

Branch Performance Blueprint Setup Instructions

IBM Cognos Planning Application

Pre-requisite technologies:

- IBM Cognos 8.4 Planning

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1. Steps for setting up environment within Contributor Administration

1.1 Import the Planning Application

The deployment package is contained in the file **Branch_Performance_Planning_Content.zip**. This file is stored in the **Deployment** folder.

This compressed file contains the Analyst library, Contributor model and data. You can import this model into a test or production environment. If you encounter errors during the extract, use the unzip option to 'extract to here'. The extracted files must be saved in the deployment directory location set in IBM Cognos Configuration. For example, /<cognos install location>\deployment. Once the files are extracted the following structure should be under the folder:

branch_perf_v2

Name	Size	Type
applications		File Folder
libraries		File Folder
security		File Folder
done.txt	1 KB	Text Document
limited_export.txt	1 KB	Text Document
progress.xml	14 KB	XML Document
request.xml	3 KB	XML Document
request_guid.txt	1 KB	Text Document

Through the import process, you can change the target datastore and security for your model. The Deployment wizard will attempt to map security settings for users, groups, and roles. As you are using different namespaces and users, groups, and role mappings, you will have to complete the mapping manually.

The security settings for the source will be applied to the user, group, or role mapped. Source users, groups, and roles can be mapped together or individually to any single target user, group, or role. When mapping a number of users, groups, or roles, the target maintains the greatest level of security privileges. Any unmapped items are mapped to Planning Rights Administrator and do not appear individually as a users, groups, or roles in the target.

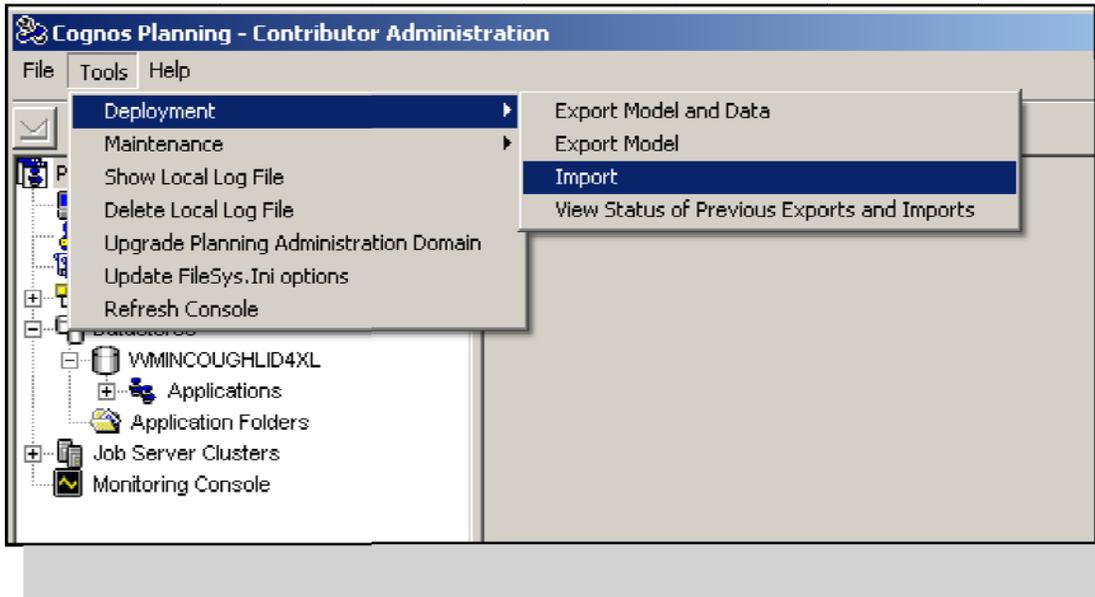
Application IDs and object names must be unique within a planning network. During the import processes, if duplicate names or IDs are found, you are warned. If you proceed with the import without changing names and IDs, then any existing applications or objects with common names or IDs will be overwritten.

To import Contributor applications, you must have at least one configured datastore and the Planning content store must be added to a job server. A datastore is not required to import Analyst libraries, macros, or administration links.

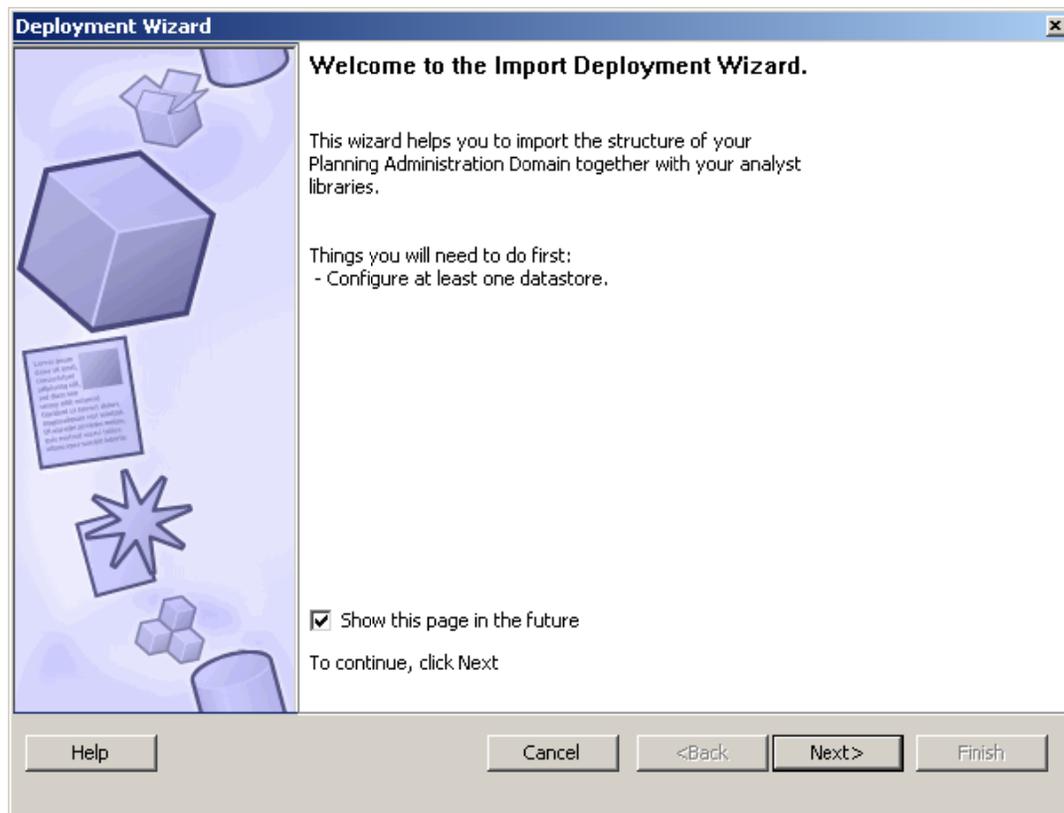
1.1.1 Launch Contributor Administration console and login with an administrator credential

1.1.2 Go to Tools/Deployment to perform the import of the planning content

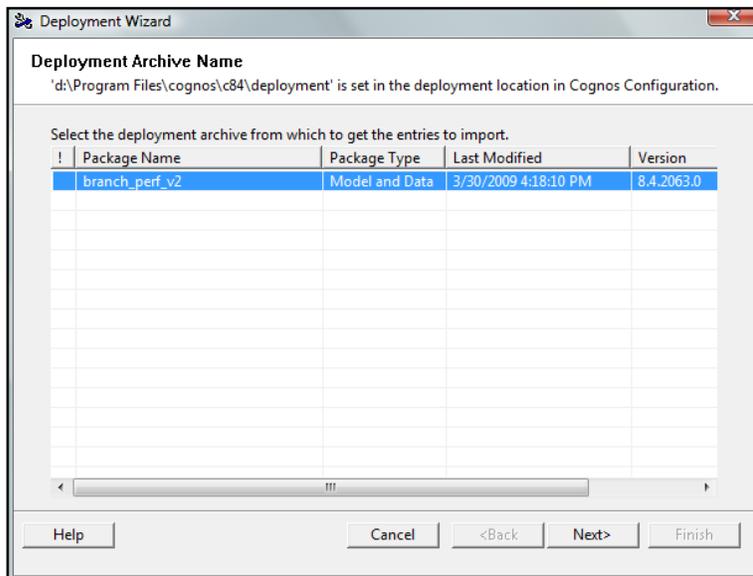
1.1.3 From the **Tools** menu, click **Deployment** and then click **Import**.



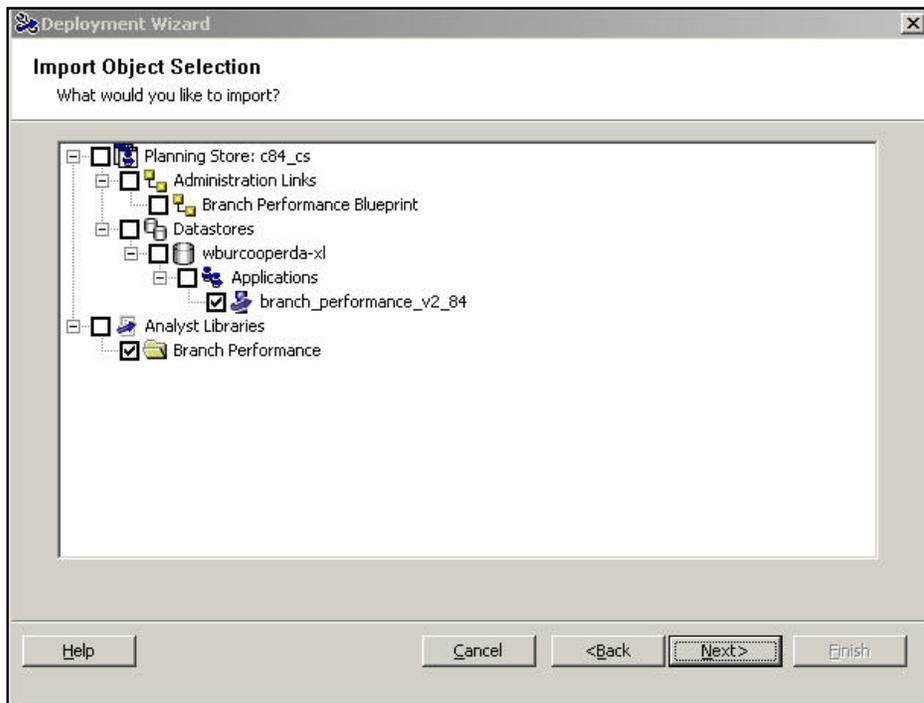
1.1.4 In the **Welcome to the Import Deployment Wizard** page, click **Next**.



- 1.1.5 In the Deployment Archive Name page, select the deployment to import (branch_perf_v2) and click Next.



- 1.1.6 In the **Import Object Selection** page, uncheck the Planning Store and Analyst Libraries objects. Select the branch_performance_v2_84 application and Branch Performance library objects for import and click **Next**. Only the Application(s) and Analyst Library(s) should be selected as shown below.



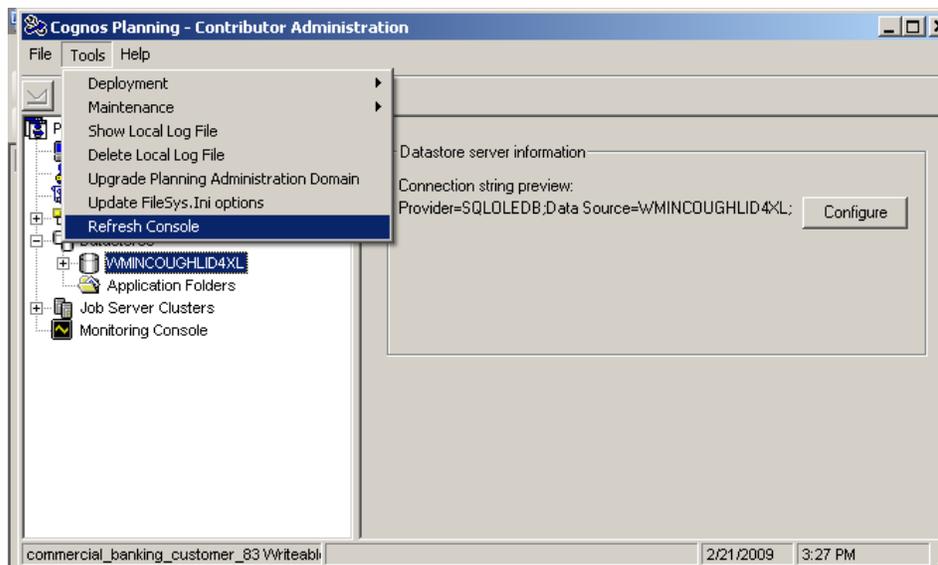
1.1.8 Click on 'Finish': the following dialog will appear. Click OK.



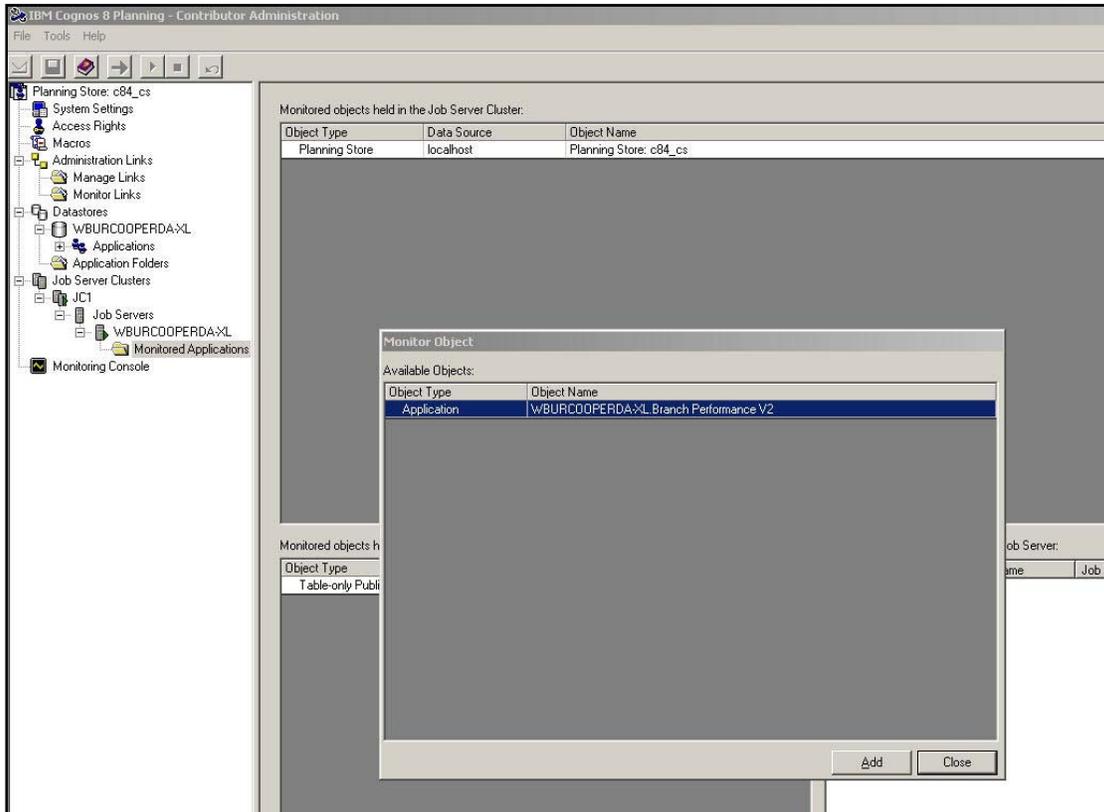
1.1.9 The import request starts on the server. You can view the progress of the import in the Monitoring Console on the Deployments tab.

Tip: During the import process, some application options are excluded from the transfer because they do not apply to the new application location, for example, display names, backup location, and publish options are excluded.

1.1.10 Select Tools from the Contributor Admin Console Menu and Refresh Console. You will then see the application under your server.

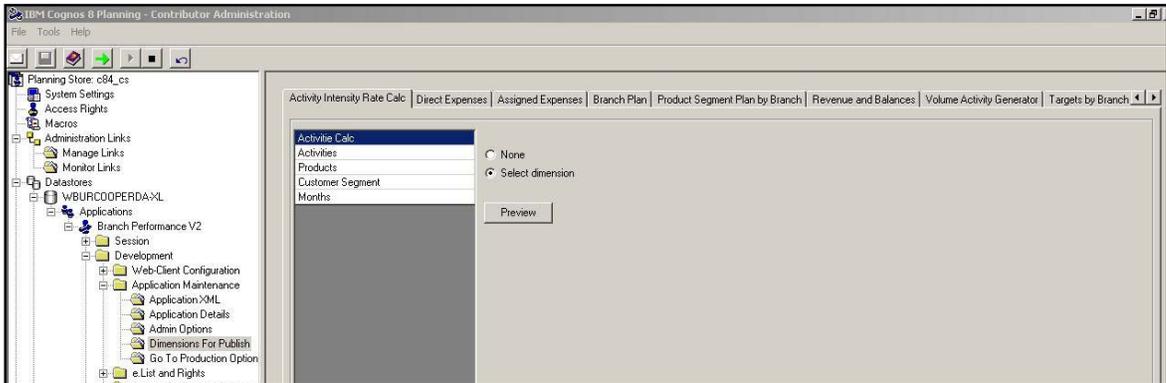


- 1.1.11 Add the application to the monitored objects by selecting your Job Server / Monitored Applications. If the application is not available on the first attempt, wait and refresh the console again as the first steps of the Import process must be completed before the applications can be monitored. Under Monitored Objects, click Add. Choose the new Application and click Add.



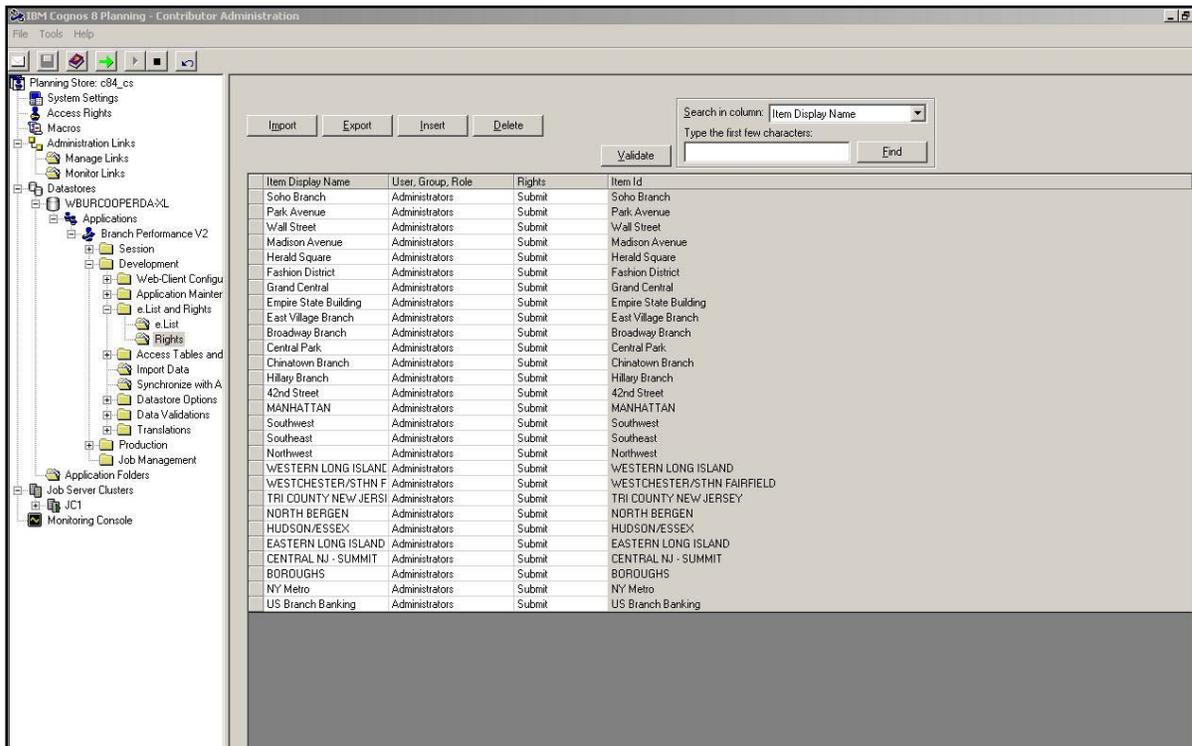
1.2 Set Dimensions for Publish

1.2.1 Go to Branch Performance V2 Full View/ Development / Dimensions for Publish. Ensure 'Select dimension' is selected for each tab:



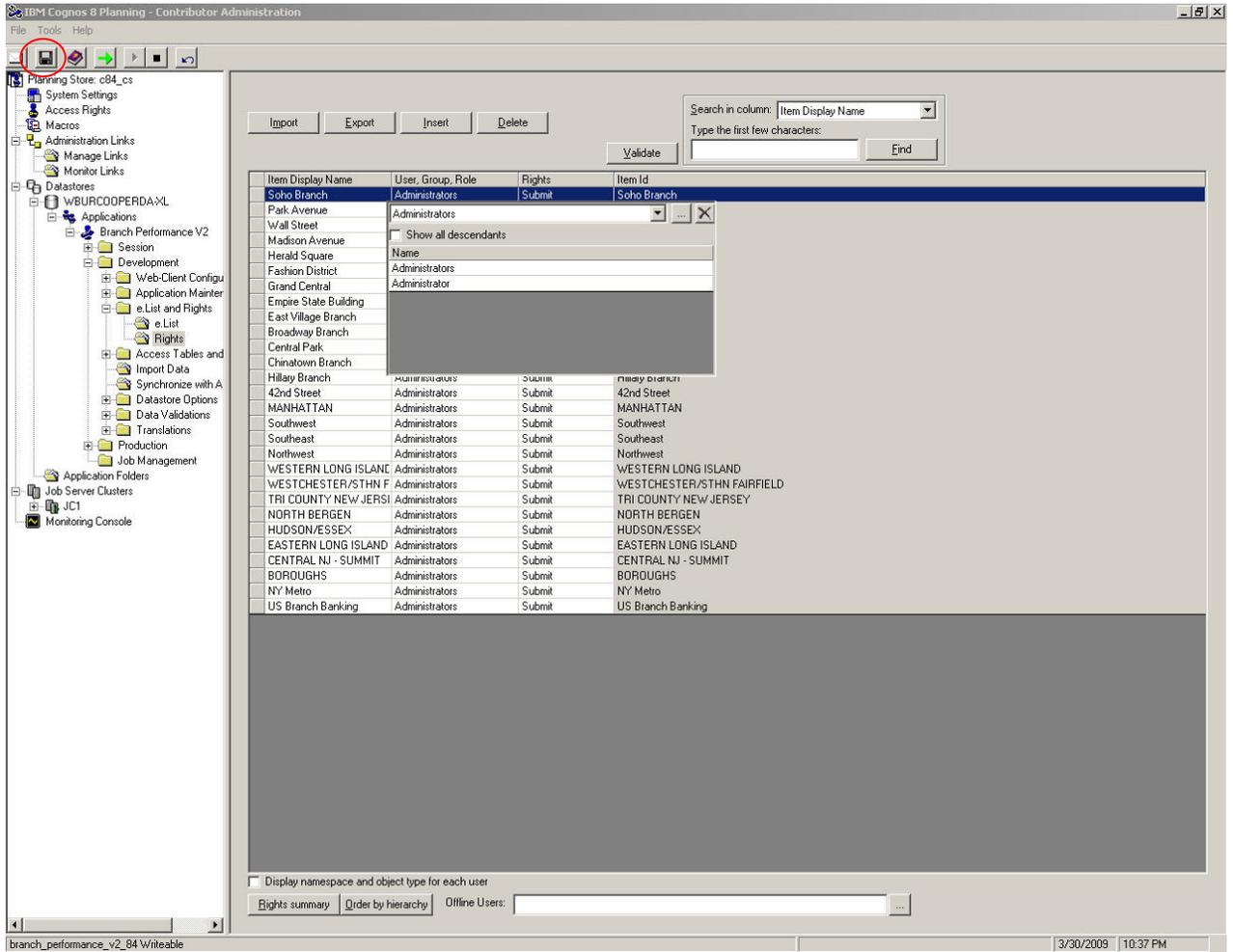
1.3 Assign Security

1.3.1 Under the Applications folder, select the new application. Expand the Development folder / e.List and Rights / Rights. You will see a window warning that the e.List, user and rights column cannot be empty. Click OK and select Rights. The following screen will open:



1.3.2 Since there are no Access Rights for any User, Group, Role. Select each entry and make sure that at least one user can submit.

The following screen depicts how the access may be granted. On this example we have granted rights to “Administrators”, however access rights can be granted to any user, group on role on the namespace.



Once Access Rights are granted, save the changes by clicking on the diskette icon on the top right corner of the contributor administration window.

1.4 Go to Production

- 1.4.1 Click on the green arrow icon to perform a GO TO PRODUCTION to make the application available to users on the web

The screenshot shows the IBM Cognos 8 Planning - Contributor Administration window. The left-hand navigation pane shows a tree structure under 'Applications' with 'Production' selected. The main area contains a table with columns: 'User Display Name', 'User Group', 'Role', and 'Item Id'. A red arrow points to a green arrow icon in the toolbar. A dialog box with the text 'GO TO PRODUCTION' is overlaid on the table. Below the table, there are checkboxes for 'Display namespace and object type for each user' and buttons for 'Rights summary', 'Order by hierarchy', and 'Offline Users:'. The status bar at the bottom shows 'branch_performance_v2_B4 Writeable' and the date/time '3/30/2009 10:35 PM'.

User Display Name	User Group	Role	Item Id
Madison Avenue	Administrators	Submit	Madison Avenue
Herald Square	Administrators	Submit	Herald Square
Fashion District	Administrators	Submit	Fashion District
Grand Central	Administrators	Submit	Grand Central
Empire State Building	Administrators	Submit	Empire State Building
East Village Branch	Administrators	Submit	East Village Branch
Broadway Branch	Administrators	Submit	Broadway Branch
Central Park	Administrators	Submit	Central Park
Chinatown Branch	Administrators	Submit	Chinatown Branch
Hillary Branch	Administrators	Submit	Hillary Branch
42nd Street	Administrators	Submit	42nd Street
MANHATTAN	Administrators	Submit	MANHATTAN
Southwest	Administrators	Submit	Southwest
Southeast	Administrators	Submit	Southeast
Northwest	Administrators	Submit	Northwest
WESTERN LONG ISLAND	Administrators	Submit	WESTERN LONG ISLAND
WESTCHESTER/STHN F	Administrators	Submit	WESTCHESTER/STHN FAIRFIELD
TRI COUNTY NEW JERSI	Administrators	Submit	TRI COUNTY NEW JERSEY
NORTH BERGEN	Administrators	Submit	NORTH BERGEN
HUDSON/ESSEX	Administrators	Submit	HUDSON/ESSEX
EASTERN LONG ISLAND	Administrators	Submit	EASTERN LONG ISLAND
CENTRAL NJ - SUMMIT	Administrators	Submit	CENTRAL NJ - SUMMIT
BOROUGHES	Administrators	Submit	BOROUGHES
NY Metro	Administrators	Submit	NY Metro
US Branch Banking	Administrators	Submit	US Branch Banking

Appendix A -- Publish-container settings

A SQL Server publish database has been included in the Branch Performance Blueprint.rar (under /Data/ branch_performance_v2_84_table_dat). Should the publish database require updating, navigate to Branch Performance V2>Production>Publish>Table-only Layout and set the following options before the publish is performed:

