BRANCH PERFORMANCE BLUEPRINT
BRANCH PERFORMANCE SETUP DOCUMENT
A WEB-BASED PERFORMANCE MANAGEMENT SOLUTION

Table of Contents

Blueprint Overview

This document explains the content and provides installation steps for a web-based solution reporting for the Branch Performance Blueprint.

IBM Cognos Blueprints are pre-defined data, process, and policy software models developed in partnership with leading academic institutions to address specific business process problems. They are essentially "quick-start" data models that IBM Cognos customers can download and implement at no extra cost.

Using the Blueprint with your IBM Cognos performance management system will enable users to clearly identify strategic performance and track it in a consistent, logical manner. It also provides a simple yet powerful way to monitor different Metrics and KPIs to better evaluate and take actionable items to increase performance.

Prerequisites

1. Cognos BI 8.4 SP1 or later
2. IBM Cognos 8.4 Metrics Server
3. MS SQL Server 2005 or higher
4. Cognos Supported database to house the Metric Studio content as well as the Analytics Content
5. This blueprint uses the same naming convention as the previous EP version of the Branch Performance Blueprint. As a result, the two versions cannot co-exist unless the database, datasources and folder names are altered to prevent conflict.

Blueprint Contents

1. **Branch Performance Blueprint.zip**
   This is the entire file structure for the BI deployment, Framework Manager Model and graphics with a categorized folder structure to house the extracted files.

2. **Branch Performance BI Deployment.zip**
   This is the BI Deployment file consisting of reports and portal pages specific to this Blueprint.

3. **Branch Performance Scorecard.zip**
   This is the Metric Studio Deployment file containing the Scorecards and data for the Metric Studio Application.

4. **Branch Performance Blueprint Setup.pdf**
   Description of the necessary files and steps needed to setup both environments for the Planning and BI portions of the Blueprint.

5. **Branch Performance Images.zip**
   Images required when rendering dashboards and reports.

6. **Branch Peformance.zip**
   This file is the Contributor Deployment file which will be imported through the TM1 Administration user interface.

Making Content Files Available for Each Application

2.1 Unzipping the Branch Performance Blueprint

Unzipping the **'Branch Performance Blueprint.zip'** file will create the following directories:

* We will reference these directories, which store the pertinent files.

2.2 Copying the Necessary Files

1. Copy the **Branch Performance BI Deployment.zip** file from the '**Deployment File – Reports**' folder to the **<IBM Cognos 8 install location>\deployment** folder.
   Note: Depending upon the configuration, location of the deployment folder may be setup on a different server, confirm the location with the BI administrator.

2. Unzip the **Branch Performance Scorecard.zip** file from the '**Deployment File - Reports'** folder. Move the **Branch Performance Scorecard** folder to the **<install directory>\deployment** folder

3. Unzip the **Branch Performance Images.zip** file from the '**Graphics, Files, etc**' folder and copy the "manhattan.gif" file into <installation directory>/webapps/p2pd/WEB-INF\cmm\images\diagrams folder, then copy the remaining image files into <installation directory>/webcontent/samples/images, if the images folder does not exist, create it
   Note: The destination folder used in the above step is customized per your environment. For multi-server installation the images would need to be copied over the Gateway servers. Verify with the BI Administrator the architecture of the BI environment before copying the files.

4. Uznip the "**Branch Performance.zip**" file from the '**TM1 Application'** and copy the folder to **<YourIBMCognosTM1 Blueprint Folder>**

5. From the **Data** folder unzip all files and move *.mdf and *.ldf files to a designated data file location. (i.e., *<SQL Server install location>/*MSSQL1/MSSQL/Data).

6. Attach database in SQL Server Enterprise Manager (2005) or Management Studio (2005) by right-clicking 'Databases' (under server name) and choosing 'Attach.'   Locate and choose the ***.mdf** files as your sources.

IBM Cognos TM1 Content

The following steps will navigate through the steps required to create a new IBM Cognos TM1 Server instance and configure the objects needed for the IBM Cognos TM1 content to work properly.

3.1 Configure a new IBM Cognos TM1 Server instance

The following steps provide a quick guideline on how to get a new IBM Cognos TM1 server instance, however a more detailed explanation can be found in the IBM Cognos TM1 Server Administration document.

To configure a new IBM Cognos TM1 Server instance the following files are required:

1. Tm1s.cfg
2. Tm1s.lic
3. A shortcut to execute tm1s.exe using the Blueprint content as the working directory.

Copy the tm1s.lic File

The **tm1s.lic** file is included in your IBM Cognos TM1 installation. This file can be copied from <YourIBMCognosTM1_DirectoryInstall>/bin folder. The content of this file is similar to:

```
DATABASE_TYPE=TM1 PROPRIETARY
CLASS=505
LICENSE=<YourLicense>
MAX_USERS=99999
MAX_READONLY_USERS=99999
EXPIRE_DT=<YourExpiryDate>
LOCATION=
ORGANIZATION=<YourCompany>
LICENSOR=
INSTALL_ID=
PRODUCT= ......
```

Copy the **tm1s.lic** file to '<**YourIBMCognos TM1 Applications Folder>\BranchPerformance\objects'** to create a new server instance.

Modify the Tm1s.cfg server configuration file

From the **'<YourIBMCognos TM1 Applications Folder>\BranchPerformance\objects'** folder, modify the **'tm1s.cfg'** file.

This file needs to be modified to **point to the IBM Cognos TM1 Admin Server on your environment**. The file is provided as:

```
[TM1S]
ServerLogging=F
SecurityPackageName=Kerberos
IntegratedSecurityMode=1
UseSSL=T
ServerName=Branch Performance
DataBaseDirectory='<YourIBMCognosTM1 Blueprint Folder>\BranchPerformance\objects'
AdminHost=YourAdminHost
PortNumber=90001
ClientMessagePortNumber=
Language=ENG
SaveTime=
DownTime=
ProgressMessage=True
AuditLogOn=F
AuditLogMaxFileSize=100 MB
AuditLogUpdateInterval=60
DefaultMeasuresDimension=T
```

The parameters highlighted in **red** need to be reviewed and modified accordingly for your company's environment. If there is certainty that the default TCP ports above are not being used, they can be left unchanged.

The "AdminHost" parameter would need to be changed to reflect the IBM Cognos TM1 Admin Sever host setting in your environment.

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Modify/Create the Server Shortcut

Navigate to **'<YourIBMCognosTM1_DirectoryInstall>/bin'** folder; **create a shortcut** to tm1s.exe.
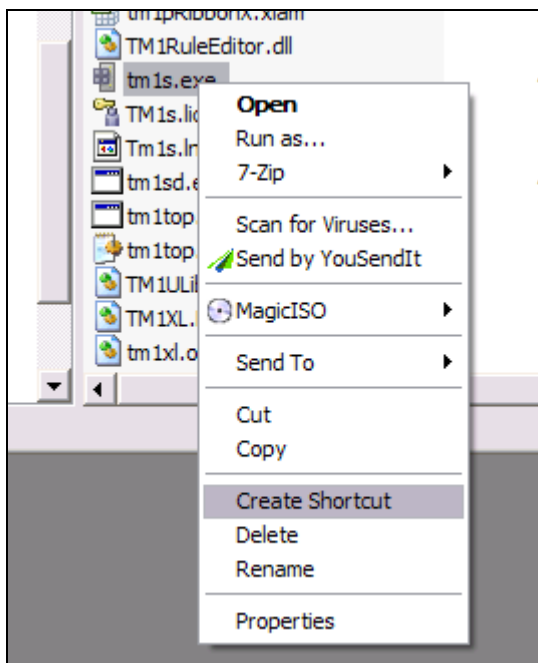
1. Copy the shortcut created to '<**YourIBMCognos TM1 Applications Folder>\ BranchPerformance\objects'**
2. Rename the shortcut to be "Branch Performance" and Edit the Shortcut Properties
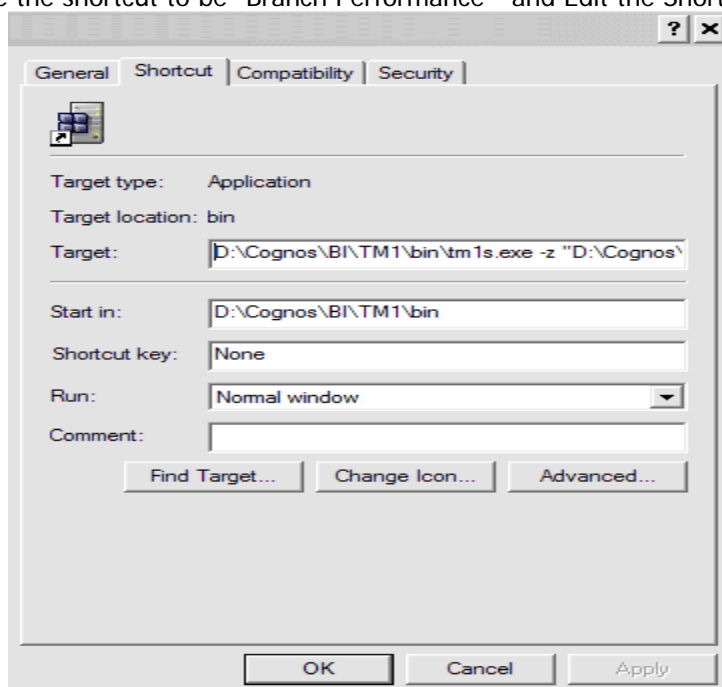
The **"Target" property** of the shortcut needs to be changed to read:

<YourIBMCognosTM1InstallFolder>\bin\tm1s.exe -z "
<**YourIBMCognos TM1 Applications Folder>\objects"**

Notice that the last portion of the command is the folder where the IBM Cognos TM1 content was extracted to.

Click onto **OK** to save the changes.

3.2 Testing the new IBM Cognos TM1 Server instance

From the **'<YourIBMCognosTM1 Blueprint Folder>\objects'** folder, double click the '**Branch Performance'** **shortcut**.

The following dialog will appear:
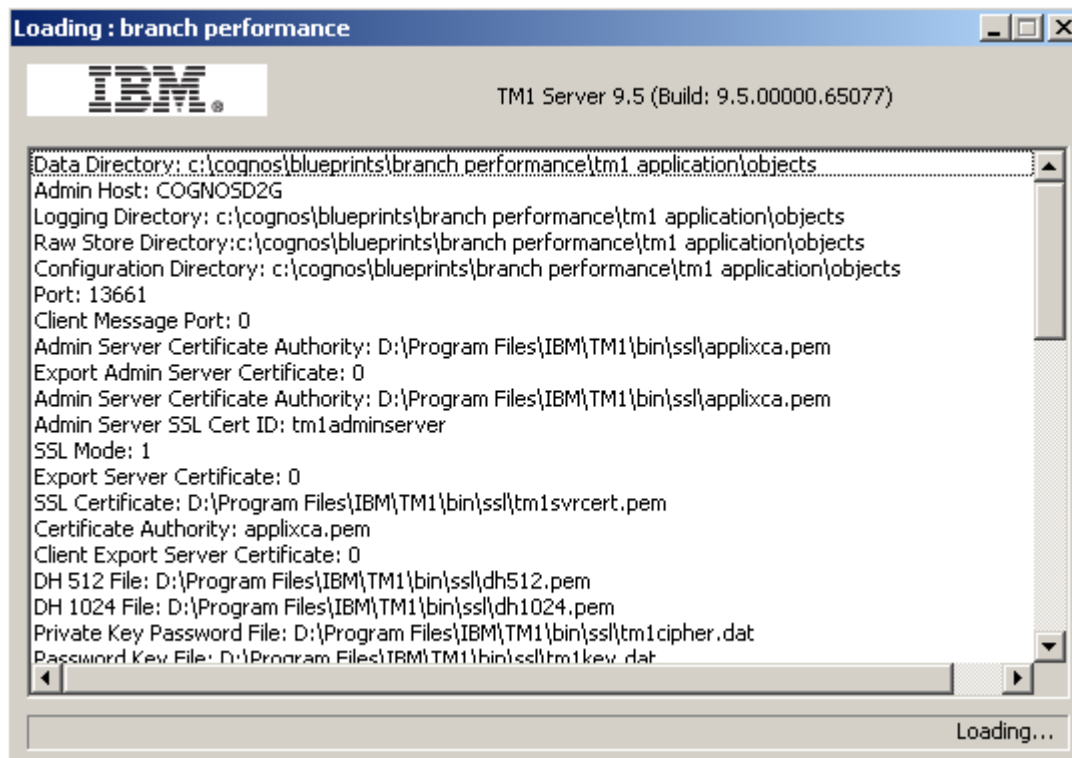
After all cubes have been loaded, the lower right corner of the dialog will display **Running...**:
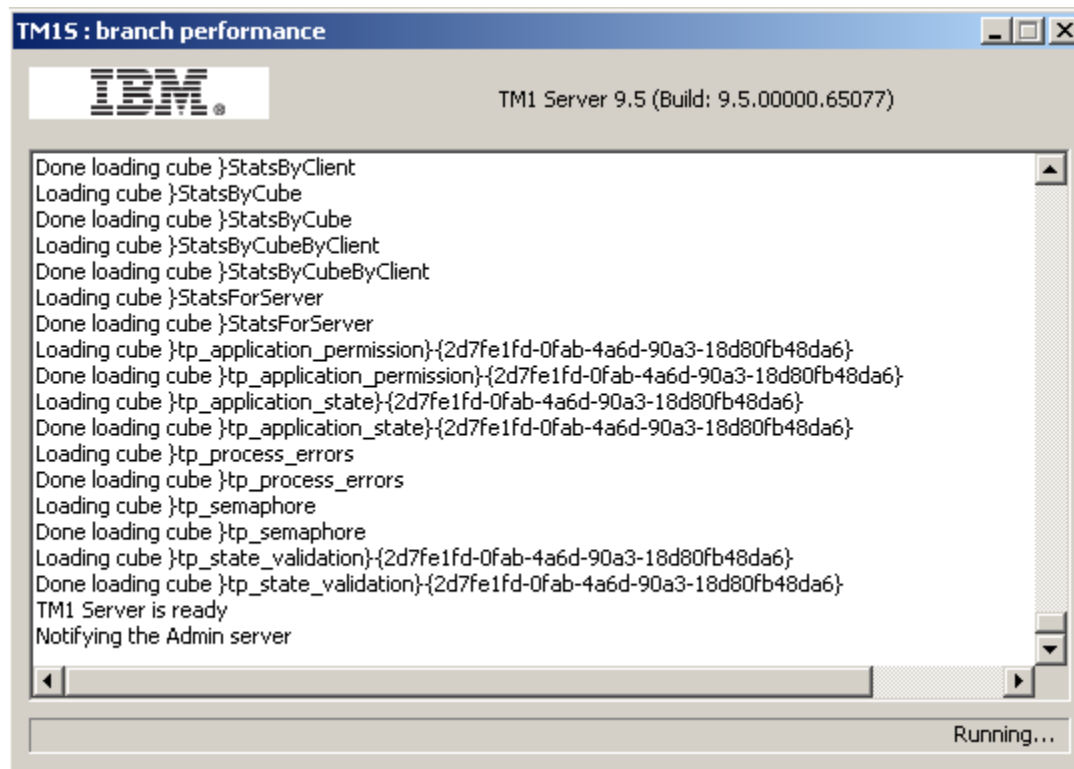
Once the newly created IBM Cognos TM1 Server instance is up and running, Architect and/or IBM Cognos TM1Web can be used to navigate through the content.

3.3 Setting Up the Contributor Application

3.3.1 Open TM1 **Architect**

3.3.2 Double click the **Branch Performance** application and **Login** as User/Password: **admin/apple**

3.3.3 Click on the Menu Item – View and validate Display Control Objects is checked
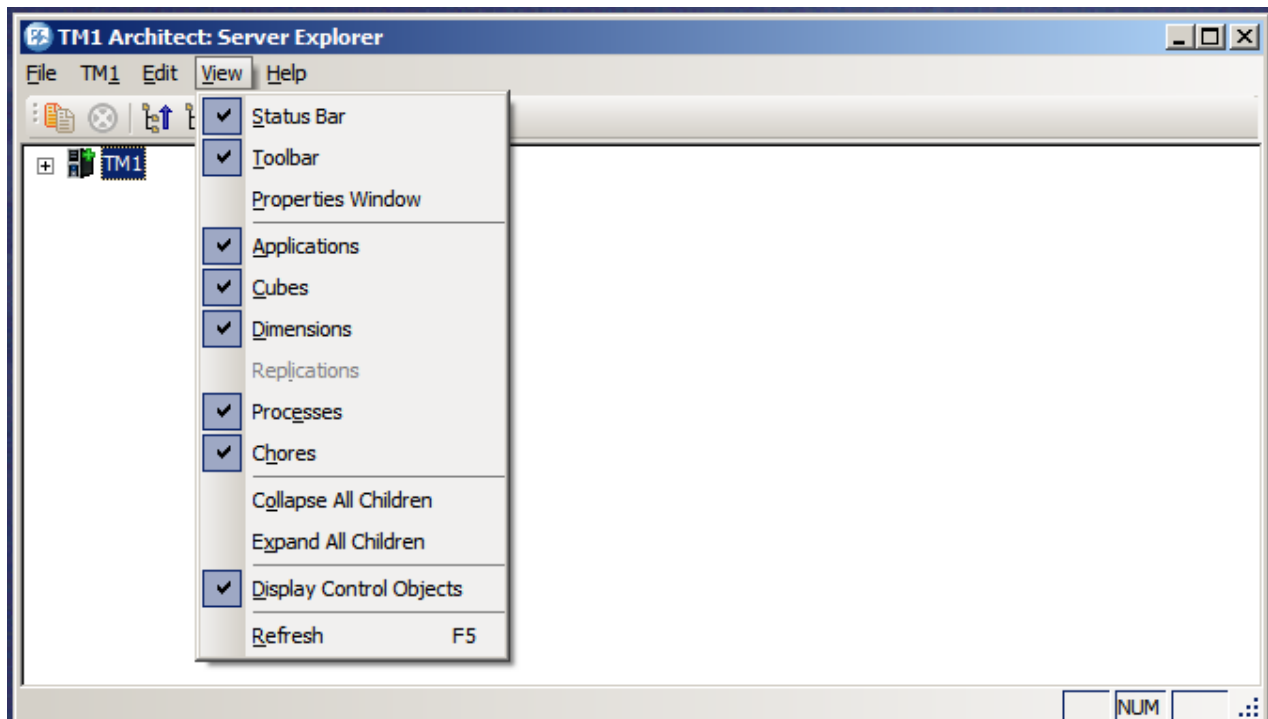
3.3.4 Expand Processes node and double click }tp_admin_delete_all. Accept all defaults.
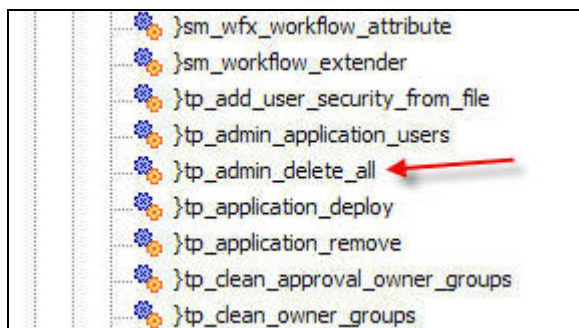
3.3.5 Click **run** and **OK**
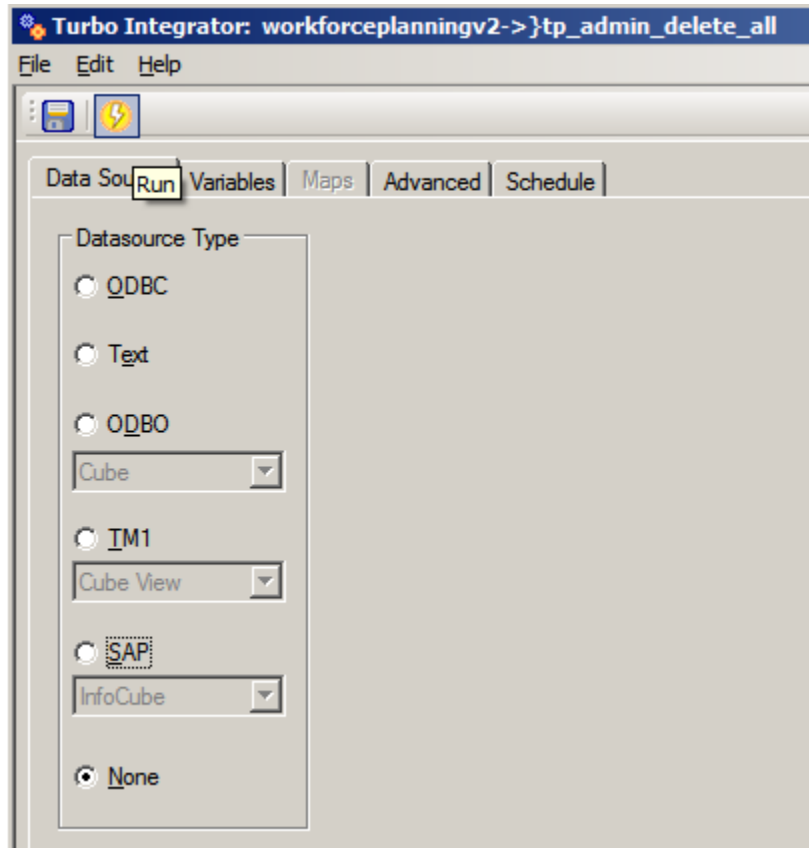
3.3.6 Copy the "Branch Performance.zip" file from the "TM1 Application Shortcut and Deployment" folder into **<YourIBMCognosTM1 Blueprint Folder>\BranchPerformance\Contributor**, if the "Contributor" folder does not exist, create it

3.3.7 Launch your TM1 Contributor environment, for example, **http://yourTM1_Server:<Port>/pmpsvc/** and Login as User/Password: admin/apple

3.3.8 Click **Administer IBM Cognos TM1 Contributor**
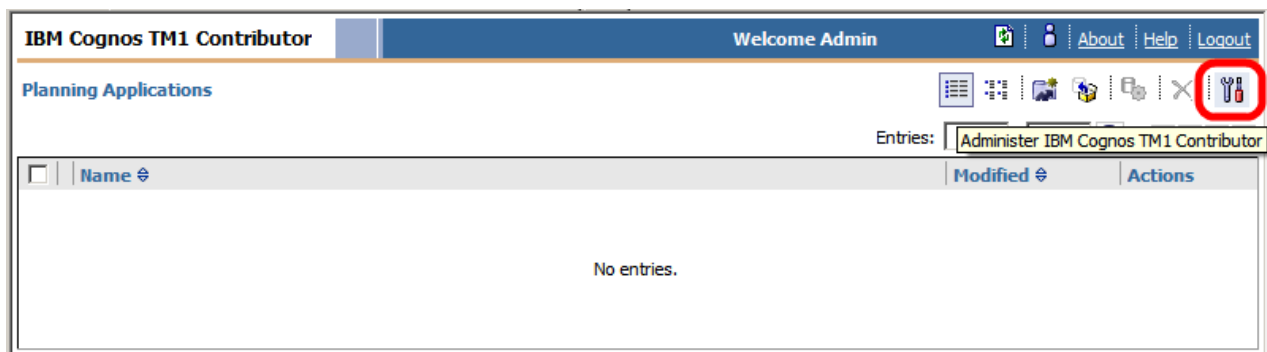
3.3.9 Click **Add...** under the Server Names: section

3.3.10 Enter your TM1 Admin Host and click the **Refresh** icon

3.3.11 For the Server Name: select **'branch performance'** and click **OK**

3.3.12 Click **OK**

3.3.13 Click the **Import Application** icon
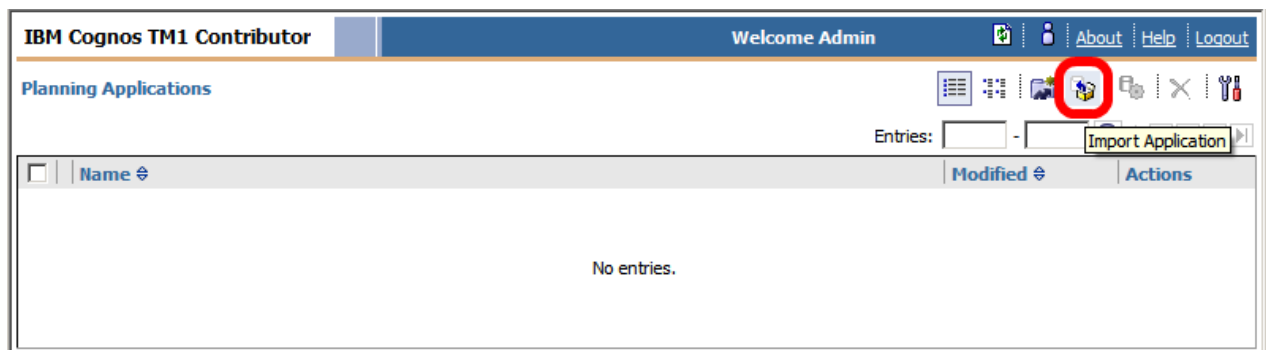
3.3.14 Choose *yourTM1ServerName*:Branch Performance for the TM1 Server

3.3.15 Browse to '**YourIBMCognosTM1 Blueprint Folder>\BranchPerformance\Contributor**'and select

the **"Branch Performance.zip"**

3.3.16 **Uncheck Import application security** and Click **Import**

Application Import

Specify your import file and import settings.

TM1 Server:

TP-mwilcox.ent.ad.cognos.com:branch performance

Application file:

C:\Master\C8 Platform\TM1\Blueprint Models\Branch Performance\xml\Branch Perform   [Browse...]

☐ Import application security

☑ Import application properties

[Import] [Cancel]

3.3.17 Click the **Activate Application** icon

3.3.18 Now click on the icon to Manage rights for Application, Select Node as Fashion Branch, Select Group as FBranch and Define Security as Submit and click the Add button to add the permissions

3.3.19 All Logons User/Password for the Branch Performance applications are:

Admin/apple
Fbranch/*BLANK PASSWORD*

3.3.20 Click the Branch Performance link to test, if installed correctly it should resemble the following

IBM Cognos 8 BI Content

The following steps will navigate trough the steps required to configure the objects needed for the IBM Cognos BI content to work properly.

4.1 Create the BI data sources

1. Open a browser window and go to **IBM Cognos Connection**. If Authentication is setup, login with a directory **Administrator user**

2. Click on to **Launch** and select **IBM Cognos Administration**
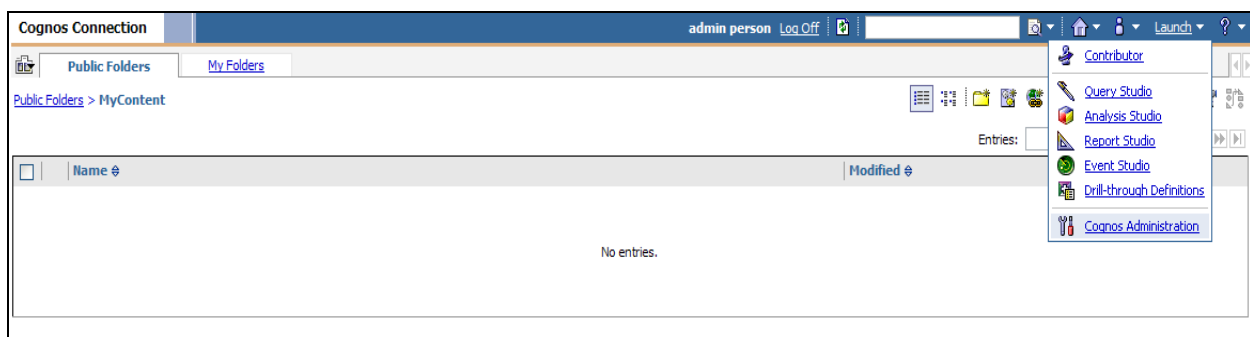
3. Click on the **Configuration tab**; make sure **'Data Source Connections'** is selected
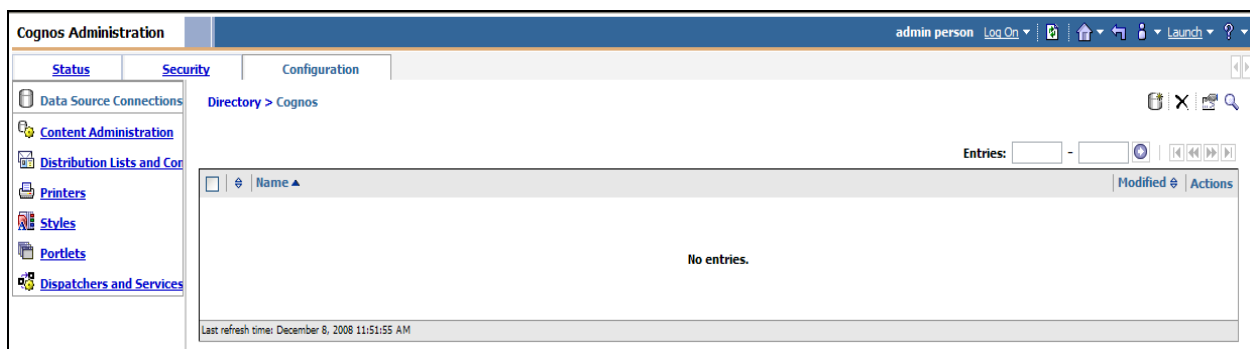
4. Click the Data Sources tab then **click the New Data Source Icon**
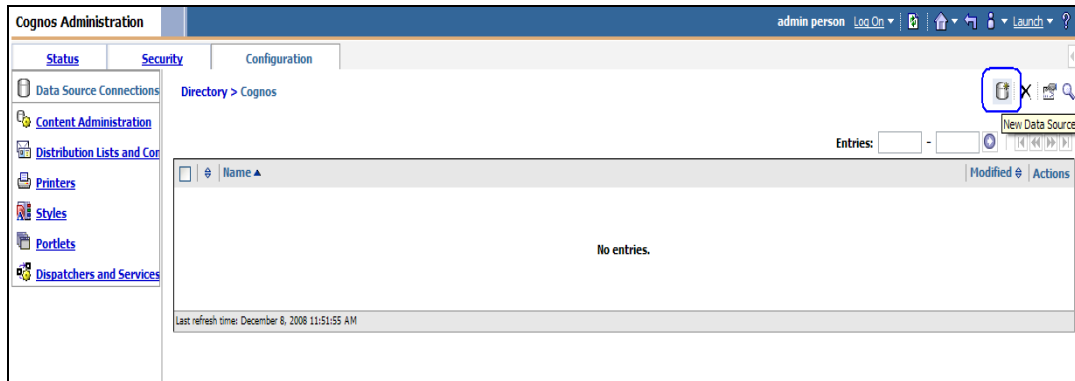
5. Name the Data Source exactly as**: 'Branch Performance Blueprint'** then click **Next >**
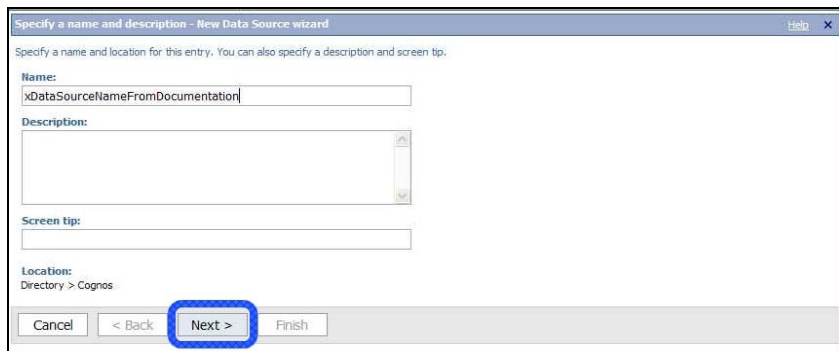
6. Select the **'TM1'** option; then click **Next** >
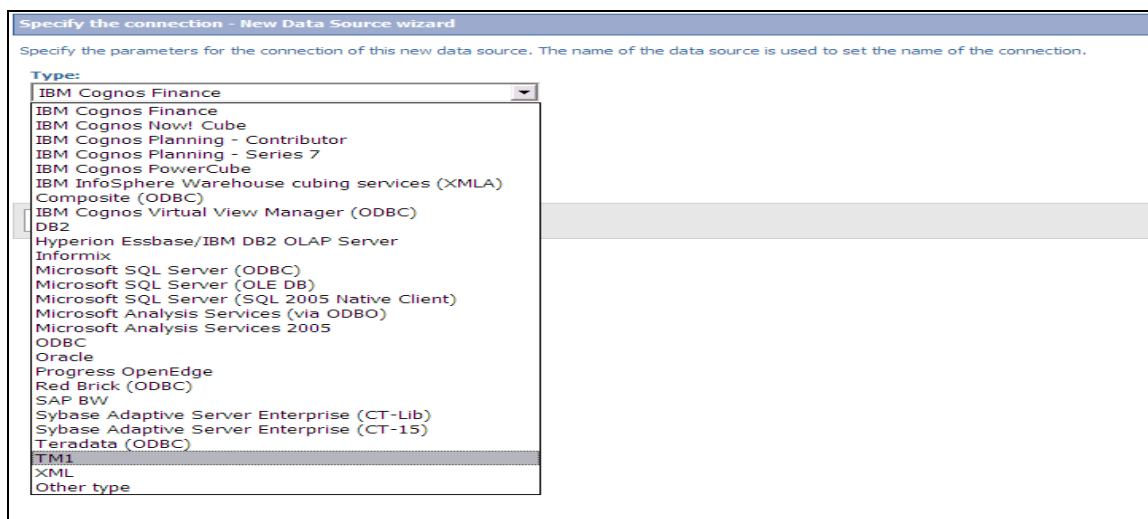
7. **Fill out the parameters** for the TM1 connection then click **Test the connection...**

8. Click **Test** to verify the connection is setup correctly

9.
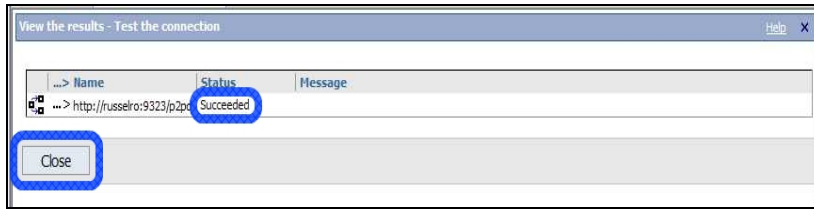
10. Click **Close** again
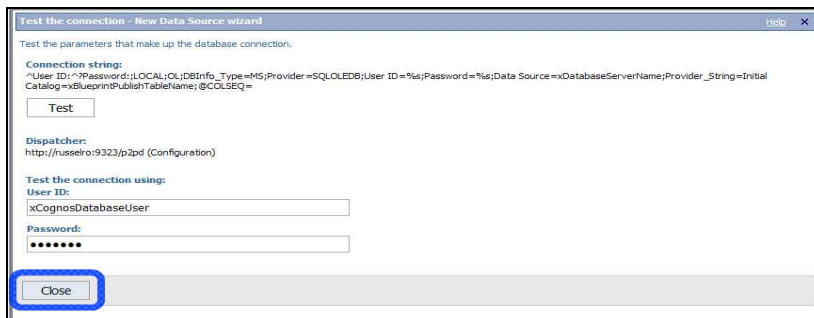
11. Click **Finish** to add the new data source.
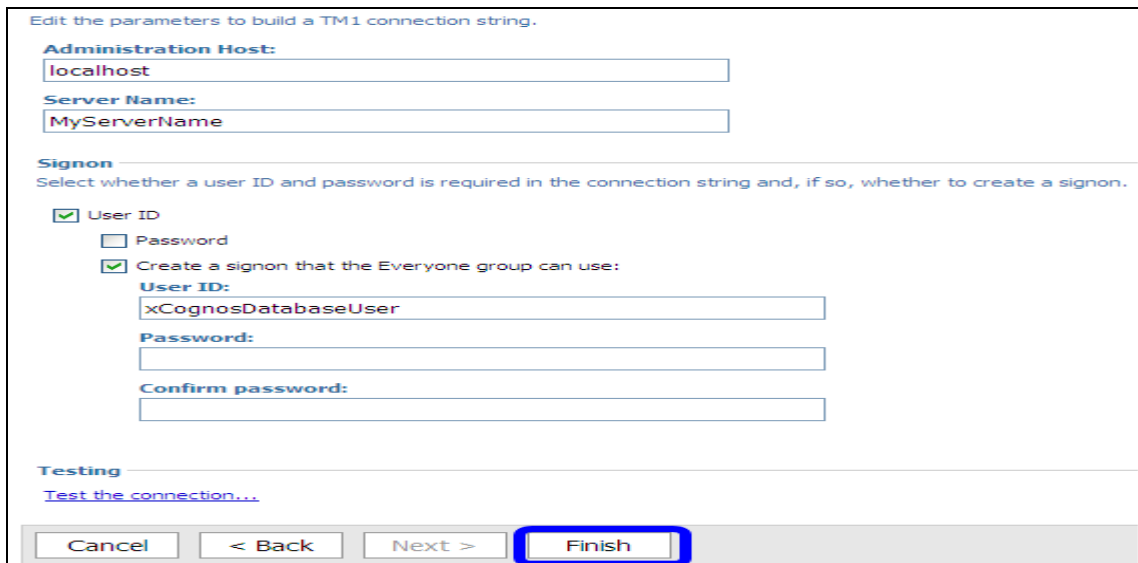
12. Repeat steps 1 through 4 above to create a new Data Source.

13. Name the Data Source exactly as**: 'BranchDW'** then click **Next >**

14. Select the **'Microsoft SQL Server (OLE DB)'** option; then click **Next** >

15. Continue creating the Data Source by pointing to the **BranchDW** database. Test the connection to ensure it is working before proceeding. Minimize.

4.2 Create the Metric Studio data source and Import the BI Deployment

1. Using a supported database, create a new database named **Branch Performance Scorecard.** If using MS SQL
   Server, use collation Latin1_General_ CI_AI

2. Repeat steps 1 through 4 above in Section 4.1 to create a new Data Source.

3. In Cognos Administration add Data Source Name: **Branch Performance Scorecard** → Database: **Branch Performance Scorecard**

4. Open IBM Cognos Connection and Select **Launch -> Content Administration**

5. Select the **Configuration** tab

6. Select **Content Administration** link

7. Click the **New Import** icon

8. Select the import package named '**Branch Performance BI Deployment'** then click **Next** >
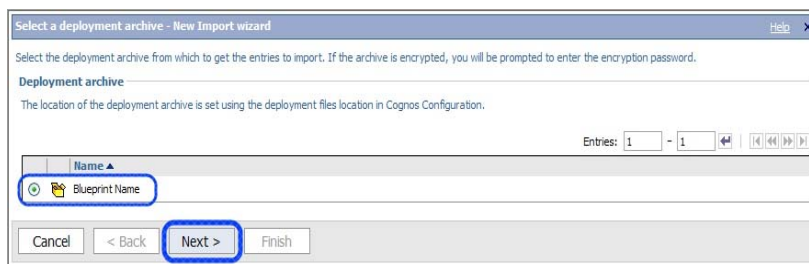
9. Verify the Name is 'Branch Performance BI Deployment' then click **Next** >

10. Specify the options and **DO NOT** check 'Disable after import' then click **Next** >

11. Specify the general options, select 'The user performing the import' and 'New entries only' then click **Next** >

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12. Review the summary options selected then click **Next** >

13. Choose 'Save and run once' then click **Finish**

14. Specify the time to run the import select 'Now' and 'Keep the existing report specifications versions' then click **Run**

15. Check 'View the details of this import after closing this dialog' then click **OK**
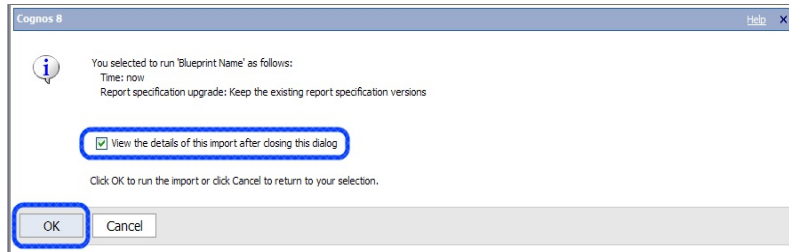
16. Initial view of the import deployment record will be blank. Press the 'Refresh' hyperlink.
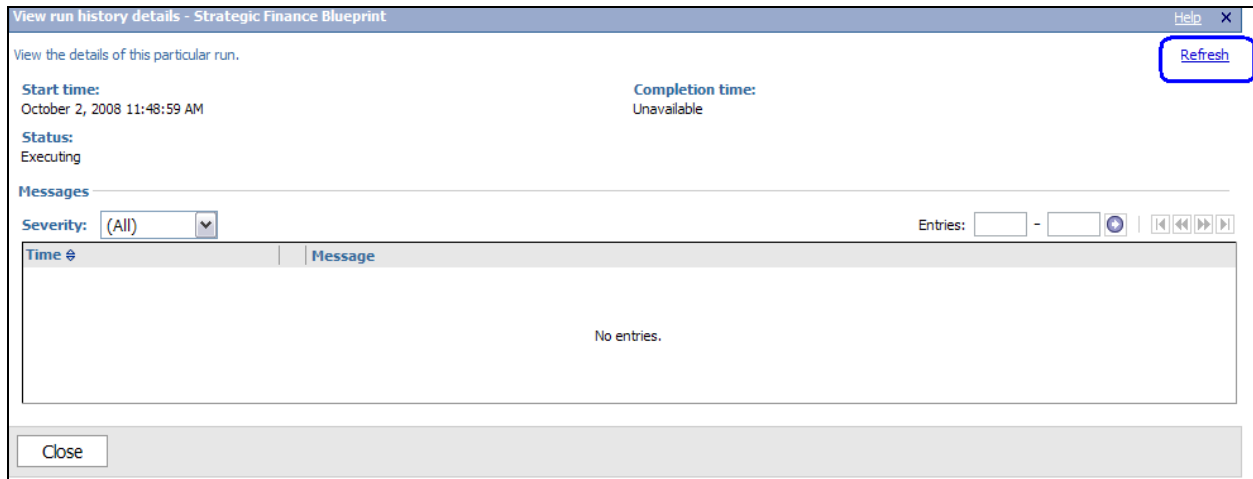
17. If the deployment import has not finished click 'Refresh' again until it shows a completion time, then click **Close.**
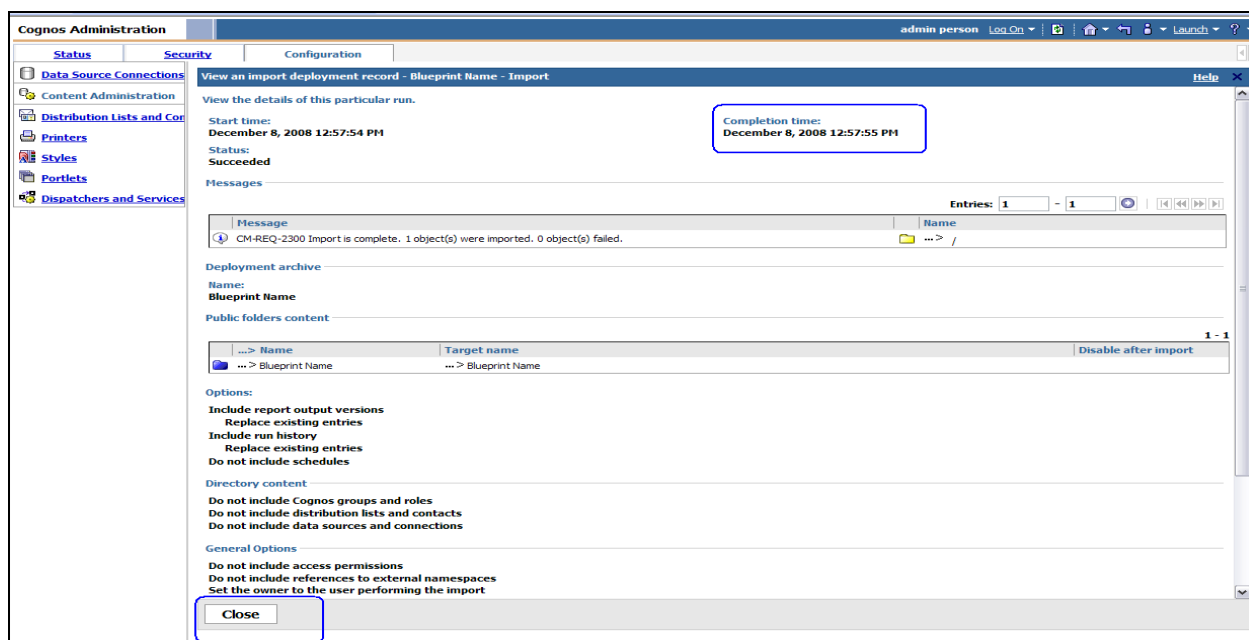
18. After validating that the import ran successfully, navigate to **Cognos Connection Public Folders**

19. Navigate the to **Branch Performance Blueprint/Packages** folder

20. Click the **Branch Performance Scorecard link** to launch the Metrics package wizard

21. Click **Next>** to advance the wizard

22. Leave the default selection as Use the default deployment location and click **Next>**

23. Select Standard calendar and click **Next>**

24. Select the checkbox options for **Years, Quarters (Three months) and Months** and click **Next>**

25. Choose the default Start date as **Jan 1, 2010** and **Add 2 Years** in the textbox below and click **Next>**

26. Click **Initialize** to create the calendar data

27. After completing the Initialize chore choose to **open the Metric Studio package**

28. Click **Tools** and **Import sources**, now click the **New...** link to add a new import source

29. On the Tools – Import Sources screen select the **New...** link to add a New... import source

30. If you receive a message dialog indicating the Default source cannot be found just click OK and we will disable it after creating the new Import Source

31. Select **English**, type the Name as **Branch Performance Scorecard** and select Import data from: **Metrics import directory**

32. Choose the option for the **Branch Performance Scorecard** folder, select the File format: as **8.4.2** and Character set encoding: as **Baltic (Windows-1257)** then click **OK**

33. On the Tools – Import sources choose the option to **Exclude from the import the Default Import Source** and click **OK**

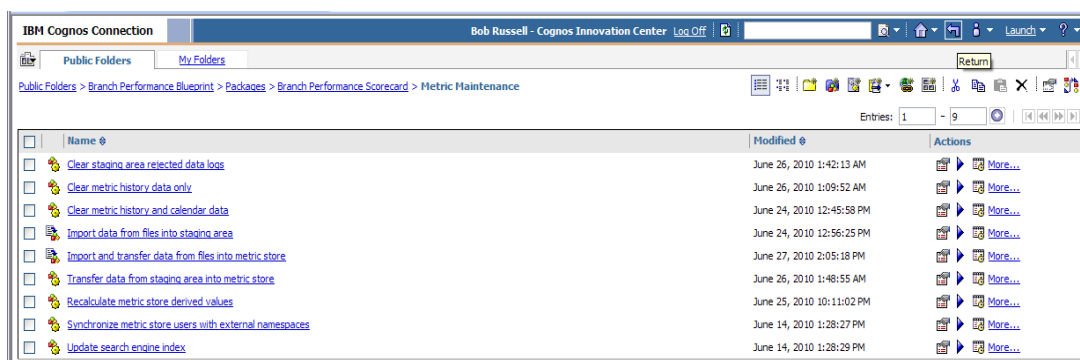34. Now click **Tools** and click **Metric maintenance**

35. Click the link to **Import and transfer data from files into metric store**
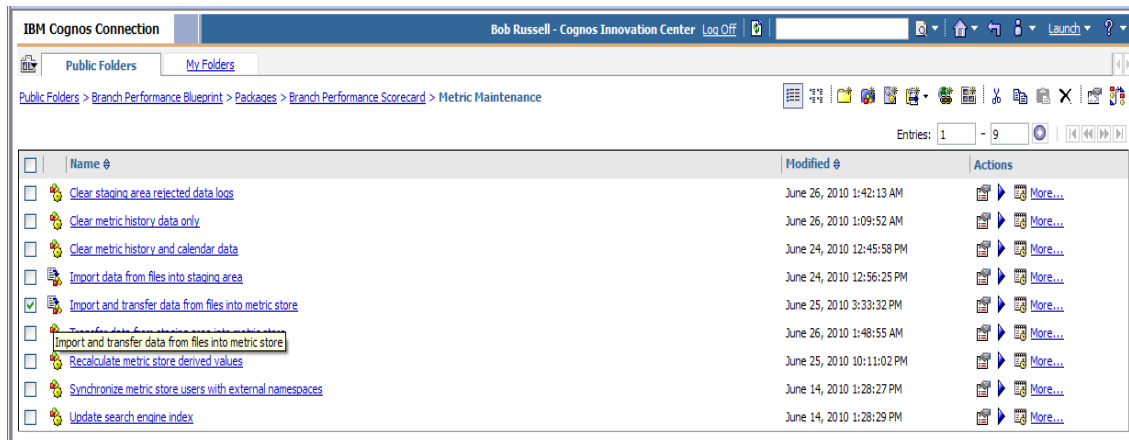
36. After the task completes click the link to View **the run details** to validate the import ran successfully your screen should resemble to following screen capture below and then click **Close**
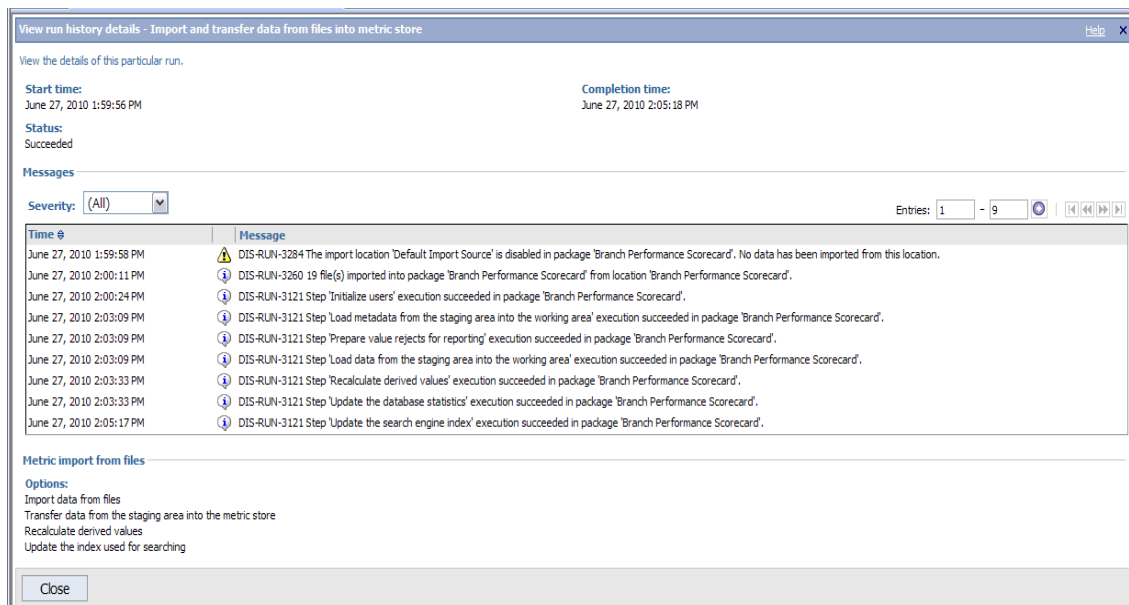
37. Now click the **Return icon** to validate the data has seeded correctly

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38. By navigating through the **Scorecards** structure and choosing the **MANHATTAN** scorecard your data should resemble the capture below

39. Now click the Return icon and to the Cognos Connection Public Folders area

40. Navigate to the Branch Performance Blueprint>Links folder and click the properties icon for the Branch Performance – Planning Contributor link

41. Change the link, if necessary to point at your TM1 Contributor environment, for example,
    http://yourTM1_Server:<Port>/pmpsvc/

42. If the event links located in the Branch Performance Blueprint>Events>District Manager folder structure is invalid

43. Click the Run icon to launch to rerun the event and click the Run button then OK

44. From the Public Folders tab Navigate to Branch Performance Blueprint>Dashboards>District Manager>District Manager Portal Tabs and select the properties icon for the Welcome dashboard page

45. Click on the Page Style tab and uncheck both Hide title bars and Hide Edit buttons on the title bar and click OK

46. Click the Welcome dashboard page and click the properties icon for the Image Viewer entry at the top right

47. Validate the url path is pointing to your environment for the images virtual directory

48. Do steps 44 through 47 for the entry within Branch Performance Blueprint>Dashboards>Branch Manager>Branch Manager Portal Tabs Welcome dashboard page as well

4.3 Testing IBM Cognos Dashboard Content

Navigate to IBM Cognos Connection Public Folders. A new folder will appear named '**Branch Performance Blueprint**', the content of this folder will display as:

To test the content, from the **Dashboards** folder, click the **District Manager** folder and launch the '**District Manager Dashboard**'. The following screen should appear:

Testing can then be performed on each of the reports listed in the Reports folder.