IBM Cognos Business Intelligence License Descriptions

This document describes the capabilities associated with IBM Cognos Business Intelligence licenses. This document is intended to help sales to offer the best license options to match the customer's buying agenda, and to ensure customers understand the rights of the different licenses. This includes customers trading up from Cognos ReportNet, Cognos PowerPlay, Cognos Metrics Manager and Cognos DecisionStream to Cognos BI 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. This document is superseded by the official License Information document.

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"
- "IBM Cognos Workspace as "Workspace"
- "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 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 New Customer BI Licenses

With the 10.2.1 release of Cognos Business Intelligence, two user types were introduced for customers developing new applications. These user types are our new strategic roles and do not include classic studios.

The combination of these two users greatly simplifies the licensing of BI solution and ensures users have access to all the analytic capabilities included.

IBM Cognos BI Architect

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 User
- 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;
- Use the Map Manager modules and functionality
- Use IBM Cognos Cube Designer for building Dynamic Cubes
- Use Dynamic Query Analyzer to optimize performance
- Use the Software Development Kit (SDK) for creation of custom applications

IBM Cognos BI User

This is the main license, which will be used by those people who author or consume content through the Cognos Connection portal, Cognos Workspace module, Cognos Workspace Advanced, Cognos Insight and Report Studio it provides rights to:

- Use IBM Cognos Mobile applications
- Use the Cognos Workspace and Cognos Workspace Advanced modules
- Consume Cognos Active Report outputs
- Use the Cognos Insight functionality (can share CDD files via Connections but not connect to TM1);
- Use Cognos for Office module and functionality
- Use Cognos Connection Portal, Event Studio, and Cognos Search identify reports to be viewed
- Use the Cognos Connection Portal to create and consume portal pages
- Subscribe to a scheduled report, create and manage report folders and personalized standard reports
- Run and schedule reports, interact with prompts, output the reports to other formats

such as PDF and CSV;

- If customer has acquired BI User 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 use the Real-time Monitoring Dashboard is included.

Recommended BI Standardization Roles for existing customers

IBM 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, Cognos Insight, Metric Studio and Metric Designer modules and functionality;
- Use the Cognos Workspace 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
- Use IBM Cognos Cube Designer for building Dynamic Cubes
- Use Dynamic Query Analyzer to optimize performance

IBM 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, Cognos Insight, Metric Studio and Metric Designer modules and functionality;
- Use the Cognos Workspace module (standard and advanced mode)
- Design, create and maintain PowerCubes using the Transformer module and functionality.

IBM 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, Analysis Studio and Cognos Insight module and functionality;
- Use the Cognos Workspace module (standard and advanced mode)

IBM 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 Cognos Workspace module, (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;
- Use IBM Cognos Mobile applications.
- 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 Cognos Workspace (Formerly Business Insight) module (standard mode only)
- Utilize Cognos Search capabilites exposed in the studios and UIs for which user is licensed
- 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 use the Real-time Monitoring Dashboard is included.

IBM Enterprise User

This role is a bundled license which entitles users to the same rights as a TM1 PM User, plus BI User. This provides access to BI reporting, analysis and dashboard capabilities for a planning user, or planning to a BI User. If a customer purchases an Enterprise User, they must also already have (or purchase new) a Cognos Analytic Server, at least 1 BI Architect or Administrator to use the BI capabilities of this license for data sources other than TM1. PM Modelers can administer BI environments for TM1 without a BI Architect.

IBM 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
- Utilize Cognos Search capabilites exposed in the studios and UIs for which user is licensed
- Note: This license does not provide the rights to distribute or consume "Active Report" content

IBM Cognos BI Remote Recipient

This role is aimed at customers with 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, Cognos Workspace 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 provides the rights to 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.

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.

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 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.

Legacy Roles (available for incremental purchase only)

Cognos BI Professional Author (incremental purchase only)

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 Studio, Report Studio and Cognos Insight modules and functionality;
- Use the Cognos Workspace module (standard and advanced mode)

Cognos BI Business Author (incremental purchase only)

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 BI Business Manager (incremental purchase only)

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 (incremental purchase only)

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;

IBM Cognos Insight, Standard Edition

This license provides the right to install the IBM Cognos Insight Software on a computer and use the software to import and analyze data and create visualizations. Please note that this license is now considered to be a Performance Management offering.

IBM Cognos Mobile Consumer (incremental purchase only)

This role is aimed at customer with users who require access to IBM Cognos Business Intelligence only via the optimized applications developed for mobile devices and provides rights to:

- • Access IBM Cognos BI via applications delivered with or supported by Cognos Mobile Server
- • Consume Cognos Active Report outputs

  Use of all of the rights defined for the Cognos BI Consumer role (to the degree these functionalities are supported by the mobile applications provided)

IBM Cognos BI Recipient (incremental purchase only)

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 Collaboration (incremental purchase only)

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.

Additional Legacy Studio Licenses *(incremental purchase only)*

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

Cognos BI Mobile Server (incremental purchase only)
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.

Note: In addition to the server license, customers must purchase Cognos Mobile Add-on licenses for each user enabled to use Cognos Mobile functionality. When rights to use Mobile applications is acquired via core roles (from release 10.1.1 on) separate licensing for the BI Mobile Server is not required.

Cognos BI Mobile Add-on (incremental purchase only)
This license provides the right for a specified number of Authorized Users to
- Install the Cognos Mobile applications 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 applications.
- Run, schedule, browse and search reports in the Cognos Connection Portal from the Cognos Mobile applications 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 applicatons.
- Forward Cognos BI reports to other Cognos BI licensed users from the Cognos Mobile applications on the handheld device.

An individual may only be permitted to be a Cognos 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.

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

Cognos BI PowerPlay Analyst This license 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 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.
- Use the Cognos Workspace (Formerly Business Insight) module (standard mode only)
- Use Active Reports

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
- Use of all of the rights defined for the Cognos BI Consumer role
- 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

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 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 Cognos Workspace (formerly Business Insight) modules, (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 tradeup to the full Cognos BI Administrator capabilities (fee applies).