Roles of a Package Custodian

Logging In

1. Navigate to https://cedar.princeton.edu
2. From the **IW & Tools** tab, click **Enter the Warehouse**
3. Enter your **NetID** and **Password**

Responsibilities

Package Custodians manage the technical area where data resides. They are responsible for:

- Managing access to their respective package(s)
- Managing (writing, testing, and scheduling) reports
- Moving reports within their respective package(s)
- Creating folders to assist with the organization of reports into an appropriate structure
- Having an understanding of the Cognos Analytics Environment

Packages and Folders

With the upgrade to Cognos Analytics, the location of the Package, typically seen on the front-end of the tool has now been moved into the Reports folder, in a folder called "~Packages". Any packages you have access to will be in this folder.

The "file drawer" or package (formerly viewed as a blue folder) represents a data set needed to access underlying data to write reports.

This folder (formerly viewed as a yellow folder) is a container, which holds all of your reports. It houses all reports for any package you have access to in the Warehouse.

There may be multiple layers of organized folders within the initial folder.

Getting Access to a Package

Users are instructed to contact the appropriate Package Custodian when requesting access to any package in the Warehouse. A list of all packages and their respective custodians can be found on our CeDAR website, under the **Access & Use Data** tab.

Following a request, Package Custodians are then instructed to complete the Cognos Security Form, which is also found on our website: http://cedar.princeton.edu/access-use-data/package-custodians-only.

Moving Reports

To move a report from one location to another within a package:

1. Navigate to the report you would like to move.
2. Click the **More** button.
3. Select **Copy or Move**.
4. Navigate to select a destination for which the report should reside and click **Move to**.

Use this same process to copy the report to a new location.

The Inbox

Inside each folder is an **Inbox** folder. This area should be used as a temporary holding place for reports allowing for easy access of other report writers.
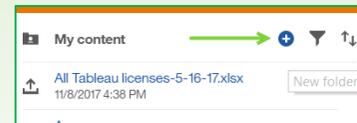
    📁 - Inbox

Only Report Writers and Package Custodians can save reports inside of the Inbox.

Creating a New Folder

A new folder can be created in any area of the Warehouse that you have Write permissions to.

1. Navigate to the directory in which you would like to add a folder and click the **New** button.
2. Give your new folder a name.

This folder will not be secured. Anyone who has 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 a folder, a request must be sent to CeDAR. Please contact Cedar@Princeton.edu

Deleting a Folder

If you need to delete a folder:

1. Navigate to the folder to be removed.
2. Click the **More** button.
3. Select **Delete**.

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Scheduling

Whether you need to run your report on a daily basis or only every so often, the Scheduling Tool in Cognos Analytics makes it possible to schedule your reports to run automatically, as frequently as you need.

A Schedule runs a report and saves the output as an "output file" which is stored on the Cognos Content Server. It can also be sent to a pre-determined list of recipients which can either contain the output file directly, it can be displayed as an attachment, and/or a link can be provided allowing direct access to the file.

To Schedule a report:

1. Navigate to the report you would like to create a schedule for.
2. Click the **More** button and then select **Properties**.
3. Click the **Schedule** Tab and then click **New**.
4. Enter appropriate criteria in the top half of the schedule creator.
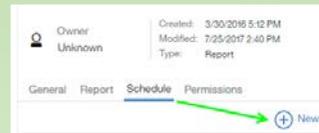
- **Schedule**: Choose from a list of execution types
- **Period**: Choose a data and time for **Start** and **End**, then choose the recurrence (i.e. every 2 weeks on Tuesday).
- **Daily Time Interval**: Place a checkmark in the box if you wish for your schedule to run on a daily time interval (i.e. every 2 hours between 9:00a and 5:00p)
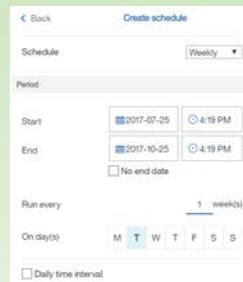
Once you have chosen how often you would like your schedule to run, pay special attention to the options that follow:

- **Format**: Choose as many formats as appropriate from a list of output types
- **Delivery**: Choose to send report by email, print the report, or save the report. *See more details on delivery option to send report by email*
- **Prompts**: Set or clear prompt values
- **PDF**: Choose the layout and password protect a PDF. *See more details on password protecting a PDF*
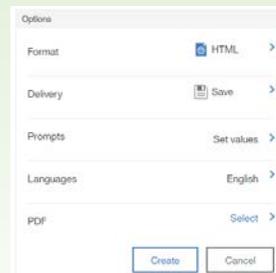
Send Report by Email

You have the ability to email the output of the schedule to a mass distribution.

1. Choose to **Send Report by Email** from the Delivery options.
2. (Optional) Place a checkmark in the box next to **Attach the Report** (especially if your report is scheduled out of **My Content**, since only you have access to the contents of this location)
3. Provide email addresses in the **To:**, **cc:**, and **bcc:** fields as appropriate.

If you need help, click the arrow next to the **To:** field, choose a **Namespace** to search from and either type in the recipients name (or part of their name) or their NetID. Use the **Filter**, if needed. Then click **Add**.

4. Modify the subject line, if appropriate.
5. Place a checkmark in the box next to **Include a link to the report**, if necessary.
6. Provide a message in the **Body** of the email.
7. Click **Done**.
8. Click **Create**.

Password Protect a PDF

You have the ability to protect your output. If one of your **Format** options is PDF, you can set it up to require a password to open the report.

1. Choose PDF from the list of Options
2. Place a checkmark in the box next to **Requires a password to open the report**
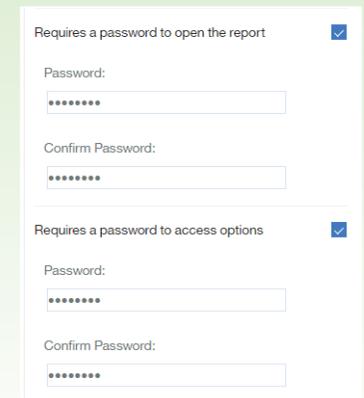
You can also choose to password protect access options to your PDF.