

Branch Performance Blueprint Setup Instructions

IBM Cognos BI Content

Pre-requisite technologies:

- IBM Cognos 8.4 Business Intelligence Server
- IBM Cognos 8.4 Metric Server
- Microsoft SQL Server 2000 or higher

Additional technologies (not required for set-up)

- IBM Cognos 8.4 BI Modeling (Framework Manager)
- IBM Cognos 8.4 Metric Modeling (Metric Designer)

1. Steps for setting up Cognos 8 Business Intelligence content:

- 1.1. **Copy the necessary files into their respective directories**
- 1.2. **Connect database files and create datasources**
- 1.3. **Run the import wizard to deploy the BI Content**
- 1.4. **Test the BI Content**

2. Steps for setting up Cognos 8 Business Intelligence content

2.1. Copy the necessary files into their respective directories

2.1.1. Open  **Data** directory and move all *.mdf and *.ldf files to a designated data file location. (i.e., <SQL Server install location>\MSSQL1\MSSQL\Data). You should have the following files:

Name	Size
Unspecified (6)	
 Branch_Perf_MS.mdf	28,672 KB
 Branch_Perf_MS_log.ldf	47,616 KB
 branch_performance_db_Data.MDF	10,368 KB
 branch_performance_db_Log.LDF	1,024 KB
 branch_performance_v2_84_table_dat.mdf	922,304 KB
 branch_performance_v2_84_table_log.mdf	182,272 KB

2.1.2. Copy the Branch Performance Blueprint BI.zip file from the  **Deployment** folder into <cognos 8 install location>/deployment

Note: Depending upon the BI environment configuration the location of the deployment folder may be setup to a different server, confirm the location with the BI administrator.

2.1.3. Copy all image files from the  **Images** folder to <cognos 8 install location>\webcontent\samples\images. If directory does not exist, please create it.

Note: 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.

1.1.4 Copy **manhattan.gif** from the  **Diagrams** folder to:
 <cognos 8 install location>\webapps\p2pd\WEB-INF\cmm\images\diagrams

2.2. Connect database files and create datasources

2.2.1. Attach the Database

Follow the steps within MS SQL Server 2000 or MS SQL Server 2005 to attach the 3 database files.

Hints:

For MS SQL Server 2000:

- Launch SQL Server Enterprise Manager
- Expand the Database Server
- Right click onto Databases and select Attach
- Browse to the location where the Reporting Database is stored and select

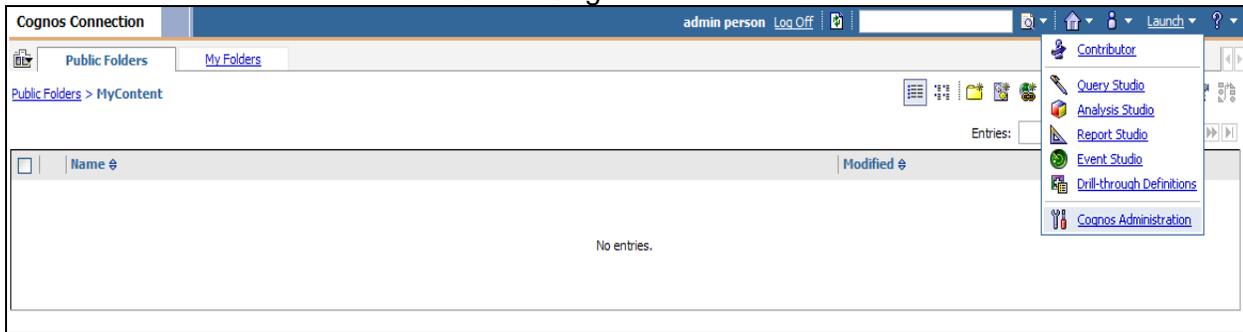
- For MS SQL Server 2005:
- Launch SQL Server Management Studio
- Expand the Database Server
- Right click onto Databases and select Attach
- Browse to the location where the Reporting Database is stored and select

Refer to SQL Server Help files for help on attaching databases.

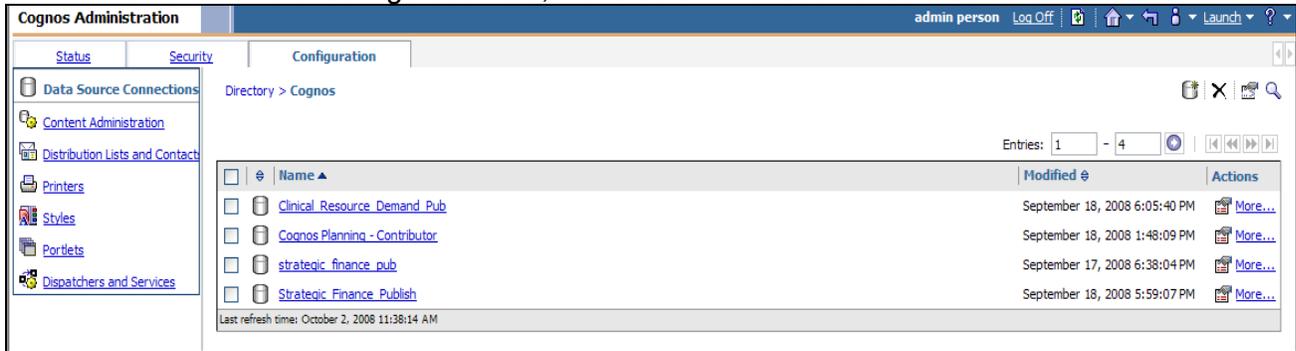
2.2.2. Create the datasource “BranchDW”

2.2.2.1. Open a browser window and go to Cognos Connection. If Authentication is setup, login with an directory administrator user

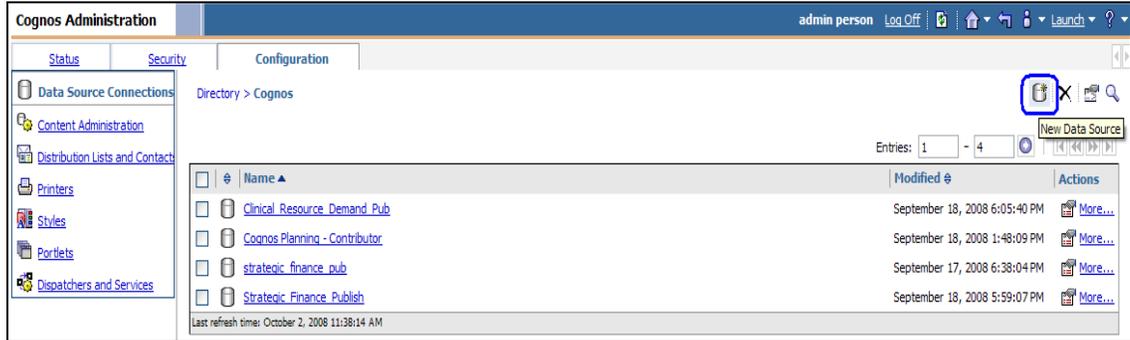
2.2.2.2. Click on to Launch and select Cognos Administration



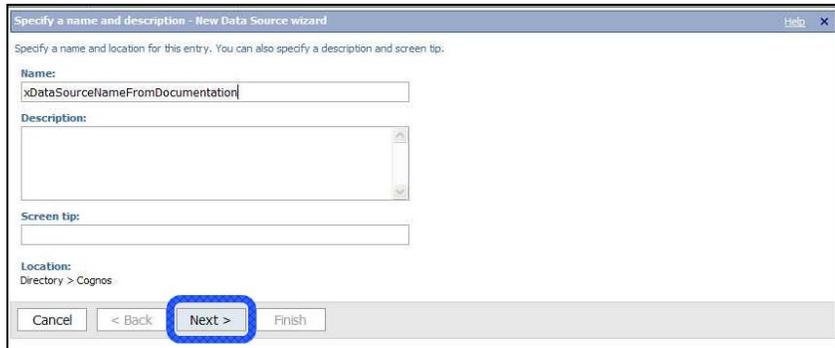
2.2.2.3. Click on the Configuration tab, make sure ‘Data Source Connections’ is selected



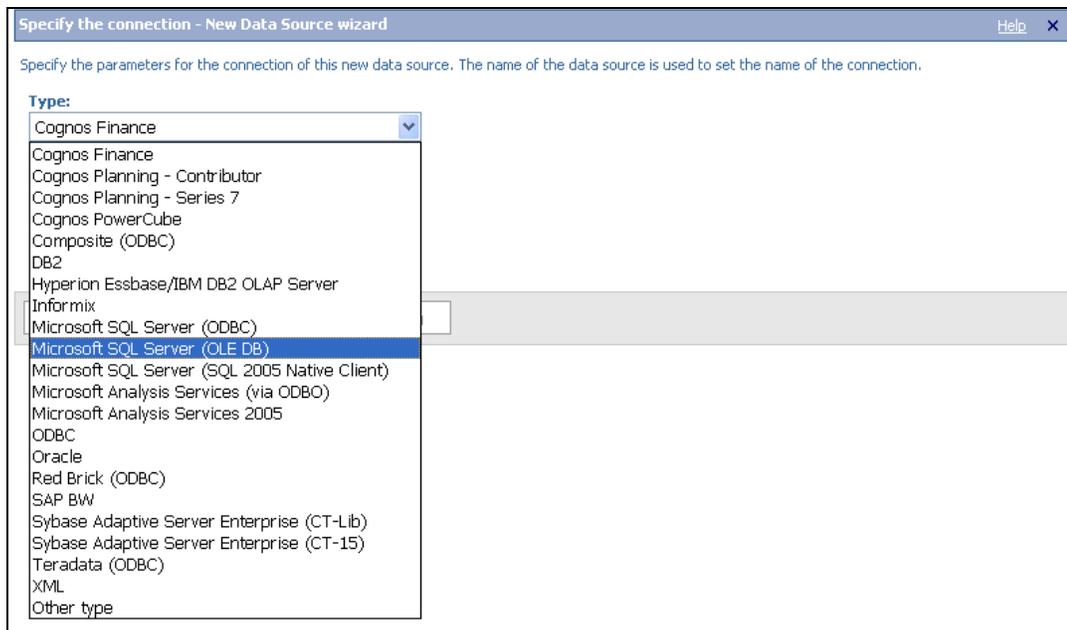
2.2.2.4. Click the Data Sources tab then click the New Data Source Icon 



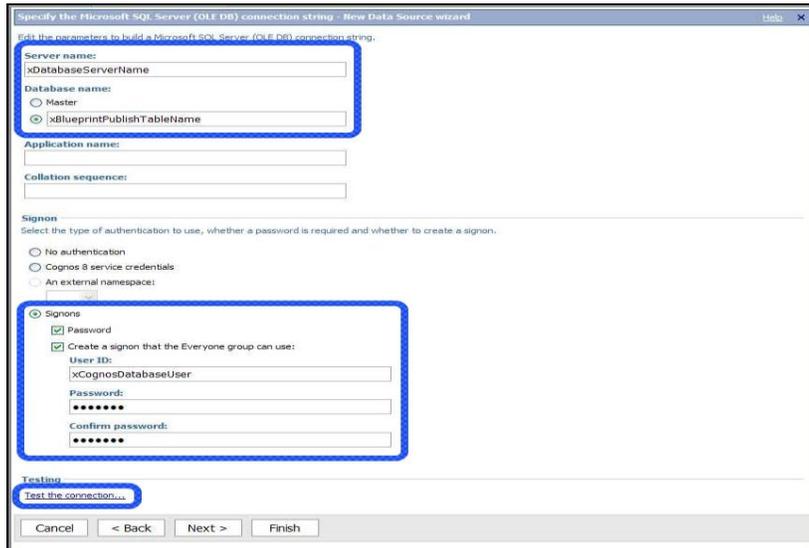
2.2.2.5. Name the Data Source exactly as: “BranchDW” then click Next >



2.2.2.6. Specify the database type of the connection created during the publish container connection then click Next >



2.2.2.7. Fill out the options for the connection then click [Test the connection...](#)



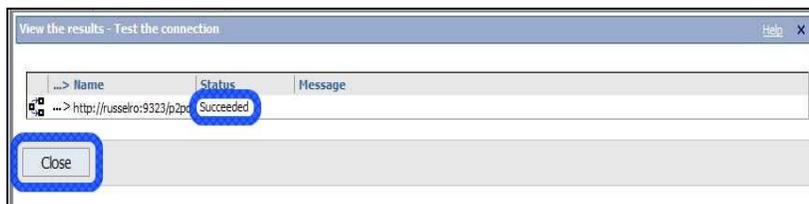
Database Name: **BranchDW**

Type in the credentials to access the database on your Server.

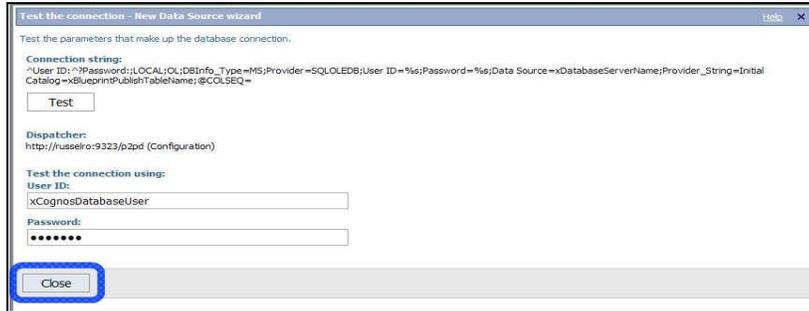
2.2.2.8. Click Test to verify the connection is setup correctly



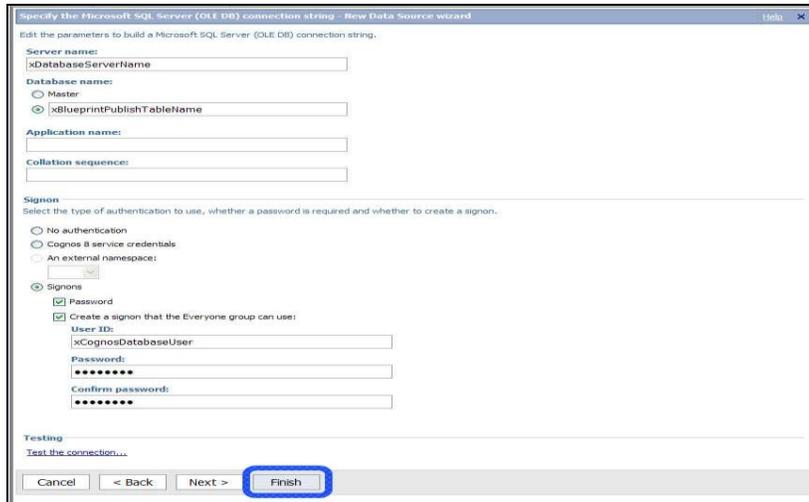
2.2.2.9. The following screen should indicate Succeeded below the Status then click Close



2.2.2.10. Click Close



2.2.2.11. Click Finish to add the new data source

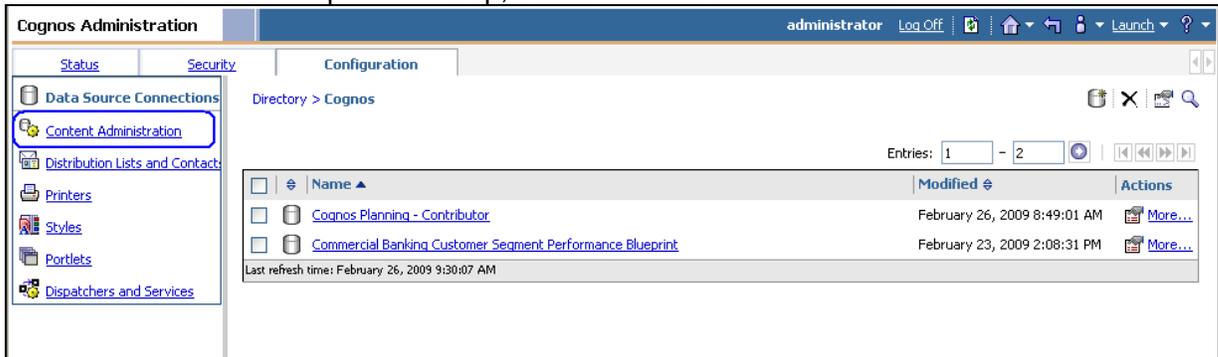


2.2.2.12. Repeat steps 1.2.2.4 through 1.2.2.11 for the remaining two databases using the following naming conventions:

- (a) Data Source Name: **Branch Perf Metric Store** → Database: **Branch_Perf_MS**
- (b) Data Source Name: **branch_performance_v2** → Database: **branch_performance_v2_84_table**

2.3. Run the import wizard to deploy the BI Content

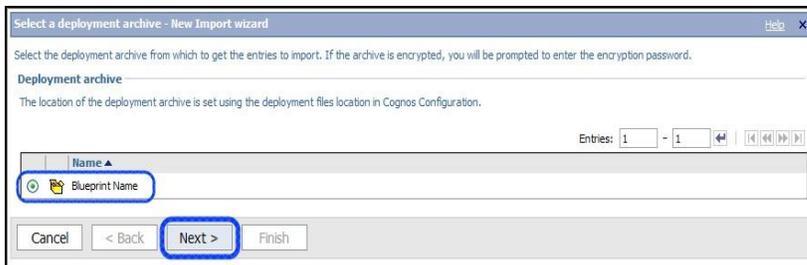
2.3.1. From the screen in the previous step, select Content Administration



2.3.2. Click the New Import icon



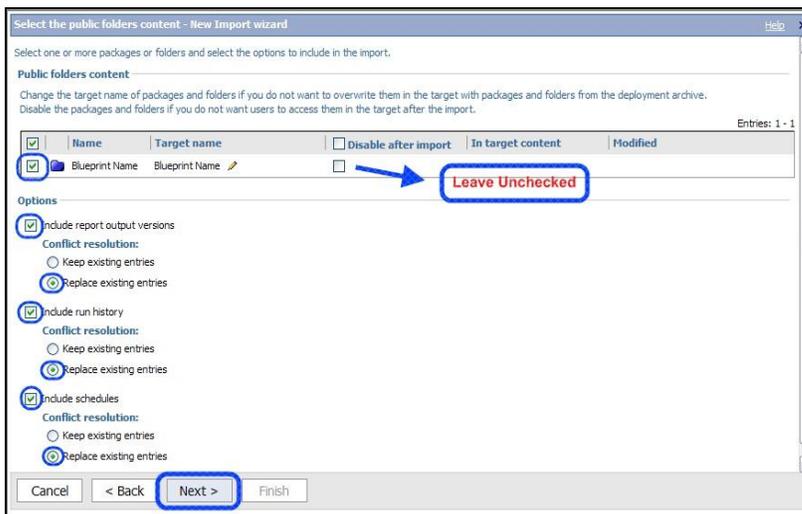
2.3.3. Select the import package named "Branch Performance Blueprint BI" then click Next >



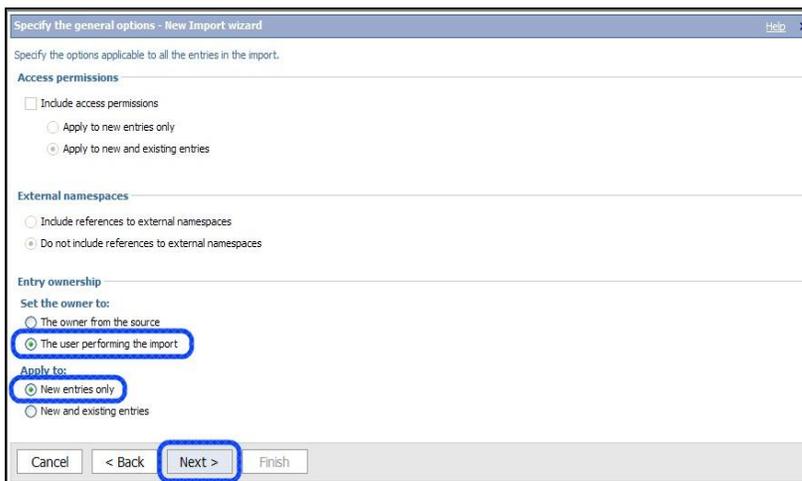
2.3.4. Verify the Name is "Branch Performance Blueprint BI" then click Next >



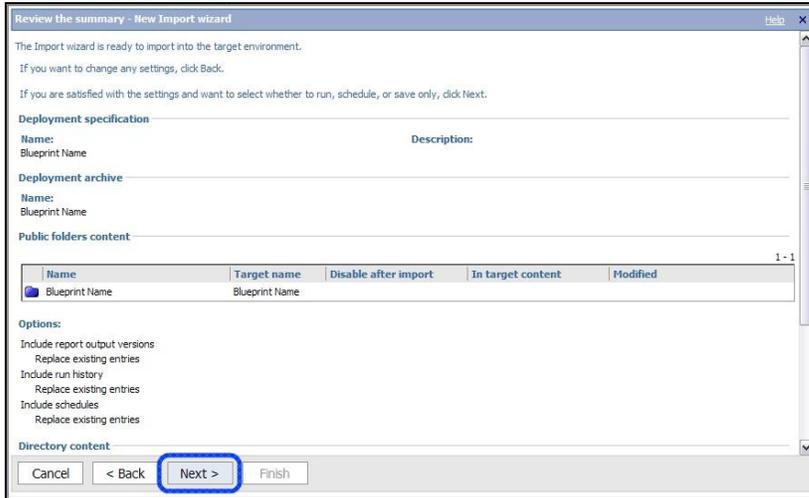
2.3.5. Specify the options and DO NOT check 'Disable after import' then click Next >



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



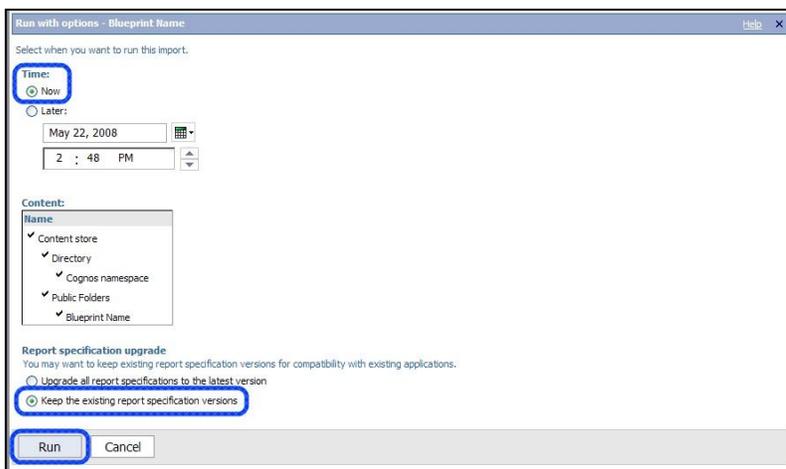
2.3.7. Review the summary options selected then click Next >



2.3.8. Choose 'Save and run once' then click Finish



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



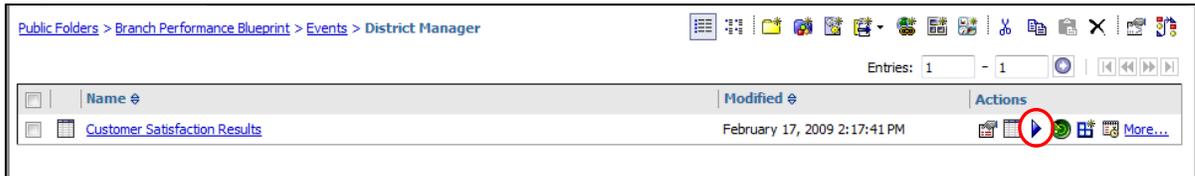
2.3.12. If the deployment import has not finished click on 'Refresh' again until it shows a completion time then click Close

The screenshot shows a web browser window titled "View an import deployment record - Corporate Banking - Customer Segment Performance Blueprint". The window displays the following information:

- Start time:** February 26, 2009 9:37:03 AM
- Status:** Succeeded
- Completion time:** February 26, 2009 9:37:06 AM (highlighted with a blue box)
- Messages:** A message box shows "CM-REQ-2300 Import is complete. 66 object(s) were imported. 0 object(s) failed." (highlighted with a blue box)
- Deployment archive:** Name: Corporate Banking - Customer Segment Performance Blueprint
- Public folders content:** A table with columns "Name" and "Target name". The table contains one entry: "Corporate Banking Customer Segment Performance Blueprint" with a "Disable after import" button.
- Options:** A list of options including "Include report output versions", "Include run history", and "Include schedules", each with a "Replace existing entries" checkbox.
- Directory content:** A list of options including "Include Cognos groups and roles" and "Include distribution lists and contacts", each with a "Keep existing entries" checkbox.
- Close button:** A "Close" button is located at the bottom left of the window (highlighted with a blue box).

2.4. Test the BI Content

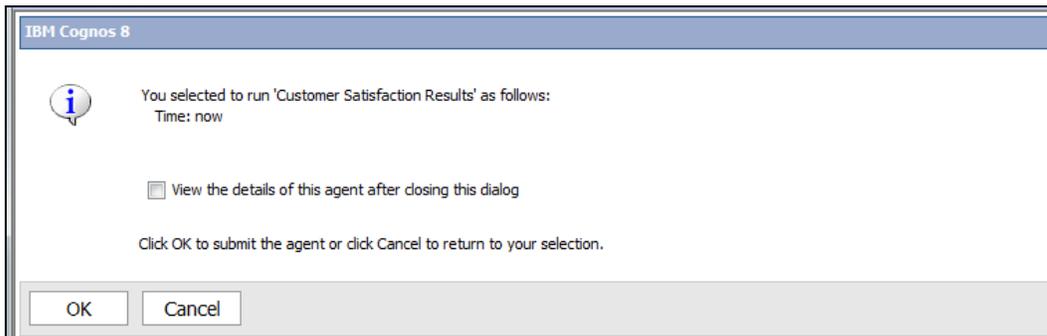
2.4.1. Navigate to Public Folders>Branch Performance Blueprint>Events>District Manager.
Click the Run button under 'Actions'



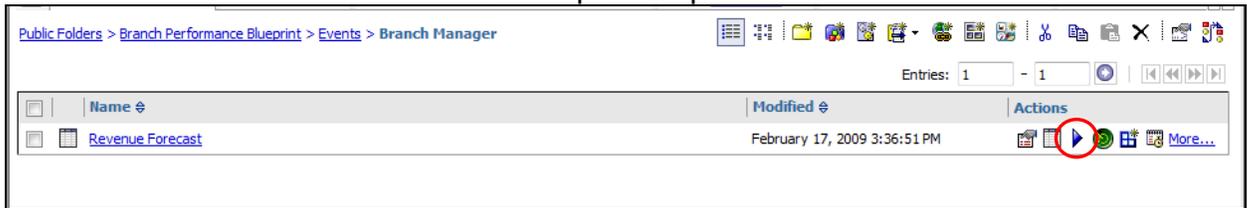
2.4.2. Confirm the run time as 'Now' and click 'Run'



2.4.3. Click OK.



2.4.4. Navigate to Public Folders>Branch Performance Blueprint>Events>Branch Manager. Click the Run button under 'Actions'. Repeat steps 1.4.2 and 1.4.3.



2.4.5. Navigate to Public Folders>Branch Performance Blueprint>Dashboards>District Manager. Click on "District Manager Dashboard."



2.4.6. The screen should appear as follows:

Cognos Viewer - District Manager Dashboard

Welcome

[KPI](#)

[Market Share](#)

[Demographics](#)

District Manager Alerts

Customer Satisfaction Survey Results are in

No filter

Profitability

Name	Actual	Target	Time Period
Efficiency Ratio -- MANHATTAN	2.37%	2.14%	Apr 2009
Net Income -- MANHATTAN	6.36M	5.20M	Apr 2009
Net Interest Margin -- MANHATTAN	68.19M	61.54M	Apr 2009
Profit Margin -- MANHATTAN	54.85M	49.49M	Apr 2009

Sales

Name	Actual	Target	Time Period
% Account Growth -- MANHATTAN	4.97%	7.50%	2009 Q2
% Revenue Growth -- MANHATTAN	2.20%	1.99%	Apr 2009
New Accounts -- MANHATTAN	10k	9k	Apr 2009
Revenue -- MANHATTAN	14.67M	13.23M	Apr 2009

Service

Name	Actual	Target	Time Period
Balance Retention -- MANHATTAN	99.94%	95.00%	Apr 2009
Customer Satisfaction -- MANHATTAN	81%	85%	2009 Q2
Elite Customers -- MANHATTAN	13%	12%	2009
Number of FTEs -- MANHATTAN	37.8	34.3	Apr 2009

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[Written agreement with BankEast Corporation](#)

[Written agreement with First State Bank of Red Bud](#)

[Termination of enforcement action against Eagle National Holding Company](#)

(display all entries)

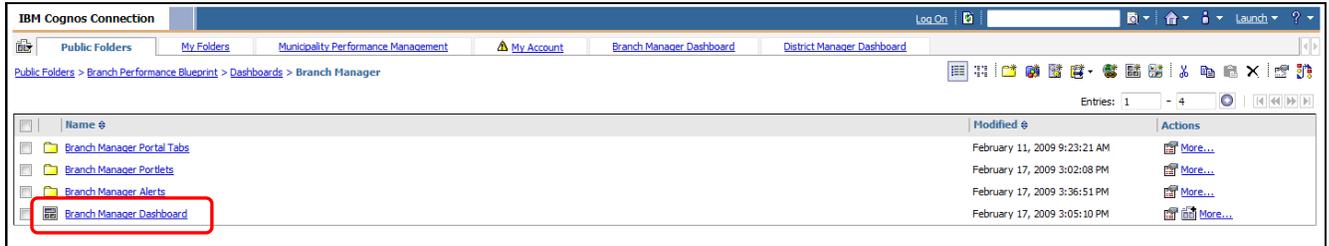
Reports

Name
Demographics
Detail Reports
Profitability
Sales
Service

Search: Full text and all fields

Advanced

2.4.7. Navigate to Public Folders>Branch Performance Blueprint>Dashboards>Branch Manager. Click on “Branch Manager Dashboard.”



2.4.8. The screen should appear as follows:

