

IBM Cognos Controller
Version 10.2.1

Getting Started Installation Guide



Note

Before using this information and the product it supports, read the information in “Notices” on page 17.

Product Information

This document applies to IBM Cognos Controller Version 10.2.1 and may also apply to subsequent releases.

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Introduction

IBM® Cognos® Controller is a Web-based financial consolidation tool that provides standard reports to support both statutory and management reporting.

This document is intended for use with IBM Cognos Controller. It provides the information you need to install and configure IBM Cognos Controller on a Microsoft Windows 2008 server using default settings. This type of installation is suitable for a test or evaluation environment or for a small production environment.

This document allows you to install IBM Cognos Controller

- On a single computer running Microsoft Windows 2008 Server
- Using Microsoft SQL Server for the content store and controller databases
- Using Microsoft Internet Information Services (IIS) as your Web server
- Without additional security

For information about customizing the installation, distributing the components, using other databases, or upgrading an existing installation, see the *IBM Cognos Controller Installation and Configuration Guide*.

Audience

To use this guide, you must be familiar with:

- Some database administration
- Basic Microsoft Windows operating system administration
- Web server configuration, specifically Microsoft IIS version 7 or later

Finding information

To find product documentation on the web, including all translated documentation, access IBM Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. This product has accessibility features. For information on these features, see “Accessibility features,” on page 15.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Chapter 1. Setting up the environment

This section guides you through setting up your environment so that you can install IBM Cognos Controller.

Review supported environments

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

To review an up-to-date list of environments supported by IBM Cognos Controller 10.2, such as operating systems, patches, browsers, web servers, directory servers, database servers, and application servers, see the IBM Cognos Controller 10.2 Supported Software Environments site (<http://www.ibm.com/support/docview.wss?uid=swg27041444>).

Create two empty databases

You must create two empty databases for IBM Cognos Controller. One database is for the content store database. The second is for the Controller database.

Use the following checklist to help you create a database for your content store in Microsoft SQL Server.

- Ensure that the collation sequence is case-insensitive.
In a Custom installation, you choose a collation, which includes character sets and sort order, during the SQL Server setup. In a typical installation, the installation uses the locale identified by the installation program for the collation. You cannot change this setting later.
- For Microsoft SQL Server 2008, grant EXECUTE permission to the user account that accesses the database.
Under **Security** for the new database, create a schema and assign a name to it.
Under **Security** for the new database, create a user with the following settings:
 - For **Login name**, specify the new login that you created for the user account.
 - For **Default schema**, specify the new schema.
 - For **Owned Schemas**, select the new schema.
 - For **Role Members**, select **db_datareader**, **db_datawriter**, and **db_ddladmin**.

Procedure

1. If you performed a typical installation of Microsoft SQL Server, after you install you must change the authentication mode to **SQL Server and Windows**.
2. Create a database to be used as your content store.
Ensure that the database collation sequence is case insensitive.
For Microsoft SQL Server 2005, if you do not specifically make another selection, **dbo** is the default table owner. Controller tables owned by **dbo** are not supported. If **dbo** is the default table owner you must change it to another user.
The content store database is used when you install the IBM Cognos Controller server components in chapter 2.
3. Create a second database to be used as the Controller database.

The controller database is used when you configure the IBM Cognos Controller components in chapter 3.

Verify that Microsoft .NET Framework is installed

Microsoft .NET Framework supports smart client technology that allows applications to be started using a URL and downloaded from a server. Microsoft .NET Framework must be installed on the computer where you install IBM Cognos Controller.

Important: You must perform this task on each computer from where you access the IBM Cognos Controller client.

Procedure

1. Click **Start > Control Panel > Programs and Features**.
2. Click **Turn Windows features on or off**.
3. Click **Server Manager > Roles**.
4. Under **Role Services**, verify that **.NET Extensibility** appears in the list of installed programs.
5. If you do not have it installed, go to the Microsoft website (<http://www.microsoft.com>). Open the downloads page and search for Microsoft.NET Framework. Follow the download and installation instructions.

Verify that Microsoft Visual C++ 2005 Redistributable is installed

Microsoft Visual C++ 2005 Redistributable must be installed on the computer where you install the Controller server components.

Procedure

1. Click **Start > Control Panel > Programs and Features**.
2. Verify that Microsoft Visual C++ 2005 Redistributable appears in the list of installed programs.
3. If you do not have it installed, go to the Microsoft website (<http://www.microsoft.com>) and open the download page. Search for Microsoft Visual C++ 2005 Redistributable. Follow the download and installation instructions.

Enable Access to the COM+ Server

When you install IBM Cognos Controller, a Controller COM+ application is created. After you install IBM Cognos Controller, you must confirm that network access to the COM+ Server is enabled.

By default, installations of Windows Server 2008 restrict the functionality of network and communication components. You must enable the COM+ Server before IBM Cognos Controller can operate.

Procedure

1. In the Windows **Control Panel**, click **Add or Remove Programs**, and then click **Add/Remove Windows Components**.
2. Click **Application Server**, and then click **Details**.
3. Click **Enable network COM+ Access**, and then click **OK**.
4. Click **Next**, and then click **Finish**.

Chapter 2. Installing and configuring IBM Cognos Controller on one computer

This chapter provides the information you need to install and configure IBM Cognos Controller on one computer using default settings. This type of installation is suitable for a test or evaluation environment or for a small production environment. This installation is the quickest and easiest way to get started using the product.

Install the server components

The installation wizard for IBM Cognos Controller is provided on the installation CD or as a download from Passport Advantage®.

Procedure

1. Insert the IBM Cognos Controller product disk or go to the location where the installation files were downloaded and extracted.
2. The installation wizard starts automatically from the product disk. If you are installing from a download, go to the operating system directory and then double-click `issetup.exe`.
3. Select the language to use for the installation wizard, and click **Next**.
4. Accept the license agreement, and click **Next**.
5. Enter the directory into which you want to install the product, and click **Next**.
6. Click **Next** on the **Component Selection** page to install all the components.
7. Click **Next** on the **Shortcut Folder** page.
8. Click **Next** on the **Installation Summary** page to start the installation.
9. In the **Finish** page of the installation wizard, click **Finish**.

Install Framework Manager

To deploy the Publish to Data Mart Framework Manager model that is provided with IBM Cognos Controller, you must install Framework Manager.

You install Framework Manager from the IBM Cognos Business Intelligence (BI) Modeling CD provided with IBM Cognos Controller.

Procedure

1. Insert the IBM Cognos BI Modeling product disk or go to the location where the installation files were downloaded and extracted.
2. The installation wizard starts automatically from the product disk. If you are installing from a download, go to the operating system directory and then double-click `issetup.exe`.
3. Select the language to use for the installation wizard, and click **Next**.
4. Accept the license agreement, and click **Next**.
5. Enter the directory into which you want to install the product, and click **Next**.

For a demonstration environment, install Framework Manager to the same directory as the IBM Cognos Controller components. This means you do not have to configure Framework Manager separately from the server components.

Click **Yes** to messages about installing to a location where other products are installed and to create backups of replaced files.

6. Click **Next** on the **Component Selection** page to install all the components.
7. Click **Next** on the **Shortcut Folder** page.
8. Click **Next** on the **Installation Summary** page to start the installation.
9. In the **Finish** page of the installation wizard, click **Finish**.

Connect to the content store database

You must specify the database server information to connect to the content store database you created.

Procedure

1. From the **Start** menu, click **Programs > IBM Cognos 10 > IBM Cognos Configuration**.
2. In the **Explorer** window, under **Data Access, Content Manager**, right-click **Content Store** and click **Delete**.
3. Right-click **Content Manager**, and then click **New resource, Database**.
4. In the **Name** box, type a name for the resource.
For example, type **Content Store**.
5. In the **Type** box, select **Microsoft SQL Server database**, and click **OK**.
If your database server uses Windows authentication, select **SQL Server database (Windows Authentication)**.
6. In **Database server and port number**, enter the name of the computer where your database server is running and the port number on which it is running.
For example, enter `servername:1433`, where 1433 is the default port number used by Microsoft SQL Server. If you are using a different port number, use that value.
7. If you are using SQL Server Authentication, click the **Value** box next to the **User ID and password** property and then click the edit button when it appears.
Type the appropriate values and click **OK**.
8. In the **Properties** window, for the **Database name** property, type the name of the database.
9. Right-click the database connection you created, and click **Test**.

Results

After you test your connection to the content store database is working, you can start the IBM Cognos services.

Save your settings and start the IBM Cognos services

You must save your configuration settings and start the IBM Cognos service.

Procedure

1. In IBM Cognos Configuration, click **File > Save** to save your configuration settings.
2. Click **Actions > Start**.
It may take a few minutes for the IBM Cognos service to start.

When you receive a warning during the **Testing the mail server connection** process, click **OK** and **Continue** to continue starting the services. A mail server connection is not required.

3. After the services have started, click **Close**.
4. Close IBM Cognos Configuration.

Configure the web server

Before you can access the IBM Cognos Controller portal, you must configure your web server. You must set up virtual directories, also known as web aliases, for the directories that contain the HTML and web files for IBM Cognos Controller.

Before you begin

You must use Microsoft Internet Information Services (IIS) version 7 or later. To enable the required permissions for the cgi-bin directory, you must first enable CGI applications for your web server.

Procedure

1. Click **Start > Control Panel > Programs and Features**.
2. Click **Turn Windows features on or off**.
3. Click **Server Manager > Roles > Web Server (IIS)**.
4. In **Role Services**, if **HTTP Redirection** is set to **Not installed**, select **HTTP Redirection** and click **Add Role Service**.
5. If **CGI** is set to **Not installed**, select **CGI** and click **Add Role Service**.
6. In the **Internet Information Services (IIS) Manager**, select your server name.
7. Double-click **ISAPI and CGI Restrictions**, and click **Add**.
8. Enter the path to the cognos.cgi file. The file is located in the *ccr_location*\cgi-bin directory.

Note: The variable *ccr_location*/ refers to the installation location of IBM Cognos Controller. The default Controller installation location is C:\Program Files\IBM\Cognos\ccr_64

You must enter the full path including the filename. If the path includes spaces, ensure that the path is enclosed in quotation marks; for example, use quotation marks as shown in the following path:

"C:\Program Files\IBM\Cognos\ccr_64\cgi-bin\cognos.cgi"

9. Select **Allow extension path to execute**, and click **OK**.
10. Select **Application Pools**.
11. Select **Add Application Pool**.
12. Set the **.Net Framework Version** value to **v2.0.50727**.
13. Enter a name for the application pool and click **OK**.
14. Click **Advanced Settings**.
15. Ensure that the **.Net Framework Version** value to **v2.0**.
16. Ensure that the **Enable 32-Bit Applications** value is set to **False** (the default setting).
17. Set the **Identity** value to **LocalSystem**.
18. Click **OK**.
19. Expand **Sites** and, under your web site, create the following virtual directories as shown in the table.

Table 1. Required virtual directories

Alias	Location
ibmcognos	<i>ccr_location/webcontent</i>
ibmcognos/cgi-bin	<i>ccr_location/cgi-bin</i>
ibmcognos/controller	<i>ccr_location/ccrmdir</i>
ibmcognos/controllerbin	<i>ccr_location/webcontent/ccr</i>
ibmcognos/controllerhelp	<i>ccr_location/webcontent</i>

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

Remember: If you use `ibmcognos` in the web aliases and embed the aliases within other applications, such as Microsoft Excel reports, should you upgrade to a future version of IBM Cognos Controller, you must also update the embedded aliases.

20. Select the `cgi-bin` virtual directory you created.
21. Double-click **Handler Mappings**.
22. Under **Actions**, click **Add Module Mapping**.
 - a. In **Request Path**, type `cognos.cgi`.
 - b. In **Module**, type `CgiModule`.
 - c. Leave **Executable (optional)** blank.
 - d. In **Name**, enter a name for the entry, such as `CognosCGI`.
 - e. Click **OK**.
23. Right-click the `ibmcognos` virtual directory, and click **Add Application**.
 - a. In the **Alias** box, type `controllerserver`.
 - b. In the **Physical path** box, enter *ccr_location/ControllerProxyServer*
24. Select the controller virtual directory.
 - a. Double-click **HTTP Redirect**.
 - b. Select **Redirect requests to this destination**, and enter the following path:
`/ibmcognos/controllerbin/ccr.exe`
25. Click **Apply** and click **OK**.

Test your access to the portal

You can test your access to the portal using your Web browser. Accessing the portal, will also verify whether the server components are running.

Procedure

1. Open Microsoft Internet Explorer.
2. In the Address bar, type the following:

`http://localhost/ibmcognos`

This value is the **Gateway URI** value from IBM Cognos Configuration.

If you are not on the computer where your Web server is installed, you must enter the server name instead of `localhost`. `ibmcognos` is the root virtual directory you created when you configured the Web server.

When you see the **Welcome** page of IBM Cognos Connection, your IBM Cognos Controller server components are running.

What to do next

You must now configure your Controller database and enable access for the Microsoft .Net components and COM+ Server components.

Chapter 3. Configure IBM Cognos Controller components

Configuring the IBM Cognos Controller components requires you to configure your Controller database and to configure the Microsoft .Net Framework and COM+ Server components.

Configure Microsoft ASP.NET

Microsoft ASP.NET is a Microsoft Internet Information Services (IIS) extension that is bundled with the Microsoft .NET Framework. You must configure ASP.NET on all computers running Controller components.

Procedure

1. In a command window, go to the `c:/Windows/Microsoft.NET/Framework64/v2.0.50727` directory.
2. Enter the following command:
`aspnet_regiis.exe /i`

Configure Microsoft .NET Framework

You must configure the Microsoft .NET Framework to create a trust between the Controller components. On a 64-bit computer, you must also set Microsoft .NET to use the 32-bit libraries.

The Microsoft .NET Framework security policy is configured using a hierarchy of code groups at the machine policy level.

You can create this trust using the Code Access Security Policy tool (CasPol.exe). This Microsoft .NET tool is a command-line interface for working with security policy. For more information about using the Microsoft .NET Code Access Security Policy tool, see the Microsoft .NET Framework documentation.

Important: You must perform this task on each computer from where you will access the IBM Cognos Controller client.

Procedure

1. In a command window, go to the `C:\WINDOWS\Microsoft.NET\Framework64\v2.0.50727` directory.
2. Type the following command, and press Enter:
`Ldr64.exe SetWow`
This command will enable the 32-bit Microsoft libraries.
3. Change to the `C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727` directory.
4. Type the following command, and press Enter:
`CasPol.exe -m -q -ag "All_Code" -url http://servername/* FullTrust -n Controller`

Where *servername* is the name of the computer where you are installing IBM Cognos Controller.

Important: The command is case sensitive.

Install a database driver

The IBM Cognos Controller Database Conversion Utility requires a database driver. For Microsoft SQL Server, the driver is sqljdbc4.jar. The driver file must be in same location as the Database Conversion Utility (dbconv.exe).

Procedure

1. In a Web browser, go to the Microsoft website (<http://microsoft.com>) and open the download page. Search for Microsoft JDBC Driver for SQL Server and download the driver.
The driver is provided in a self extracting archive.
2. Double-click the archive to uncompress it, and locate the sqljdbc4.jar file in the uncompressed folder.
3. Copy the sqljdbc4.jar file to the root c10_location.

Configure the Controller database

Before you can run IBM Cognos Controller, you must configure the Controller database.

You configure the Controller database using Controller Configuration.

Important: Controller Configuration is not the same tool as was used to configure and start the server components. Ensure that you start Controller Configuration rather than IBM Cognos Configuration.

Procedure

1. From the **Start** menu, start **Controller Configuration**.
If you are using a Windows 7 or Windows 2008 computer, installed the product to the Program Files directory, and the User Account Control (UAC) is turned on, IBM Cognos Controller Configuration is identified as an administrative application; therefore, you must run it with elevated administrative privileges. To properly save the configuration settings, the UAC prompts for credentials if you are using a standard account.
2. In the **Explorer** window, click **Database Connections**, and then click **File > New**.
3. In the **Properties** window, click the **Database type** box, and then use the drop-down arrow to select the database type.
You can choose **DB2**, **Oracle** or **SQL Server**.
4. In the **Name** box, type a name for the database connection.
5. In the **Provider** box, type the name of the database provider.
To obtain the database provider information, see the DB2®, Oracle or SQL Server documentation.
6. In the **User ID** and **Password** boxes, type the user name and password for the Controller database.
7. In the **Initial catalog** box, type the Controller database name.
8. In the **Data source** box, type the database server computer name.
Do not use localhost.
9. Click **File > Save**.
10. In the **Explorer** window, expand **Database Connections**.
11. Select the database you want to upgrade.

12. Click **Actions > Run**.
13. If no Java™ is found, browse to and select the Java 7 JRE in the *install_dir\bin64\jre\7.0* directory.
14. If you have more than one Oracle version installed a message appears, select the same Oracle version that you are using with Controller.
15. If this is an empty Controller database, in the **Database Conversion Utility** window, click **Create Db**.

The Database Conversion Utility initializes the database.

Note: When you create a new database, by default the database version is 813. You then need to perform database upgrade to the latest version of IBM Cognos Controller.

16. In the **Database Conversion Utility** dialog box, click **Connect** and then click **Upgrade**.

The Database Conversion Utility upgrades the existing database.

Note: To upgrade database versions lower than 789 use the old Database Conversion Utility tool in the *c10\legacy* directory.

17. Click **Close**.
18. From the **Actions** menu, click **Check**.
If the database connection validation fails, review the database connection properties and fix any errors.
19. From the **File** menu, click **Save**.
20. In the **Explorer** window, under **Web Services Server**, click **Report Server**.
21. Under **Report Server connections**, click **Repair**.

The new database is now configured as a data source for Report Server, and is listed as a data source in IBM Cognos Connection.

Configure your web browser

To allow you to access Controller from your web browser, you must add your Controller server as a Trusted Site.

Important: You must perform this task on each computer from where you will access the IBM Cognos Controller client.

Procedure

1. Open Microsoft Internet Explorer.
2. Click **Tools > Internet options**.
3. Click the **Security** tab.
4. Select **Trusted Sites**, and click **Sites**.
5. Clear the **Require server verification (https:) for all sites in this zone** check box.
6. Enter the root URL of your Controller server, and click **Add**.
For example, enter *http://servername*.
7. Click **Close**.
8. Set the security level for the Trusted Sites to **Medium-low**.
9. Click **OK**.

Test IBM Cognos Controller

You can test your IBM Cognos Controller installation by accessing the Controller application from the portal.

Procedure

1. In the Microsoft Internet Explorer **Address** bar, type:
`http://localhost/ibmcognos`
This value is the **Gateway URI** value from IBM Cognos Configuration.
If you are not on the computer where your Web server is installed, you must enter the server name instead of *localhost*. *ibmcognos* is the root virtual directory you created when you configured the Web server.
2. On the **Welcome** page, click **Consolidate my financial information**.
The **Select Database** window opens.
3. Select a database in the list, and click the check mark.
4. Enter your logon credentials:
In the **IBM Cognos Controller - Login** window, type the User ID, Password, Actuality, and Period, and then click the check mark.
For new databases, the default user ID is ADM and the default password is kbs.
You must select an **Actuality** and **Period** before you can log in.
For more information about using the product, see the *IBM Cognos Controller User Guide*.

Import the IBM Cognos Controller Standard Reports Package

Before you can run IBM Cognos Controller and view reports in Cognos Viewer, you must import the IBM Cognos Controller standard reports package into Content Manager.

Procedure

1. Launch IBM Cognos Administration.
2. Click the **Configuration** tab, and then click **Content Administration**.
3. On the toolbar, click the **New Import** button. The **New Import** wizard appears.
4. In the **Deployment archive** box, click the **Controller** package, and then click **Next**.
5. Type the name and an optional description and screen tip for the deployment specification, select the folder where you want to save it, and then click **Next**.
6. Select the content that you want to include in the import.
7. Select the options you want, along with your conflict resolution choice for options that you select.
8. In the **Specify the general options** page, select whether to include access permissions and references to external namespaces, and who should own the entries after they are imported in the target environment.
9. Click **Next**.
The summary information appears.
10. Review the summary information and click **Next**.
11. In the **Select an action** page, select **Save and run once**, and then click **Finish**.

Results

After you run the import, the IBM Cognos Controller reports package appears in your IBM Cognos Connection content.

Appendix. Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products.

See the IBM Accessibility Center (<http://www.ibm.com/able>) for more information about the commitment that IBM has to accessibility.

Keyboard Shortcuts for the Installation Wizard

Keyboard shortcuts, or shortcut keys, provide you with an easier and often faster method of navigating and using software. The installation wizard uses standard Microsoft Windows operating system navigation keys in addition to application-specific keys.

Note: The following keyboard shortcuts are based in US standard keyboards. The following table lists the keyboard shortcuts that you can use to perform some of the main tasks in the installation wizard on the Windows operating system.

Table 2. Keyboard shortcuts for main tasks in the installation wizard on the Windows operating system

To do this	Press
Move to the next field on a page	Tab
Return to the previous field on a page	Shift+Tab
Close the installation wizard	Alt+F4
Move to the next configuration step	Alt+N
Return to the previous configuration step	Alt+B
Move to the next selection in a list	Down arrow
Move to the previous selection in a list	Up arrow

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

Table 3. Keyboard shortcuts for main tasks in the installation wizard on the UNIX or Linux operating system

To do this	Press
Move to the next field on a page	Tab
Return to the previous field on a page	Shift+Tab
Close the installation wizard	Alt+F4
Move to the next selection in a list	Down arrow
Move to the previous selection in a list	Up arrow

The following table lists the keyboard shortcuts you can use to perform some of the main tasks in the License Agreement page of the installation wizard.

Table 4. Keyboard shortcuts for main tasks in the License Agreement page of the installation wizard

To do this	Press
Accept the license agreement	Alt+A
Decline the license agreement	Alt+D
Quit the installation wizard	Alt+x

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