

Cognos Business Intelligence User Role Descriptions

This document describes the capabilities associated with authorized user roles in IBM Cognos Business Intelligence version 10.1. This document is intended to help sales and business partners offer the best license options to match the customer's buying agenda, and to ensure customers understand the rights of the different user roles. This includes customers trading up from Cognos ReportNet, Cognos PowerPlay, Cognos Metrics Manager and Cognos DecisionStream to Cognos BI version 10.1 as well as new Cognos BI opportunities.

IBM Publishes legal license descriptions on a Software Licensing website which can be accessed both internally and externally. The legal descriptions for IBM Cognos Business Intelligence licenses applicable for Version 10.1 are found here:

<http://www-03.ibm.com/software/sla/slabd.nsf/displaylis/13E610057831E5FD852577C10070B46B?OpenDocument>

For simplicity, we will use the following short names for the various studios and tools that are available to Cognos Business Intelligence.

- "Business Intelligence" as "BI"
- "IBM Cognos Report Studio" as "Report Studio"
- "IBM Cognos Query Studio" as "Query Studio"
- "IBM Cognos Event Studio" as "Event Studio"
- "IBM Cognos Analysis Studio" as "Analysis Studio"
- "IBM Cognos Metrics Studio" as "Metrics Studio"
- "IBM Cognos Metrics Designer" as "Metrics Designer"
- "IBM Cognos Report Viewer" as "Report Viewer"
- "Cognos Business Insight" as "Business Insight"
- "IBM Cognos Search" as "Cognos Search"
- "IBM Cognos Mobile" as "Cognos Mobile"
- "IBM Cognos For Microsoft Office" as "Cognos for Office"
- "IBM Cognos Framework Manager" as "Framework Manager"
- "IBM Cognos Transformer" as "Transformer"
- "Cognos Map Manager" as "Map Manager"
- "IBM Cognos Data Manager" as "Data Manager"
- "IBM Cognos PowerPlay Studio" as "PowerPlay Studio"
- "IBM Cognos PowerPlay Client (Windows)" as "PowerPlay Client (Windows)"
- "IBM Cognos PowerPlay Reports" as "PowerPlay Reports"
- "IBM Cognos Statistics" as "Cognos Statistics"
- "IBM Cognos Collaboration" as "Cognos Collaboration"
- "IBM Cognos Real-time Monitoring" as "Cognos Real-time Monitoring"

Recommended BI Standardization Roles

Cognos BI Administrator

This role is aimed at IT administrator users who need to administer sever environments, create and maintain metadata and all types of business intelligence on behalf of their organization, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Enhanced Consumer](#) role
- Use the Query Studio, Report Studio, Analysis Studio, Event Studio, Metric Studio and Metric Designer modules and functionality;
- Use the Business Insight module (standard and advanced mode)
- Administer the Cognos BI Software environment in relation to server, security and report scheduling administration
- Administer Search service, including scheduling of indexing operations
- Model metadata via Framework Manager; and
- Design, create and maintain Cognos PowerCubes using the Transformer modules on all platforms.
- Use the Map Manager modules and functionality
- Use the Virtual View Manager modules and functionality

Cognos BI Professional

This role is aimed at technical users who need to create and maintain all types of business intelligence content on behalf of their organization, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Enhanced Consumer](#) role
- Use the Query Studio, Report Studio, Analysis Studio, Event Studio, Metric Studio and Metric Designer modules and functionality;
- Use the Business Insight module (standard and advanced mode)
- Design, create and maintain PowerCubes using the Transformer module and functionality on Windows platforms only.

Cognos BI Advanced Business Author

This role is aimed at business users who need to view scheduled reports, run reports interactively, and need to create new reports, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Enhanced Consumer](#) role
- Use the Query and Analysis Studio module and functionality;
- Use the Business Insight module (standard and advanced mode)

Cognos Business Intelligence User Role Descriptions

Page 3

Cognos BI Enhanced Consumer

This role is the main report /dashboard consumption license and is the building block for the higher level authoring roles. It is aimed at users who will view scheduled reports and run reports interactively through the Cognos Connection portal, and need to use Business Insight (standard mode) and Cognos Search functionalities, it provides rights to:

- Access through Cognos Connection Portal to select reports, view reports and set personal preferences (for languages, time zones etc.);
- Use the Cognos Connection Portal to create and consume portal pages, including use of all the portlet types provided with Cognos Connection.
- Run and schedule reports created by a licensed Cognos BI Studio module, interact with prompts, output the reports to other formats such as PDF and CSV;
- Subscribe to a scheduled report, create and manage report folders and personalized standard reports
- Receive Event Studio notifications & set and manage personal alerts.
- Use Cognos for Office module and functionality
- Use the Business Insight module (standard mode only)
- Utilize Cognos Search, for dynamic and static text search of BI content
- Consume Cognos Active Report outputs
- If customer has acquired Enhanced Consumer rights through licenses purchased by the “Authorized User” metric, then the ability to use Lotus Connections functionality to collaborate is included.
- If customer has acquired Real-time Monitoring license(s) then the ability to assemble and consume Real-time Monitoring dashboard objects and the ability to use the Real-time Monitoring Dashboard is included.

Additional Report Consumption Roles

Cognos BI Consumer

This role is the reduced version of the Cognos BI Enhanced Consumer. It is aimed at users who will view scheduled reports and run reports interactively through the Cognos Connection portal, it provides rights to:

- Access through Cognos Connection Portal to select reports, view reports and set personal preferences (for languages, time zones etc.);
- Use the Cognos Connection Portal to create and consume portal pages, including use of all the portlet types provided with Cognos Connection.
- Run and schedule reports created by a licensed Cognos BI Studio module, interact with prompts, output the reports to other formats such as PDF and CSV;
- Subscribe to a scheduled report, create and manage report folders and personalized standard reports
- Receive Event Studio notifications & set and manage personal alerts.
- Use Cognos for Office module and functionality
- Note: This license does not provide the rights to generate, distribute or consume “Active Report” content

Cognos Business Intelligence User Role Descriptions

Page 4

Cognos BI Recipient

This role is aimed at casual users who will need to view scheduled reports through the Cognos Connection Portal interfaces, it provides rights to:

- Access through Cognos Connection Portal solely to select reports, view reports and set personal preferences (for languages, time zones etc).
- Note: This license does not provide the rights to generate, distribute or consume “Active Report” content

Note: This role does not include the ability to run reports dynamically and filter the results through prompts. That right was included in some sales of Cognos ReportNet Recipient licenses. If an existing customer relies on that right please contact your legal team before upgrading the customer to Cognos BI.

Cognos BI Remote Recipient

This role is aimed at customers with users who have users that need to receive personalized reports generated in an automated fashion by Cognos BI, and access those reports via a mechanism outside either Cognos Connection portal, Business Insight Dashboards or outside Cognos Office (e.g. by email). The Remote Recipient role is typically sold using a PVU/Processor-licensing approach where Cognos BI is typically being used as a high volume automated report production engine. It provides rights to:

- Generate, distribute and access reports where such reports have been customized or otherwise personalized for individual users and distributed directly to the user by a delivery mechanism outside of the Cognos Connection Portal.
- Note: This license does not provide the rights to generate, distribute or consume “Active Report” content

Note: It is not necessary to purchase a Remote Recipient license to email a generic (non-personalized) report saved to a standard format such as Adobe pdf to a list of one or more users. The Remote Recipient license is only required when Cognos BI is creating personalized reports – for example bank statements; pay and benefit reports; etc. – for a number of individuals, and those individuals do not have Cognos Connection rights to access and view the reports as authenticated users in the Cognos BI environment.

Additional Author and Power User Roles

Cognos BI Professional Author

This role is aimed at technical users who need to create new reports on behalf of the organization and test them, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Enhanced Consumer](#) role
- Use the Query and Report Studio module and functionality;
- Use the Business Insight module (standard and advanced mode)

Cognos BI Business Author

This role is aimed at business users who need to view scheduled reports, run reports interactively, and need to create new reports, it provides rights to:

- Use of all of the rights defined for [Cognos BI Enhanced Consumer](#) role
- Use the Query Studio module and functionality;

Cognos Business Intelligence User Role Descriptions

Page 5

Cognos BI Business Manager

This role is aimed at business users who need to view scheduled reports, run reports interactively, and need to manage corporate performance through the use of metrics, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Enhanced Consumer](#) role
- Use the Metric Studio and Metric Designer module and functionality;

Cognos BI Business Analyst

This role is aimed at business users who need to view scheduled reports, run reports interactively, and need to perform interactive analysis, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Enhanced Consumer](#) role
- Use the Analysis Studio module and functionality;

Additional Studio Licenses

These licenses provide an additional right to use a specific studio. They can only be licensed for users who already have Consumer or Enhanced Consumer rights.

Note: These license options are not applicable to user with [Cognos BI Recipient](#) or [Cognos BI Remote Recipient](#) roles. Full Cognos BI Report Studio is not available as an optional studio license. But it is included in the [Cognos BI Professional Author](#), [Cognos BI Professional](#) and [Cognos BI Administrator](#) roles.

Cognos BI Analysis Studio User Add-on

Adds the right to use Analysis Studio. This license can only be applied to users who already have Consumer or Enhanced Consumer rights.

Cognos BI Event Studio User Add-on

Adds the right to use Event Studio. This license can only be applied to users who already have Consumer or Enhanced Consumer rights.

Cognos BI Metric Studio User Add-on

Adds the right to use Metric Studio and Metric Designer. This license can only be applied to users who already have Consumer and Enhanced Consumer rights.

Cognos BI Query Studio User Add-on

Adds the right to use Query Studio. This license can only be applied to users who already have Consumer or Enhanced Consumer rights.

Optional Add-on Licenses

Cognos BI Analysis for Microsoft Excel User Add-on

Adds the right to use Analysis for Microsoft Excel (often abbreviated CAFÉ). This license can only be applied to users who already have Consumer or Enhanced Consumer rights. Currently this is the only license which includes CAFÉ, as it is not included with any Enhanced Consumer, power user or administrator roles.

Cognos BI for Linux on System z User Authorization

This license provides the right for a specified number of Named Users that are also licensed for Cognos BI Consumer or Enhanced Consumer or higher level license rights to

- Run the software associated with those license rights in a Linux for System z server environment. (To the extent that such specified base Cognos BI license rights are made commercially available for use on Linux for System z).
- And that Licensee must make sure and configure the Cognos BI Software to ensure that those users are restricted from using any other Software functionality.

Specialist Roles and Licenses

Cognos BI Software Development Kit User

This role is aimed at users who need to develop and maintain applications that integrate with Cognos BI through the SDK. This bundle offering supplements a defined user role (normally Cognos BI Administrator, Cognos BI Reporting Administrator or Cognos BI Professional) and provides access to:

- SDK manuals,
- developer oriented software

Cognos BI Data Manager Developer

This role is aimed at users who need to design and maintain relational data marts for use with Cognos Business Intelligence.

Note: Cognos BI Data Manager Engine and Cognos BI Data Manager Connector for SAP R/3 are separately licensed on the per-Processor licensing model. Data Manager was formerly called Decision Stream.

Cognos BI Data Manager Engine

This license provides the rights to use the Data Manager engine for data movement process execution. This is licensed per Processor and is used in conjunction with at least one Cognos BI Data Manager Developer license

Note: Cognos BI Data Manager Developer and Cognos BI Data Manager Connector for SAP R/3 are separately licensed. Data Manager was formerly called DecisionStream.

Cognos BI Data Manager Connector for SAP R/3

This license provides the rights to read SAP R/3 is a Data Manager Data movement process execution. This is licensed per CPU and requires an existing Cognos BI Data Manager Engine license for the same server.

Cognos BI Mobile Server

This license enables the right to use a Cognos Mobile Server to provide mobile BI content to users. The server is licensed on an "Install or Instance" basis, meaning that a single license allows the customer to install the mobile server software onto any reasonable number of servers required to provide mobile access to the licensed mobile users associated with a distributed Cognos BI installation.

In addition to the server license, customers must purchase Cognos Mobile Add-on licenses for each user enabled to use Cognos Mobile functionality.

Cognos BI Mobile Add-on

This license provides the right for a specified number of Authorized Users to

- Install the Cognos Mobile rich client to a supported hand held device,
- Connect to a Cognos Mobile Server in a Cognos BI server environment from a hand held device using the Cognos Mobile rich client,
- Run, schedule, browse and search reports in the Cognos Connection Portal from the Cognos Mobile rich client run from a supported handheld device,
- View and interact with Cognos BI reports online and offline in connected and disconnected mode respectively from a supported hand held device using the Cognos Mobile rich client
- Forward Cognos BI reports to other Cognos BI licensed users from the Cognos Mobile rich client on the handheld device.

An individual may only be permitted to be a Go! Mobile Authorized User if they are separately licensed to use Cognos BI roles either with [Cognos BI Consumer](#) rights or with higher level license rights that include Cognos BI Consumer rights. These licenses can only be used in conjunction with the Cognos BI Mobile Server component.

Cognos Statistics

This license provides the rights to install and use IBM Cognos Statistics service. This license is available only by PVU/processor. The license enables licensed users of Cognos Report Studio to include statistical capabilities such as Regression, Correlation, Box Plots, and Statistical Process Control into Reports

Cognos Real-time Monitoring

This license provides the right to install and use IBM Cognos Real-time Monitoring. This license is available only by PVU.

Note: This license only provides the right to install, configure, and administer Real-time Monitoring functionality. For an end user to consume Real-time monitoring dashboards or dashboard objects, a user must also have Enhanced Consumer or higher license.

Cognos Collaboration

This license enables a user to use IBM Lotus Connections to enable collaborative decision making, including but not limited to functionality integrated with business intelligence. The customer may use any or all functional modules of IBM Lotus Connections.

Note: This role is only available for purchase in conjunction with Cognos BI licenses purchased by PVU or processor metrics at the Enhanced Consumer level or higher. Customers purchasing licenses at the Enhanced Consumer level or higher using the authorized user metric receive entitlement to use Lotus Connections functionality without requiring an additional license.

Trade-up only roles: (available to existing customers only).

Cognos BI PowerPlay Analyst

This license provides the right for a specified number of Authorized Users to

- Access through Cognos Connection Portal to select reports, view reports and set personal preferences (for languages, time zones etc.)
- Use the Cognos Connection Portal to create and consume portal pages, including use of all of the portlet types provided with Cognos Connection.
- Run and schedule reports created by a licensed Cognos BI Studio module, interact with prompts, output the reports to other formats such as PDF and CSV.
- Subscribe to a scheduled report, create & manage report folders and personalized standard reports.
- Receive Event Studio notifications & set and manage personal alerts.
- Use the Cognos for Office module and functionality.
- Use the PowerPlay Studio module and functionality.

Cognos BI PowerPlay Web User

This license provides the right for a specified number of Authorized Users to

- Access through Cognos Connection Portal to select and view only reports created by PowerPlay Studio or published from PowerPlay Client and set personal preferences (languages, time zones etc.)
- Run and schedule PowerPlay Reports, interact with prompts, output the PowerPlay Reports to other formats such as PDF and CSV
- Subscribe to a scheduled PowerPlay Report, create and manage PowerPlay Report folders and portal pages
- Use the Cognos Connection Portal to create and consume portal pages, including use of all of the portlet types provided with Cognos Connection and personalize standard PowerPlay Reports.
- Use the PowerPlay Studio module and functionality.

Cognos BI PowerPlay Studio User Add-on

This license is available to existing Series 7 PowerPlay customers only.

Permits the specified number of Named Users that have the specified base Cognos BI license the rights to also use Cognos BI PowerPlay Studio Software, and Licensee will configure the Software to ensure that those users are restricted from using any other Software functionality.

Cognos BI PowerPlay Client (Windows)

This license provides the right to install the PowerPlay Client Software on a Windows personal computer and an authorized user may access the Software from the same Windows personal computer to

- Create, view, or personalize PowerPlay reports based on a PowerCube, including the output of those reports to other formats such as PDF or CSV, interact with prompts and set personal preferences
- Access a remote PowerCube data source, by online continuous connection to a PowerPlay service (i.e., a client/server connection between the user and Cognos BI)
- While online, to save a PowerCube Sub-Cube for use offline
- To access offline via the personal computer desktop (disconnected from any online client/server connection) to
 - a local PowerCube data source on the same computer
 - a local PowerCube Sub-Cube data source on the same computer
- To publish PowerPlay reports to the Cognos Connection Portal via a PowerPlay service connection, provided Licensee is licensed to use one or more licenses that includes the rights to use the PowerPlay Studio module

Cognos BI PowerPlay Administrator (Trade-up Only)

This license provides the right for a specified number of Authorized Users to

- Access through Cognos Connection Portal to select reports, view reports and set personal preferences (for languages, time zones etc.)
- Run and schedule reports created by a licensed Cognos BI Studio module, interact with prompts, output the reports to other formats such as PDF and CSV.
- Subscribe to a scheduled report, create and manage report folders and portal pages and use the Cognos Connection Portal to create and consume portal pages, including use of all of the portlet types provided with Cognos Connection, personalize standard reports.
- Use the Cognos for Office module
- Use the PowerPlay Studio module and functionality
- Use the Cognos BI PowerPlay Client (Windows) module and functionality
- Administer the Cognos BI Software environment in relation to server, security and report scheduling administration and the ability to model metadata via Framework Manager
- Use the Cognos Transformer PowerCube Builder and Modeler modules and functionality
- Licensee will configure the Software to ensure that those users are restricted from using any other Software functionality.

Cognos BI Metric User (Trade-up only)

This role is aimed at business users who need to manage performance through metrics, but do not run or view reports created by other users, it provides rights to:

- Use the Metric Studio module and functionality;
- Use the Metric Designer module and functionality;
- Use Report Viewer and Cognos for Office to view and run reports based on Metrics Package information and exports them to other formats (such as PDF and Excel).
- Use the Cognos Connection portal to organize content into folders and pages, and to set personal preferences.
- Use the Cognos Connection Portal to create and consume portal pages, including use of all the portlet types provided with Cognos Connection.

Note: This role is only available as a trade-up for Cognos Metrics Manager Users. We recommend that users in this role trade up to [Cognos BI Business Manager](#) to add the ability to consume reports authored by other Cognos BI Studios (fee applies).

Cognos BI Reporting Administrator (Trade-up only)

This role is a reduced version of the [Cognos BI Administrator](#) role. It is aimed at IT administrators who need to administer sever environments, create and maintain metadata and create and maintain reporting content on behalf of their organization, it comprises of rights to:

- Use of all of the rights defined for the [Cognos BI Consumer](#) role
- Use the Query Studio, Report Studio modules and functionality;
- Use of Business Insight (advanced mode only)
- Administer the Cognos BI Software environment in relation to server, security and report scheduling administration
- Model metadata via Framework Manager;
- Use the Map Manager modules and functionality
- Use the Virtual View Manager modules and functionality

The Cognos BI Reporting Administrator role excludes:

- Use of the Analysis Studio, Event Studio, Metric Studio and Metric Designer module and functionality;
- Use of Business Insight (standard mode)
- Rights to design create and maintain Cognos PowerCubes using the Transformer modules.

Note: This role is only available for customer trading-up existing Cognos ReportNet administrators to Cognos BI. We recommend that Reporting Administrators trade-up to the full [Cognos BI administrator](#) capabilities (fee applies).

Cognos BI Metric Administrator (Trade-up only)

This role is a reduced version of the [Cognos BI Administrator](#) role. It is aimed at IT administrators who need to administer sever environments, create and maintain metadata and create and maintain metrics content on behalf of their organization, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Consumer](#) role, except for the use of Cognos for Office.
- Use the Metric Studio and Metric Designer Analysis Studio module and functionality;
- Model metadata via Framework Manager;
- Administer the Cognos BI Software environment in relation to server, security and report scheduling administration
- Use the Virtual View Manager modules and functionality

The Cognos BI Metric Administrator role excludes:

- Use of the Query Studio, Report Studio, Event Studio, Analysis Studio module and functionality;
- Use of Business Insight (standard or advanced modes)
- Use of the Map Manager modules and functionality
- Rights to design create and maintain Cognos PowerCubes using the Transformer modules.

Note: This role is only available or customer trading-up existing Metrics Manager Users to Cognos BI. One Cognos BI Metric Administrator role is provided without charge to upgrading Cognos Metrics Manager Customers. We recommend that Metrics Manager Administrators trade-up to the full [Cognos BI Administrator](#) capabilities (fee applies).

Discontinued Roles (available for incremental purchases only)

Cognos BI Analysis User (Trade-up only)

This role is aimed at business users who need to perform interactive analysis, but do not run or view reports created by other users, it provides rights to:

- Use the Analysis Studio module and functionality;
- Use Report Viewer to view and run reports saved from Analysis Studio and exports them to other formats (such as PDF and Excel).
- Use the Cognos Connection portal to organize content into folders and pages, and to set personal preferences.
 - Use the Cognos Connection Portal to create and consume portal pages, including use of all the portlet types provided with Cognos Connection.
- Use of the Cognos for Office module and functionality to access reports saved from Analysis Studio.

Note: This role was only available as a trade-up for PowerPlay users.

Cognos BI Analysis Administrator (Trade-up only)

This role was a reduced version of the [Cognos BI Administrator](#) role. It is aimed at IT administrators who need to administer sever environments, create and maintain metadata and create and maintain Analysis content on behalf of their organization, it provides rights to:

- Use of all of the rights defined for the [Cognos BI Consumer](#) role
- Use the Analysis Studio module and functionality;
- Administer the Cognos BI Software environment in relation to server, security and report scheduling administration
- Model metadata via Framework Manager; and
- Design, create and maintain Cognos PowerCubes using the Transformer modules.

The Cognos BI Analysis Administrator role excludes:

- Use of the Query Studio, Report Studio, Event Studio, Metric Studio and Metric Designer modules and functionality;
- Use of Business Insight (standard or advanced modes)
- Use the Map Manager modules and functionality

Note: This role was only available for customers trading up existing Cognos Series 7 PowerPlay Administrators.