

Guiding Principles for Allocating Cognos Licenses

1. The Cognos Licenses purchased by ITaP, will be allocated only to users reporting against enterprise data - Student, Finance, Human Resources, and Advancement. A process for purchasing additional licenses for accessing non-enterprise data will be put into place at a later date.
2. Priority will be given to non-self supporting units at all campuses (with emphasis on units that need to report against enterprise data) and to the colleges and schools.
3. Cognos licenses will only be allocated to those individuals that meet a predefined skill set related to the requested license type. If they do not meet the skill set, they must be trained before receiving the license. Training for the BI Professional Author and BI Business Author will be done by ITaP. Training for BI Administrator (Framework Manager and Transformer) will have to be done (either offsite or onsite) by a qualified Cognos third party trainer as this training is more technical in nature. Individuals must have data modeling experience before receiving Framework Manager training. Framework Manager is used to create the underlying data models/table joins. This tool is used in the beginning of deployment and as tables are added or data models change. Individuals must have data modeling experience before receiving Transformer training. Transformer is used to create data cubes that summarize commonly requested information. The other piece of BI Administrator (Server Administrator) will only be allocated to ITaP technical staff to centrally manage and maintain the Cognos Servers.
4. A Cognos License Coordinator for each enterprise data set (Student, Finance, Human Resources, and Advancement) will be responsible for allocating licenses to named individuals and tracking name, title, and role information about each user in the ITaP database. Once designated users meet the skill set requirements, the ITaP central Cognos server administrators will assign the licenses to the individuals and ensure duplicate/overlapping licenses are not given to an individual.
5. For purposes of administering Purdue's licenses within the Cognos agreement, ITaP will be the custodian of a database of named users who have been assigned Cognos licenses.
 - a. Management of named users will be done in conjunction with the Cognos License Coordinators of each enterprise data set.
 - b. A process will be established for administering licenses at the server level.
 - c. A process will be established for de-provisioning licenses allocated to terminated employees or to employees transferred to other positions.
6. Purdue owns 300 of a new license type called BI Business Author. BI Business Author licenses may be swapped with BI Professional Author licenses for users who were previously assigned the latter license type and who do not have primary responsibility for creating prompted reports that will be shared with other users.
7. Requests from the Cognos License Coordinators for licenses after the initial allocation will be submitted to ITEA. An appropriate user advisory committee will screen requests and recommend disposition. A Request will be granted if a license is available (unassigned), the user has a validated need, and the user has a requisite skill set. Training is a pre-requisite to receiving a Cognos license.

- a. If a license is not available and all licenses in that area are assigned and needed, then ITaP will ask a Cognos Oversight Group if a license might be available in another enterprise data area for possible re-allocation.
 - b. If there are no licenses available for re-distribution, then ITaP will advise the Oversight Group so appropriate steps can be taken for the purchase of additional licenses.
8. Organization units within Purdue may purchase licenses of any Cognos product to add to the ITaP server. In this case, those licenses belong to the organization unit and may not be reallocated to any other unit. The organization unit is responsible for both one-time and recurring costs for any additional licenses purchased, but they will receive any quantity discounts available through the ITaP agreement with Cognos. If you would like to purchase a Cognos license, please contact Brad Skiles (bwskiles@purdue.edu) in ITEA.
9. If an area requests a license(s) for non-enterprise data, a few exceptions allow for minimal licenses to be seeded to the area so they become familiar with the tools:
 - a. An area may receive a temporary BI Administrator license (Framework Manager or Transformer) for non-enterprise data use for a limited time period. After that time, the license reverts back to the pool and the area will need to purchase their own. This presumes that all BI Administrator licenses in the pool are targeted for areas needing them for enterprise data.
 - b. An area may receive one BI Professional Author and possibly one BI Business Author. Additional licenses will need to be acquired by the unit. The unit will also have to pay maintenance on the licenses they acquire.
 - c. For BI Consumer, a unit may be seeded with one or two licenses, and additional licenses will need to be acquired by the unit. The unit will also have to pay maintenance on the licenses they acquire.

Glossary

BI Administrator: The BI Administrator license contains Framework Manager, Transformer, and Server Administrator functionality.

BI Business Author: This license is used to build basic reports, and enhance, customize, and manage professional reports using Query Studio.

BI Consumer: This license is used to run reports created by others, view reports via a web browser, respond to multiple prompts, save reports, schedule reports, and output reports to PDF, Excel, and CSV files.

BI Professional Author: This license is used to create, and modify professional reports(prompted reports) using Report Studio and Query Studio. Other functionality includes creating query models, bursting reports, setting up drill-through access, and authoring advanced reports.

Cognos License Database: This is currently a spreadsheet containing a worksheet for each license. Each worksheet contains the name of the license recipient, campus, department, title, reason for license assignment, telephone, License Coordinator, and email address.

Enterprise Data: The four primary components of central University data used for administration and reporting: Student, Human Resources, Financial, and Advancement.

Cognos License Coordinators: The coordinators are responsible for allocating licenses to named individuals and tracking name, title, and role information about each user.

Framework Manager: This license is used to create the underlying data models and table joins. This tool is used in the beginning of deployment and as tables are added or data models are changed.

Oversight Group: A small group of individuals representing ITaP and Enterprise Data Sets (Student Services, Business Services, Advancement, and Institutional Research) who is recommending an approach and guidelines for allocating Cognos licenses. Jeff Whitten was appointed by Gerry McCartney, VPIT, to lead the group. Others on the group are Brad Skiles, Melissa Burton, Mike Szczepanski, Jacque Frost, Lee Gordon, and Dan Gentry. The group was formed to serve for an interim period, until the time when a Data and Reporting Advisory Committee is formed to govern OnePurdue enterprise data and reporting issues.

Server Administrator: This license is used to administer servers and content in Cognos BI. It is also used to set up the Cognos 8 BI system, implement security, and manage the server components.

Transformer: This license is used to create data cubes that summarize commonly requested information.