Deltek

Deltek Costpoint Business Intelligence 8.2.15

Upgrade Installation Guide

October 1, 2024

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Contents

Overview

This guide includes the procedures in upgrading to Cognos Analytics with Watson 11.2.4 FP4 and Costpoint Business Intelligence 8.2.15.

The sections in this document are divided into three parts and should be performed in the following order:

1. Upgrading to Cognos Analytics 11.2.4 FP4
2. Upgrading to Costpoint Business Intelligence 8.2.15
3. Upgrading to Costpoint Authentication Provider 8.2

You will be guided throughout the document to help you in your upgrade process.

Important: After the successful upgrade of Costpoint BI and Cognos Analytics with Watson, follow the procedures in the Costpoint Business Intelligence Post Installation and Configuration Guide for 8.2.15 to properly secure your BI environment before you allow users to run and create reports and dashboards in Costpoint BI. Certain configuration settings were updated due to the Cognos Analytics with Watson upgrade. Deltek recommends that you revisit the settings to have a seamless upgrade.

Get Installation Help

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

While Deltek has worked hard to ensure a step-by-step installation, Costpoint Business Intelligence, which leverages IBM® Cognos® Analytics with Watson 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.

Note: If you are upgrading from Cognos 10.2.x to 11.x, you need to install the 11.x components to a separate location. Click here to learn more about the process for this type of upgrade.

If You Need Assistance

Deltek can help you in the implementation of Costpoint Business Intelligence in your organization.

If you need assistance installing, implementing, or using Costpoint Business Intelligence, 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**.

> **Note:** If you forget your username or password, you can click the **Login 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

> **Attention:** 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 Success 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 Success analyst online

> **Note:** 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 **Login**.

   > **Note:** If you do not have a username and password for the Deltek Support Center site, contact your firm's Costpoint Business Intelligence Administrator. If you forget your username or password, you can click the **Login Help?** button on the login screen for help.

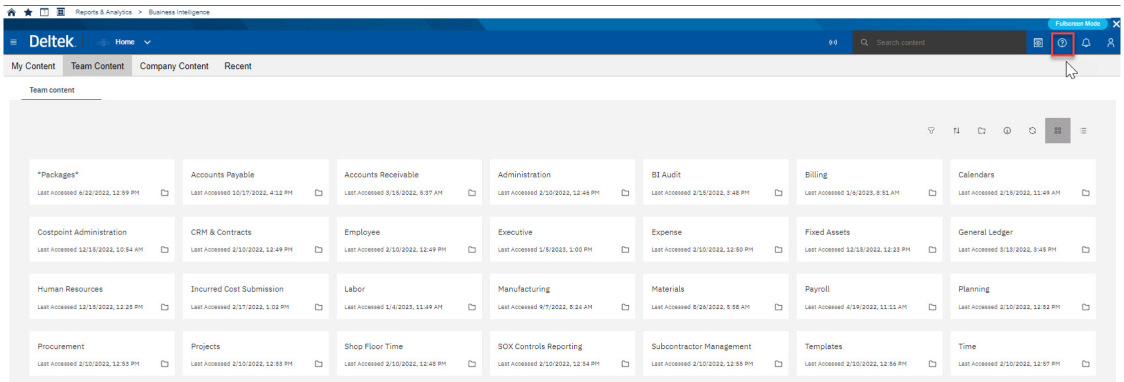
Additional Documentation

There are several documents that can help in your implementation of Costpoint Business Intelligence 8.2.15

The following table lists the additional Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center site.

Document Name	Description
Deltek Costpoint Business Intelligence 8.2.x 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 8.2.15 Release Notes	This document provides release information, such as new features and resolved software issues about Costpoint including Costpoint Business Intelligence 8.2.15.
Deltek Costpoint Business Intelligence 8.2.15 New User/Full Installation Guide	This document includes instructions for installing and configuring Costpoint Business Intelligence for the first time, specifically version 8.2.15.
Deltek Costpoint Business Intelligence 8.2.15 Post Installation and Configuration Guide	This document includes configuration procedures to be done after the successful installation of Costpoint Business Intelligence 8.2.15.
Deltek Costpoint Business Intelligence 8.2.15 Team Contents Guide	This document provides a list of the reports in each reporting package and references to the Costpoint Business Intelligence guides that contain report descriptions and related information.
Deltek Costpoint Business Intelligence 8.2.15 Reports List	This document includes the list of all reports that are provided in this release.
Deltek Costpoint Business Intelligence 8.2.15 Smart AI Guide	This document provides information about the Smart AI feature in Costpoint Business Intelligence.
IBM Cognos Analytics 11.2.4 Product Documentation	IBM provides extensive documentation for Cognos Analytics, the underlying foundation for Costpoint Business Intelligence. In addition to the Cognos documentation provided with Costpoint Business Intelligence, you can find all of the most current Cognos documentation on the IBM Support website.

> **Note:** Cognos Analytics 11 documentation is also available in the online help of the main Costpoint BI page.



System Requirements

There are several requirements that you need to meet before you upgrade to Costpoint Business Intelligence 8.2.15.

Costpoint Business Intelligence 8.2.15 runs with Cognos Analytics with Watson 11.2.4 FP4.

You should have at least one of the following Deltek products:

- Deltek Costpoint 8.2.15
- Deltek Shop Floor Time 2.2

Test Environment

Deltek recommends that you use a test environment where you can emulate your existing production environment.

First, create a deployment of your content store (from production). And then, import this deployment to the non-production environment (into test). For detailed steps and other procedures for the upgrade, you can find them in this guide.

Back Up the Content Store Database

There are three major steps to back up your Content Store database.

- First, you should identify the database to back up.
- Next, back up the Microsoft SQL Server database. Or...
- Back up your Oracle database.

Identify the Content Store Database

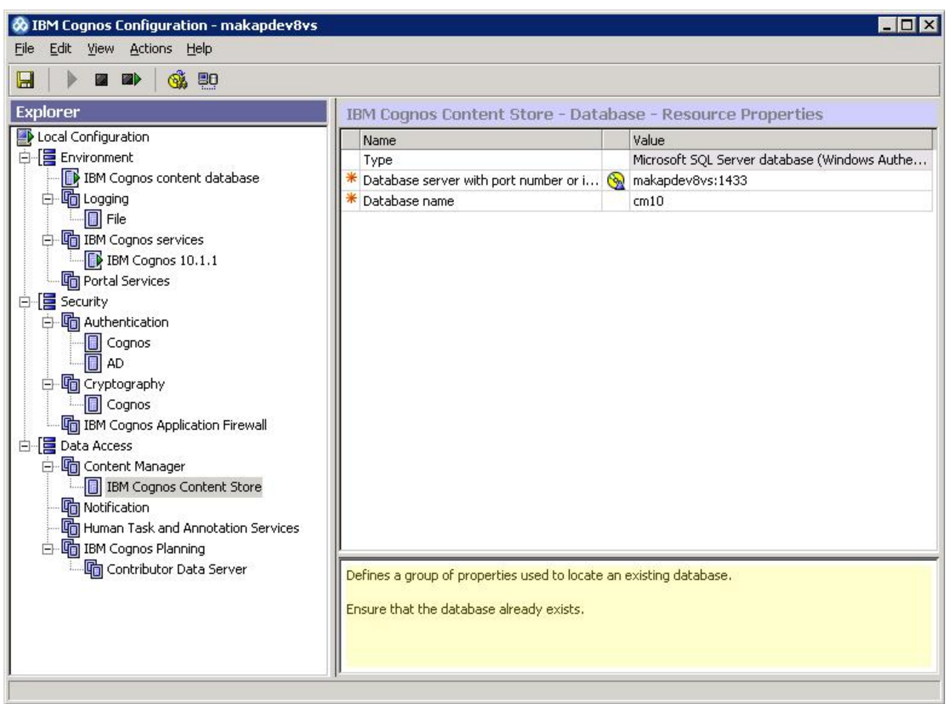
The first step in the back up process is to identify the Content Store database.

To identify your Content Store database, complete the following steps:

1. Open Cognos Configuration.
2. In the left pane, click **Data Access** » **Content Manager** » **Content Store**.

   Note: The Content Store label is a user-editable label, so this node may display with a different name in your version of Cognos Configuration.

   The right pane displays details on which database Cognos uses as the Content Store.

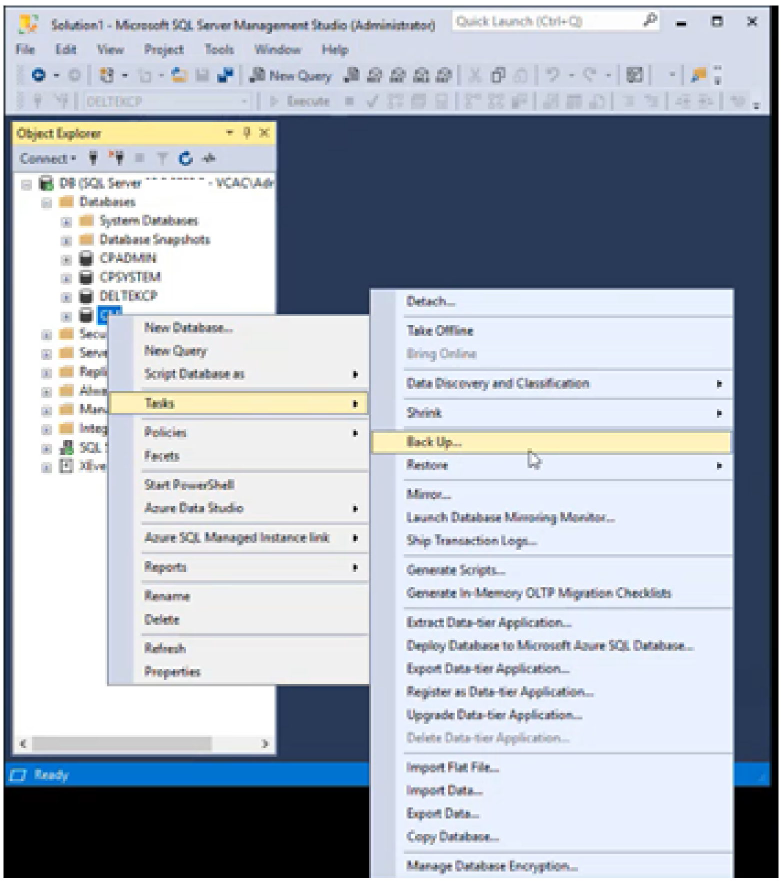


Back Up the Microsoft SQL Server Database

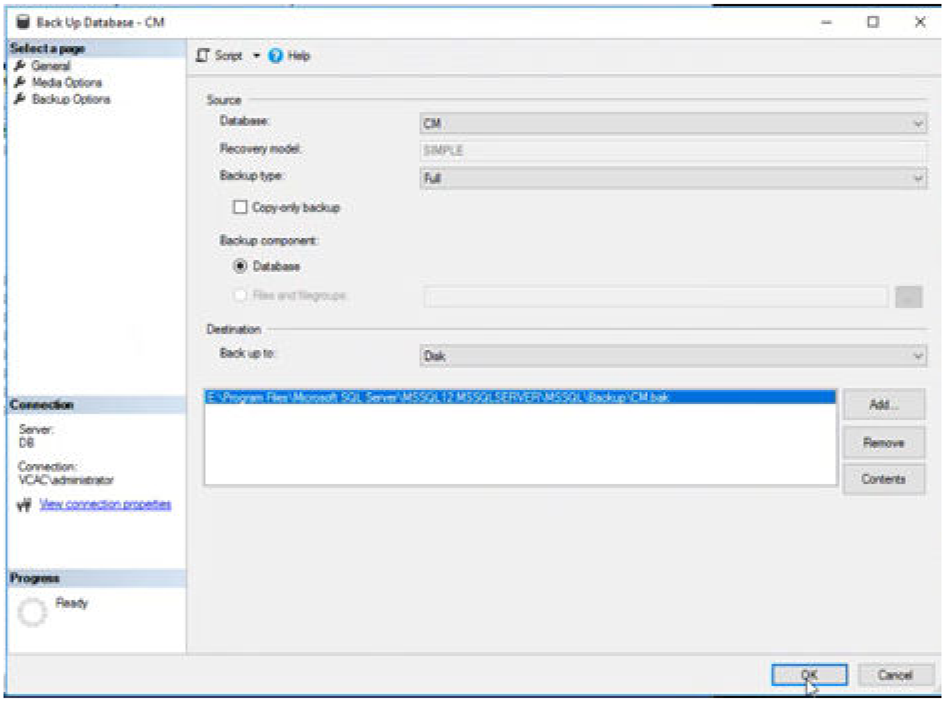
Your Content Store database may be a Microsoft SQL Server. There are several steps to back up this database.

To back up your Content Store database (Microsoft SQL Server):

1. Open Microsoft SQL Server Management Studio.
2. Right-click the **CM** database, and click **Tasks** » **Back Up**.



3. On the Back Up Database dialog box, select **Full** in **Backup type**, specify the location of the backup file in **Destination**, and click **OK**.



4. When a message displays and states that the backup has been completed successfully, click **OK**.
5. Close SQL Server Management Studio.

> **Note:** Deltek strongly recommends that you test your database backup before proceeding with the remainder of this installation.

Back Up the Oracle Database

Your Content Store database may be an Oracle server. There are several steps to back up this database.

To back up your Content Store database (Oracle), complete the following steps:

1. On the database server that hosts the Content Store database, execute an Oracle command similar to the following:

```
exp system/<Password>@<Oracle_Sid_Instance> file=CM.DMP
log=CMBackup.log owner=COGNOS10
```

> **Note:** <Password> is the Oracle SYSTEM user's password, and <Oracle_Sid_Instance> is the Oracle instance that hosts your Cognos Content Store database.

2. Open the CMBackup.log file with a text editor (for example, Notepad), and search for any 'ERROR:' messages.

3. If any ‘ERROR:’ messages are found, contact Deltek Support Center.

> **Note:** Deltek strongly recommends that you test your database backup before proceeding with the remainder of this installation.

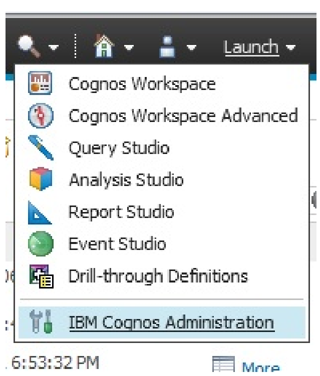
Back Up the Costpoint Business Intelligence Implementation

Before you begin the Costpoint Business Intelligence upgrade, you should export your current Costpoint Business Intelligence or Costpoint Enterprise Reporting folder in Cognos Connection or Cognos Analytics. This will provide you with a restore point if the upgrade overwrites a report that you customized and forgot to rename prior to importing the new deployment ZIP file.

Warning: Aside from the Costpoint BI or CER backup, it is also important that you make a backup copy of your Framework Manager models, particularly if you have created custom versions of any of the models.

To back up the Costpoint BI or CER folder:

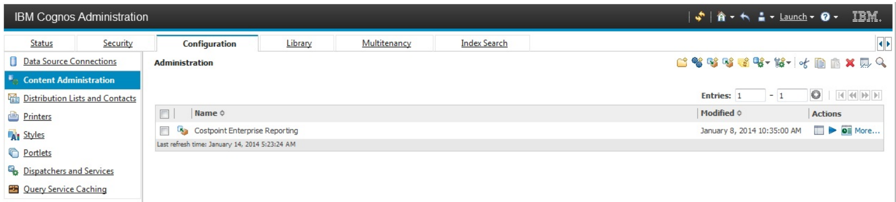
1. Open your web browser, and navigate to Cognos Connection.
   - If you are using the server itself, you normally find it at http://localhost/ibmcognos.
   - If you are using a different computer, replace “localhost” with the server name.
   - If your installation defined a different IIS virtual directory name other than ibmcognos, replace “ibmcognos” with the custom virtual directory name.
   - If you are using Cognos Analytics, go to the Welcome portal and click **Manage** » **Administration Console**. And then, proceed to step 3.
2. In the upper-right corner of the Cognos Connection screen, click **Launch** » **IBM Cognos Administration**.



Note: If you are coming from the Welcome screen, click the **IBM Cognos content** link.

3. In IBM Cognos Administration, click the Configuration tab and click **Content Administration** in the left pane to display the Export and Import job lists.
   - If you have already created an Export job for Costpoint BI or CER, you can run that instance to create your backup.

- If you have not created an Export job for Costpoint BI or CER, follow the steps in the Create an Export Job and Back Up CER section to create one.

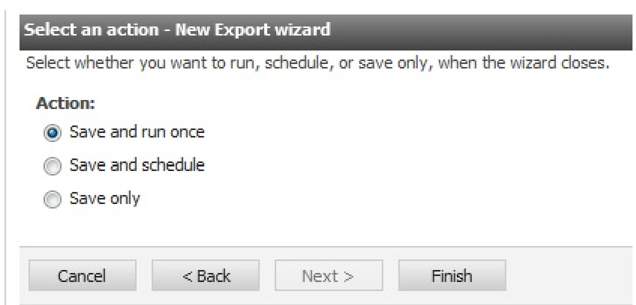


Create an Export Job and Back Up Costpoint BI

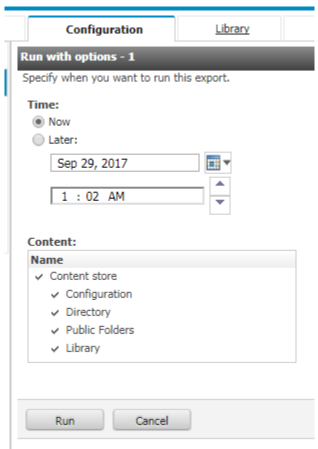
There are several steps to follow to create an Export job and back up Costpoint BI.

To create an Export job and back up Costpoint BI (or CER), complete the following steps:

1. Click the **New Export** icon .
2. Enter a name for the export, and click **Next**.
3. Select the **Select the entire Content Store** deployment method, and click **Next**. The next screen displays a blank list of items to export.
4. On the Specify a deployment archive screen, enter a **New archive** name. Click **Next**.
5. On the Enter an encryption password screen, enter a **Password** for the archive and fill out the **Confirm Password** field. Click **OK**.
6. On the Review the Summary screen, review the entries you made to create the Export job, and click **Next**.
7. On the Select an action screen, select **Save and run once**, and click **Finish**.

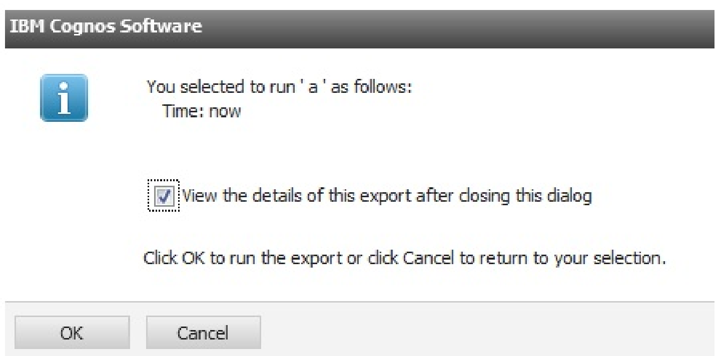


8. On the Run with options screen, select **Now**, and click **Run**.



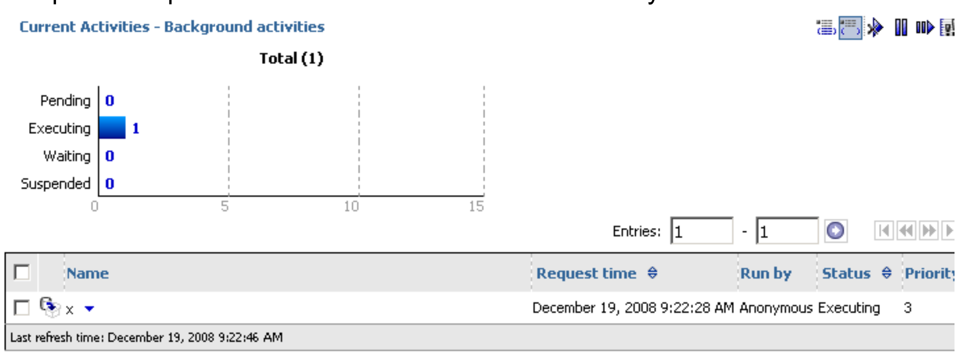
9. Select the **View the details of this import after closing this dialog** option before you click **OK** to see the export progress.

   Refresh the page (press **F5**) to see the updated status.



10. After the executing task is cleared from the page (you need to refresh the page to update the view), check the deployment folder to see if your ZIP file has been generated.

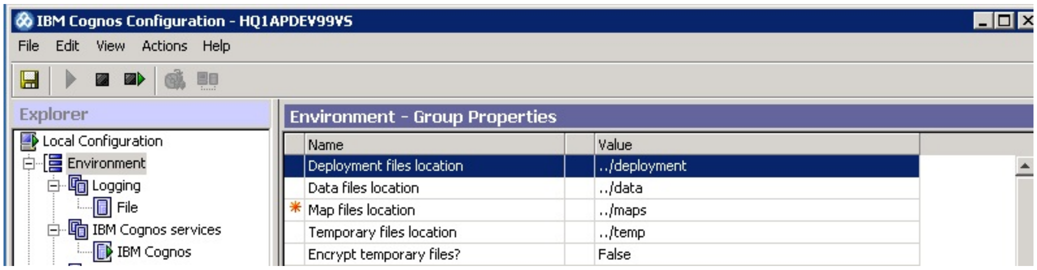
    Keep a backup of this ZIP file in a different location so you can restore it.



> **Note:** Take note of the name and location of ZIP file.

11. If you do not know the location of the deployment folder, run Cognos Configuration, expand **Local Configuration**, and click **Environment**.

The location is displayed in the **Value** column for the **Deployment files location** parameter. If it is a relative path, it will be in the Cognos installation directory.



Back Up Your Framework Manager Models

You need to back up your Framework Manager Models before you upgrade your Costpoint Business Intelligence implementation.

To back up your framework models:

1. In Windows Explorer, navigate to the location of the framework models with extension .cpf and .xml.

   The default location of the model files are:

   - **For CER 7.1.4 and above** — C:\Program Files (x86)\Deltek \CostpointBusinessIntelligence\CBI<*version*>\<product/area>\model
   - **For CER 7.1.3 and lower** — C:\Deltek\CostpointEnterpriseReporting\<*CER version*> \<product/area>\model

   For example, the default location for **Accounts Receivable.cpf** and **model.xml** files for Costpoint BI 8.2.4 is C:\Program Files (x86)\Deltek\CostpointBusinessIntelligence \CBI824\Accounts Receivable\model.
2. Copy the .cpf and .xml files of the models that you want to back up to a separate location or directory.

   > **Note:** Remember the backup files and location. You will need these files when you upgrade.

Back Up Your Analytics Folder

Do this procedure if you will upgrade from an existing Cognos Analytics 11 installation. You need to back up the **Analytics** folder in your Cognos server to save the current configurations for Cognos, CAP, JDBC drivers, customized logos, and other objects that you use in your Cognos Analytics implementation.

To back up the Analytics folder:

1. In your Cognos server, go to **C:\Program Files\ibm\cognos** .
2. Look for the **Analytics** folder and copy.
3. Put the copied **Analytics** folder in a different and safe directory location.

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**.

   > **Note:** 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.

   > **Note:** 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.

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

Installing Cognos Analytics with Watson

When you install the Cognos Analytics with Watson 11.2.4 FP4 software on your application server, the installation includes the Cognos Workspace, Reporting, and Data Modeling components.

This section includes instructions for installing the Cognos Analytics with Watson 11.2.4 FP4 software on your application server.

Note: Costpoint Business Intelligence leverages on Cognos Analytics software. The installation instructions in this section are just one of many possible installation solutions. In certain situations, the Costpoint Business Intelligence installation may require special consideration. There are variables that may affect your installation such as in the case of multiple server installation, load balancing, database replication, or firewall and DMZ deployments.

Attention: If you are performing an advanced installation, refer to the IBM documentation for this version of Cognos Analytics. 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.

Note:

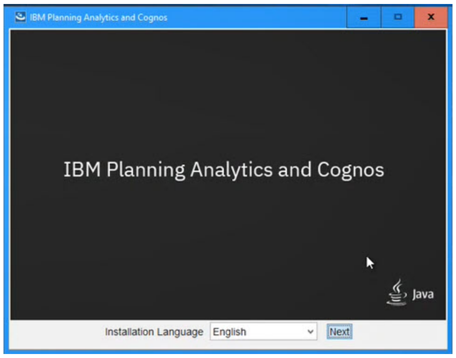
- Cognos Analytics Server components are the only true 64-bit components of Cognos Analytics. The 64-bit Cognos Analytics Server component must be installed on a 64-bit server.
- Cognos Analytics components (Framework Manager) are not 64-bit components, but they can be installed on the 64-bit server 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 11.2.4 FP4 software in your application server.

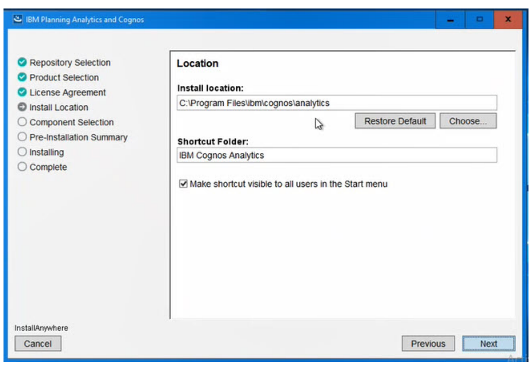
To install Cognos Analytics Server 11.2.4 FP4, complete the following steps:

1. Go to the location of the **analytics-installer-3.7.31-win.exe** that you downloaded from Deltek Software Manager.
2. Right-click **analytics-installer-3.7.31-win.exe** file and select **Run as administrator**.
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 - 11.2.4** and click **Next**.
5. On the **License Agreement** screen, review 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**.

   Note: 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.

   For upgrades, a dialog box may appear that tells you that your chosen location has files of your old Cognos Analytics installation and that they may be overwritten. Just click **Yes**. However, be sure that you have already made a back-up of your existing CER or Costpoint BI implementation. A dialog box may also appear that tells you that your files can be preserved. You can either select **Yes** to preserve, otherwise, click **No**.
7. On the **Choose components** screen, select **Content Tier**, **Application Tier**, and **Gateway**, and then click **Next**.
8. On the **Pre-Installation Summary** screen, review the information, and click **Install**.

   The installation progress displays at the bottom of the Installation Progress screen. When the installation is complete, the Finish screen displays.
9. Click **Done** to complete the installation.

Configuring IIS with Cognos Analytics with Watson

Configuring Microsoft Internet Information Server (IIS) to support IBM Cognos Analytics with Watson is different than the procedure performed when you set it in previous versions of IBM Cognos such as version 10.

> **Note:** If you are upgrading from Cognos Analytics 11.0.x, you may skip this procedure of configuring your IIS.

To set up IIS with Cognos Analytics, follow the procedure on the IBM website, Configuring IIS with Cognos Analytics .

An automated procedure is also available to configure Microsoft's IIS to support IBM Cognos Analytics on the IBM website, Automate the configuration of Microsoft's Internet Information Service to support IBM Cognos Analytics You need the following as pre-requisite to run this automated procedure.

Microsoft IIS installed with the following features:

- **World Wide Web Services** » **Application Development Features** » **ISAPI Extentions and Isapi Filters**
- **World Wide Web Services** » **Security** » **Request Filtering and Windows Authentication**

Configuring the Cognos Analytics Data Access from Cognos Configuration

You must configure the Cognos Analytics Data Access object to point to the Content Store database, for example **cm**, that you made a back up of using the instructions in the Back Up the Content Store Database 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 (for Upgrade Install)

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.

   A dialog box may appear that informs you that old configuration files were found and were upgraded to the latest version. Click **OK**.
2. From the **Explorer** pane on the left side of the screen, expand **Data Access** » **Content Manager**, and click **Cognos Content Store**.
3. In the **Cognos Content Store** section, enter the details in the following table.

   Note: If the old CM database is still connected to MS SQL server, skip this step and proceed to Step 6.

Option	Description
Type	If **Type** is set to something other than **Microsoft SQL Server database**, delete the entire Cognos Content Store folder and add a new Content Store with **Microsoft SQL Server database** in **Type**.
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 the database name. For example, **cm**.

4. 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.

> **Note:** 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.

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

> **Note:** 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 (for Upgrade Install)

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. In the Content Store area, enter the following:

Option	Description
Type	If **Type** is set to something other than **Oracle database**, delete the entire Cognos Content Store folder and add a new Content Store with **Oracle database** in **Type**.

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.
Service name	Enter the service name. For example, **cm**.

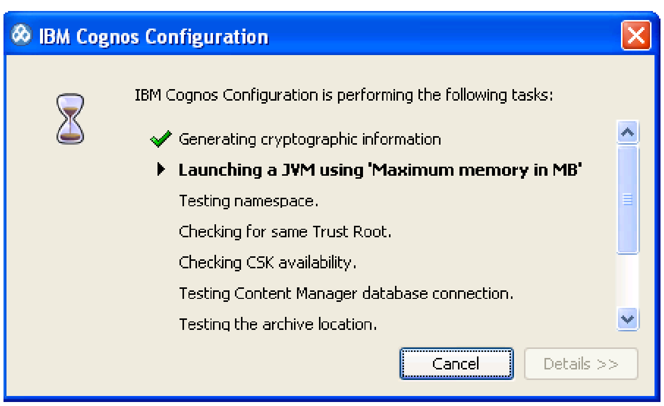
4. If you are setting up email notification now, select **Notification** under **Data Access** in the **Explorer** pane, and enter the following:

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.

> **Note:** 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.

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

   A dialog box displays the server startup status.



8. When the process is complete, review the details by clicking the **Details** button.

9. Close the dialog box, and exit Cognos Configuration.

Rename Reports and Folders

The Labor Utilization report, Costpoint Enterprise Reporting for Shop Floor Time folder, and Costpoint Enterprise Reporting for Costpoint Administration folder have all been renamed in the Costpoint BI 8.2. release. To avoid issues in importing these updates, you must rename your existing versions.

To rename the report and folders:

1. In Costpoint BI, navigate to the **Labor Utilization** report located in **Team Content** » **Planning** » **Reports**.
2. Click the **Action menu** icon (⋮) beside the **Labor Utilization** report and select **Edit name and description**.
3. Change the name and then **Save**.
4. Repeat steps 1 to 3 for the following folders:
   - Go to **Team Content** and look for **Costpoint Enterprise Reporting for Costpoint Administration**. Rename **Costpoint Enterprise Reporting for Costpoint Administration** to **Costpoint Administration**.
   - Go to **Team Content** and look for **Costpoint Enterprise Reporting for Shop Floor Time**. Rename **Costpoint Enterprise Reporting for Shop Floor Time** to **Shop Floor Time**.

   .

Remove Shortcuts to Some Reports

In Costpoint BI 8.2, the shortcut to the Accounts Receivable Aging report was replaced by a report view. To avoid issues in the installation, this shortcut must be removed.

You should only perform this procedure if you have the shortcuts to the following reports. Otherwise, proceed to the next section of this document.

- **Accounts Receivable Aging** (**Team Content** » **Projects** » **Reports**)
- **Team Content** » **Materials**
  - **Audit Log**
  - **Indented Bills of Materials**
  - **Summarized Bills of Materials**

To remove the Accounts Receivable Aging shortcut:

1. In Costpoint BI, go to **Team Content** » **Projects** » **Reports**.
2. Look for the **Shortcut to Accounts Receivable Aging** and click the **Action menu** (⋮) icon adjacent to it.
3. Select **Delete**.
4. Repeat steps 1 to 3 to remove the following shortcuts in **Team Content** » **Materials**:
   - **Delete** shortcut to **Audit Log**
   - **Delete** shortcut to **Indented Bills of Materials**
   - **Delete** shortcut to **Summarized Bills of Materials**

Import CER Content Store Deployment to Test Environment

Perform this procedure if you are setting up your non-production (test) environment. It is not necessary to perform this procedure when you are just upgrading to Cognos Analytics 11.

Import Created Deployment into the Test Environment

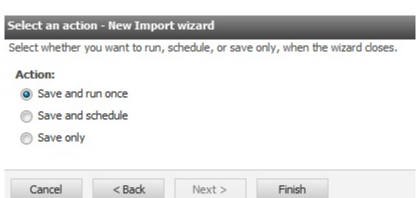
When you import your previous CER or Costpoint BI implementation (created in the "Create an Export Job and Back Up Costpoint BI" section), the process automatically upgrades it to the Cognos environment that you are using.

To import the created deployment and upgrade to Cognos 11.2.4:

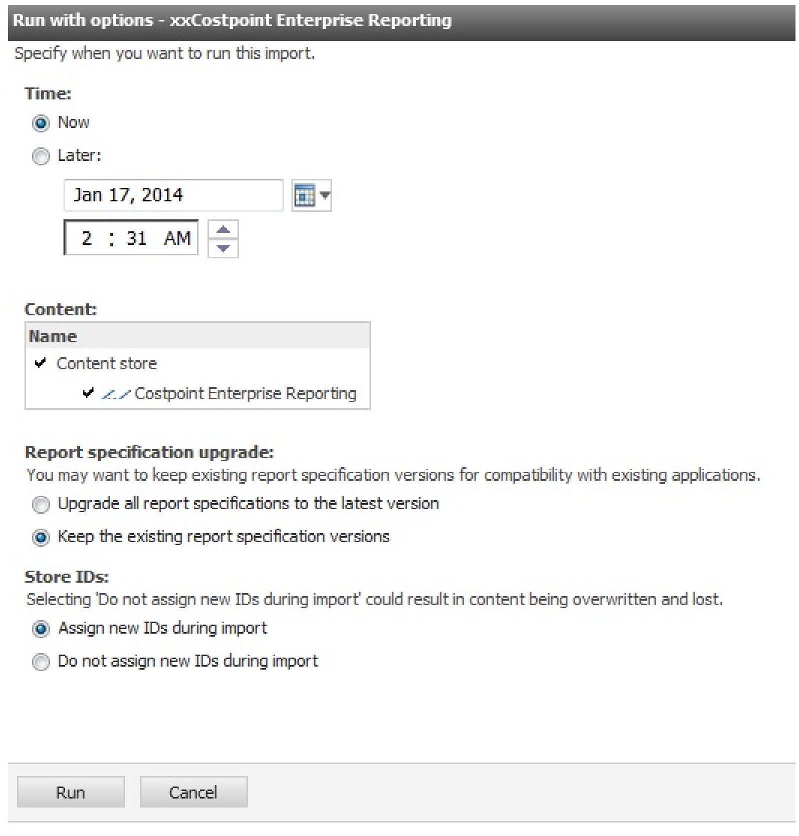
1. Copy the ZIP files into the deployment folder from your install location, if they do not already reside in the folder.

   > **Note:** If you do not know the location of the deployment folder, run Cognos Configuration, expand **Local Configuration**, and click **Environment**.

   The location displays in the **Value** column for the **Deployment files location** parameter. If it is a relative path, it will be in the Cognos installation directory.
2. Open your web browser, go to the Cognos Analytics with Watson portal using http://<your host server name>:9300/bi/.
3. Click the **Open menu** (☰) and then click **Manage** » **Administration Console**. Click the **Configuration** tab.
4. Click **Content Administration** in the left pane.
5. Click the **New Import** icon .
6. Under **Select a deployment archive**, select the backup file from which you want to import content, and click **Next**.
7. Enter the encryption password .
8. Under **Specify a name and description**, enter a name for the import, and click **Next**.
9. Review the information on the **Review the summary** screen, and click **Next**.
10. Under **Select an action**, select **Save and run once**, and click **Finish**.

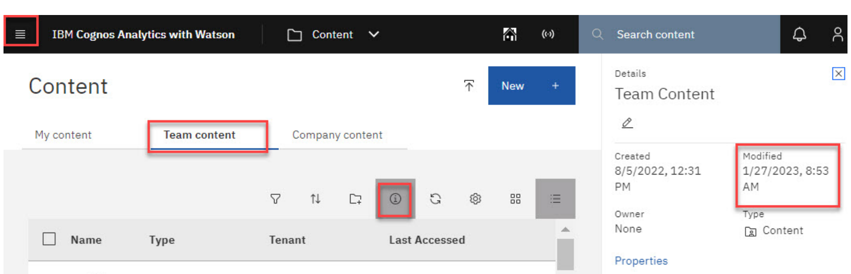


11. Under **Run with options**, select **Now**, and click **Run**.



12. On the next screen, Deltek recommends that you select **View the details of this import after closing this dialog** to see the import progress.
13. Click **OK** to import the reports, and press **F5** to refresh the page and see the updated status.
14. After the process finishes, check the Team Content location in Cognos Analytics to see if the last modified dates have changed. Click the **Team content** tab. And then, click the **Open menu** icon ( ). Afterwards, click the **Details** icon ( ). The **Details** pane displays.

> **Note:** If the last modified dates remain unchanged after the process has finished, you may have either imported the reports in a different location or you have selected the default **Keep the existing report specification versions** option on step 11.



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 Business Intelligence.

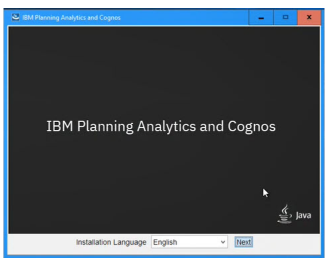
Attention: If you are performing an advanced installation, refer to the IBM website of how to install Cognos Analytics with Watson 11.2.x. It is also recommended that you contact ConsultingSalesRequest@deltek.com for assistance.

Install Cognos Framework Manager 11.2.4 FP4

When you install Cognos Framework Manager 11.2.4 FP4 on your application server, you should select the client repository file.

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

1. Go to the location of the **analytics-installer-3.7.21-win.exe** that you downloaded from Deltek Software Manager.
2. Right-click **analytics-installer-3.7.21-win.exe** and select **Run as administrator**.
3. On the first screen, select the language that you will use for the installation. Click **Next**.



4. On the **Let's get started!** screen, select **IBM Cognos Framework Manager - 11.2.4**. Click **Next**.
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 where you want to install Cognos Framework Manager, and click **Next**.

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

   For upgrades, a dialog box may appear that tells you that your chosen location has files of your old Cognos Analytics installation and that they may be overwritten. Just click **Yes**. However, be sure that you have already made a back-up of your existing CER or Costpoint BI implementation. In addition, old files may also be preserved and a dialog box will display during this step that has the directory location.
7. On the **Pre-Installation Summary** screen, review the information and click **Install**. The installation progress displays at the bottom of the screen. When the installation is complete, the Finish screen displays.

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

Upgrade Previous Framework Manager Models to Cognos 11.2.4

The Framework Manager models in your previous CER implementation must be upgraded to the Cognos 11.2.4 in order to use it for Costpoint Business Intelligence 8.2.x.

Prepare the backup of your Framework Manager models that were created in Back Up Your Framework Manager Models section.

To upgrade your old Framework Manager models to Cognos 11.2.4, complete the following steps:

1. Navigate to the location of the backup of your Framework Manager models and look for the *.cpf and *.xml files (for example, **Costpoint Enterprise Reporting.cpf** and **model.xml**).
2. Run IBM Cognos Framework Manager.
3. Click **Open a project...**, and select the backup model's CPF file.
   Opening the old model will automatically upgrade it to Cognos 11.2.4.
4. After the model has been upgraded to Cognos 11.2.4, click **File** » **Save**.
5. Click **File** » **Close** to close the Framework Manager model.
6. Repeat steps 3-5 for the other Framework Manager models.

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 onwards.

> **Note:** Verify if you already have the latest driver in **C:\Program Files\ibm\cognos\analtyics\drivers**. If you have the correct JDBC Driver version, you can skip this step and proceed to the next.

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.

> **Note:** The MS JDBC driver will depend on the MS SQL server database that you are using. Go to the Microsoft website as reference when choosing the right JAR file. Just make sure that it is for JRE 8.0.

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

To learn more about other configuration actions, see the IBM website, Critical Configuration Actions.

Install Costpoint Business Intelligence 8.2.x

Be sure to check the system requirements first before you install Costpoint Business Intelligence 8.2.x.

Installation Procedure

There are several steps to follow when you install Costpoint Business Intelligence 8.2 or 8.2.x.

Note: Even if you want to retain your existing Costpoint Enterprise Reporting or Costpoint Business Intelligence implementation and do not want to upgrade to Costpoint Business Intelligence 8.2.x, perform this procedure to download a copy of the change scripts so that you can update your framework manager models. This procedure also enables you to download the branding images. For more information in applying the Deltek branding, see the "Apply the Deltek Theme to Cognos Analytics" section in the *Costpoint Business Intelligence 8.2.x Post Installation and Configuration Guide for On-premises Users.*

Warning: If you have an existing CER or CBI installation, make sure that you made a backup of your CER or CBI folders. The Costpoint Business Intelligence 8.2 installation process will overwrite existing CER or CBI folders in your installation directory.

To install Costpoint Business Intelligence 8.2.x:

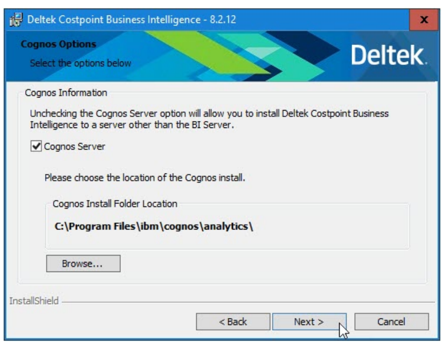
1. Download Costpoint Business Intelligence 8.2.x from the Product Downloads page of the Deltek Support Center site (https://support.deltek.com), and extract the contents of the downloaded file.
2. From the application server, use Windows Explorer to go to the folder to which you downloaded Costpoint Business Intelligence 8.2.x.
3. Right-click the **DeltekCostpointBusinessIntelligence8_2.x.exe** file and click **Run as administrator** to begin the installation.
4. On the Welcome screen, a prompt displays and tells you that the InstallShield(R) Wizard allows you to remove the existing Costpoint BI files and folders in your machine. The dialog box displays the version number of the currently installed Costpoint BI software. Deltek recommends that you close all other open programs before continuing with the installation. Click **Next**.
5. Click **Remove** to delete existing Costpoint BI files and folders in the default installation location.

   Warning: The default folder location is **C:\Program Files (x86)\Deltek \CostpointBusinessIntelligence**. This folder may be different from earlier releases of CER or Costpoint BI. Make sure that you have backup copies of your Costpoint BI folders, Framework Manager models, and Cognos Analytics folder.

Note: If you do not have existing Costpoint BI files and folders, skip this and the succeeding steps and proceed to step 9.

6. Click **Finish** after the files have been removed.
7. Go back to the **DeltekCostpointBusinessIntelligence8_2.x.exe** file and right-click and select **Run as administrator** to begin the installation.
8. On the Welcome screen, click **Next**.
9. Specify the folder where you want to install Costpoint Business Intelligence 8.2.x, and click **Next**.
10. On the Cognos Options screen, do one of the following actions:
    - If you are installing on the Cognos server, select the **Cognos Server** check box, and then specify the Cognos Install Folder Location. Click **Next**.
    - If you are not installing on the Cognos server, clear the check box, and click **Next**.

Note: If you clear the **Cognos Server** check box, you can still proceed with the installation which will enable you to download the files needed for the Costpoint Business Intelligence 8.2.x upgrade, such as deployment files and change scripts. The dialog box displays the Costpoint BI version you are installing. Your version number may be different than the one displayed on the succeeding screen shot.



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

Warning: 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.

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

Import the Deltek Content into Cognos Analytics

Deltek recommends that you import the Deltek Content in this Costpoint Business Intelligence release to get the latest versions.

You can import these reports after you have upgraded to Cognos Analytics with Watson 11.2.4 FP4.

New Deployment Files/Reports

This release includes new deployment files and reports that you can use.

The deployment file is **CPBI 8.2.x.zip** where **x** refers to the last digit of the version number. For example, **CPBI 8.2.15.zip**.

You can find the deployment file in C:\Program Files (x86)\Deltek\CostpointBusinessIntelligence \CBI82x\Deploy, where x corresponds to the last digit of the release number.

Notes on Importing Reports

There are some notes to consider when you import reports.

- Deltek does not recommend deploying reports to any location other than the standard location under Team Content because of the danger of breaking links to packages, common library reports, and drill reports. However, if you want to deploy reports to a different location, it is important that you read the information in Deploying Reports to a Location Other Than the Standard Location before you begin the import procedure.
- Be sure you import new versions of drill-through reports into Cognos with their standard names. If you change the name of a report that is a drill-through target, the drill-through will take you to the old version of the report rather than the current version. If you want to preserve the old version, you should rename it and use the standard name for the new version.

Import Deltek Content

There are several steps to follow when you import Deltek content.

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

1. Copy the **CPBI 8.2.15.zip** file into the deployment folder from your install location, if it does not already reside in the folder.

   If you do not know the location of the deployment folder, run Cognos Configuration, expand **Local Configuration**, and click **Environment**. The location displays in the **Value** column for the **Deployment files location** parameter. If it is a relative path, it will be in the Cognos installation directory.
2. Open your web browser and the Cognos Analytics with Watson home page using http://<your host server name>:9300/bi/.

3. Click the **Open menu** icon (▤) and then click **Manage** » **Administration console**. Click the **Configuration** tab.
4. Click **Content Administration** in the left pane.
5. Click the **New Import** icon .
6. Under **Select a deployment archive**, select the **CPBI 8.2.15** file from which you want to import reports, and click **Next**.
7. Enter **InstallCPBI** in the **Password** field. Click **OK**.

   > **Note:** This password is required by IBM Cognos Analytics with Watson to unzip a data set into the content store upon installation. In this version Deltek has provided a Calendar Data Set which allows for using relative time (such as, Current Period, Prior Year Period, and so on) in a data module. The inclusion of this data set has caused the need for this password.

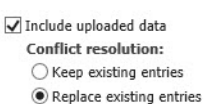
8. Under **Specify a name and description**, enter a name for the import. If you are logged on as an admin tenant, click **Clear** in the **Tenant** field. Click **Next**.
9. Under **Select the public folders content**, select the appropriate folder so it will be included in the import, and click **Next**.

   Deltek recommends that you import the **Administration** folder that is needed to run the legacy reports.

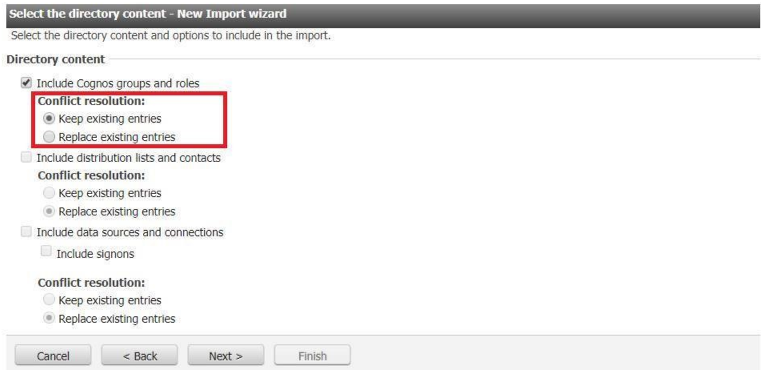
   For upgrades, do not select the **Company content** folder if you want to preserve its contents in your current implementation.

   > **Note:** 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 reports to a different location, it is important that you read the information in Deploying Reports to a Location Other Than the Standard Location before you begin the import procedure.

   Under **Options**, make sure that the **Include uploaded data - Replace existing entries** is selected.

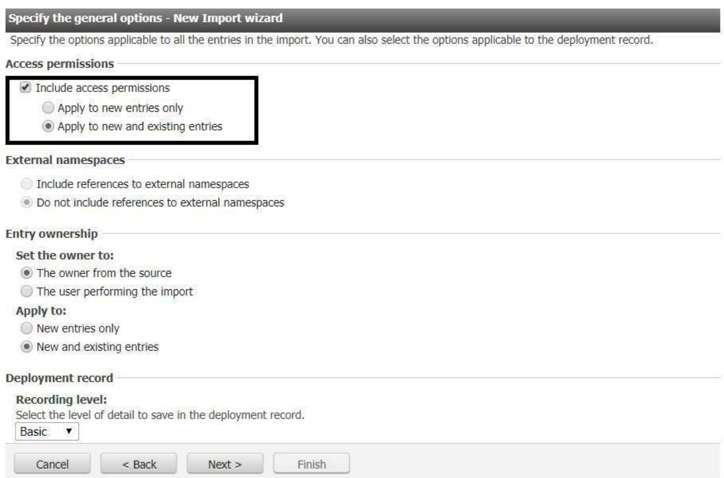
   

10. On the Select the directory content screen, select the **Include Cognos groups and roles** check box. Select **Keep existing entries**. Click **Next**.



Attention: Make sure to select the **Keep existing entries** option. Otherwise, your existing mapped Cognos groups will be overwritten because the Deltek CAP groups are not the same as your own CAP groups.

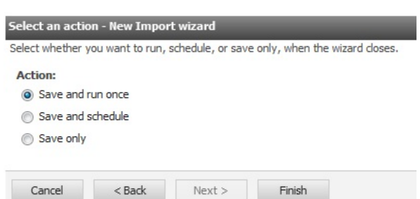
11. On the Specify the general options screen, select the **Include access permissions** check box. And then select **Apply to new and existing entries** option. Click **Next**.



Note: If you select the **Include access permissions - Apply to new entries only** option, the new Deltek security groups will not be added to your installation.

A summary of your import parameters displays.

12. Review the information under **Review the summary**, and click **Next**.
13. Under **Select an action**, select **Save and run once**, and click **Finish**.



14. From the Run with options screen, click **Run**.
15. Click **OK** to confirm the run options.

> **Note:** After you have successfully imported the reports, make sure to delete the duplicate reports (if any) in the old location. Removing the report files will avoid conflict with the new versions of the reports.

Costpoint Authentication Provider

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

CAP is the tool that verifies your user credentials whenever you access Costpoint BI in Costpoint. It checks for your Costpoint BI user group and access rights that are set up one time in Costpoint and in Costpoint Business Intelligence.

Cognos and Costpoint User Groups Mapping Table

> **Note:** 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 Accounting All Secure	CER__ACCT_ALL_SECURE	CER Accounting All Secure	Object Security	This is a Deltek group used to set permissions on all secure Accounting content.
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.
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.

Group or Role in Cognos	Group ID in Costpoint	Group Name in Costpoint	Use	Description
CER Advanced Lite	CER__ADV_LITE	CER Advanced User Lite	Cognos Capabilities	This is similar to CER__ADV but with limited capabilities.
CER All	CER__ALL	CER All	Object Security	This is a Deltek group used to set permissions for all domains.
CER Accounts Payable Secure	CER__AP_SECURE	CER Accounts Payable Secure	Object Security	This is a Deltek group used to set permissions on secure Accounts Payable content.
CER Accounts Receivable Secure	CER__AR_SECURE	CER Accounts Receivable Secure	Object Security	This is a Deltek group used to set permissions on secure Accounts Receivable content.
CER Billing Secure	CER__BILL_SECURE	CER Billing Secure	Object Security	This is a Deltek group used to set permissions on secure Costpoint Billing content.
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 Contracts	CER__CONTRACTS	CER Contracts	Object Security	This is a Deltek group used to set permissions on Contract & Opportunity Management content such as dashboards, packages, reports, and others.
CER CP Administrator	CER__CP_ADMIN	CER Costpoint Administrator	Object Security	This is a Deltek group used to set permissions on Costpoint Administration content.
CER Developer	CER__DEV	CER Developer	Cognos Capabilities	This is a Deltek role used to secure capabilities in the IBM Cognos software based

Group or Role in Cognos	Group ID in Costpoint	Group Name in Costpoint	Use	Description
				on Deltek's licensing structure.
CER Development	CER__DEVELOPMENT	CER Development	Object Security	This is an object security group, and users assigned can create managed content in the company content area.
CER Employee Secure	CER__EMPL_SECURE	CER Employee Secure	Object Security	This is a Deltek group used to set permissions on secure Employee content.
CER Executive Secure	CER__EXEC_SECURE	CER Executive Secure	Object Security	This is a Deltek group used to set permissions on secure executive content in Costpoint BI.
CER Expense Secure	CER__EXPENSE_SECURE	CER Expense Secure	Object Security	This is a Deltek group used to set permissions on secure expense content.
CER Fixed Assets	CER__FA_SECURE	CER Fixed Assets	Object Security	This is a Deltek group used to set permissions on Costpoint Fixed Assets content.
CER General Ledger Secure	CER__GL_SECURE	CER General Ledger Secure	Object Security	This is a Deltek group used to set permissions on secure General Ledger content.
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 Human Resources Secure	CER__HR_SECURE	CER Human Resources Secure	Object Security	This is a Deltek group used to set permissions on secure Human Resources content.
CER Labor Secure	CER__LABOR_SECURE	CER Labor Secure	Object Security	This is a Deltek group used to set permissions

Group or Role in Cognos	Group ID in Costpoint	Group Name in Costpoint	Use	Description
				on secure Labor content.
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 Materials Secure	CER__MATERIAL_SECURE	CER Materials Secure	Object Security	This is a Deltek group used to set permissions on secure Costpoint Materials content.
CER Manufacturing Secure	CER__MFG_SECURE	CER Manufacturing	Object Security	This is a Deltek group used to set permissions on secure Manufacturing content
CER Materials Manufacturing All Secure	CER__MM_ALL_SECURE	CER Materials Manufacturing All Secure	Object Security	This is a Deltek group used to set permissions on all secure Materials Manufacturing content
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.
CER Planning (Projects) Secure	CER__PLAN_PRJ_SECURE	CER Planning (Projects) Secure	Object Security	This is a Deltek group used to set permissions on secure project based Planning content.
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 Procure Secure	CER__PROCURE_SECURE	CER Procurement	Object Security	This is a Deltek group used to set permissions

Group or Role in Cognos	Group ID in Costpoint	Group Name in Costpoint	Use	Description
				on secure Procurement content.
CER Projects	CER__PROJECTS	CER Projects	Object Security	This is a Deltek group used to set permissions on Costpoint project content such as reports, dashboards, stories, packages, and others.
CER Project Secure	CER__PROJ_SECURE	CER Project Secure	Object Security	This is a Deltek group used to set permissions on secure Costpoint Project content.
CER Payroll Secure	CER__PR_SECURE	CER Payroll Secure	Object Security	This is a Deltek group used to set permissions on secure Costpoint Payroll content.
CER Role Security Group	CER__ROLE_SEC	CER Role Security Group	Project Security	
CER Subcontractor Management Secure	CER__SUBK_SECURE	CER Subcontractor Management Secure	Object Security	This is a Deltek group used to set permissions on secure Subcontractor Management content.
CER Time & Expense	CER__TE	CER Time & Expense	Object Security	This is a Deltek group used to set permissions on Time & Expense content.
CER Time Secure	CER__TIME_SECURE	CER Time Secure	Object Security	This is a Deltek group used to set permissions on secured Time & Expense content.
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.

Group or Role in Cognos	Group ID in Costpoint	Group Name in Costpoint	Use	Description
CER Web Administrator	CER__WEB_ADMIN	CER Web Administrator	Cognos Capabilities	This is a Deltek role who is assigned to the system administrator for cloud users.

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 Costpoint Authentication Provider, the following are the major steps:

- In the Costpoint Server side:
  - Add the Tenant ID in the Configuration Utility
  - Assign CER Administrators in Costpoint
  - Assign CPSUPERUSER to Costpoint BI User Groups
- 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)
  - Set up the CAP Namespace
  - Set up the CAP_SSO Namespace
  - 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.

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.

> **Note:** You need at least one admin tenant to manage the Costpoint Authentication Provider (CAP). For more information about the Costpoint Configuration Utility, see the *DeltekCostpoint82ConfigurationUtility.pdf*.

Configure Costpoint Business Intelligence in the Costpoint Configuration Utility

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

To configure Costpoint Business Intelligence in the Costpoint Configuration Utility:

1. Launch the Costpoint Configuration Utility.
2. Click the **System** tab. And then, click the **System Integrations** tab. 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:

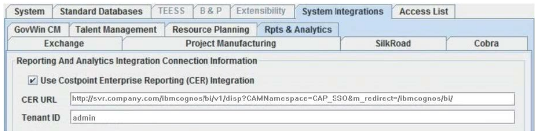
   - Server Name = svr.company.com *(the fully qualified domain name or FQDN should be included)*
   - Tenant ID in Cognos = admin

     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.company.com**/ibmcognos/bi/v1/disp?CAMNamespace=CAP_SSO&m_redirect=/ibmcognos/bi/ *OR*
   - http://**svr.company.com**/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. Save and then restart the WebLogic servers or run the Rebuild Global Settings (SYPSTNG) application in Costpoint for changes to take effect.

Assign Costpoint Business Intelligence Administrators in Costpoint

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

To assign Costpoint Business Intelligence 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**.

Add CPSUPERUSER to Costpoint Business Intelligence User Groups

You should assign **CPSUPERUSER** to all CER__ User Groups. This will make the groups visible when it is time to map Costpoint and Costpoint Business Intelligence user groups.

To add CPSUPERUSER to Costpoint Business Intelligence User Groups:

1. In Costpoint, go to **Admin** » **Security** » **System Security** » **Manage Users**.
2. Click the **Query** button.
3. On the **Manage Users** query dialog box, open the **Find** tab.
4. In the **ID** field of the **Search Criteria** group box, select **is equal to** in the drop-down and enter **CPSUPERUSER**.
5. Click **Find** button.
6. On the **Manage Users** screen, click the **Assigned User Groups** subtask.
7. Click the **New** button in the **Assigned User Groups** table window.
8. Enter or select a Costpoint Business Intelligence user group. For example, **CER__ACCTG**.

9. Repeat steps 7 to 8 for all the Costpoint Business Intelligence user groups.

   > **Note:** All Costpoint Business Intelligence User Groups has a prefix of **CER__**. Please take note of the double underscore (__).

10. 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\`*`<Costpoint version>`*
   `\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`

   > **Warning:** 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.

Create an AAA Folder

The AAA folder will hold the JAR file that supports the creation of log activities.

To create the AAA folder:

1. Open **{Cognos Server}\C:\Program Files\ibm\cognos\analytics\webapps\p2pd\WEB-INF** folder.
2. Create a new folder and label it as **AAA**.
3. Create a **lib** folder in **{Cognos Server}\C:\Program Files\ibm\cognos\analytics\webapps\p2pd\WEB-INF\AAA**.

Copy Setup Files to the Cognos Server

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

To copy the setup files to the Cognos server:

1. Go to the installation directory of Costpoint BI and open the **CAP8.2** folder. As default, the location is **C:\Program Files (x86)\Deltek\CostpointBusinessIntelligence\CBI82x \zSupport Files\CAP8.2**.
2. Copy the following files to their respective Cognos directories and replace old CAP files, if any.

Filename	Copy to this Cognos directory:
▪ **commons-dbcp2-2.1.1.jar** ▪ **commons-logging-1.2.jar** ▪ **commons-pool2-2.4.2.jar** ▪ .	**{Cognos Server}\C:\Program Files\ibm \cognos\analytics\webapps\p2pd\WEB-INF \lib**
DeltekCAP.jar	**{Cognos Server}\C:\Program Files\ibm \cognos\analytics\webapps\p2pd\WEB-INF \AAA\lib**
log4j.dtd	**{Cognos Server}C:\Program Files\ibm \cognos\analytics\configuration**

3. Open the **{Cognos Server}\C:\Program Files\ibm\cognos\analytics\webapps\p2pd \WEB-INF\lib** directory and look for the following **log4j** JAR files:
   - **log4j-api-2.x.jar**
   - **log4j-core-2.x.jar**
4. Copy the **log4j** JAR files to **{Cognos Server}\C:\Program Files\ibm\cognos\analytics \webapps\p2pd\WEB-INF\AAA\lib**.
5. Open the **C:\Program Files (x86)\Deltek\CostpointBusinessIntelligence\CBI82x \zSupport Files\CAP8.2\sample_configuration** folder and look for the **log4j2_deltek.xml** file.
6. Copy **log4j2_deltek.xml** to the **{Cognos Server}C:\Program Files\ibm\cognos \analytics\configuration** directory.

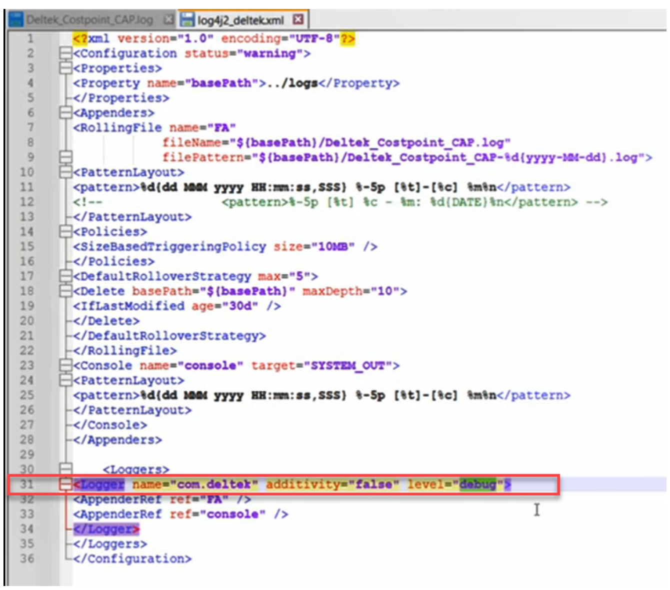
Modify log4j2_deltek.xml

Set the logging level in Costpoint BI to either **debug** or **warning**.

To set the logging level in Costpoint BI:

1. In your Cognos server, go to the **ibm\cognos\analytics\configuration** directory and look for the **log4j2_deltek.xml** file.
2. Open the **log4j2_deltek.xml** file via Notepad.
3. Set the logging level as either:

Option	Description
debug	Use this to log debug information. For example: Logger name="com.deltek" additivity="false" level="**debug**"
warning	Use this to log warning information. For example: Logger name="com.deltek" additivity="false" level="**warning**"



```
<?xml version="1.0" encoding="UTF-8"?>
<Configuration status="warning">
<Properties>
<Property name="basePath">../logs</Property>
</Properties>
<Appenders>
<RollingFile name="FA"
        fileName="${basePath}/Deltek_Costpoint_CAP.log"
        filePattern="${basePath}/Deltek_Costpoint_CAP-%d{yyyy-MM-dd}.log">
<PatternLayout>
<pattern>%d{dd MMM yyyy HH:mm:ss,SSS} %-5p [%t]-[%c] %m%n</pattern>
<!--            <pattern>%-5p [%t] %c - %m: %d{DATE}%n</pattern> -->
</PatternLayout>
<Policies>
<SizeBasedTriggeringPolicy size="10MB" />
</Policies>
<DefaultRolloverStrategy max="5">
<Delete basePath="${basePath}" maxDepth="10">
<IfLastModified age="30d" />
</Delete>
</DefaultRolloverStrategy>
</RollingFile>
<Console name="console" target="SYSTEM_OUT">
<PatternLayout>
<pattern>%d{dd MMM yyyy HH:mm:ss,SSS} %-5p [%t]-[%c] %m%n</pattern>
</PatternLayout>
</Console>
</Appenders>

    <Loggers>
<Logger name="com.deltek" additivity="false" level="debug">
<AppenderRef ref="FA" />
<AppenderRef ref="console" />
</Logger>
</Loggers>
</Configuration>
```

4. Save.

Copy and Modify the Configuration Property Files

You need to locate the **sample_configuration** folder from the extracted files from DSM. After installing Costpoint Business Intelligence 8.2, the default location is **C:\Program Files**

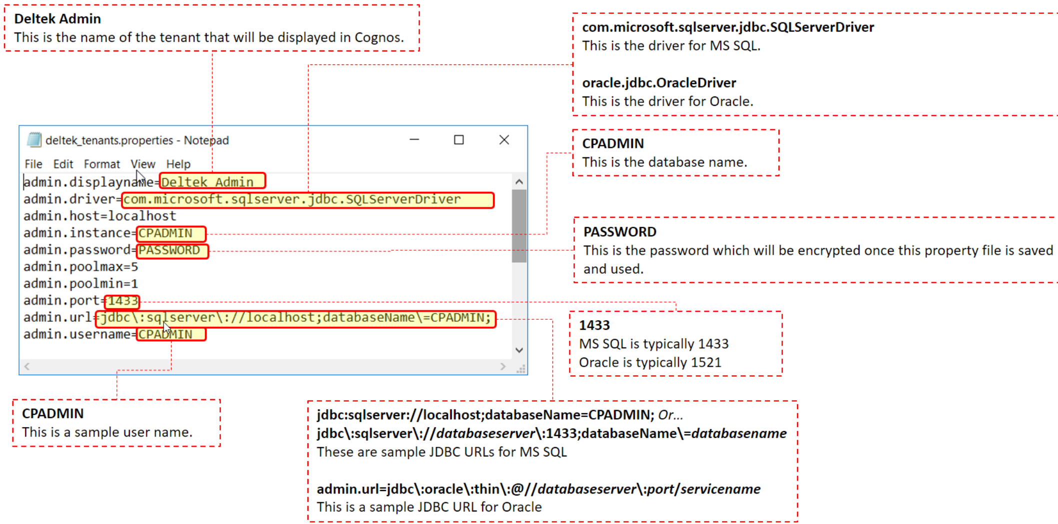
(x86)\Deltek\CostpointBusinessIntelligence\CBI820\Support Files \CAP8.2\sample_configuration.

Warning: If you are upgrading your CAP installation, go to **C:\Program Files\ibm\cognos \analytics\configuration** in your Cognos server and back up your existing **deltek_tenants.properties** file. Put the file in a safe directory location. You will need to use this file as reference when you modify the new **deltek_tenants.properties** file from CAP 8.2

To modify the configuration property files:

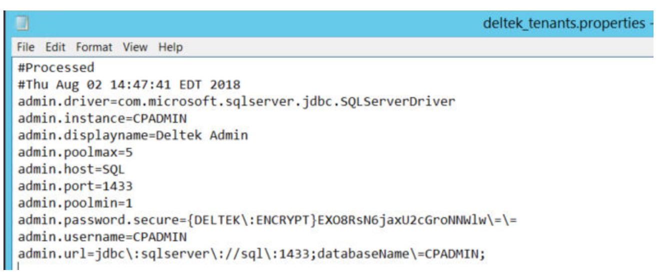
1. In the **sample_configuration** folder, look for the following files:
   - **deltek_cap.properties**: Use this file to define the administrator tenant within the CAP namespace
   - **detlek_cap_sql.properties**: This file contains the SQL script to get information about users and user groups
   - **deltek_tenants.properties**: Use this file to define the new tenant with information about the database connection
   - **domainMapping.xml**: This file is used for backwards compatibility for old CAP versions.
   - **domainMappingCAP.xml**: This file contains the namespace to be used for the Costpoint Authentication Provider. As a default, use "CAP"
2. Copy the configuration files mentioned above to **C:\Program Files\ibm\cognos \analytics\configuration**.

   Note: You can make copies of the files and leave the original ones in the **sample_configuration** folder for backup.
3. Open the **deltek_tenants.properties** file to modify it.
4. In the **deltek_tenants.properties** file, add an Admin Tenant by following the syntax in this diagram:



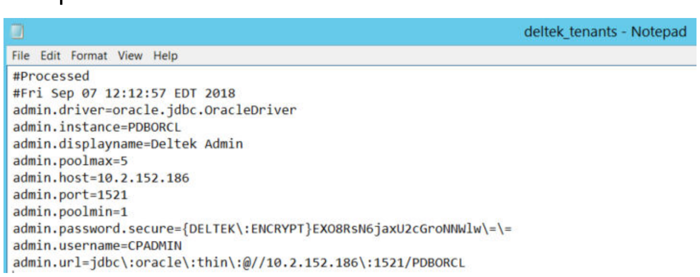
> **Note:** Make sure that you are using the ADMIN instance of the Costpoint database instead of the Transaction instance. If you entered a **Tenant ID** in the Costpoint Configuration Utility tool, make sure that you enter the same **Tenant ID** in the **deltek_tenants.properties** file so that they 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}EXO8RsN6jaxU2cGroNNWlw\=\=
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}EXO8RsN6jaxU2cGroNNWlw\=\=
admin.username=CPADMIN
admin.url=jdbc\:oracle\:thin\:@//10.2.152.186\:1521/PDBORCL
```

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

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

The Tenant Properties File

The **deltek_tenants.properties** file is scanned by CAP to check if there are changes to the tenants.

Five seconds after a change has been made to the **deltek_tenants.properties** file, CAP rereads its content for changes.

- If the attributes of a tenant are the same, CAP skips and checks the next tenant.
- If the attributes of a tenant have updates, the tenant is reconfigured. This includes closing the old database connection and opening a new connection with the updated connection attributes.
- If a tenant has been removed in the **deltek_tenants.properties** file, that tenant is removed from CAP and users will not be able to login. Currently, active sessions are not considered invalid for tenants that have been removed.

> **Note:** The **deltek_tenants.properties** file is AES encrypted.

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 an old version of CAP.

To remove configuration files of previous CAP versions:

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

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

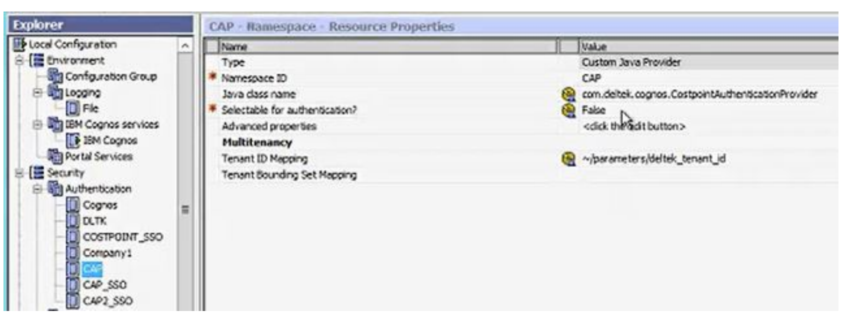
Create the namespace for CAP that will handle the verification process between Cognos and Costpoint cloud and non-cloud users.

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 **CAP** in the **Name** field.

   > **Note:** 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.



Set Up the CAP_SSO Namespace

Create the CAP_SSO Namespace when you are using Costpoint Business Intelligence 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.

Add 'Admin' Tenant on the Multitenancy Tab

You need to add the 'Admin' tenant 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:

1. Log in to Cognos Analytics with Watson.
2. Click the the Open Menu icon (▤) and then click **Manage** » **Multitenancy**.
3. Click the plus icon.
4. 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.
5. Click **Add**.
6. On the **Multitenancy** pane, the newly created tenant appears. Right-click on the tenant and click **Enable**.

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**.
7. Restart the Cognos server.

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 Costpoint Business Intelligence system.

To set up the System Administrator:

1. Log in to Cognos Analytics with Watson. Click the **Open menu** icon (▤) and then 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, select **Cognos** » **Everyone**. Click the yellow arrow button to move **Everyone** to the **Selected entries** box on the right.

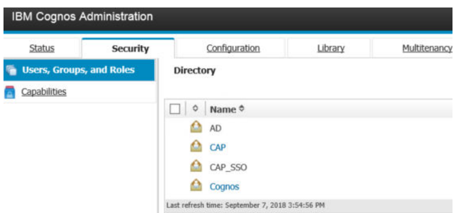
   > **Note:** The **Everyone** account is added at this stage for configuration purposes, but will be removed once we are done.

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 add it to the System Administrators account.
7. Click **OK**. And then, click **OK** again. **Log off** of Cognos Analytics with Watson.

   > **Note:** Close all the IBM Cognos Analytics with Watson sessions that are open or simply close your browser and open a new one.

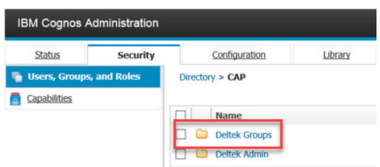
8. Login to Costpoint as one of the users you added to the **CER__ADMIN** group.
9. Go to **Reports and Analytics** » **Business Intelligence** » **Business Intelligence** » **Business Intelligence**.
10. Click the **Open menu** icon (▤) and then click **Manage** » **Administration Console**.
11. Open 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...** . Then, click **Add...**

15. Click **CAP**.
16. Click the **Deltek Groups** folder.
17. Select the check box before **CER Cloud Administrator** and click the yellow arrow.
18. Click **OK**. And then, click **OK** again.
19. Click **Cognos**.
20. Scroll through the Directory until you see **System Administrators**.
21. Click **More...** found on the right that is adjacent to **System Administrators**.
22. Click **Set members...**. Then, click **Add...**
23. Click on the **CAP** folder



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

24. Click the **Deltek Groups** folder.



25. Select the **CER Cloud Administrator**.
26. Click the yellow arrow button to add the selected groups as **System Administrators**.
27. 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 Costpoint Business Intelligence 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.

> **Note:** 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**.

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
- Create an AAA folder
- Copy Setup Files
- Modify log4j2_deltek.xml
- 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
- Update Cognos Authentication and Namespace Properties
- Set Up a Cognos System Administrator
- Remove 'Everyone' as System Administrator

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\logs\Deltek_Costpoint_CAP.log

User Token Error

When you experience a user token error, there are two potential issues. Check to see if they are addressed.

You can check the following:

- In the **Deltek_Costpoint_CAP.log** file, see if it indicates that the token has expired. If so, make sure that the time zones in the Costpoint, Costpoint database, and Cognos application servers are the same.
- Check that the latest **biintegration.res** file from the Costpoint server directory is in the Cognos server directory.
  - Costpoint server directory:
    - `{Costpoint Server}\deltek\costpoint\`*`<Costpoint version>`*`\applications\enterprise\properties`
  - Cognos server directory:
    - `{Cognos server}Program Files\ibm\cognos\analytics\configuration`

Create New View for Organization Security

Open the Manage BI Settings (BIMCERSETTINGS) screen in Costpoint to generate several required views for the Costpoint and Planning databases. These views will be used for the organization security that is applied to the Planning, Materials, Procurement, and Manufacturing models.

To create a new view for Organization Security:

1. In Costpoint, enter **Manage BI Settings** in the **Browse Applications** field or go to **Reports & Analytics** » **BI Controls** » **Manage BI Settings**.
2. Once the Manage BI Settings application is displayed, check and verify the settings. Make the necessary changes, if needed. Click **Save** and then close the screen.

Set the _as_of_date Global Parameter

As an administrator, set up the **_as_of_date** global parameter that is needed to run the new Resource Management dashboard.

To set the _as_of_date global parameter for data modules:

1. In Costpoint Business Intelligence, click the **Open menu** icon (≡) and then click **Manage** » **Customization**. Select the **Parameters** tab.
2. Click **+New** and enter **_as_of_date** in the space provided. Press **ENTER** on the keyboard.
3. Adjacent to the **_as_of_date** parameter that you just made, click the **More** icon and select **Properties**.
4. Click the **Applied to all roles** check box.

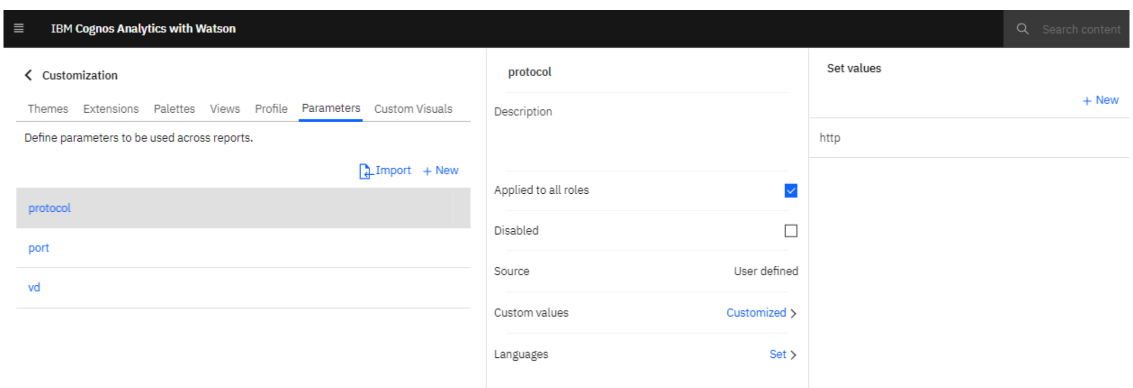
> **Note:** For more details in setting the **_as_of_date** global parameter, see the IBM website.

Add Parameters for the Menu Tab

The Menu tab contains links to the custom tenant reports and links to standard reports. For it to work, some parameters need to be added.

To add the parameters for the Menu tab:

1. In Costpoint Business Intelligence, click the **Open menu** icon (≡) and then click **Manage** » **Customization**. Select the **Parameters** tab.
2. Click **+New** and enter **protocol** in the space provided. Press **ENTER** on the keyboard.
3. Adjacent to the **protocol** parameter that you just made, click the **More** (⋮) icon and select **Properties**.
4. Click the **Applied to all roles** check box.
5. Repeat steps 2 to 4 and add the following parameters:
   - port
   - vd
6. Click the **More** icon for **protocol** and select **Properties**.
7. In the **Custom values** field, click **Set values** and click **+New** .
8. Enter either **http** or **https** depending on the use of your server.



9. Repeat Steps 6 to 8 and enter the following **Custom values** for **port** and **vd** parameters:
   - port: 9300
   - vd: leave blank

> **Note:** If the custom values are left blank, the following default values will be used and the server might fail when it runs.
>
> - protocol=HTTPS
> - port=433
> - vd=ibmcognos

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:

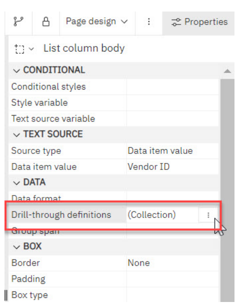
- To minimize the impact on the links, first deploy the reports to the standard directory under Team Content, and then cut and paste the reports to move them to the desired location. This approach preserves the links to the packages and Common Library reports. However, it breaks the links to drill reports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

Redefine Links to Drill Reports

When you move reports to a non-standard location, you need to specify the new deployment location of all the drill reports in Cognos Analytics with Watson.

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

1. Go to the location of the report from Team Content and right-click the report and select **Edit report**.
2. On the report page, click the drill-through link (displayed as blue underlined text), and click the **Properties** icon on the right-hand side of the screen.
3. On the List column body pane, click **Drill-through definitions** field. Click the more icon.



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 the more icon 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.

Interactive Mode in Reports

New reports created in Cognos Analytics 11 are automatically created in Interactive mode.

Interactive mode is automatically turned off for reports that have been upgraded from previous versions. At the moment, you can only switch the Interactive mode per report and there is no way to perform a mass change.

Some features are not supported in fully interactive mode such as:

- embedded javascript
- drill through links
- prompt API

For the Costpoint Business Intelligence reports, fully interactive mode cannot be applied because of the embedded HTML components used in the prompt pages.

To see the steps to convert reports to fully Interactive mode, see Converting Reports to Fully Interactive in Cognos Analytics.

For more information about Interactive mode, see the IBM website.

Hiding and Displaying Entries in Costpoint Business Intelligence

You can show or hide entries in Costpoint Business Intelligence if you have the option to hide them. Examples of reports that you can hide if you have the rights are the drill-thru reports in Contracts and the Common Library report.

You can open the drill-thru reports in Contracts when you click their corresponding links in the Customer Inquiry report. For example, you can open the Contract Drill-Thru report and see details when you click the contract link in the Customer Inquiry report. An option to hide the drill-thru reports is available through the **Profile and settings** feature.

Another Costpoint Business Intelligence entry that you have the option to hide is the Common Library report which 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.

> **Note:** Even if the Common Library report and drill-thru reports are 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 an Entry Visible in Costpoint Business Intelligence

You can adjust whether or not to display hidden reports to users.

To make a hidden report visible in Costpoint Business Intelligence, complete the following steps:

1. On the home page of Costpoint BI, open the reporting package that contains the report.

   The Common Library report is located in **Team Content** » **Administration**.

   The Contract drill-thru reports are located in **Team Content** » **CRM & Contracts** » **Reports** .
2. If the hidden report is not visible in the list of reports, click the **Personal menu** icon ( ) on upper right-hand side of the screen, and click **Profile and settings**.
3. Click the **Settings** tab.
4. Click the **Show hidden entries** toggle to enable it.

   > **Note:** If the **Show hidden entries** toggle is not displayed, you do not have the necessary access rights to change it.
5. Go to the report, for example Common Library, right-click the report and click **Properties**.
6. Clear the **Hide this entry** check box.
7. To hide the report again, repeat this procedure and click the **Hide this entry** check box in step 6.

Troubleshooting

Some installations require you to perform extra steps to avoid errors.

Error Message When Creating a Project in Framework Manager

An error message may display if you try to create a new project in Framework Manager and your installation has not been configured yet.

Sample error messages that may display are:

- BMT-MD-0003
- CCL-BIT-0031 The requestor cannot connect to the provider at the URL http://localhost:9300/bi/v1/disp. Code: -2,113,929,210.
- CAM-CRP-0012 The cryptographic engine is not initialized.

To resolve this, you need to configure the Framework Manager installation with the gateway and dispatcher URIs from the BI server.

Configure FM Installation with Gateway and Dispatcher URIs

You need to have access to the IBM Cognos Configuration tool.

To configure Framework Installation with Gateway and Dispatcher URIs from the BI server:

1. Open the Cognos Configuration tool for the Framework Manager install.
2. Update the gateway and external dispatcher URIs there to match what is set in the BI server Cognos Configuration tool.
3. Save the Framework Manager configuration.

> **Note:** For more information about this resolution, see the IBM support website, http://www-01.ibm.com/support/docview.wss?uid=swg22001983

Error When Opening a Copied Report Specification

An error message may display if you create a new report by opening it from the clipboard.

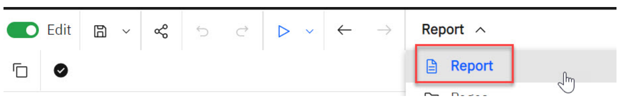
When you copy an existing CER or Costpoint BI report to another server or a new location using the copy to clipboard or open from clipboard option, the Cognos Analytics with Watson treats it as a 'new' report and the Interactivity Mode is automatically turned on. This may result to an error because the embedded HTML components in the prompt pages of the Costpoint Business Intelligence reports are not compatible with the Interactivity Mode. Switch off the Interactivity Mode to remove the error.

Turn Off the Interactivity Mode in a Report

You should be in Edit mode to switch off the Interactivity Mode in a report.

To turn off the Interactivity Mode:

1. Look for a report for which you want to turn off the **Interactivity Mode**. Click the **More (...)** icon.
2. Click **Edit Report**.
3. Click the **Report** icon.



4. And then, click **Properties**  .
5. Under the **RUNNING & VALIDATING** section of the Properties pane, turn off the **Run with full interactivity** toggle. Click **Save**.

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:

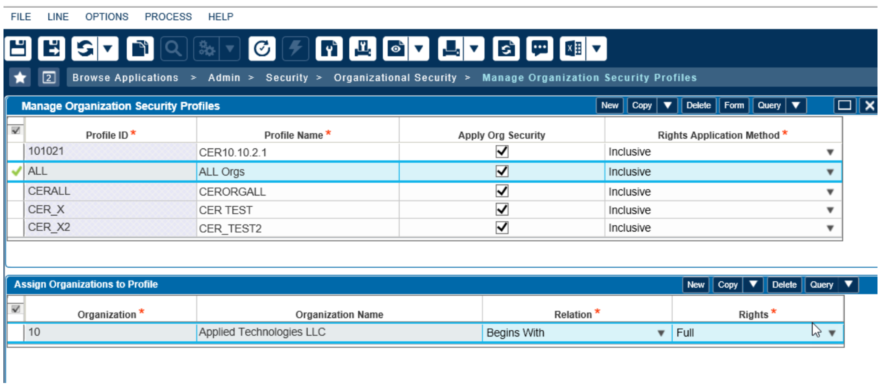
1. On the Cognos Analytics with Watson IIS host server, open the **Control Panel** under **Administrative tools** option. Open **Microsoft Internet Information Service Manager**.
2. On the navigation tree on the left-hand side, click **Sites/Default Web Site\IBMCognos** and select **bi** directory.
3. 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.

Unable to See Data for Any Organization

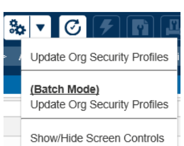
When you have an existing organization security prior to upgrading to the latest Costpoint Business Intelligence, make sure you select the **Apply Org Security** check box for the **ALL** organization security profile. When this profile is not set up properly, you may not see data for any organization when you run a report.

To apply the organization security to the ALL profile:

1. In Costpoint, go to **Admin** » **Security** » **Organizational Security** » **Manage Organization Security Profiles**.
2. In the **Manage Organization Security Profiles** table window, select the **ALL** profile.
3. Select the adjacent **Apply Org Security** check box and **Save**.



4. Go to **Admin** » **Security** » **Organizational Security** » **Update Organization Security Profiles**.
5. Enter or select a **Parameter ID** and/or **Description**.
6. In **Selection Ranges**, select **One** in the **Option** drop-down list and **ALL** in the **Start** lookup.
7. Click the gear icon drop-down on the toolbar and select **Update Org Security Profiles**. **Save**.



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