | Files |
|----------|--|
| /SFT | Model files for Costpoint Enterprise Reporting for Costpoint Shop Floor Time |
| /SOX | Scripts and model files for Sarbanes-Oxley (SOX) |
| /Support | Font files and the files needed to install Costpoint Authentication Provider (CAP) 2.0 |

Installation Procedure

After downloading the installer and satisfying all the prerequisites described in System Requirements, you are ready to begin the installation.

To install Costpoint Enterprise Reporting 7.2.1, complete the following steps:

1. Download Costpoint Enterprise Reporting 7.2.1 Cumulative Update 1 and extract the contents of the file.
2. From the application server, go to the folder where you downloaded Costpoint Enterprise Reporting 7.2.1 CU1 installation file.
3. Right-click the **DeltekCostpointEnterpriseReporting721CumulativeUpdate1.exe** file, and click the **Run as Administrator** option to start the installation process.
4. Read the information on the Welcome screen, and click **Next**.



Deltek recommends that you close all other open programs before continuing with the installation.

5. On the License Agreement screen, read the terms, select **I accept the terms in the License Agreement**, and click **Next**.

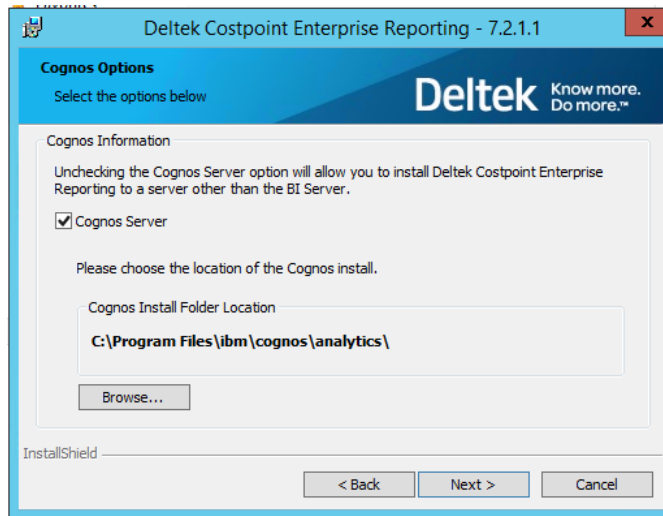


6. On the Destination Folder screen, accept the default location, or click **Change** to select a different installation folder, and click **Next**.



The C: drive can be used as the initial installation location, but the models should not be permanently stored on the C: drive because C: drives are not usually backed up. The permanent location of the models and reports should be a network drive that gets backed up regularly.

7. On the Cognos Options screen, do one of the following actions:
 - If you are installing in a non-Cognos server, clear the **Cognos Server** check box and click **Next**.
 - If you are installing in a Cognos server, select the **Cognos Server** check box, and then specify the Cognos Install Folder Location. Click **Next**.



8. On the Ready to Install the Program screen, click **Install**.



Do not cancel the installation during this step because folders are being created on your drive, and the models are being extracted from the installation and stored in these folders.

9. When the InstallShield Wizard Completed screen displays, click **Finish**.

Installing the Cognos Framework Manager

You will need to install Cognos Framework Manager on your application server to be able to manage the Framework Manager models in Costpoint Enterprise Reporting.



If you are performing an advanced installation, refer to the *IBM Cognos Analytics Version 11.0 Installation and Configuration (inst_cr_winux.pdf)*. It is also recommended that you contact ConsultingSalesRequest@deltek.com for assistance.

Install Cognos Framework Manager 11

When you install Cognos Framework Manager 11 on your application server, the installation should include the Framework Manager and Map Manager components.

To install Cognos Framework Manager 11, complete the following steps:

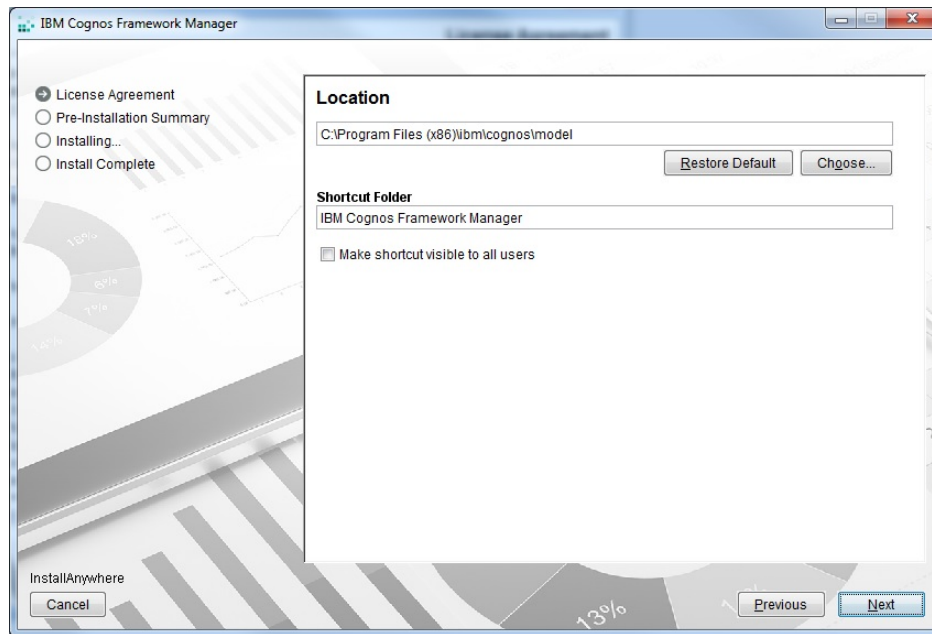
1. Go to the location of the **ca_model_win32_11.0.x.exe** (IBM Cognos Framework Manager 11.0.x Microsoft Windows Multilingual) that you downloaded from Deltek Software Manager.
2. Run the **ca_model_win32_11.0.x.exe** file.
3. On the first screen, select the language that you will use for the installation. Click **Next**.



4. On the **License Agreement** screen, read the agreement, select the **I accept the terms of the License Agreement** check box, and click **Next**.
5. On the **Location** screen, enter or select the folder where you want to install Cognos Framework Manager, and click **Next**.



The default folder depends if you use a 32-bit or 64-bit environment.



6. On the **Pre-Installation Summary** screen, review the information and click **Next**. The installation progress displays at the bottom of the screen. When the installation is complete, the Finish screen displays.
7. Click **Done** to complete the installation.

Configure IBM Cognos Framework Manager

Enter the appropriate settings for **Gateway URI** and **Dispatcher URI for external applications** in order to connect IBM Cognos Framework Manager with IBM Cognos Analytics and its components.

To configure IBM Cognos Framework Manager:

1. In the computer where IBM Cognos Framework Manager is installed, launch IBM Cognos Configuration.
2. In the Explorer pane on the left-hand side, click **Environment**.
3. Specify the appropriate values for the following:
 - **Gateway URI**
 - Default: `http://ca_server:port/bi/v1/disp`
 - Example: `http://my_ca_server:9300/bi/v1/disp`
 - This URI must always be the same as for Cognos Analytics.
 - If the URI contains **localhost**, replace **localhost** with a fully-qualified host name or IP address.
 - **Dispatcher URI for external applications**
 - Default: `http://ca_server:port/p2pd/servlet/dispatch`
 - Example: `http://my_ca_server:9300/p2pd/servlet/dispatch`

- If the URI contains **localhost**, replace **localhost** with a fully-qualified host name or IP address.

4. Click **Save**.

Configuring Microsoft IIS with Cognos Analytics

After you install the required Cognos downloads, you need to configure Microsoft Internet Information Services (IIS) for use with Cognos.

To set up IIS with Cognos Analytics, an automated procedure is available on the IBM website, [Automate the configuration of Microsoft's Internet Information Service to support IBM Cognos Analytics](#).

If you prefer the manual process, you can follow the [Configuring IIS with Cognos Analytics](#) procedure.



If you are using Microsoft Windows Server 2016, you might encounter an error where IIS URL Rewrite Module 2 is required. Follow the procedures in the following sections to configure the gateway:

- Install URL Rewrite 2.1
- Install ARR 3.0 x64
- Edit and run the CA_IIS_Config.bat script

Install URL Rewrite 2.1

For Windows Server 2016, URL Rewrite 2.1 is required.

To install URL Rewrite 2.1:

1. On your web browser, go to the Microsoft website [URL Rewrite](#).



In case your machine does not have access direct internet connection, do this in a separate machine. And then, copy the URL Rewrite installer to your server.

2. Look for the link where you can download the URL Rewrite Module 2.1.
3. After downloading, you will see the **urlrewrite2.exe**. Copy this file in your server.
4. Right-click **urlrewrite2.exe** and click **Run as administrator**.
5. Follow the installation instructions.

Install ARR 3.0 x64

For Windows Server 2016, Microsoft Application Request Routing (ARR) 3.0 (x64) is required.

To install ARR 3.0 x64:

1. On your web browser go to the Microsoft website, [Microsoft Application Request Routing 3.0 \(x64\)](#).



In case your machine does not have access direct internet connection, do this in a separate machine. And then, copy the ARR 3.0 x64 installer to your server.

2. Click **Download**.
3. After downloading, you will see the **requestRouter_amd64.msi**. Copy this file in your server.

4. Right-click **requestRouter_amd64.msi** and click **Install**.
5. Follow the installation instructions.

Edit and Run the CA_IIS_Config.bat Script

There is an automated way to configure IIS with Cognos Analytics. However, you need to edit the CA_IIS_Config.bat script file first before you run it.

You need to have access to Microsoft's Internet Information Service's appcmd command line tool to run the batch script included in this procedure. Also, Deltek recommends that you back up IIS before running this configuration tool.

To edit and run CA_IS_Config.bat Script:

1. On your web browser, go to the IBM website, [Automate the configuration of Microsoft's Internet Information Service to support IBM Cognos Analytics](#).
2. On the website, look for the **CA_IIS_Config_v1.13(6.08.18).zip** file and download.
3. Copy the zip file to your server.
4. Go back to the IBM website and follow the instructions.

CER URL

After you set up the gateway, the URL might have changed when you did the manual instructions or ran the batch script.

The URL will be either one of the following:

- <http://svr/analytics/bi/>
- <http://svr/ibmcognos/bi/>

The trailing slash is required.

Copy Deployment Files

During the Costpoint Enterprise Reporting installation, report package files are copied to the C:\Program Files (x86)\Deltek\CostpointEnterpriseReporting\CER721_CU1\Deploy folder.

The filename of the zip file is **CERv721_CU1.zip**.

The installation also copies the deployment file to the <*Cognos Installation directory*>\Deployment folder (for example, C:\Program Files\ibm\cognos\analytics\deployment) to make it available for selection from the Cognos Administration screen later in the configuration process.



See [Configuring Data Sources Using Cognos Administration](#) for details

Configuring the Cognos Analytics Data Access from Cognos Configuration

You must configure the Cognos Analytics Data Access object to point to the **cm** Content Store database that you created using the instructions in the Creating the Cognos Analytics Content Store section.

You perform this configuration on the database server. Follow the instructions for Microsoft SQL Server or for Oracle, depending on your database platform.

Configure the Data Access Object for Microsoft SQL Server

From your Microsoft SQL database server, you need to specify the Cognos Content Store and Notification settings on the Data Access object in IBM Cognos Configuration.

To configure the Data Access object, complete the following steps:

1. From your Cognos server, open IBM Cognos Configuration.
2. From the **Explorer** pane on the left side of the screen, expand **Data Access » Content Manager**, and click **Content Store**.
3. If a **Content Store** exists for a type other than your database platform, right-click **Content Store** and select **Delete**. If there's none, skip this step.
4. Right-click **Content Manager** and select **New resource » Database**.
5. Enter **Content Store** as **Name** and select **Microsoft SQL Server database** as **Type(Group)**.
6. Enter the following for the other fields on the **Content Store** section:

| Option | Description |
|---|---|
| Database Server with port number | Enter your database server and port. The default port is 1433 for SQL Server. For example, localhost:1433 |
| User ID and password | Enter cognos as the user and enter the password you set up in SQL Server. |
| Database name | Enter CM11 |



7. If you are setting up email notification now, select **Notification** under **Data Access** in the **Explorer** pane, and enter the following:

| Option | Description |
|-----------------------------|---|
| SMTP mail server | Enter the SMTP email server. |
| Account and password | Enter the authentication information, if necessary. |

| Option | Description |
|-----------------------|--|
| Default sender | Enter the email address of the default sender. |



If you do not set up notification information at this point, when you start the Cognos Analytics Server from Cognos Configuration, you will receive a mail server setup error. You can ignore the error and continue starting up the server. You can set up the SMTP mail server information at a later time.

8. Click  on the toolbar to save changes.
9. Click  on the toolbar to start the service and test connectivity.
10. If prompted, click **Yes** to save changes and continue.
A dialog box displays the server startup status.
11. When the process is complete, click the **Details** button to review the details.
12. Close the dialog box, and exit Cognos Configuration.



If you receive an installation error message, the prerequisite Microsoft SQL TCP/IP protocol may not be enabled. See [Troubleshoot Your Installation](#) for additional information.

Configuring the Data Access Object for Oracle

From your Oracle database server, you need to specify the Cognos Content Store and Notification settings on the Data Access object in IBM Cognos Configuration.

To configure the Data Access object for Oracle, complete the following steps:

1. From the database server, open IBM Cognos Configuration.
2. From the **Explorer** pane on the left side of the screen, expand **Data Access » Content Manager**, and click **Content Store**.
3. If a content store exists for a type other than your database platform, right-click **Content Store** and select **Delete**. If there's none, skip this step.
4. Right-click **Content Manager** and select **New resource » Database**.
5. Enter **Content Store** as **Name** and select **Oracle database** as **Type(Group)**.
6. Enter the following for the other fields on the **Content Store** section:

| Option | Description |
|--|--|
| Database Server and port number | Enter your database server and port. |
| User ID and password | Enter cognos as the user and enter the password you set up in Oracle. |

| Option | Description |
|---------------------|---------------------|
| Service name | Enter cm11 . |

- If you are setting up email notification now, select **Notification** under **Data Access** in the **Explorer** pane, and enter the following:

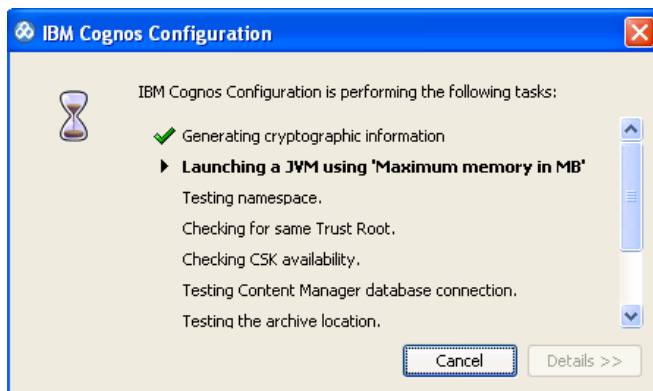
| Option | Description |
|-----------------------------|---|
| SMTP mail server | Enter the SMTP email server. |
| Account and password | Enter the authentication information, if necessary. |
| Default sender | Enter the email address of the default sender. |



If you do not set up notification information at this point, when you start the Cognos Analytics Server from Cognos Configuration you will receive a mail server setup error. You can ignore the error and continue starting up the server. You can set up the SMTP mail server information at a later time.

- Click on the toolbar to save changes.
- Click on the toolbar to start the service and test the connectivity.
- If prompted, click **Yes** to save changes and continue.

A dialog box displays the server startup status.



- When the process is complete, review the details by clicking the **Details** button.
- Close the dialog box, and exit Cognos Configuration.

Configuring Data Sources Using Cognos Administration

You need to specify data source connection settings for Costpoint, Time & Expense, Budgeting & Planning, and Shop Floor Time in Cognos Administration.


Refer to the Microsoft SQL Server or Oracle procedure, depending on your database platform.

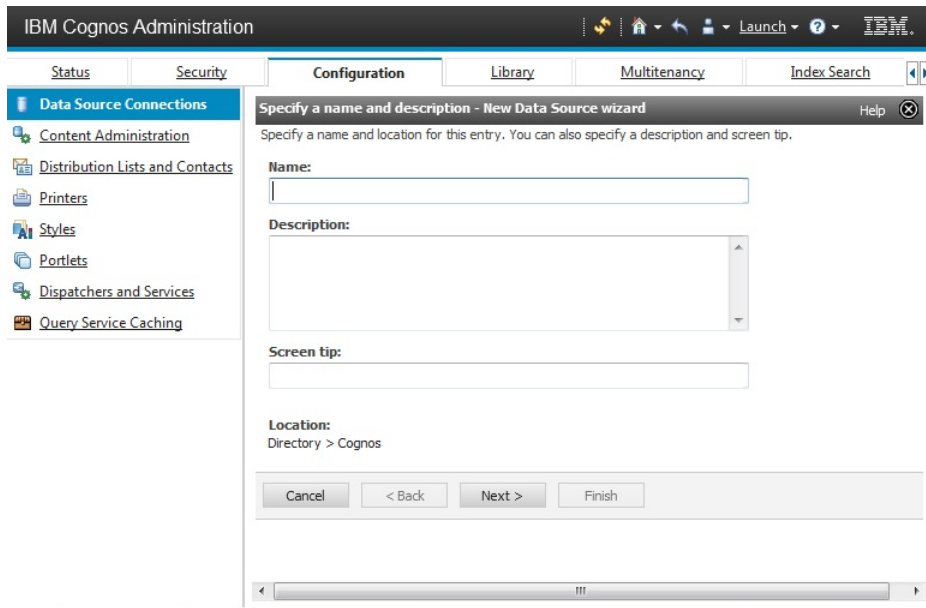
Configure Microsoft SQL Server Data Sources

From your Microsoft SQL database server, you need to specify the data source connections for Costpoint, Time & Expense, TESS, TE_Config, Budgeting and Planning, and Shop Floor Time in IBM Cognos Administration.

The Microsoft SQL Server Native Client software needs to be installed in the IBM Cognos server(s). The Microsoft SQL Server should be listed in the Windows Programs and Features list in the Cognos server.

To configure Microsoft SQL Server Data Sources using Cognos Administration, complete the following steps:

1. Open Internet Explorer and open the Cognos Analytics Welcome portal (<http://<your host server name>:9300/bi/>).
2. On the Welcome portal, click **Manage » Administration console**.
3. From Cognos Administration, click the **Configuration** tab.
4. Click the **New Data Source** icon () in the upper-right corner of the screen.
5. In the **Name** field, enter **Costpoint** as the data source name, and click **Next**.



6. On the Specify the connection screen, select **Microsoft SQL Server (Native Client)** in the **Type** field, select the **Configure JDBC connection** check box, and click **Next**.

Specify the connection - New Data Source wizard
Specify the parameters for the connection of this new data source. The name of

Type:
Microsoft SQL Server (Native Client) ▼

Isolation level:
☒ Use the default object gateway
☐ Specify a value:
 Cursor stability ▼

☒ Configure JDBC connection

Cancel < Back Next > Finish

- On the Specify the Microsoft SQL Server (Native Client) connection string screen, perform the following:

| Option | Description |
|---|---|
| Server Name | Enter the name for the server. |
| Database Name | Enter the name for the database. |
| Signons | Select this option in the Signons section. |
| Password | Select this check box. |
| Create a signon that the Everyone group can use | Select this check box. |
| User ID | Enter your Costpoint user ID. |
| Password/Confirm Password | Enter the password associated with your user ID. |

- At the bottom of the Specify the Microsoft SQL Server (Native Client) connection string screen, click the **Test the connection** link to test the database connection.
- On the Test the connection screen, click **Test** to check the connection parameters.
- On the View the results screen, click **Close**, and on the Test the connection screen, click **Close** again.
The parameters you set for your database connection displays.
- If the connection test worked, click **Next**.
If not, make changes as necessary and test again.
- On the Specify the Microsoft SQL Server (JDBC) connection string screen, enter the **Server name** and **Database name**. Fill out the rest of the fields based on your database setup.
- On the Test the connection screen, click **Test** to check the connection parameters.
- On the View the results screen, click **Close**, and on the Test the connection screen, click **Close** again.

15. Click **Next**.
16. On the Specify the commands screen, click **Finish**.
17. Repeat steps 4 – 16 for the following:

| Application | Instructions |
|-------------------------------|--|
| Costpoint | <p>Use the following data source names:</p> <ul style="list-style-type: none"> ▪ COSTPOINT — Enter the appropriate user ID and password information for this data source. ▪ COSTPOINT_ADMIN — Enter the appropriate user ID and password information for this data source. ▪ COSTPOINT_SYSTEM — Enter the appropriate user ID and password information for this data source. |
| Time & Expense | <p>Use the following data source names:</p> <ul style="list-style-type: none"> ▪ TESS — Enter the appropriate user ID and password information for this data source. ▪ TE_Config — Enter the appropriate user ID and password for this data source. The default user ID is TC_0000 and the password is x. |
| Budgeting and Planning | <p>Use DeltekBP as the data source name, and enter the appropriate user ID and password information for this data source.</p> |
| Shop Floor Time | <p>Use SFT as the data source name, and enter the appropriate user ID and password information for this data source.</p> |

Configure Oracle Data Sources

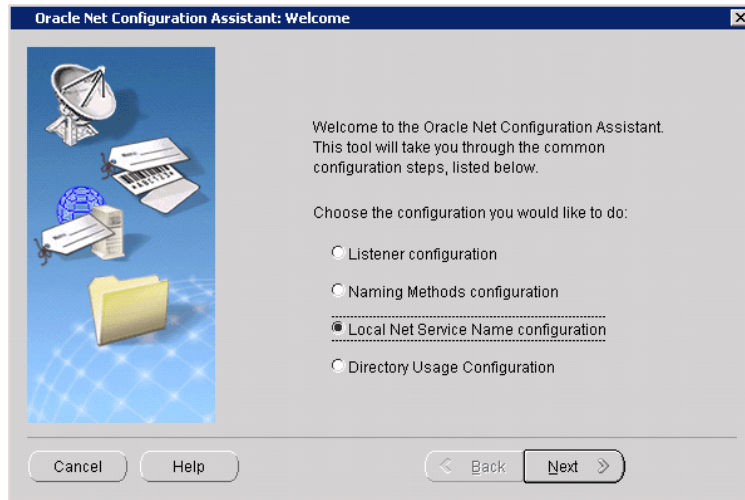
Oracle users must first create the Cognos Analytics database and the Costpoint TNSNAMES, and then they must configure the data source using Cognos Administration.

Creating the Cognos Analytics Database and Costpoint TNSNAMES

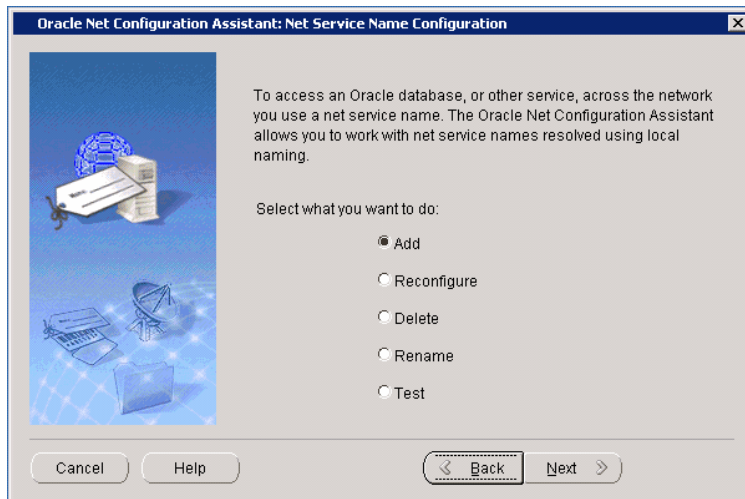
Set the Cognos Analytics Database and Costpoint TNSNAMES in the Oracle Net Configuration Assistant.

To create the Cognos Analytics database and Costpoint TNSNAMES on the Cognos server, complete the following steps:

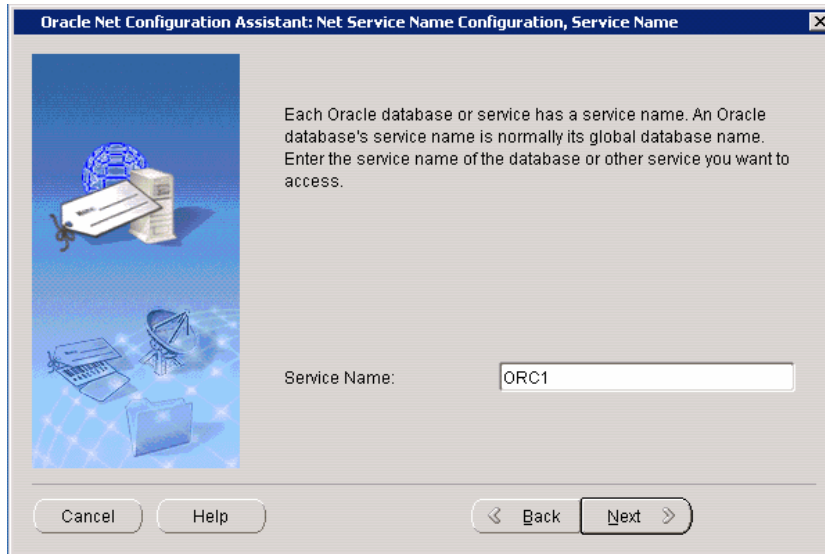
1. Take one of the following actions to open the Net Configuration Assistant to create a connect string to the Costpoint data:
 - On UNIX, run **netca** from \$ORACLE_HOME/bin.
 - On Windows, click **Start » Programs » Oracle - HOME_NAME » Configuration and Migration Tools » Net Configuration Assistant**.
2. On the Welcome screen, select **Local Net Service Name configuration**, and click **Next**.



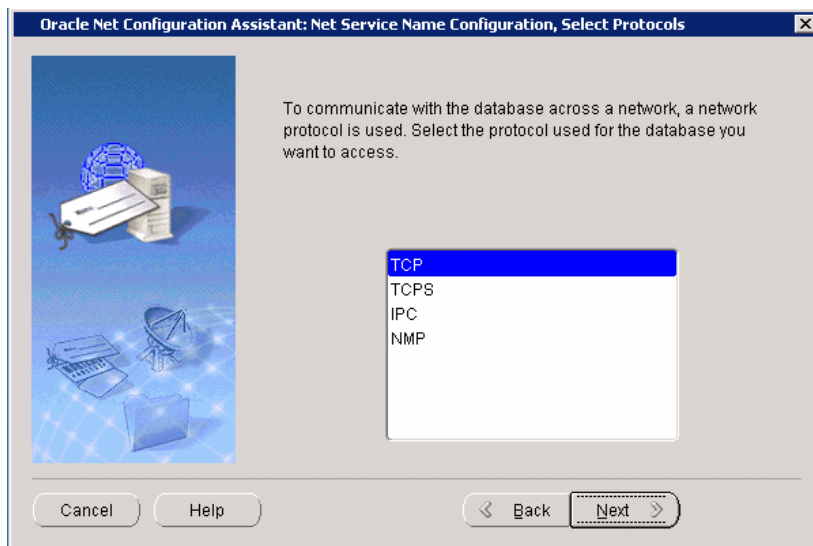
3. On the Net Service Name Configuration screen, select **Add**, and click **Next**.



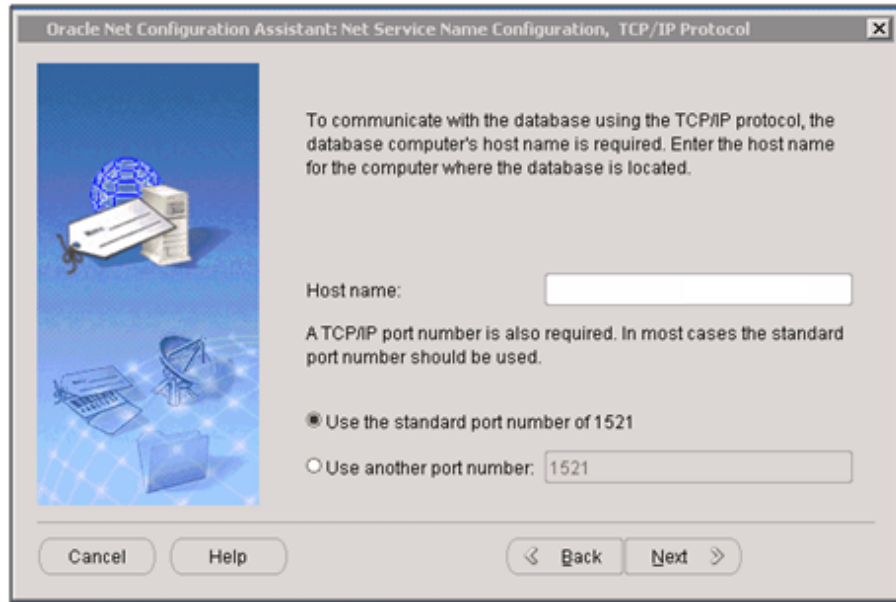
4. On the Service Name screen, enter the service name for the Costpoint data in the **Service Name** field, and click **Next**.



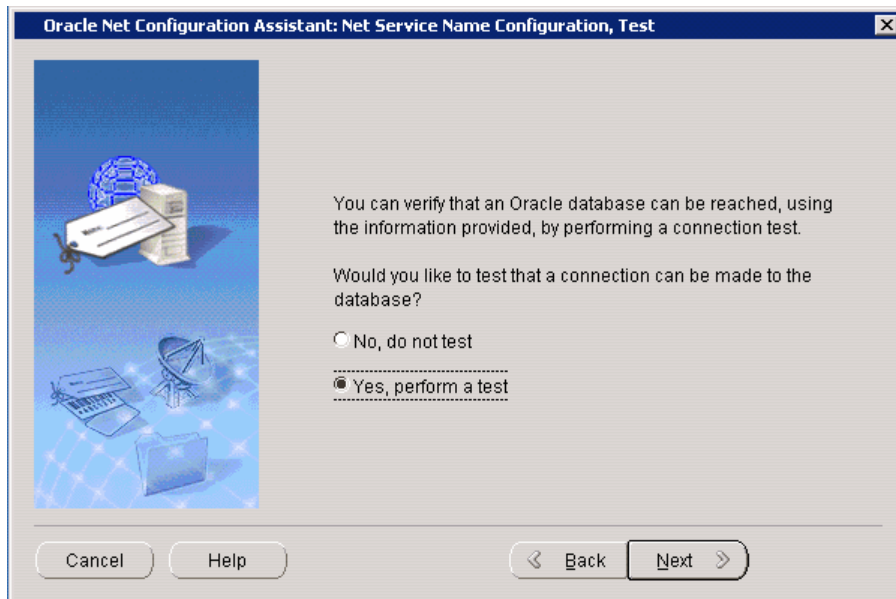
5. On the Select Protocols screen, select **TCP**, and click **Next**.



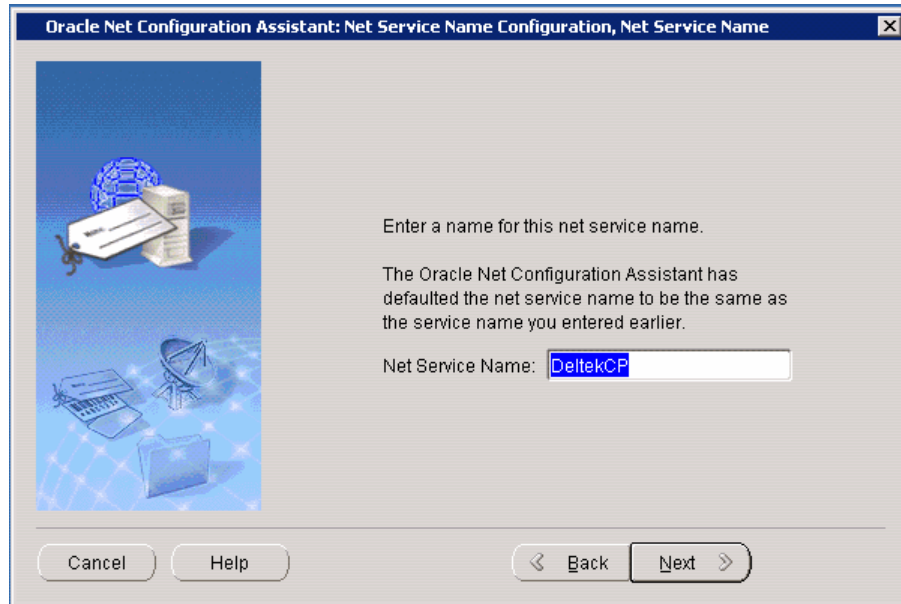
6. On the TCP/IP Protocol screen, enter the server or hostname in the **Host name** field, and click **Next**.



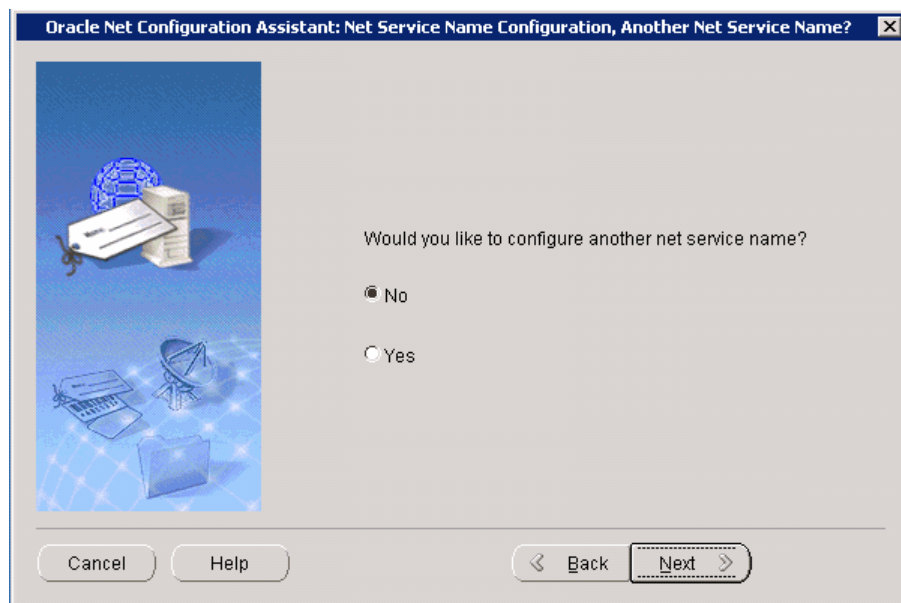
7. On the Test screen, select **Yes, perform a test**, and click **Next**.



8. On the Net Service Name screen, enter a **Net Service Name**, and click **Next**.



9. On the Another Net Service Name screen, select **No**, and click **Next**.




10. Click **Finish** to complete the procedure.

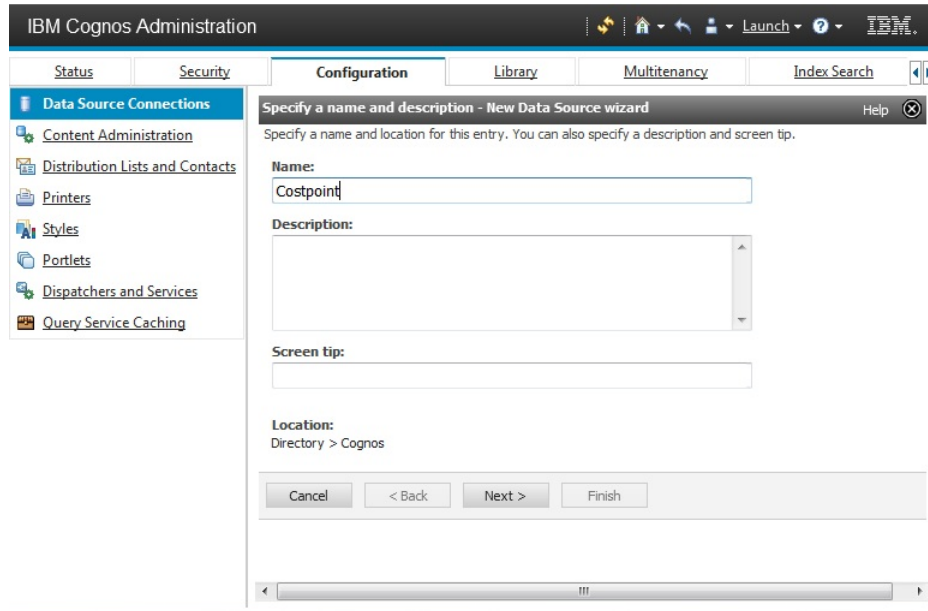
Configure the Oracle Data Source Using Cognos Administration

Set your Oracle data sources for Costpoint, TESS, TE_Config, TC_0000, and COSTPOINT_ADMIN in IBM Cognos Administration.

To configure Oracle data sources, complete the following steps:

1. Open Internet Explorer and open the Cognos Analytics Welcome portal (<http://<your host server name>:9300/bi/>).
2. On the Welcome portal screen, click **Manage » Administration console**.

3. From Cognos Administration, click the **Configuration** tab.
4. In the left pane, click **Data Source Connections**.
5. Click the **New Data Source** icon () in the upper-right corner of the screen.
6. In the **Name** field, enter **Costpoint** as the data source name, and click **Next**.



IBM Cognos Administration

Specify a name and description - New Data Source wizard

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

Name: Costpoint

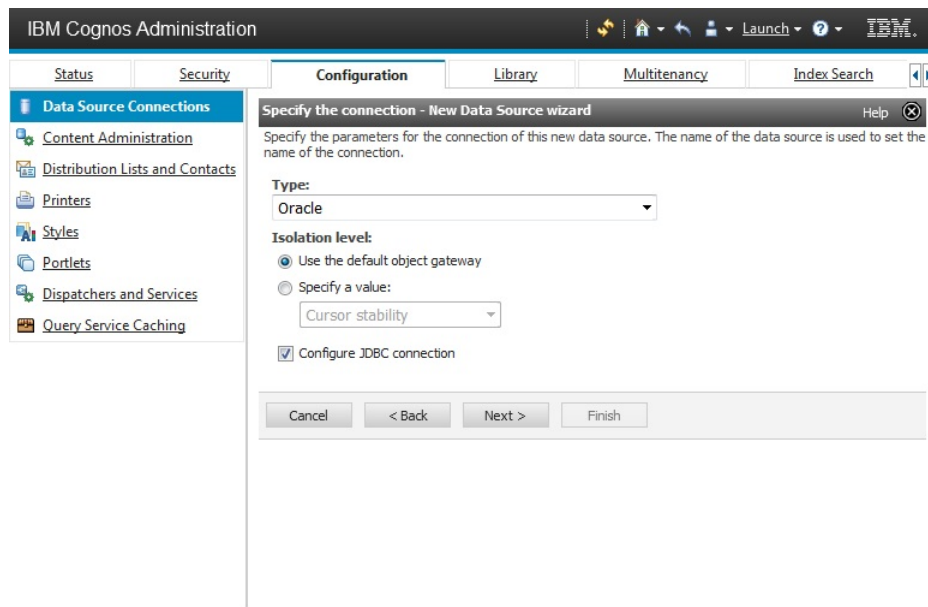
Description:

Screen tip:

Location: Directory > Cognos

Cancel < Back Next > Finish

7. In the **Type** field, select **Oracle**.



IBM Cognos Administration

Specify the connection - New Data Source wizard

Specify the parameters for the connection of this new data source. The name of the data source is used to set the name of the connection.

Type: Oracle

Isolation level:

☒ Use the default object gateway

☐ Specify a value:

Cursor stability

☒ Configure JDBC connection

Cancel < Back Next > Finish

8. Click **Next**.
9. On the Specify Oracle connection string screen, perform the following:

| Option | Description |
|---|---|
| SQL Net connect string | Enter the connection string to connect to the Costpoint data. This is the name you entered in the Service Name field in the Oracle Net Configuration Assistant during creation of the Content Store (for example, ORC1). |
| User ID | Select this check box in the Signon section. |
| Password | Select this check box. |
| Create a signon that the Everyone group can use | Select this check box. |
| User ID | Enter your Costpoint user ID. |
| Password/Confirm Password | Enter the password associated with your user ID. |

10. At the bottom of the Specify the Oracle connection string screen, click the **Test the connection** link to test the database connection.
11. On the Test the connection screen, click **Test** to check the connection parameters.
12. On the View the results screen, click **Close**, and on the Test the connection screen, click **Close** again.
The parameters you set for your database connection displays.
13. If the connection worked, click **Next**.
If not, make the necessary changes and test again.
14. Click **Finish**.
15. Repeat steps 4 – 14 to connect to the data sources for the following:

| Application | Instructions |
|---------------------------|---|
| Costpoint | Use the following data source names: <ul style="list-style-type: none"> ▪ COSTPOINT — Enter the appropriate user ID and password information for this data source. ▪ COSTPOINT_ADMIN — Enter the appropriate user ID and password information for this data source. ▪ COSTPOINT_SYSTEM — Enter the appropriate user ID and password information for this data source. |
| Time & Expense | Use the following data source names: |

| Application | Instructions |
|------------------------|---|
| | <ul style="list-style-type: none"> ▪ TESS — Enter the appropriate user ID and password information for this data source. ▪ TE_Config — Enter the appropriate user ID and password for this data source. The default user ID is TC_0000 and the password is x. |
| Shop Floor Time | Use SFT as the data source name, and enter the appropriate user ID and password information for this data source. |

Importing Deltek Content into Cognos Analytics

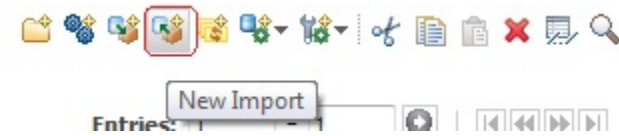
You must specify the folders and packages that you want to include in the import. If you want to add or remove packages or folders, you can also use your existing settings in IBM Cognos Administration. Make sure that you import Cognos groups and roles as well.

Import Deltek Content

Set up the folders and packages that you want to include in the import on IBM Cognos Administration. Include the Cognos user groups and roles as well.

To import Deltek content into Cognos Analytics, complete the following steps:

1. Open Internet Explorer and open the Cognos Analytics Welcome portal (<http://<your host server name>:9300/bi/>).
2. Click **Manage » Administration Console**.
3. From Cognos Administration, click the **Configuration** tab.
4. Click **Content Administration** in the left pane.
5. Click the **New Import** icon in the upper-right corner of the screen.



Deltek does not recommend deploying Deltek content to any location other than the standard location under Team Content because of the danger of breaking links to packages, common library reports, drill reports, and security permissions. However, if you want to deploy Deltek reports to a different location, it is important that you read the information in [Special Topic: Deploying Reports to a Location Other Than the Standard Location](#) before you begin the import procedure.

6. On the Select a deployment archive screen, select **CERv721_CU1** from the available options, and click **Next**.
7. On the Specify a name and description screen, click **Next**.
8. On the Select the public folders, directory and library content screen, select the check box for the folders and packages that you want to include in the import, and click **Next**.
9. On the Select the directory content screen, select the **Include Cognos groups and roles** check box. Select **Keep existing entries**. Click **Next**.
10. On the Specify the general options screen, select the **Include access permissions** check box. And then select **Apply to new entries only** option. Click **Next**.
A summary of your import parameters displays.
11. Review the summary information and when ready, click **Next**.
12. Select the **Save and run once** option, and click **Finish**.
13. From the Run with options screen, click **Run**.
14. Click **OK** to confirm the run options.

Testing Configuration

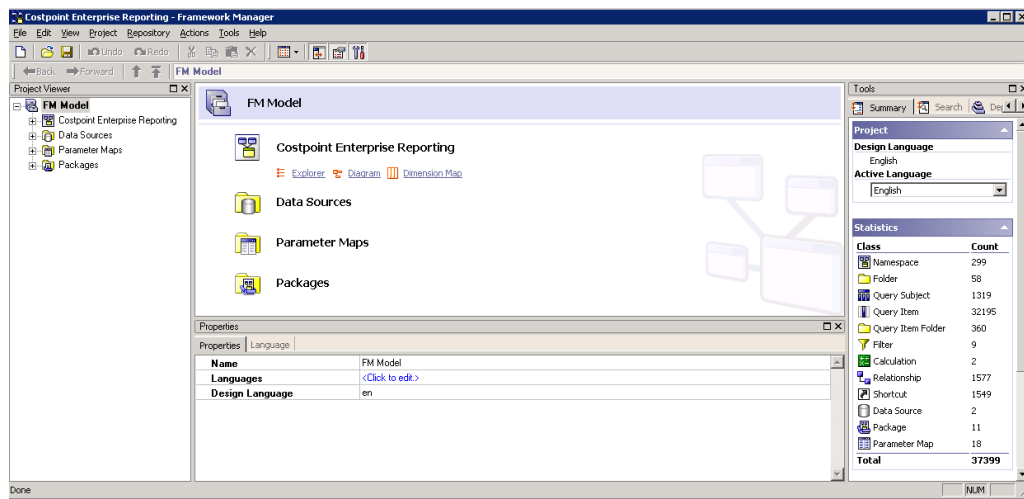
Test your configuration by opening Framework Manager to verify that the data sources display and by testing the link to the Cognos Analytics Welcome portal.

Test Configuration of Data Sources from Framework Manager

You must verify that the data sources for all the projects that you use are listed in Framework Manager.

To test database connections, complete the following steps:

1. Open Framework Manager.
2. On the Welcome screen, click **Open a project**. If you decide to use Framework Manager, you have to configure Cognos with a regular authentication provider, such as ADS. Costpoint Authentication Provider cannot be used with Framework Manager as authentication source.
3. Browse to the Costpoint Enterprise Reporting.cpf file in the \Models subdirectory of the Costpoint Enterprise Reporting installation location (for example, C:\Program Files (x86)\Deltek\CostpointEnterpriseReporting\CER721\Costpoint Enterprise Reporting\Model).
4. Verify that the Costpoint and TESS data sources are listed under **FM Model » Data Sources** in the **Project Viewer** pane.



5. Repeat these steps for the other projects.
- The table lists the projects with their data sources:

| Project | Data Source |
|---|---|
| ICS-Presentation.cpf | COSTPOINT |
| (ICS) Core Model.cpf | COSTPOINT |
| Costpoint Enterprise Reporting for Costpoint Administration | COSTPOINT; COSTPOINT_ADMIN; COSTPOINT_SYSTEM |
| Costpoint Enterprise Reporting for Budgeting and Planning.cpf | DeltekBP |

| Project | Data Source |
|--|----------------------------|
| Costpoint Enterprise Reporting for Fixed Assets | COSTPOINT |
| Costpoint Enterprise Reporting for HR and Payroll.cpf | COSTPOINT |
| Costpoint Enterprise Reporting for Costpoint Project Manufacturing.cpf | COSTPOINT; COSTPOINT_ADMIN |
| Costpoint Enterprise Reporting for Shop Floor Time.cpf | COSTPOINT; SFT |
| Costpoint Enterprise Reporting - TrendedPM.cpf | COSTPOINT |
| CPSOX.cpf | COSTPOINT |
| TESOX.cpf | TE; TE_Config |
| Project Planning Reporting and Analysis.cpf | DeltekBP |
| Project Reporting and Analysis.cpf | Costpoint |

Test Configuration by Navigating to the Cognos Analytics Portal

To test the service, open Internet Explorer and go to the Cognos Analytics portal (<http://<your host server name>:9300/bi/>).

Costpoint Authentication Provider

Costpoint Authentication Provider (CAP) lets you use CER with the Costpoint database as the authentication source.

Since CER is used within Costpoint, it is ideal that you use the same login credentials for Costpoint. CAP is the tool that verifies your user credentials whenever you access CER via Costpoint. It checks for your CER user group and access rights that are set up one time in Costpoint and CER.

You can set up the default CER user groups in Costpoint when you install PATCH7153 and PATCH7163. To see the default CER user groups, refer to the following table.



Before you install CAP, make sure that your Costpoint environment has been updated to at least SysJar 041. Some components in this Costpoint sysjar are required for the integration of most of the Costpoint Enterprise Reporting 7.2.1 features such as CAP and model security.

Cognos and Costpoint User Groups Mapping Table



Please take note of the double underscore used as prefix for CAP user groups in Costpoint. For example, CER__ACCTG.

| Group or Role in Cognos | Group ID in Costpoint | Group Name in Costpoint | Use | Description |
|-------------------------|-----------------------|-------------------------|-----------------|---|
| CER Accounting | CER__ACCTG | CER Accounting | Object Security | This is a Deltek group used to set permissions on Accounting content, such as reports, dashboards, stories, packages, and others. |
| CER Projects | CER__PROJECTS | CER Projects | Object Security | This is a Deltek group used to set permissions on project-based planning content, such as reports, dashboards, stories, packages, and others. |
| CER Planning (Projects) | CER__PLAN_PROJ | CER Planning (Projects) | Object Security | This is a Deltek group used to set permissions on project based Planning content, such as reports, dashboards, stories, packages, and others. |
| CER People | CER__PEOPLE | CER People | Object Security | This is a Deltek group used to set permissions on People content, such as reports, dashboards, stories, packages, and others. |

| Group or Role in Cognos | Group ID in Costpoint | Group Name in Costpoint | Use | Description |
|------------------------------|-----------------------|------------------------------|------------------|--|
| CER HR | CER__HR | CER HR | Object Security | This is a Deltek group used to set permissions on Human Resources content, such as reports, dashboards, stories, packages, and others. |
| CER Time & Expense | CER__TE | CER Time & Expense | Object Security | This is a Deltek group used to set permissions on Time & Expenses content, such as reports, dashboards, stories, packages, and others. |
| CER Materials | CER__MATERIALS | CER Materials | Object Security | This is a Deltek group used to set permissions on Materials content, such as reports, dashboards, stories, packages, and others. |
| CER CP Administrator | CER__CP_ADMIN | CER CP Administrator | Object Security | This is a Deltek group used to set permissions on Costpoint Administrator content, such as reports, dashboards, stories, packages, and others. |
| CER Project Manager Security | CER__PM_MGR | CER Project Manager Security | Project Security | <p>This is a Deltek group used to limit data access.</p> <p>If model security is enabled in Costpoint (Manage CER Settings), and the user is a member of the Project Manager Security group, the user will only see projects where they are assigned as the project manager. In this case, organizational security settings are ignored. Applicable to non-legacy packages that are introduced in CER 7.2.1 and beyond and sourced from Costpoint database only.</p> |

| Group or Role in Cognos | Group ID in Costpoint | Group Name in Costpoint | Use | Description |
|-------------------------|-----------------------|-------------------------|---------------------|---|
| CER User | CER__USER | CER User | Cognos Capabilities | This is a Deltek role used to secure capabilities in the IBM Cognos software based on Deltek's licensing structure. |
| CER Consumer | CER__CONSUMER | CER Consumer | Cognos Capabilities | This is a Deltek role used to secure capabilities in the IBM Cognos software based on Deltek's licensing structure. |
| CER Advanced User | CER__ADV | CER Advanced User | Cognos Capabilities | This is a Deltek role used to secure capabilities in the IBM Cognos software based on Deltek's licensing structure. |
| CER Developer | CER__DEV | CER Developer | Cognos Capabilities | This is a Deltek role used to secure capabilities in the IBM Cognos software based on Deltek's licensing structure. |
| CER Cloud Administrator | CER__ADMIN | CER Cloud Administrator | Cognos Capabilities | This is a Deltek role used to secure capabilities in the IBM Cognos software based on Deltek's licensing structure. This limited administrator role is intended for SaaS customers where Deltek Cloud OPS is performing some of the administration. |

When you use these user groups with the combination of the Deltek-shipped add-on deployment packages, you will automatically secure Deltek add-on folders/packages based on these default user groups and roles.

In order to set up the CER Authentication Provider, the following are the major steps:

- In the Costpoint Server side:
 - Set Up CER User Group through the installation of PATCH7153 and PATCH7163
 - Add the Tenant ID in the Configuration Utility
 - Assign CER Administrators in Costpoint
- In the Cognos Server side:
 - Check and Copy the Latest biintegration.res file
 - Copy Setup Files

- Copy and Modify the Configuration Property File
- Remove old CAP files (if any)
- Add the Namespaces in IBM Cognos Configuration
- Add Admin Tenant on the Multitenancy Tab
- Set Up a Cognos System Administrator
- Remove 'Everyone' as System Administrator
- Update Cognos Authentication and Namespace Properties
- Restart the Cognos Server

Set Up the Costpoint Authentication Provider in Costpoint

The succeeding sections must be done in the Costpoint Server. Follow the procedures in this section in the order they were written.

CER User Groups in Costpoint

Install PATCH7153 and PATCH7163 in Costpoint that includes the CER user groups and user group names.

Tenant ID and the Configuration Utility

The Configuration Utility tool in Costpoint establishes the Tenant ID that will be used for the Costpoint Authentication Provider.

The Costpoint System Administrator enters the Tenant ID in the Configuration Utility tool. Afterwards, he will log on to Costpoint and open the Rebuild Global Settings (SYPSTNG) application to reload settings and generate token that contains the newly added Tenant ID.



You need at least one admin tenant to manage the Costpoint Authentication Provider (CAP).

For more information about the Costpoint Configuration Utility, see the [DeltekCostpoint711ConfigurationUtility.pdf](#).

Configure CER in the Costpoint Configuration Utility

Use the **Rpts & Analytics** tab of the Costpoint Configuration Utility to configure the interface between CER and Costpoint.

To configure CER in the Costpoint Configuration Utility:

1. Launch the Costpoint Configuration Utility.
2. On the **Rpts & Analytics** tab, select the **Use Costpoint Enterprise Reporting (CER) Integration** check box.
3. Enter the following information:
 - Enterprise Reporting instance URL
 - Tenant ID



For example you have the following values:

- Server Name = svr
- Tenant ID in Cognos = admin

The Tenant ID must match the tenant indicated in the **deltek_cap.properties** file. As default, **admin** is the Tenant ID in the said file. You will use the **deltek_cap.properties** file in succeeding sections of this document.

The **CER URL** will be:

- http://svr/ibmcognos/bi/v1/disp?CAMNamespace=CAP_SSO&m_redirect=/ibmcognos/bi/ OR
- http://svr/analytics/bi/v1/disp?CAMNamespace=CAP_SSO&m_redirect=/analytics/bi/

The **Tenant ID** must be **admin**.

Take note of the **Tenant ID** that you will enter on this screen. You will use this Tenant ID when you modify the **deltek_tenants.properties** file later when you configure CAP in the Cognos server side.

4. Restart the WebLogic servers or run the Rebuild Global Settings (SYPSTNG) application in Costpoint for changes to take effect.

Assign CER Administrators in Costpoint

You should assign CER Administrators in Costpoint via the Manage User Groups screen.

To assign CER administrators:

1. In Costpoint, go to **Admin » Security » System Security » Manage User Groups**.
2. In the **User Groups** table window, select **CER__ADMIN**.
3. Click the **Assign Users to Group** subtask.
4. Click the **New** button in the **Assign Users to Groups** table window.
5. Enter or select the CP Cloud Admin users.
6. Click **Save**.

Set Up the Costpoint Authentication Provider in Cognos

In the Cognos Server side, there are certain procedures that you should follow to set up the Costpoint Authentication Provider. Follow them in the order that they were written.

Check and Copy the Latest biintegration.res File

The biintegration.res file is the resource file that contains the key in coding the token. This file is generated by either the Costpoint Configuration Utility or at the start of Costpoint services. Make sure that you get the latest version of the biintegration.res file.

You need to have access to Costpoint server directories to get the latest file.

To check and copy the latest biintegration.res file, complete the following steps:

1. Check if the biintegration.res file is in this Costpoint server directory:
{Costpoint Server}\deltek\costpoint\71\applications\enterprise\properties
2. Make a copy of the latest biintegration.res file and put it in this Cognos server directory:
{Cognos server}\Program Files\ibm\cognos\analytics\configuration



If the file already exists in the Cognos server location, replace it with the new file that you just copied from the Costpoint server. This is to make sure that you have the latest key file.

Copy Setup Files to the Cognos 11.x Server

The files must be copied to the Cognos 11.x Server to complete the Costpoint Authentication Provider setup.



This procedure is for Cognos 11.x users only. If you are using Cognos 10.x, skip this section.

To copy the setup files to the Cognos 11.x server:

1. Go to the installation directory of CER 7.2.1 and open the **CAP2.0** folder.
As default, the location is **C:\Program Files (x86)\Deltek\CostpointEnterpriseReporting\CER721\Support\CAP2.0**.
2. Open the **Libs** folder and see that the following files are available:
 - **commons-dbcp2-2.1.1.jar**
 - **commons-logging-1.2.jar**
 - **commons-pool2-2.4.2.jar**
 - **DeltekCAP.jar**
3. Copy the files mentioned above to this Cognos 11.x server directory:
{Cognos Server}\C:\Program Files\ibm\cognos\analytics\webapps\p2pd\WEB-INF\lib

- Next, look for the **log4j.xml** file in the **C:\Program Files (x86)\Deltek\CostpointEnterpriseReporting\CER721\Support\CAP2.0** directory and copy to this Cognos server directory:
{Cognos Server}\C:\Program Files\ibm\cognos\analytics\webapps\p2pd\WEB-INF\lib .

Copy and Modify the Configuration Property Files

You need to locate the **Config** folder from the extracted files from DSM.

To modify the configuration property files:

- Look for the **Config** folder in the extracted files and then open it.



As default, the extracted files are in **C:\Program Files (x86)\Deltek\CostpointEnterpriseReporting\CER721\Support\CAP2.0\Config**.

- In the **Config** folder, look for the following files:

- domainMappingCAP.xml** — This file contains the namespace to be used for the Costpoint Authentication Provider. As a default, use "CAP"
- deltek_cap.properties** — Use this file to define the administrator tenant within the CAP namespace
- deltek_cap_sql.properties** — This file contains the SQL script to get information about users and user groups
- deltek_tenants.properties** — Use this file to define the new tenant with information about the database connection

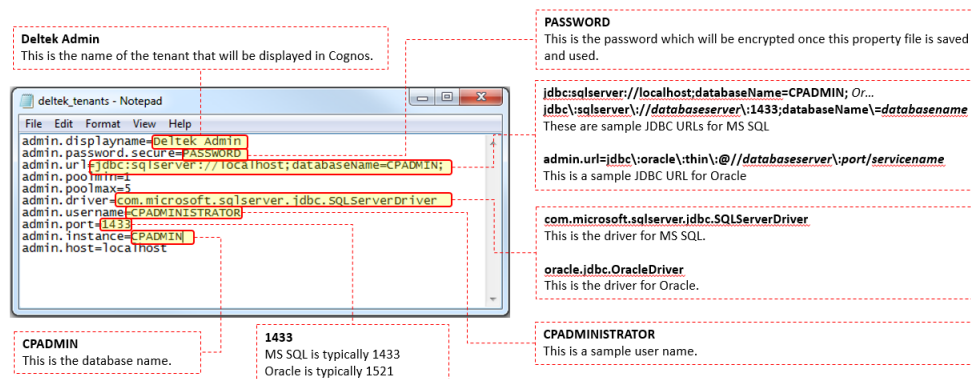
- Copy the configuration files mentioned above to this Cognos server directory:

C:\Program Files\ibm\cognos\analytics\configuration



You can make copies of the files and leave the original ones in the **Config** folder for backup.

- Open the **deltek_tenants.properties** file to modify it.
- In the **deltek_tenants.properties** file, add an Admin Tenant by following the syntax in this diagram:





Make sure that you are using the ADMIN instance of the Costpoint database instead of the Transaction instance. If you entered a **Tenant ID** in the Costpoint Configuration Utility tool, make sure that you enter the same **Tenant ID** in the **deltek_tenants.properties** file so that they match. In the diagram above, **admin** is used in the **deltek_tenants.properties** file which should be the same **Tenant ID** in the Costpoint Configuration Utility tool.

If you only have one tenant, make sure that it uses **admin** similar to the diagram. If you have multiple tenants, the first tenant must be **admin**.

Sample MS SQL file:

```
deltek_tenants.properties
File Edit Format View Help
#Processed
#Thu Aug 02 14:47:41 EDT 2018
admin.driver=com.microsoft.sqlserver.jdbc.SQLServerDriver
admin.instance=CPADMIN
admin.displayName=Deltek Admin
admin.poolmax=5
admin.host=SQL
admin.port=1433
admin.poolmin=1
admin.password.secure={DELTEK\;ENCRYPT}EX08RsN6jaxU2cGroNNWlw\=\
admin.username=CPADMIN
admin.url=jdbc\:sqlserver\://sql\:1433;databaseName\=CPADMIN;
```

Sample Oracle file:

```
deltek_tenants - Notepad
File Edit Format View Help
#Processed
#Fri Sep 07 12:12:57 EDT 2018
admin.driver=oracle.jdbc.OracleDriver
admin.instance=PDBORCL
admin.displayName=Deltek Admin
admin.poolmax=5
admin.host=10.2.152.186
admin.port=1521
admin.poolmin=1
admin.password.secure={DELTEK\;ENCRYPT}EX08RsN6jaxU2cGroNNWlw\=\
admin.username=CPADMIN
admin.url=jdbc\:oracle\;thin\:@//10.2.152.186:1521/PDBORCL
```

6. Remove any unused tenant property in the **deltek_tenants.properties** file.
7. **Save** the configuration property file and **Close**.



Restart **IBM Cognos Configuration** if it is already open so that the system will pick up these newly copied and modified files.

Remove Old CAP Files

If you have installed a previous version of CAP, you might have old configuration files. Remove these files in your server.

Skip this procedure if you have not installed CAP 1.0 previously.

To remove the CAP 1.0 configuration files:

1. In your Cognos Analytics server, go to {Cognos Server} C:\Program Files\ibm\cognos\analytics\webapps\p2pd\WEB-INF\lib.
2. Look for **CAM_AAA_COSTPOINT.jar** and delete this file.
3. Next, go to {Cognos Server}\C:\Program Files\IBM\Cognos\analytics\Configuration.
4. Look for **JDBC_Config_<namespace ID>.properties** and **dbutil.class** files. Delete them.

Set Up The Cognos Authentication Provider

The authentication provider handles the verification process between Cognos and Deltek Costpoint. You need to create the namespaces for CAP and CAP_SSO.

Set Up the CAP Namespace

Create the namespace for CAP that will handle the verification process between Cognos and Costpoint cloud and non-cloud users.

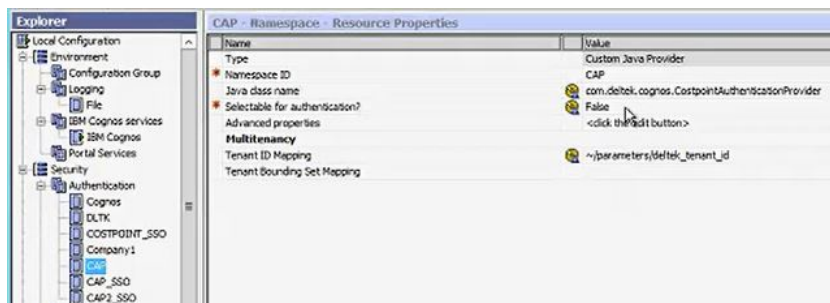
To set up the CAP namespace:

1. Launch the IBM Cognos Configuration application.
2. From the Explorer pane on the left side of the screen, go to **Security » Authentication**. Right-click **Authentication** and go to **New resource » Namespace**.
3. Enter the **CAP** in the **Name** field.



Make sure that the **Name**, in this case **CAP**, is the same as the **Tenant ID** that has been configured in the **domainMappingCAP.xml** file.

4. Select **Custom Java Provider** in the **Type** field. Click **OK**.
5. On Namespace - Resource Properties pane, fill out the following:
 - **Namespace ID** - Enter **CAP**.
 - **Java class name** - Enter **com.deltek.cognos.CostpointAuthenticationProvider**.
 - **Selectable for authentication?** - Select **False**.
 - **Tenant ID Mapping** - Click the pencil icon. On the Tenant ID Mapping screen, select **Pattern** as **Type**. In the **Value** field enter **~/parameters/deltek_tenant_id**.
6. Click **Save configuration** icon.



7. Test the connection to this newly created namespace. Right-click **CAP** and click **Test**.
You might get a prompt to enter credentials for a user in the namespace to complete the test.

Set Up the CAP_SSO Namespace

Create the CAP_SSO Namespace when you are using Costpoint Enterprise Reporting application via the Costpoint user interface.


To set up the CAP_SSO namespace:

1. Launch the IBM Cognos Configuration application.
2. From the Explorer pane on the left side of the screen, go to **Security » Authentication**. Right-click **Authentication** and go to **New resource » Namespace**.
3. Enter the **CAP_SSO** in the **Name** field.
4. Select **Custom Java Provider** in the **Type** field. Click **OK**.
5. On Namespace - Resource Properties pane, fill out the following:
 - **Namespace ID** - Enter **CAP_SSO**.
 - **Java class name** - Enter **com.deltek.cognos.sso.CostpointSSO**.
 - **Selectable for authentication?** - Select **False**.
6. Click **Save configuration** icon.
7. Test the connection to this newly created namespace. Right-click **CAP_SSO** and click **Test**. You might get a prompt to enter credentials for a user in the namespace to complete the test.

Add 'Admin' Tenant on the Multitenancy Tab

You need to add the 'Admin' tenant on the Multitenancy Tab in the Administration Console in Cognos that is similar with the **Tenant ID** that is in the Costpoint Configuration Utility and the **deltek_tenants.properties** file.

To add the Admin tenant on the Multitenancy Tab:

1. Log in to Cognos Analytics.
2. On the pane found on the left-hand side, click the **Manage » Administration Console**.
3. Open the **Multitenancy Tab**.
4. Click the **New Tenant** icon .
5. In the **Name** and **Tenant ID** fields, enter the Admin tenant. Make sure that it matches with the **Tenant ID** in the Costpoint Configuration Utility and the Admin tenant in the **deltek_tenants.properties** file.
6. Click **Finish**.

Set Up a Cognos System Administrator

In the **deltek_tenants.properties** file, an admin tenant has been defined. You will need to assign a user who belongs to this admin tenant as your System Administrator who will then manage your CER 7.2.1 system.

To set up the System Administrator:

1. Log in to Cognos Analytics. On the pane on the left-hand side, click **Manage » Administration Console**.
2. Open the **Security** tab and click **Cognos** in the Directory table.
3. Look for **System Administrators** in the list and click **More...** found on the right.
4. Click **Set members....** And then, click **Add**.

5. Under the **Available entries** box on the left-hand side of the screen, go to **Cognos » Everyone**. Click the yellow arrow button to move **Everyone** to the **Selected entries** box on the right.



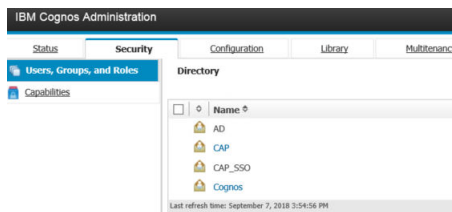
The **Everyone** account is added at this stage for configuration purposes, but will be removed once we are done.

6. Under the **Available entries** box, click on the active directory (AD) folder and select **Show users in the list** check box. Look for your AD account and it to the System Administrators account.
7. Click **OK**. And then, click **OK** again. **Log off** of Cognos Analytics.



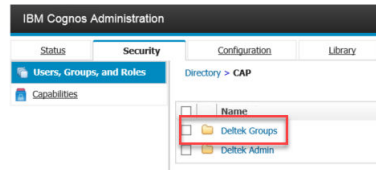
Close all the IBM Cognos Analytics sessions that are open or simply close your browser and open a new one.

8. Login to Costpoint as one of the users you added to the CER__ADMIN group.
9. Go to **Reports and Analytics » Enterprise Reporting » Enterprise Reporting » Enterprise Reporting**.
10. On the pane found on the left-hand side, click the **Manage » Administration Console**.
11. Open the **Security** tab and click **Cognos** in the Directory table.
12. Click the **Deltek** folder.
13. Look for **CER Cloud Administrator** and click **More...** on its right.
14. Click **Set members...**
15. Click **Add...**
16. Click **CAP**.
17. Click the **Deltek Groups** folder.
18. Select the check box before **CER Cloud Administrator** and click the yellow arrow.
19. Click **OK**. And then, click **OK** again.
20. Click **Cognos**.
21. Scroll through the Directory until you see **System Administrators**.
22. Click **More...** found on the right that is adjacent to **System Adminstrators**.
23. Click **Set members...**
24. Click **Add...**
25. Click on the **CAP** folder



If the **CAP** folder is missing, try to restart the dispatch servers.

26. Click the **Deltek Groups** folder.



27. Select the **CER Cloud Administrator**.
28. Click the yellow arrow button to add the selected groups as **System Administrators**.
29. Click **OK**. And then, click **OK** again.
This step will add your administrators. However, further steps are needed to be done to add the rest of the Deltek groups in the appropriate Cognos user groups. You will see the procedure and more information about this once you review the CER Post Installation Guide.

Remove 'Everyone' as System Administrator

Once a System Administrator has been established, the 'Everyone' group should be removed in the System Administrator role.



This procedure should only be done after a user with System Administrator rights has been created.

To remove the 'Everyone' group as System Administrator:

1. In IBM Cognos Administration, open the **Security** tab and click **Cognos** in the Directory table.
2. Scroll through the Directory until you see **System Administrators**.
3. Click **More...** found on the right that is adjacent to **System Administrators**.
4. Click **Set members...**
5. Look for **Everyone** and select.
6. Click **Remove** and then **OK**.

Update Cognos Authentication and Namespace Properties

You should configure the appropriate settings for anonymous settings and Cognos authentication via the IBM Cognos Configuration application.

To update the Cognos Authentication and Namespace properties:

1. Launch the IBM Cognos Configuration application.
2. On the **Explorer** pane, go to **Security » Authentication » Cognos**.
3. On the **Cognos Namespace - Resource Properties** pane on the right, set the **Allow anonymous access?** field to **False**.
4. On the **Explorer** pane, go to **Security » Authentication**.
5. On the **Authentication - Component Properties** pane on the right, set the **Restrict access to members of the built-in namespace?** field to **True**.
6. Click **Save**.

Restart the Cognos Server

Restart the Cognos server after the procedures have been successfully completed.

The procedures are:

- Check and Copy the Latest biintegration.res file
- Copy Setup Files
- Copy and Modify the Configuration Property File
- Remove old CAP files (if any)
- Add the Namespaces in IBM Cognos Configuration
- Add Admin Tenant on the Multitenancy Tab
- Set Up a Cognos System Administrator
- Remove 'Everyone' as System Administrator
- Update Cognos Authentication and Namespace Properties

CAP Troubleshooting

Use the **Deltek_Costpoint_CAP.log** file when you need to troubleshoot a Costpoint Authentication Provider issue.

You can find the log file in:

{Cognos Server}\C:\Program Files\ibm\cognos\analytics\log\Deltek_Costpoint_CAP.log

Troubleshoot Your Installation

One of the prerequisites before you can create the content store is enabling the Microsoft SQL Server TCP/IP protocol. If you receive errors during the installation process, you must check this setting in Microsoft SQL Server.

The Cognos Error During Installation Process section provides an example of an installation error and the Enable TCP/IP Protocol section contains steps to enable the protocol in Microsoft SQL Server.

Cognos Error During Installation Process

During the installation process, if the Microsoft SQL Server TCP/IP Protocol is disabled, you will not encounter an error until you start services in Cognos Analytics.

Cognos will display the following error message:

“The test phase has warnings. Do you want to continue?.”

Click **No** and complete the steps in the Enable TCP/IP Protocol procedure. Return to Cognos and continue the installation process.

Enable TCP IP Protocol



Before you can create the content store (see Creating the Cognos Analytics Content Store), you must have the proper version of Microsoft SQL Server installed and TCP/IP protocol enabled.

To confirm if TCP/IP is enabled, complete the following steps:

1. Open Microsoft SQL Server.
2. Open the SQL Server Configuration Manager.
3. On the left menu pane, expand **SQL Server Network Confirmation**.
4. Click **Protocols for MSSQLSERVER**.
The **Protocol Name** and **Status** fields on the right information pane display the name of each protocol and current status.
5. Confirm that the TCP/IP protocol is **Enabled**.
6. If TCP/IP is **Disabled**, double-click **TCP/IP**.
7. On the TCP/IP Properties dialog box, click the Protocol tab.
8. Click the **Enabled** line, and select **Yes** from the drop-down list.
9. Click **OK** to save your changes.



Because changes do not take place until SQL services are stopped and restarted, you must stop services.

10. On the left menu pane of the SQL Server Configuration Manager, click **SQL Server [XX] Services**.
11. Click **SQL Server (MSSQLSERVER)**, and click **Stop Services** .
12. Click **SQL Server (MSSQLSERVER)** again, and click **Start Services**  to restart the services.

13. Close the SQL Server Configuration Manager.

Non-Domain Administrator in MS Server 2012

After you install CER 7.2.1 on Server 2012 and you do not have domain administrator rights, you may not be able to launch the IBM Cognos Configuration and Framework Configuration from the Start menu.

As a workaround, you need to locate the executable files for these applications and create desktop shortcuts.

To create the shortcuts and launch the applications, complete the following steps:

1. In the Start Menu, remove the IBM Configuration and Framework Configuration applications.
2. Locate the executable files which are in these directories:

| Application | Executable Location |
|------------------------------|--|
| IBM Cognos Configuration | C:\Program Files\ibm\cognos\analytics\bin64\cogconfigw.exe |
| IBM Cognos Framework Manager | C:\Program Files (x86)\ibm\cognos\model\bin\FM.exe |

3. Create shortcuts for the executable files, and place them on your desktop.
4. Right-click the desktop shortcut, and select **Run as administrator**.

Run Internet Explorer in Compatibility Mode

There may be instances that tabs on a report are not visible when you use Internet Explorer 11 with Cognos Analytics 11. In this case, run Internet Explorer 11 in compatibility mode.

To run Internet Explorer 11 in compatibility mode, complete the following steps:

1. In Internet Explorer, click **Tools » Compatibility View Settings**, or press **ALT+X** and select **Compatibility View Settings**.
2. On the Compatibility View Settings screen, add the URL for the IBM Cognos BI instance that you want to use, and click **Add**.
3. Click **Close**.

Mixed Active Content

When your Costpoint implementation is using the HTTPS protocol while your Cognos Analytics is HTTP, a blank page will display.

This is called Mixed Active Content and is blocked by all major web browsers now.

To correct this, put both Costpoint and Cognos Analytics implementation in either HTTPS or HTTP protocol.

Cannot Retrieve Data from Data Set

Microsoft Internet Information Service imposes a limit on the size of the URL address. This may cause an error when you use dashboards where it says that you cannot retrieve data from a data set . To avoid this, you must modify the values in the **Maximum URL Length** and **Maximum Query String**.

To modify the Maximum URL Length and Maximum Query String:

1. On the Cognos Analytics IIS host server, open the **Control Panel** under **Administrative tools** option. Open **Microsoft Internet Information Service Manager**.
2. On the navigation tree on the left-hand side, click **Sites/Default Web Site/IBMCognos** and select **bi** directory.
3. Double click **Request Filtering**. And then, click **Edit Feature Settings**.
4. Enter **16000** on the **Maximum URL Length** field.
5. Enter **8000** on the **Maximum Query String** field.
6. Restart IIS.

Special Topic: Deploying Reports to a Location Other Than the Standard Location

Deltek does not recommend deploying reports to any location other than the standard location because of the danger of breaking links to packages, common library reports, and drill reports.




If you choose to deploy reports to a different location, note the following:

- To minimize the impact on the links, first deploy the reports to the standard directory under Team Content, and then cut and paste the reports to move them to the desired location. This approach preserves the links to the packages and common library reports. However, it breaks the links to drill reports because the main (source) reports and drill (target) reports are not located in the same folders.
- After you relocate the reports, you must use edit the report to redefine the links between the main reports and the drill reports.

Redefine Links to Drill Reports

You need to specify the new deployment location for all the drill reports in Cognos Analytics.

To redefine the links to drill reports, complete the following steps:

1. Go to the location of the report from Team Content and click the **More (...)** button on the right. Click **Edit report**.
2. On the report page, click the drill-through link (displayed as blue underlined text), and click the properties icon .
3. On the List column body pane, click **Drill-through definitions** field. Click the .
4. On the Drill-Through definitions dialog box, click the first item in the **Drill-Through definitions:** list.
The **Report** field displays the drill report.
5. Click  next to **Report**, and browse to the new deployment location.
6. Select the drill report in that location, and click **Open**.
7. If the **Drill-Through Definition** list contains more than one item, repeat steps 4 – 6 for each one.
8. Click **OK** to close the Drill-Through Definitions dialog box.
9. Save the report.

Special Topic: Hiding and Displaying the Common Library Report

You can show or hide the Common Library Report in Cognos Analytics.

A Common Library report is not an actual report that you are intended to run. Rather, it contains elements, such as Deltek logos, prompt tabs, product version number, and so on, that are used in common by all reports.



Even if the Common Library report is hidden, they are still visible to users with **Show hidden entries** selected in their preferences, though the icon for the report is dimmed. System administrators may want this option selected. However, for those users who should never see these reports, it is recommended that you make sure **Show hidden entries** is not selected and that you do not give them access to change this preferences option.

Make a Common Library Report Visible in Cognos Analytics

You can adjust whether or not to display a particular Common Library report to users.

To make a Common Library report visible in Cognos Analytics, complete the following steps:

1. On the Welcome portal, open the reporting package that contains the Common Library report in the **Team Content » Administration**.
2. If the Common Library report is not visible in the list of reports, click your Username on upper right-hand side of the screen, and click **My Preferences**.
3. Select the **Show hidden entries** check box.



If the **Show hidden entries** check box is not displayed, you do not have the necessary access rights to change it.

4. Go to the Common Library report, click the **More (...)** icon on the right.
5. Click **Properties** and expand **Advanced**.
6. Clear the **Hide this entry** check box.
7. To hide the Common Library report again, repeat this procedure and select the **Hide this entry** check box in step 6.



Deltek is the leading global provider of enterprise software and information solutions for government contractors, professional services firms and other project- and people-based businesses. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 20,000 organizations and millions of users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, recruit and develop talent, optimize resources, streamline operations and deliver more profitable projects. Deltek – Know more. Do more.®

deltek.com