



## Logging On:

1. Start your browser; enter the following URL in the address bar:  
[www.princeton.edu/iw](http://www.princeton.edu/iw)
2. Click on “Enter the Information Warehouse (IW)”
3. Enter your LDAP userid and password.

## Package Custodians Abilities:

- Manage access to their package.
- Manage reports: write reports, test reports written by report writers, move reports within their package, schedule reports.
- Create folders to organize reports.  
*If reports need to be secured, request DWI to secure them.*
- Have an understanding of the Cognos Connection Environment.

## Blue and Yellow Folder Icons

<a href="#">LDAP Data</a>	<a href="#">LDAP Data Reports</a>
Blue folder or “blue package”	Yellow report folder or “yellow reports package”
Represent a data set, and are needed to access underlying data to write reports. <b>Reports are never saved in a Blue Folder.</b>	A container for all reports. There can be folders within a yellow reports package.
Report writers see blue and yellow folders.	Report viewers can only see yellow folders.

*Data is refreshed nightly in each Package.*

## Manage Access to a Package:

- To request access to any package, please contact the responsible package custodian.  
A list can be found at: <http://www.princeton.edu/iw/access-permissions/who-to-contact/>
- To manage access, package custodians must complete the Cognos Security Form, found at: <http://www.princeton.edu/iw/access-permissions/package-custodians-only/>

## Moving Reports:

- To move a report from one location to another within a package:
  1. Check the box to the left of the report.
  2. Click either the “Cut” or “Copy” button in the white toolbar.
  3. Navigate to the new folder location into which the report should be pasted.
  4. Once there, click the “Paste” button in the white toolbar.

**Inbox:** Inside each yellow package is an “Inbox” [-Inbox](#) folder.

Only report writers, and those with Query Studio, Report Studio, or package custodian capabilities, can save reports inside the Inbox folder.

*The Inbox folder can be considered a temporary holding place for reports, by all report writers of the package.*

## Create a New Folder:

- Inside the package, click on the “New Folder” icon in the white toolbar.



*Remember, anyone with access to the package will be able to see the newly created folder. To secure the folder, a request must be sent to the DWI Team.*

## Search for Reports in Public Folders:

1. Click on the **Public Folders** tab.
2. Type the search criteria into the search text box located in the blue toolbar.



3. Click on the “Search” prompt next to the search text box.
4. A list of all reports meeting the search criteria will be displayed.



## Scheduling Reports and Sending via Email:

Reports can be scheduled to run on a recurring basis (daily, weekly, monthly, etc.). A schedule runs a report and saves the output to a file that is stored on the Cognos Content Server. The schedule can also send email to selected recipients.

1. Click the **scheduling** icon to the right of the report to enter the scheduling window.



1. **Frequency:** Select how often the schedule should execute (By Day, By Week, By Month, By Year).
2. **Start and End Dates:** Select the date and time you want the schedule to start and end. *Only schedule reports to run between 8:00am and midnight.*

3. **Options:** Check

Options

Override the default values

3. **Formats:** You may choose one or more formats (i.e. HTML, PDF, Excel, CSV, XML).
4. **Sending a report via E-mail:** Check  Send a link to the report by email [Edit the options...](#)  
Click [Edit the options...](#). Click [Select the recipients...](#) or type the email addresses, separated by, and ending with a semicolon.
5. **Subject and Body:** Compose the subject line and email text accompanying the report.

Default: Cognos populates the report scheduler's email address into the "Send by" email address .

- **Include a Link to the Report:** This will place a URL in the email that takes the users to the log-in screen. Once logged in, users can see the report, as long as they have access to the package from which the report is run.
- **Attach the Report:** This will attach the report file to the email.

Click **OK** to exit the email options screen and return to the scheduling screen.

8. **Reports with Prompts:** Under "Prompt Values" check "Override the default values" and set the report's prompts. Only one set of report prompts can be associated with a schedule. *To use a different prompt set a copy of the report or a report view must be created, and a new schedule created on the new object.*
9. **Saving the Report Output:** Create a new folder in the same location as the report.

## Disable/Enable a Schedule:

Once created a schedule can be disabled and still retain its properties.

1. Click the **scheduling** icon found to the right of the report.



2. In the top left of the schedule window check  Disable the schedule
3. Click **OK** at the bottom of the page.
4. To **enable** the schedule, uncheck the box  Disable the schedule

## Managing Reports:

When output is saved for a scheduled report, an icon will appear to the right of the report, under **Actions**.

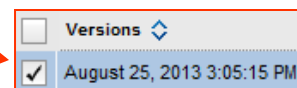


To view saved and archived reports:

1. Click the saved output icon to view the **Current** report versions.
2. Click on the **Archived versions** tab to view archived report(s).
3. Click [Select date range...](#) to open the **Select date period** window.
4. Select a **day** or **date** range. Click **OK**.

To delete saved versions:

1. Click on the **Current** or **Archived versions** tab.
2. Check the report(s) to be deleted.
3. Click [Delete](#) to the right and below the report list.
4. Click [Close](#) to return to the folder list.



**Once deleted, output cannot be recovered!**  
**Once deleted, report URLs within delivered emails will no longer work.**

**Cognos Users Group:** Usually meets on the 4<sup>th</sup> Wednesday, every other month. Agendas include:

- Information Warehouse updates
- Learn new reporting writing tips & tricks
- Network with other Princeton report writers

Contact [information-warehouse@princeton.edu](mailto:information-warehouse@princeton.edu) to join.