

Logging In

1. To log into the Information Warehouse, go to www.princeton.edu/iw
2. Click on **Enter the Information Warehouse**.
3. Enter your **NetID** and **Password**.

Package Custodian Abilities

- Manage access to their respective package.
- Manage reports: Write, test, and schedule reports written by report writers; move reports within their package.
- Create folders to organize reports. If reports need to be secured, put request in to DWI.
- Have an understanding of the Cognos Connection Environment.

Blue & Yellow Folders



Represent a data set, and are needed to access underlying data to write reports.

Note: Reports are never saved in a Blue Folder.

A container for all reports. There may be multiple layers of organized folders within the initial folder.

Data gets refreshed each night.

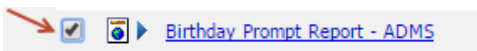


Getting Access to a Package:

To request access to any package in the Warehouse, please contact the appropriate Package Custodian. A list can be found here: <http://www.Princeton.edu/iw/access-permissions/who-to-contact/>

Package Custodians complete the Cognos Security form, found here: <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. Click the box to the left of the report. 
2. Click the Cut or Copy button in the upper-right toolbar 
3. Navigate to the New Folder location in which the report should be pasted.
4. Click the Paste button in the upper-right toolbar. 

Inbox: -Inbox

Inside each Yellow Folder is an Inbox folder. Only Report Writers, those with Query Studio, Report Studio, or Package Custodian capabilities can save reports inside of the Inbox.

Note: The Inbox should be considered a *temporary holding place* for reports, accessible by all report writers of the package.

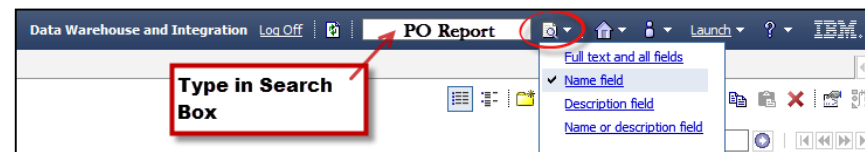
Creating a New Folder:

A new folder can be created by clicking the New Folder icon on the upper-right toolbar. 

Note: This folder will NOT be secured. Anyone with access to the package that the folder was created in will have the ability to see the folder you just created. In order to secure the folder, a request must be sent to CeDAR.

Having Trouble Finding Reports? Do a Search!


1. Click on the **Public Folders** Tab
2. Click the Search dropdown arrow and choose "Name Field"
3. In the **Search** field located on the upper-right toolbar, type in the criteria.
4. Hit **Enter** or click **Search**



Information Warehouse – Package Custodian Roles

Scheduling Reports and Sending via Email:

Reports needed to be run on a timely basis (daily, weekly, monthly) can be scheduled. A Schedule runs a report and saves the output as an “Output File,” then stores it on the Cognos Content Server. The Schedule can also send email to pre-determined recipients. This email can either contain the Output file directly, as an attachment, or provide a URL, allowing direct access to the Output file on the Cognos Content Server.

1. Click the **Scheduling** icon, found to the right of the report. 
2. Under **Frequency** set how often the Schedule should be executed (weekly, monthly, etc.) Under **Start**, select the date and time that you want the schedule to start. Under **End**, select when you want the schedule to end. **Only set Schedules to run between 8:00am and 12:00pm.**
3. Under **Options** check “Override the default values.” In the new menu, choose in which format the Output should be saved (Excel, PDF, etc.)
4. Under **Delivery**, check “Send a link to the report by email” and click “Edit the Options.”
5. In the new window set the email recipients and compose the email which will be sent to the recipients when the Schedule executes. By default, the sender of the email is the person who is logged into this session of the Warehouse when sending the email.
 - a) **Include a Link to the Report:** This will place a URL in the email which upon clicking, takes the users to the log-in screen. Once logged in, users can see the report, provided they have access to the Package from which the report is ran.
 - b) **Attach the Report:** This will attach the output file in the email, seen as an email attachment.
6. Click **OK** to exit the email set-up screen and return to the Scheduling screen.
7. If the Report has prompts, check “Override the default values” under **Prompt Values** and set the report’s prompts. Only one set of report prompts can be associated with one Schedule. A copy of the report must be made and a new Schedule set, *if a new set of prompts is desired to be Scheduled.*


Tip: Create a new folder in the same location as the report, to save the report output.

CeDAR Quick Facts


- Data is 24 hours old and is refreshed nightly for each package in the Information Warehouse.
- CeDAR stands for “Center for Data, Analytics, and Reporting”

Disabling a Schedule:

If you want to create the schedule but not apply it right away, select the **Disable the schedule** check box. To later enable the schedule, clear the check box.


1. Click the **Scheduling** icon, found to the right of the report. 
2. Check **Disable the Schedule.**
3. Click **OK** at the bottom of the page.
4. To re-instate the schedule, uncheck **Disable the Schedule.**

Managing Report’s Saved Output:

When Output is saved for a scheduled report, an icon  will appear to the right of the Report, under **Actions**, adjacent to the **Set Properties** icon. To delete these saved versions:

1. Click on the **Saved Output** icon.
2. Click **Manage Versions.**
3. Check the dated output.
4. Click **Delete** in the lower-right side.



 **Note:** Deleted Output cannot be recovered once it is deleted!

URLs found within the emails sent by the Schedule will no longer be able to retrieve the report’s output, after it has been deleted.

Cognos User Group:

The Cognos User Group meets on a bi-monthly basis, to:

- Learn new report writing tips & CeDAR/Info Warehouse Updates
- Network with other Princeton Report Writers

Contact cedar@princeton.edu to join!

Need Help?

- Call 258-HELP To speak with a Princeton ‘OIT Help’ Desk specialist, Option 3
- Submit email to helpdesk@princeton.edu
- Questions for CeDAR staff can be submitted to: Information-Warehouse@princeton.edu