

# Cognos v10.2: Load Data from Excel

## Date

November 3, 2016

## Brief Summary:

Cognos v10.2 provides the ability to load data from Excel into Cognos using Report Studio, creating a new published package. There are three settings in Framework Manager used to balance ease of use against the Cognos instance's stability and integrity. Data integrity and accessibility to the package and its data should also be addressed.

## Tools Affected:

- Cognos v10.2
- Report Studio
- Framework Manager
- Excel

## Description/Details

### Infrastructure: Framework Manager and Cognos Connection:

01. Framework Manager Governors can be used to modify the actual number of external files being used, the size of the Excel spreadsheet, and the number of rows allowed to be uploaded.
  - a. *Maximum personal data sources that can be merged with a model.*
  - b. *Maximum personal data file size (KB)*
  - c. *Maximum personal data row count*
02. If the External File does not meet the Governors applied in the Framework Manager Model, the file will not upload.
03. If a Package Custodian has been given the Capability to use external data, they will see an icon in Report Studio, which can be used to manage External Data Files.
  - a. If the Capability was granted, the "Manager External Data" icon will appear in Report Studio.
  - b. The "Allow the server to automatically load the file" checkbox will allow the reports using the newly published package to be scheduled.
04. Data uploaded from Excel must be merged with an existing package.

### Data Integrity & Security:

01. Integrity of any external data being introduced into Princeton's Data Warehouse and BI environments need to be validated and verified for accuracy and should not violate any privacy policies at Princeton University.
02. After the Package Custodian publishes the newly created Cognos package, which includes the external file, the proper access and Cognos Content security needs to be configured and verified for Report Studio Users wishing to use the package to write reports.
03. Data contained in the Excel spreadsheet is saved outside of the Cognos Content Store and because of this, the data should be saved on a shared network space, to which all report consumers have access, including Report Studio Users.

### Summary:

Uploading data from Excel into Cognos allows report authors and consumers to take advantage of delivered Cognos functionalities, marry data with existing packages, and use row-level security, if it's available in the package. Three configurations in Framework Manager are available to limit the number of data sets that can be merged with an existing package, and the size and amount of rows within the Excel file. The ability to upload data from Excel can be controlled on a package by package basis through Cognos Content security. Accessibility to the newly created package for those other than Package Custodians needs to be addressed and if required, Cognos Content security configured and tested. The data contained in the Excel spreadsheet is stored externally of Cognos and needs to be accessible by anyone using the newly published package. Data integrity is the responsibility of the Package Custodian. Additional information can be found at IBM site,

[https://www.ibm.com/support/knowledgecenter/SSRL5J\\_1.0.1/com.ibm.swg.ba.cognos.ug\\_cr\\_rptstd.10.1.1.doc/c\\_rs\\_persdat.html](https://www.ibm.com/support/knowledgecenter/SSRL5J_1.0.1/com.ibm.swg.ba.cognos.ug_cr_rptstd.10.1.1.doc/c_rs_persdat.html)