



FINANCIAL ANALYTICS - PRODUCT PROFITABILITY BLUEPRINT
PERFORMANCE BLUEPRINT SETUP DOCUMENT
A WEB-BASED PERFORMANCE MANAGEMENT SOLUTION

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1. Blueprint Overview

This document explains the content and provides installations steps for a web-based solution reporting for the Product Profitability Blueprint.

IBM Cognos Blueprints are pre-defined data, process, and policy software models developed in partnership with leading academic institutions. 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 their performance and track it in a consistent, logical manner. This tool gives the user a simple yet powerful way to have an insight into different Metrics and KPIs to understand better how they have been performing.



2. Making Content Files available for each application

2.1. Unzipping the “Product_Profitability_Blueprint_Content”

After unzipping the “PRODUCT_PROFITABILITY_Blueprint_Content” it will create the following directories:

Name ^	Size	Type	Date Modified
Deployment File - Reports		File Folder	11/16/2009 9:08 AM
Documentation		File Folder	11/16/2009 9:10 AM
Framework Manager Model		File Folder	11/16/2009 9:47 AM
Graphics, Files, etc		File Folder	11/16/2009 9:08 AM
TM1 Application		File Folder	11/16/2009 9:08 AM
readme.txt	1 KB	Text Document	11/16/2009 9:09 AM

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

2.2. Copying the necessary files into their respective directories

Copy the Product_Profitability_Blueprint_BI_Deployment.zip file from ‘Deployment File – Reports’ into <IBM 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.

Copy all folders/images from the /Graphics,Files,etc directory into <IBM Cognos 8 install location>/webcontent/samples/images

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.

Copy the content of TM1 Application to:

C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability Analytics

Note: The TM1 data model uses Turbo Integrator Processes and Chores to copy data between Scenario 2 (Actual/Forecast) and Scenario 3 (Reforecast) to start the Reforecast cycle and also to import data from source files to Reforecast to mimic the effect of making changes to the Reforecast to take corrective action. The reason this is done is to obviate the need for opening TM1 and making the data changes manually as there are quite a few data changes required. For this reason it is important that the previous path is created. Otherwise the import process will not work. Using a different path will require editing the Turbo Integrator Processes.



3. IBM Cognos TM1 Content

The purpose of the TM1 data model is to act as a data source for the Business Intelligence Analytics. The TM1 data model should not be considered as anything other than this and should not be seen as an example of manufacturing planning, retail planning, allocation methodology or any other type of planning. For proven practices for specific planning processes please refer to the blueprints designed to support functional and industry sector blueprints.

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. Extract the IBM Cognos TM1 Content

Go to folder "C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability Analytics" to unzip the file "Financial_Analytics_Product_Profitability_Blueprint_TM1Content.zip". The files extracted should be located within the same folder.

Once the files are extracted the following structure will be available:

Name	Size	Type
Applications		File Folder
Admin		File Folder
Excel		File Folder
New Folder		File Folder
Objects		File Folder
Reforecast Data		File Folder
Source Files		File Folder

3.2. 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:

Tm1s.cfg

Tm1s.lic

And, a shortcut to execute tm1s.exe using the Blueprint content as the working directory.



The tm1s.lic file is included in your IBM Cognos TM1 installation. This file can be copied from <YourIBMCognosTM1_Directory\Install>/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=16699
INSTALL_ID=13108
PRODUCT=TM1Server8
.....
```

This file would need to be copied over to the following folder:
"C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability Analytics/Objects"
to be able to create a new IBM Cognos TM1 Server instance.

3.2.1. Modify the Tm1s.cfg server configuration file

Within the folder
"C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability Analytics/Objects"
The file "tm1s.cfg" is provided.

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=Financial Analytics
DataBaseDirectory=C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability
Analytics
AdminHost=localhost
PortNumber=11111
ClientMessagePortNumber=12346
Language=ENG
SaveTime=
Downtime=
ProgressMessage=True
AuditLogOn=F
```



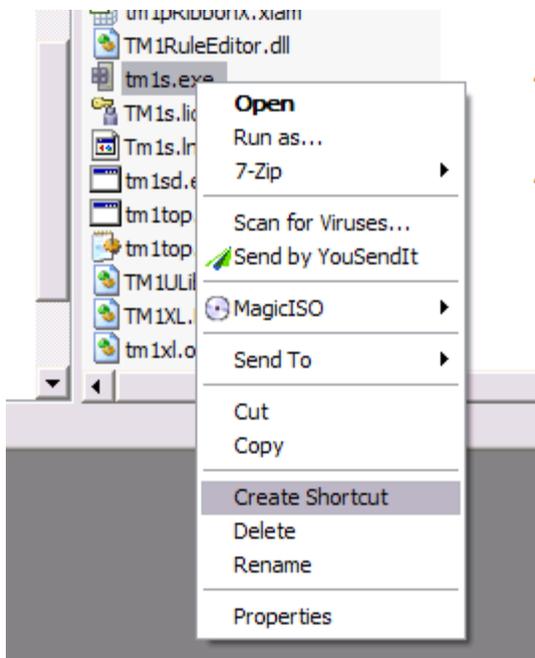
AuditLogMaxFileSize=100 MB
AuditLogUpdateInterval=60
DefaultMeasuresDimension=T

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

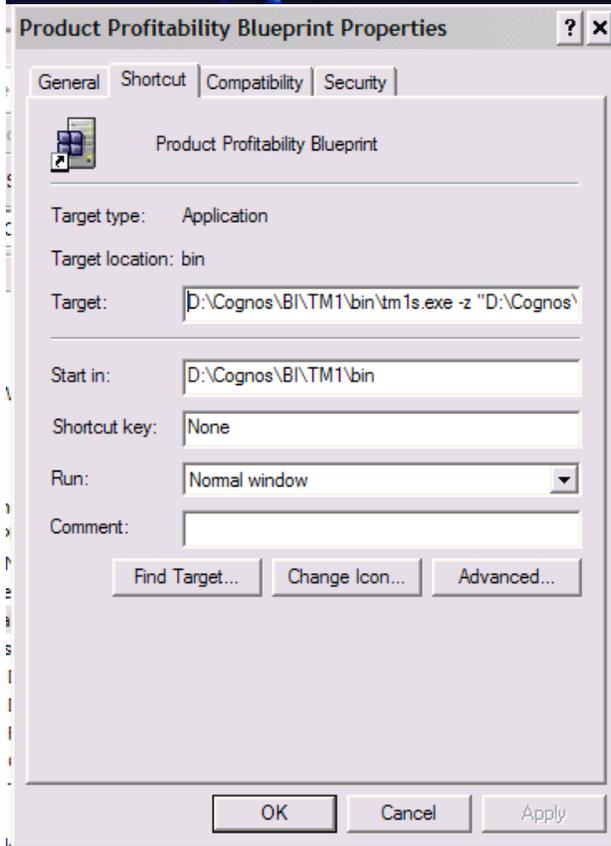
However the "AdminHost" would need to be changed to set it as the IBM Cognos TM1 Admin Sever host in your environment.

3.2.2. Modify/Create the shortcut to Server

Navigate to "<YourIBMCognosTM1_DirectoryInstall>/bin" folder; create a shortcut to tm1s.exe.



- Copy the shortcut created to "C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability Analytics"
- Rename the shortcut to be "Product Profitability Blueprint"
- Edit the Shortcut Properties



The "Target" property of the shortcut needs to be changed to read:

```
<YourIBMCognosTM1InstallFolder>\bin\tm1s.exe -z "C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability Analytics "
```

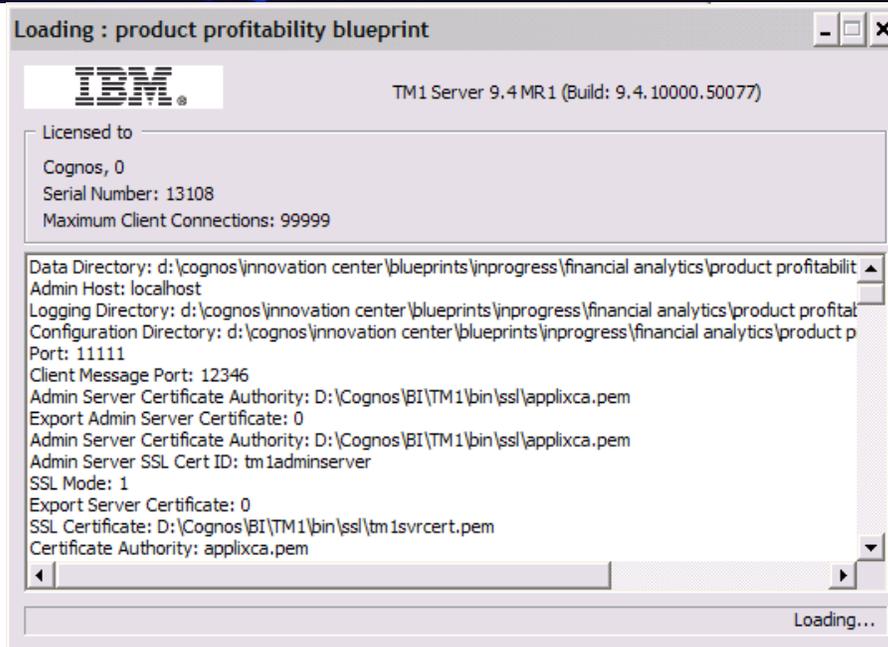
Notice that the last portion of the command is the folder where the IBM Cognos TM1 content was extracted to.

- Click onto OK to save the changes.

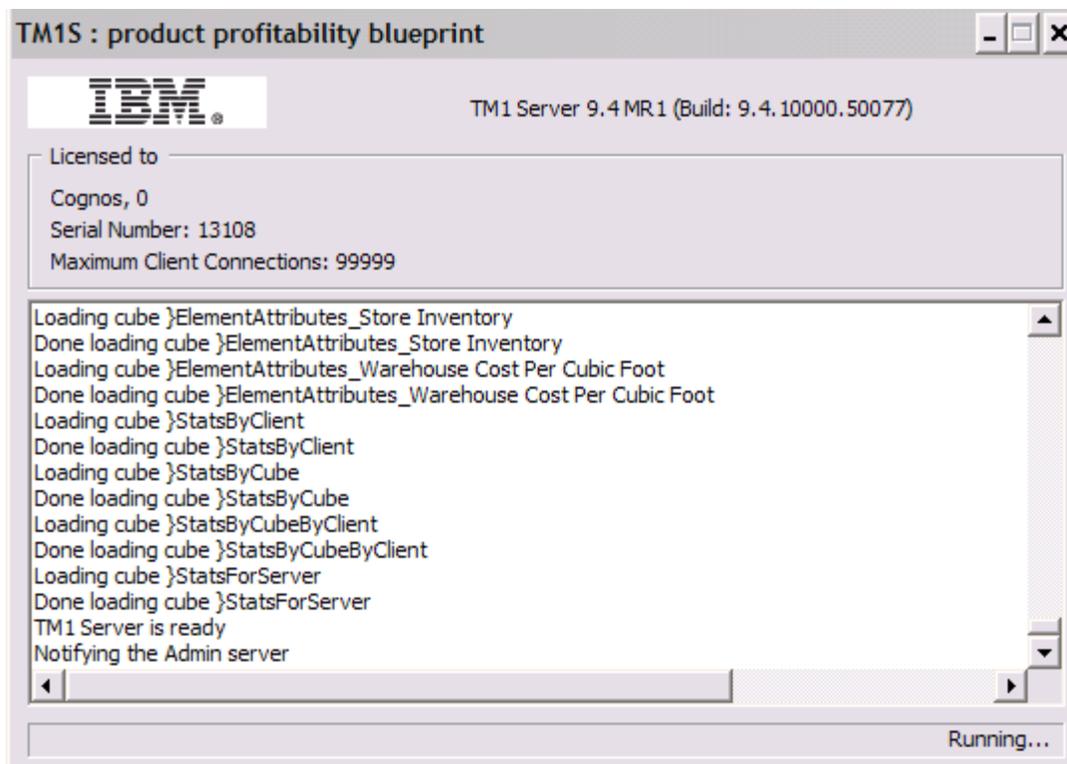
3.3. Testing the new IBM Cognos TM1 Server instance

Double click onto the shortcut "Product Profitability Blueprint" located in the folder: "C:\IBM\Cognos Innovation Center\Blueprints\Product Profitability Analytics"

The following dialog will come up:



And after all the cubes have been loaded the last lines in the dialog will display:

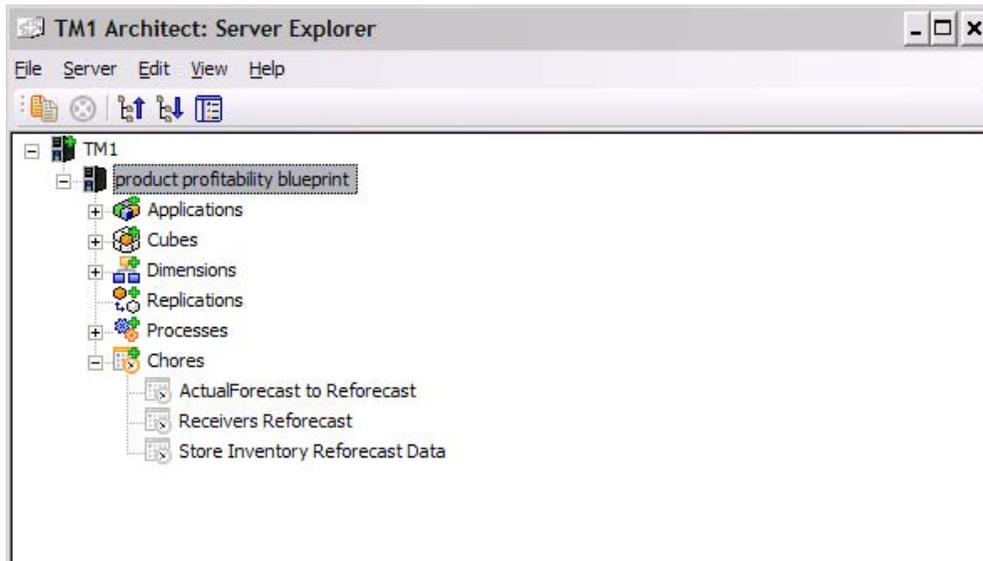


Once the newly created IBM Cognos TM1 Server instance is up and running, Architect and/or IBM Cognos TM1Web can be used to navigate through the content.



3.4. Processes to reset Reforecast Data

The Reforecast data has been pre-run so the BI Analytics will work immediately. If you wish to reset the Reforecast data to zero and to run the Turbo Integrator Chores from Architect



The easiest way to do this is to:

- Delete Scenario 3 from the dimension 'Scenarios' and then to re-add it and give it the alias 'Reforecast'.
- Execute the Turbo Integrator Chore 'ActualForecast to Reforecast' to populate 'Reforecast' with initial data.
- Execute the Turbo Integrator Chore 'Receivers Reforecast Data' to amend the Receivers data. (This process changes the Receivers reforecast data so that half the products are discontinued, inventory for these products is cleared and the sales volume associated with these products is assigned to the remaining products).
- Execute the Turbo Integrator Chore 'Store Inventory Reforecast Data' to amend the store inventory data (This reduces the cubic feet assigned to the '65 inch Flat Panel TV' and allocates the freed space to the other products with a corresponding increase in sales volume.)



4. IBM Cognos 8 BI Content

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

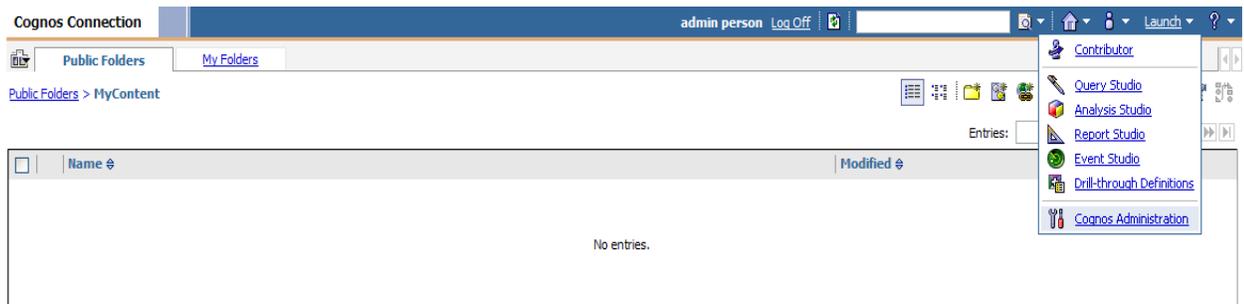
4.1. Create the data sources

First, we will look into creating the connections to the data sources.

4.1.1. Create 'Product_Profitability_Blueprint' data source

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

Click on to Launch and select IBM Cognos Administration



Click on the Configuration tab; make sure 'Data Source Connections' is selected



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

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Cognos Administration admin person Log On | Home | Launch | ?

[Status](#) | [Security](#) | [Configuration](#)

Directory > Cognos New Data Source

Entries: - Modified | Actions

<input type="checkbox"/>	Name ▲
No entries.	

Last refresh time: December 8, 2008 11:51:55 AM

Navigation Menu:

- Data Source Connections
- Content Administration
- Distribution Lists and Cor
- Printers
- Styles
- Portlets
- Dispatchers and Services



Name the Data Source exactly as: "Product_Profitability_Blueprint" then click Next >

This is a screenshot of a Windows-style dialog box titled "Specify a name and description - New Data Source wizard". The dialog contains several input fields: "Name:" with the text "xDataSourceNameFromDocumentation" entered; "Description:" with an empty text area; and "Screen tip:" with an empty text field. Below these fields, the "Location:" is set to "Directory > Cognos". At the bottom of the dialog, there are four buttons: "Cancel", "< Back", "Next >" (which is highlighted with a blue circle), and "Finish".

Select the 'TM1' option; then click Next >

This is a screenshot of a dialog box titled "Specify the connection - New Data Source wizard". The main instruction reads: "Specify the parameters for the connection of this new data source. The name of the data source is used to set the name of the connection." Below this, there is a "Type:" label and a dropdown menu. The dropdown menu is open, showing a list of connection types. The "TM1" option is highlighted with a grey background. Other options in the list include "IBM Cognos Finance", "IBM Cognos Now! Cube", "IBM Cognos Planning - Contributor", "IBM Cognos Planning - Series 7", "IBM Cognos PowerCube", "IBM InfoSphere Warehouse cubing services (XMLA)", "Composite (ODBC)", "IBM Cognos Virtual View Manager (ODBC)", "DB2", "Hyperion Essbase/IBM DB2 OLAP Server", "Informix", "Microsoft SQL Server (ODBC)", "Microsoft SQL Server (OLE DB)", "Microsoft SQL Server (SQL 2005 Native Client)", "Microsoft Analysis Services (via ODBO)", "Microsoft Analysis Services 2005", "ODBC", "Oracle", "Progress OpenEdge", "Red Brick (ODBC)", "SAP BW", "Sybase Adaptive Server Enterprise (CT-Lib)", "Sybase Adaptive Server Enterprise (CT-15)", "Teradata (ODBC)", "XML", and "Other type".

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

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Specify the TM1 connection string - New Data Source wizard

Edit the parameters to build a TM1 connection string.

Administration Host:

Server Name:

Signon

Select the type of authentication to use, whether a password is required and whether to create a signon.

- No authentication
- An external namespace:

- Signons

Password

Create a signon that the Everyone group can use:

User ID:

Password:

Confirm password:

Testing

[Test the connection...](#)

Cancel

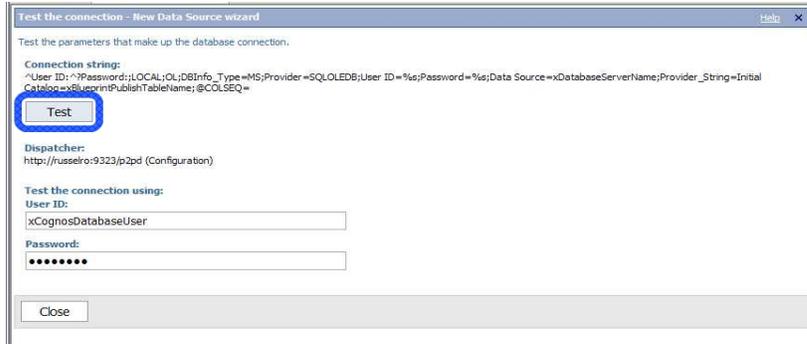
< Back

Next >

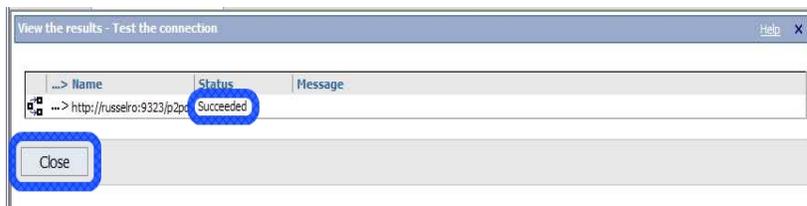
Finish



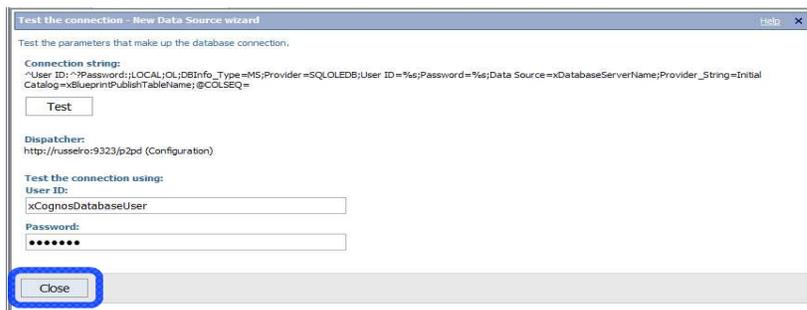
Click Test to verify the connection is setup correctly



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

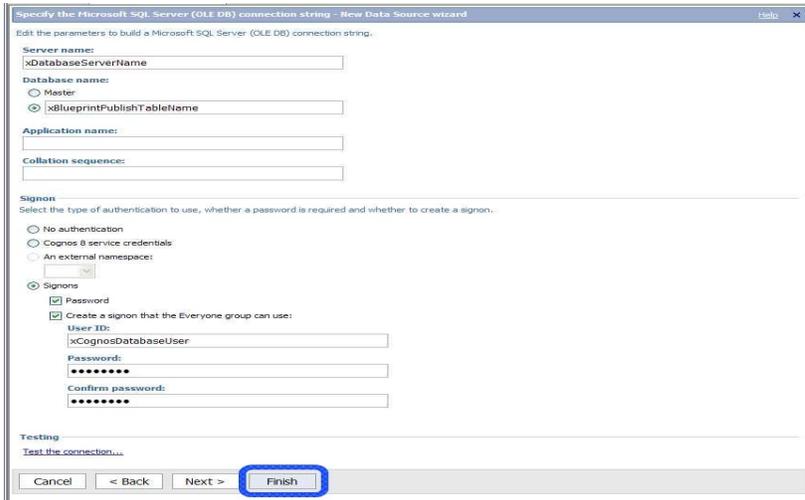


Click Close





Click Finish to add the new data source

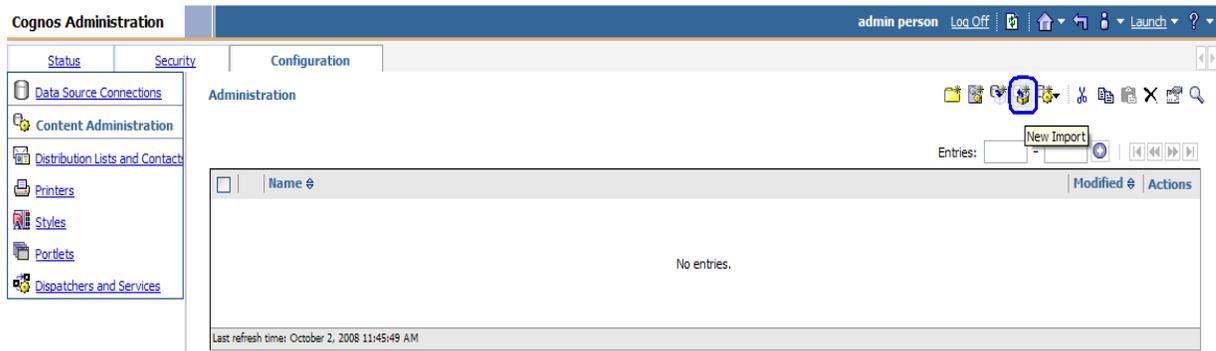


4.1.1.1. Run the import wizard to bring in the BI Content into the IBM Cognos Connection portal

From the screen in the previous step, select Content Administration



Click the New Import icon





Select the import package named 'Product_Profitability_Blueprint_BI_Deployment'; then click Next >

Select a deployment archive - New Import wizard

Select the deployment archive from which to get the entries to import. If the archive is encrypted, you will be prompted to enter the encryption password.

Deployment archive
The location of the deployment archive is set using the deployment files location in Cognos Configuration.

Entries: 1 - 1

Name ▲
Blueprint Name

Cancel < Back **Next >** Finish

Verify the Name is 'Product_Profitability_Blueprint_BI_Deployment' then click Next >

Specify a name and description - New Import wizard

Specify a name and location for the deployment specification. You can also specify a description and screen tip.

Name:
Blueprint Name

Description:

Screen tip:

Location:
Administration
[Select another location...](#)

Cancel < Back **Next >** Finish

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

Select the public folders content - New Import wizard

Select one or more packages or folders and select the options to include in the import.

Public folders content
Change the target name of packages and folders if you do not want to overwrite them in the target with packages and folders from the deployment archive. Disable the packages and folders if you do not want users to access them in the target after the import.

Entries: 1 - 1

<input checked="" type="checkbox"/>	Name	Target name	<input type="checkbox"/> Disable after import	In target content	Modified
<input checked="" type="checkbox"/>	Blueprint Name	Blueprint Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Leave Unchecked

Options

include report output versions
Conflict resolution:
 Keep existing entries
 Replace existing entries

include run history
Conflict resolution:
 Keep existing entries
 Replace existing entries

include schedules
Conflict resolution:
 Keep existing entries
 Replace existing entries

Cancel < Back **Next >** Finish



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

Specify the general options - New Import wizard

Specify the options applicable to all the entries in the import.

Access permissions

Include access permissions

Apply to new entries only

Apply to new and existing entries

External namespaces

Include references to external namespaces

Do not include references to external namespaces

Entry ownership

Set the owner to:

The owner from the source

The user performing the import

Apply to:

New entries only

New and existing entries

Cancel < Back **Next >** Finish

Review the summary options selected then click Next >

Review the summary - New Import wizard

The Import wizard is ready to import into the target environment.
If you want to change any settings, click Back.
If you are satisfied with the settings and want to select whether to run, schedule, or save only, click Next.

Deployment specification

Name: Blueprint Name Description:

Deployment archive

Name: Blueprint Name

Public folders content

Name	Target name	Disable after import	In target content	Modified
Blueprint Name	Blueprint Name			

Options:

Include report output versions
Replace existing entries

Include run history
Replace existing entries

Include schedules
Replace existing entries

Directory content

Cancel < Back **Next >** Finish

Choose 'Save and run once' then click Finish

Select an action - New Import wizard

Select whether you want to run, schedule, or save only, when the wizard closes.

Action:

Save and run once

Save and schedule

Save only

Cancel < Back Next > **Finish**



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

Run with options - Blueprint Name

Select when you want to run this import.

Time:
 Now
 Later:
May 22, 2008
2 : 48 PM

Content:

Name
<input checked="" type="checkbox"/> Content store
<input checked="" type="checkbox"/> Directory
<input checked="" type="checkbox"/> Cognos namespace
<input checked="" type="checkbox"/> Public Folders
<input checked="" type="checkbox"/> Blueprint Name

Report specification upgrade
You may want to keep existing report specification versions for compatibility with existing applications.
 Upgrade all report specifications to the latest version
 Keep the existing report specification versions

Run Cancel

Check 'View the details of this import after closing this dialog' then click OK

Cognos 8

You selected to run 'Blueprint Name' as follows:
Time: now
Report specification upgrade: Keep the existing report specification versions

View the details of this import after closing this dialog

Click OK to run the import or click Cancel to return to your selection.

OK Cancel

Initial view of the import deployment record will be blank press the 'Refresh' hyperlink

View run history details - Strategic Finance Blueprint Help X

View the details of this particular run. Refresh

Start time:
October 2, 2008 11:48:59 AM

Completion time:
Unavailable

Status:
Executing

Messages

Severity: (All) [v] Entries: [] - [] [] [] [] [] [] []

Time	Message
No entries.	

Close



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

The screenshot shows the Cognos Administration console. The main window is titled "View an import deployment record - Blueprint Name - Import". It displays the following information:

- Start time:** December 8, 2008 12:57:54 PM
- Completion time:** December 8, 2008 12:57:55 PM (highlighted with a blue box)
- Status:** Succeeded

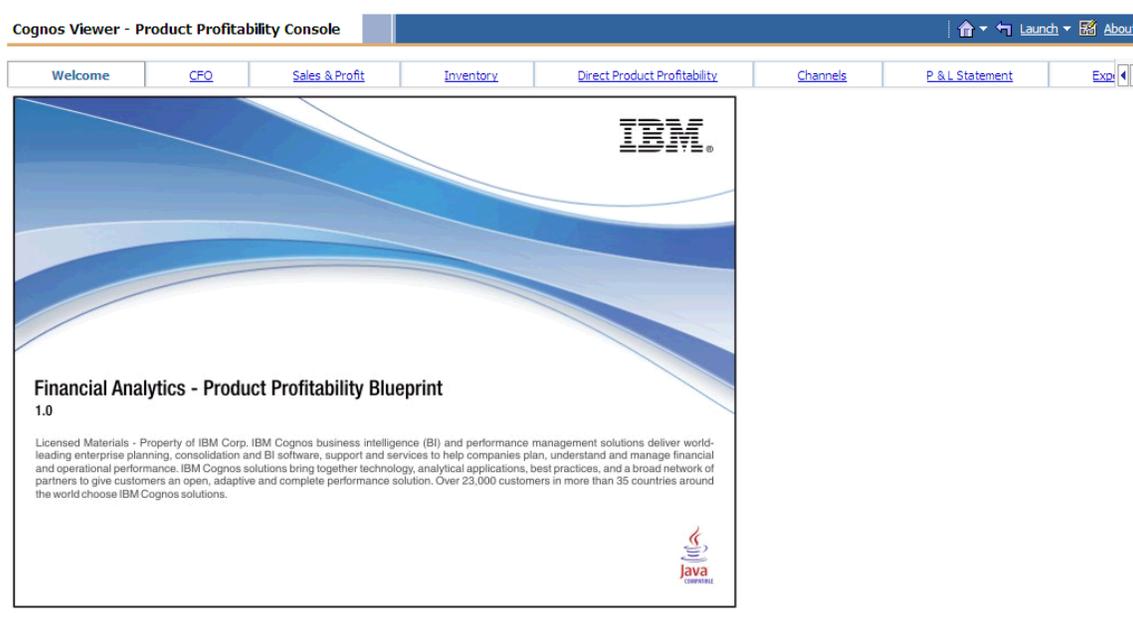
A message table shows one entry: "CM-REQ-2300 Import is complete. 1 object(s) were imported. 0 object(s) failed." Below this, there are sections for "Deployment archive", "Public folders content" (showing a folder named "Blueprint Name"), "Options" (with checkboxes for "Include report output versions", "Include run history", "Do not include schedules", "Do not include Cognos groups and roles", "Do not include distribution lists and contacts", "Do not include data sources and connections"), and "General Options" (with checkboxes for "Do not include access permissions", "Do not include references to external namespaces", "Set the owner to the user performing the import"). A "Close" button is highlighted with a blue box at the bottom left of the window.

4.2. Testing IBM Cognos Dashboards Content

After the Import is performed a new folder will show up a new folder 'Product_Profitability_Blueprint' in the IBM Cognos Connection portal. The content of this folder will display as:



To test the content is coming up correctly, launch the 'Salesforce Dashboards and Reports' Page at the bottom of the list. The following screen should come up:



Then, testing can be performed on each of the dashboard pages to obtain the dashboards displaying your organization's data.