



STRATEGIC FINANCE 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 for the Strategic Finance 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 "Strategic_Finance_Blueprint_Content"

After unzipping the "Strategic_Finance_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 Strategic_Finance_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:
<Your_TM1_Applications_folder>\Strategic Finance Blueprint



3. IBM Cognos TM1 Content

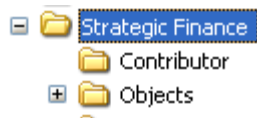
The purpose of the TM1 data model is as a data source for the Business Intelligence Analytics. For other planning processes please refer to the blueprints designed to support functional and industry sector blueprints.

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 correctly.

3.1. Extract the IBM Cognos TM1 Content

Go to folder "<Your_TM1_Applications_folder>\Strategic Finance Blueprint" to unzip the file "Strategic_Finance_Blueprint_TM1_Content.zip ". The files extracted should be located within the same folder.

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



3.2. Configure a new IBM Cognos TM1 Server instance

The following steps provide a quick guideline on how to create 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

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_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=16699
INSTALL_ID=13108
PRODUCT=TM1Server8
.....

This file should be copied to the following folder:
"<Your_TM1_Applications_folder>\Strategic Finance Blueprint\Objects"
to create a new IBM Cognos TM1 Server instance.

3.2.1. Modify the Tm1s.cfg server configuration file

Within the folder
"<Your_TM1_Applications_folder>\Strategic Finance Blueprint \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:

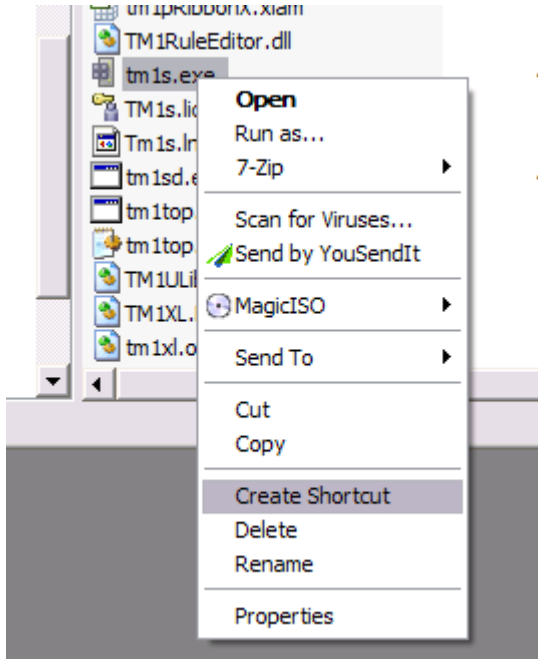
```
[TM1S]
ServerLogging=F
SecurityPackageName=Kerberos
IntegratedSecurityMode=1
UseSSL=T
ServerName=Strategic Finance Blueprint
DataBaseDirectory=<Your_TM1_Applications_folder>\Strategic Finance
Blueprint\Objects
AdminHost=localhost
PortNumber=11111
ClientMessagePortNumber=12346
Language=ENG
SaveTime=
DownTime=
ProgressMessage=True
AuditLogOn=F
DefaultMeasuresDimension=T
AllowSeparateNandCRules=T
IdleConnectionTimeoutSeconds=7200
GroupsCreationLimit=400
```

The parameters highlighted in orange 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.

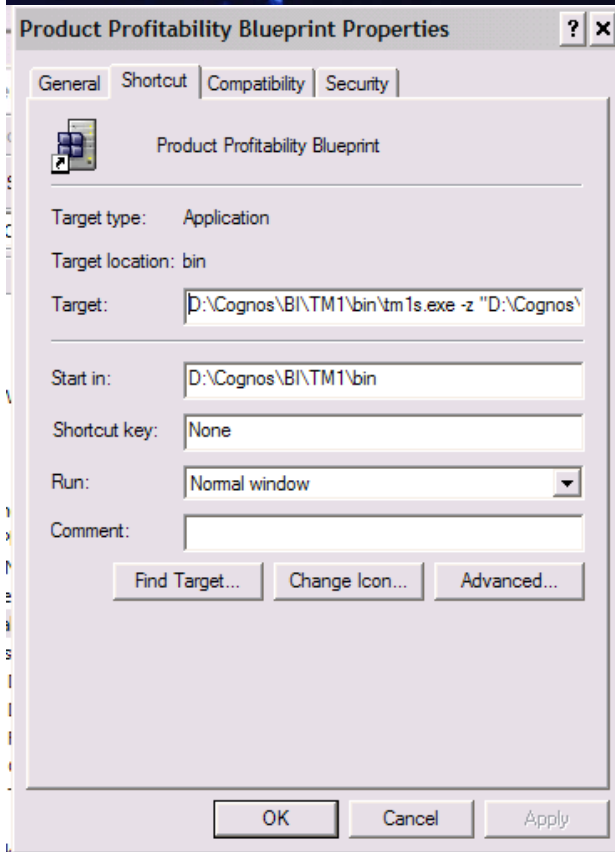
The "AdminHost" need to be changed to set it as the IBM Cognos TM1 Admin Sever host in your environment.

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 "<Your_TM1_Applications_folder>\Strategic Finance Blueprint "
- Rename the shortcut to "Strategic Finance Blueprint"
- Edit the Shortcut Properties



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

```
<YourIBMCognosTM1InstallFolder>\bin\tm1s.exe -z  
"<Your_TM1_Applications_folder>\Strategic Finance Blueprint\Objects "
```

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

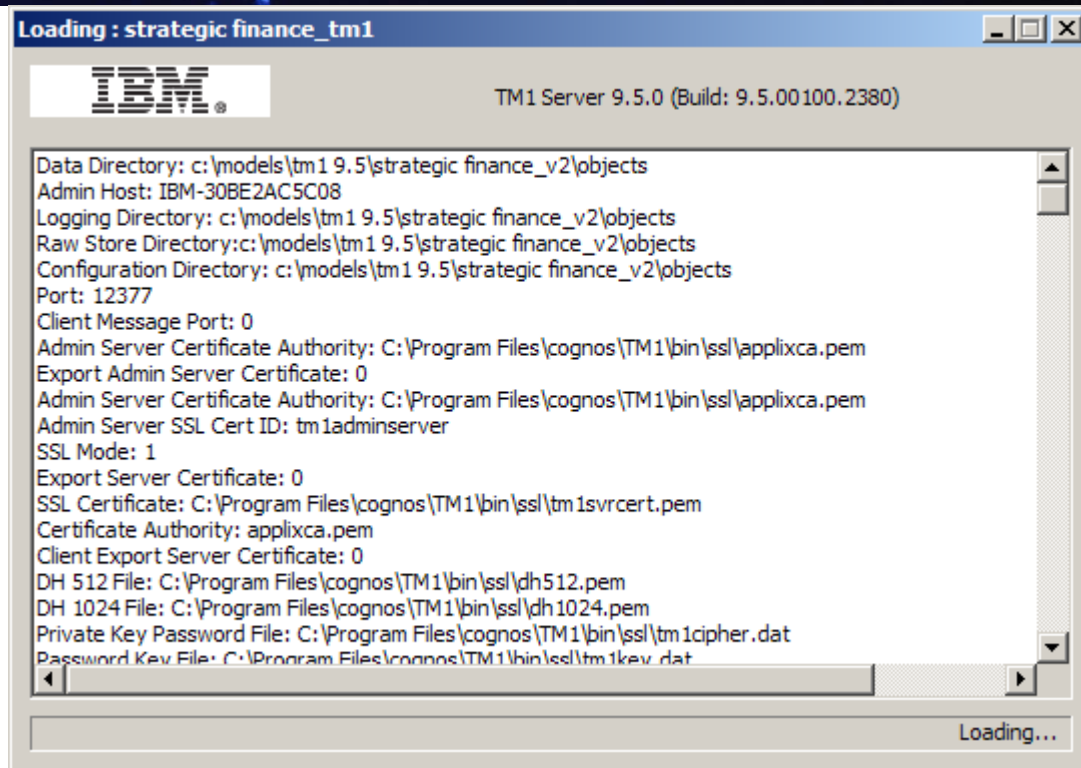
- Click OK to save the changes.

3.3. Testing the new IBM Cognos TM1 Server instance

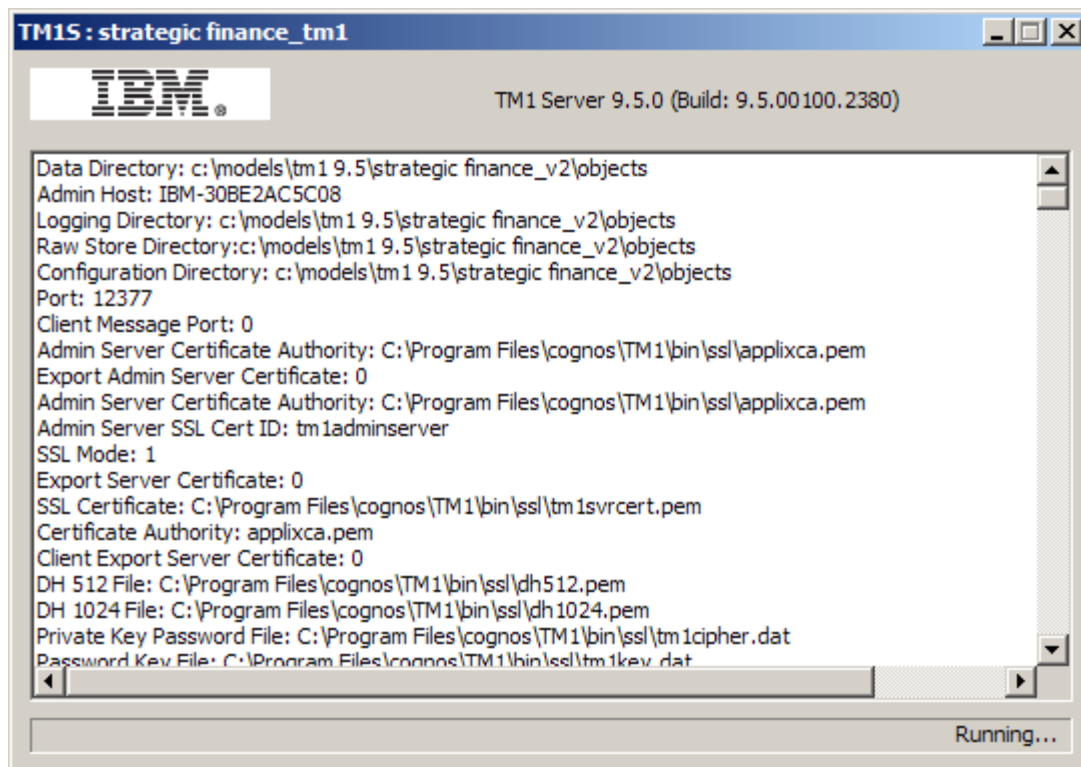
Double click onto the shortcut "Strategic Finance Blueprint" located in the folder:

```
"<Your_TM1_Applications_folder>\Strategic Finance Blueprint"
```

The following dialog will appear:



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





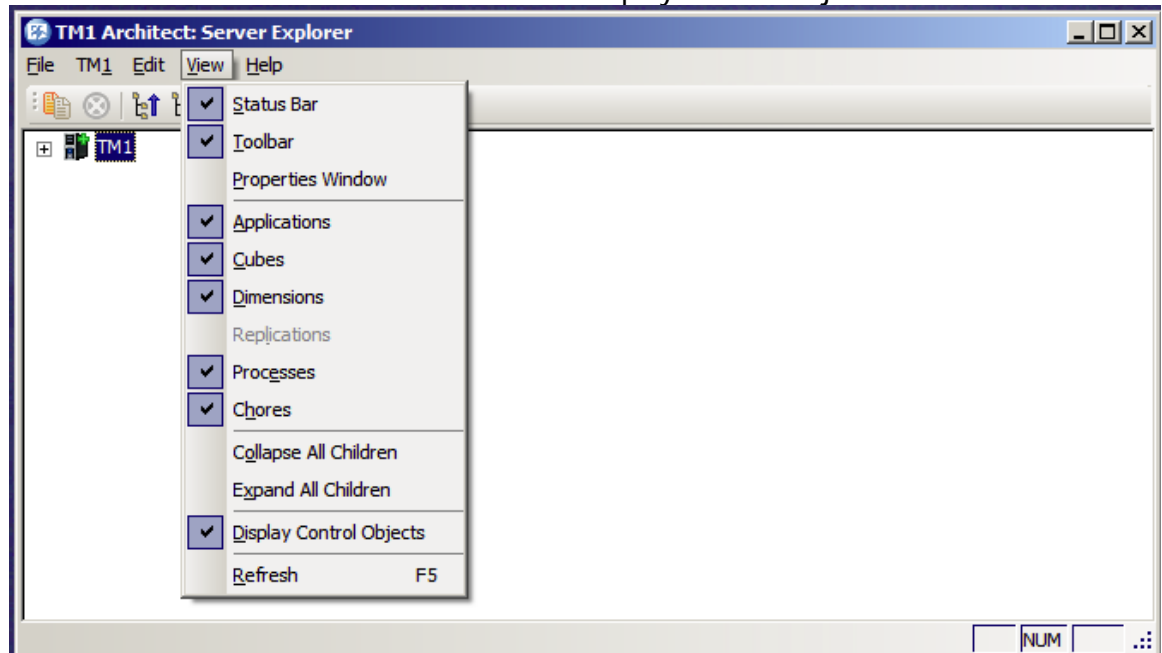
Once the newly created IBM Cognos TM1 Server instance is up and running, IBM Cognos TM1Contributor and/or Architect can be used to navigate through the content.

3.4. Setting Up the Contributor Application

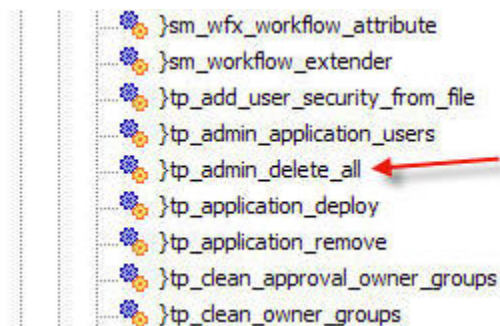
3.4.1. Open TM1 Architect

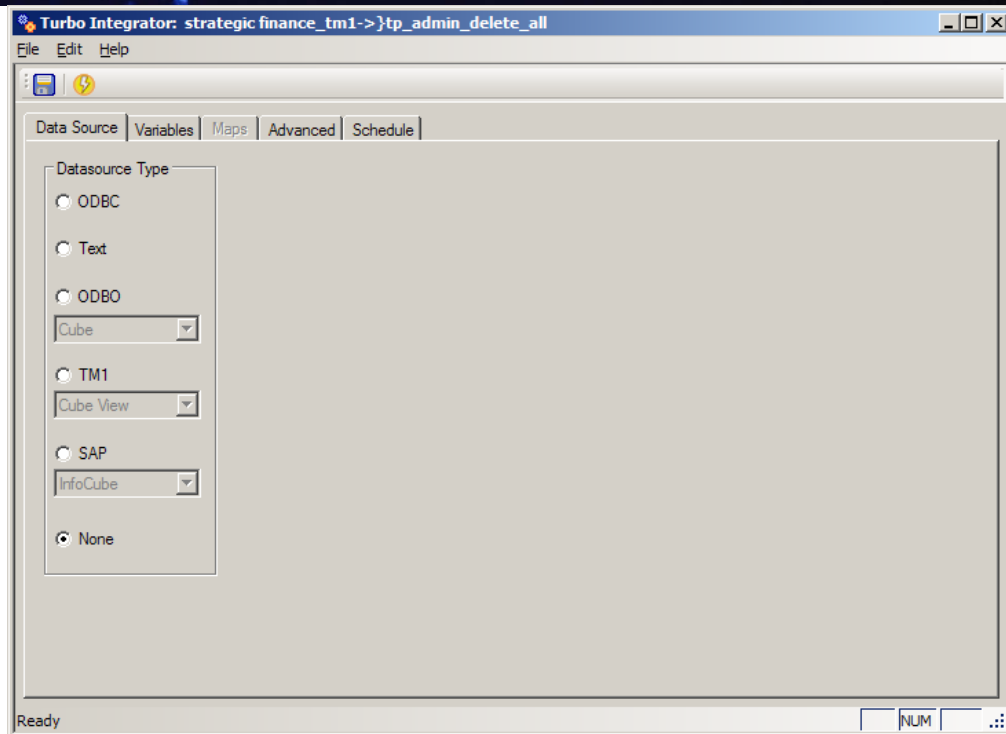
3.4.2. Double click the strategic finance_v2 application and Login as User: admin

3.4.3. Click on the Menu Item – View and validate Display Control Objects is checked



3.4.4. Expand Processes node and double click }tp_admin_delete_all





- 3.4.5. The extract process from 3.1 created the "Contributor" folder. Make sure the file "Strategic_Finance_tm1_Contributor.zip" exists in that folder. For your reference the folder is '<YourIBMCognosTM1 BlueprintFolder>\Strategic Finance Blueprint\Contributor'

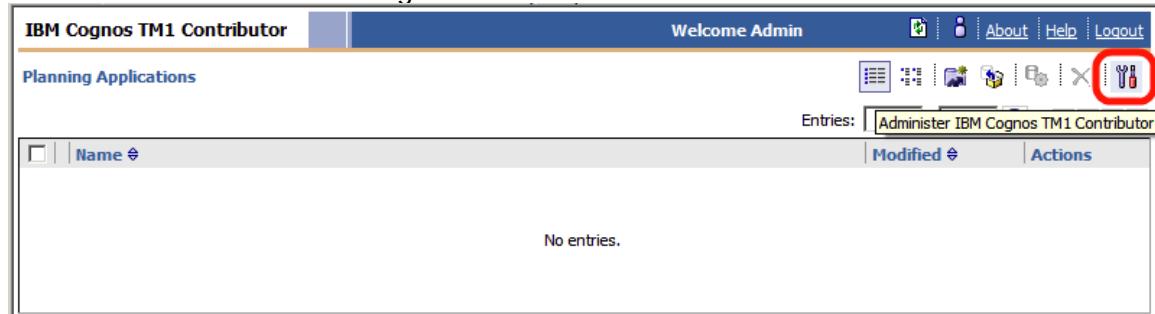
If you are launching IBM Cognos TM1 Contributor for the first time, you must set up your environment. Please refer to Chapter 5 of the TM1 Install document instructions. Once these have been completed, proceed with the following step.

- 3.4.6. Launch your TM1 Contributor environment, for example, http://yourTM1_Server/pmpsvc/ and Login as User: admin

Note: The credentials provided depend upon the Server attached to the Contributor Server. Please verify the credentials provided are valid for that Server.



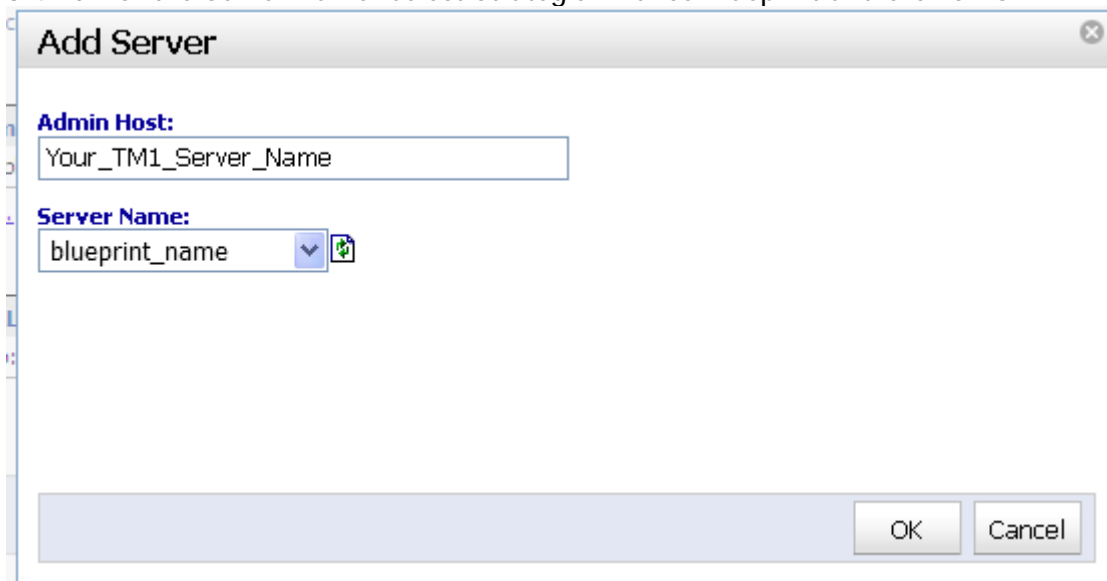
3.4.7. Click Administer IBM Cognos TM1 Contributor



3.4.8. Click Add... under the Server Names: section

3.4.9. Enter your TM1 Admin Host and click the Refresh icon

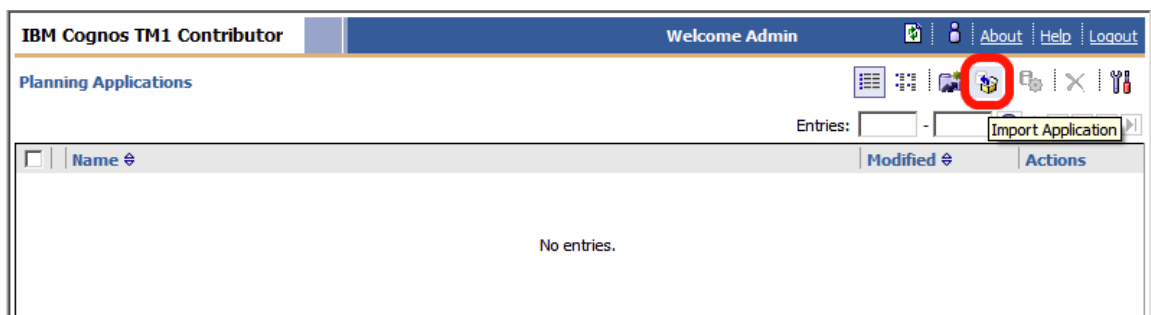
3.4.10. For the Server Name: select Strategic Finance Blueprint and click on OK



3.4.11. Click OK

3.4.12. Click OK

3.4.13. Click the Import Application icon



3.4.14. Choose your TM1ServerName: Strategic Finance Blueprint for the TM1 Server



3.4.15. Browse to "<YourIBMCognosTM1 Blueprint Folder>\Strategic Finance Blueprint\Contributor" and select the "Strategic_Finance_TM1_Contributor.zip"

3.4.16. Uncheck Import application security and Click Import

Application Import

Specify your import file and import settings.

TM1 Server:
 IBM-30BE2AC5C08.home:strategic finance_tm1

Application file:
 C:\Models\TM1 9.5\Strategic Finance_V2\Contributor\Strategic_Finance_TM1.zip Browse...

☐ Import application security
☒ Import application properties

Import Cancel

3.4.17. Click the Activate Application icon

IBM Cognos TM1 Contributor Welcome Admin About Help Logout

Planning Applications

Entries: 1 - 1

Name	Modified	Actions
Blueprint Name	December 21, 2009 1:12:30 PM PST	

Activate Application - Blueprint Name

3.4.18. Click the Strategic Finance Blueprint Application link to test; if installed correctly it should resemble the following

File Edit View History Bookmarks Tools Help

Contributor - Strategic_Finance_TM1

IBM Cognos TM1 Contributor Welcome Admin About Help Logout

You are a reviewer or contributor for:

Name	State	Ownership	Reviewer	Last Data Commit
Corporate	Work In Progress	Admin	Corporate	April 29, 2010 4:16:26 PM PDT
Legal Entity A	Not Started	None	Corporate	Never committed
Legal Entity B	Not Started	None	Corporate	Never committed
Legal Entity C	Not Started	None	Corporate	Never committed



4. IBM Cognos 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.

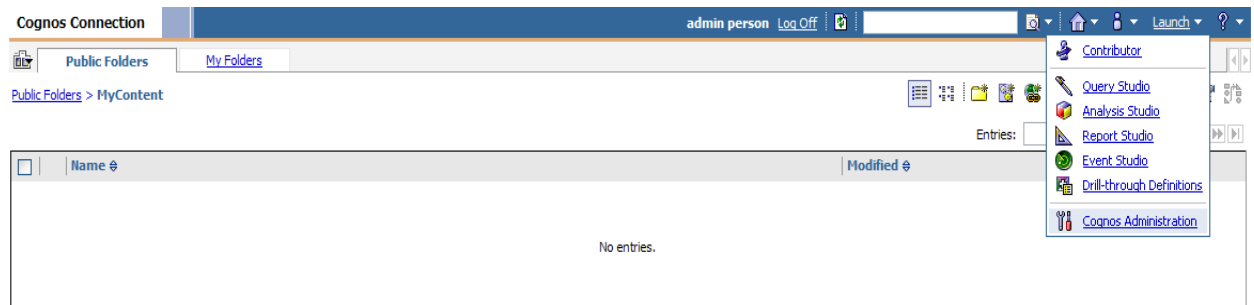
4.1. Create the data sources

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

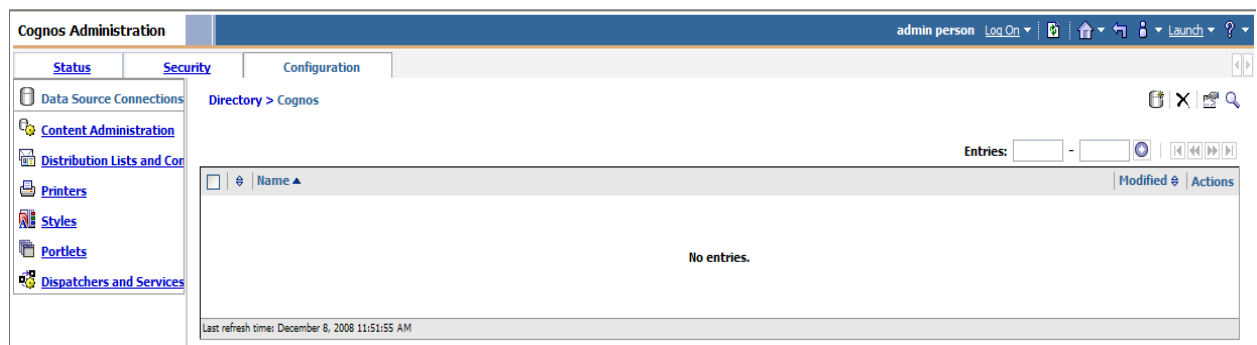
4.1.1. Create 'Strategic Finance Blueprint' data source


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

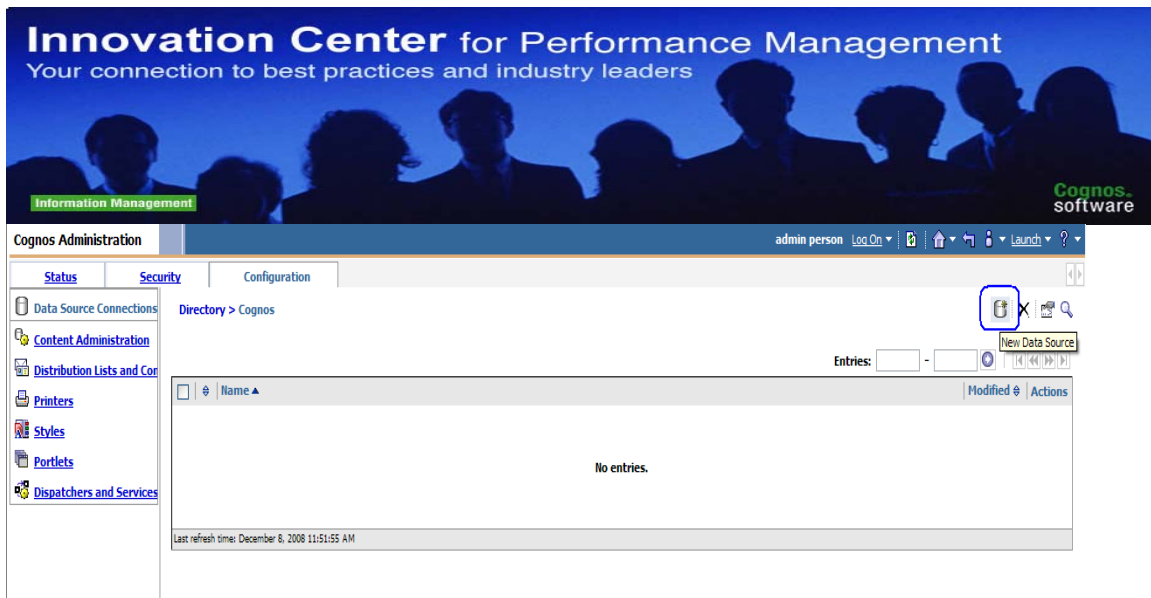
Click on to Launch and select IBM Cognos Administration



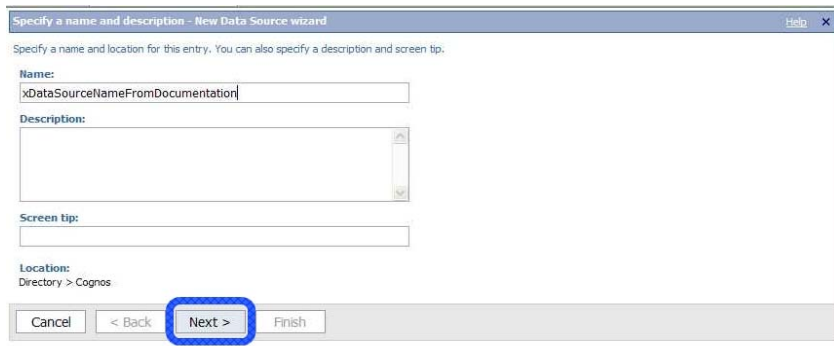
Click on the Configuration tab; make sure 'Data Source Connections' is selected



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



Name the Data Source exactly as: "Strategic Finance Blueprint" then click Next >





Select the 'TM1' option; then click Next >

Specify the connection - New Data Source wizard

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.

Type:

IBM Cognos Finance

- 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)
- TM1**
- XML
- Other type

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

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IBM Cognos Administration

Status

Security

Configuration

Data Source Connections

- Content Administration
- Distribution Lists and Contacts
- Printers
- Styles
- Portlets
- Dispatchers and Services

Administration Host:

IBM-30BE2AC5C08

Server Name:

strategic finance_tm1

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:

admin

Password:

Confirm password:

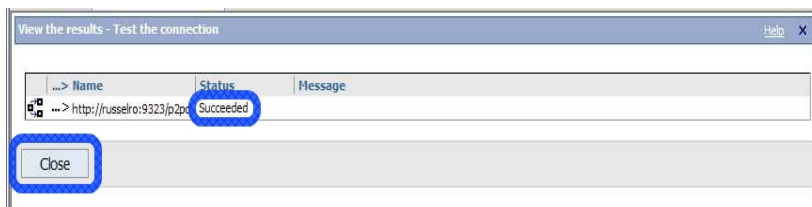
Testing



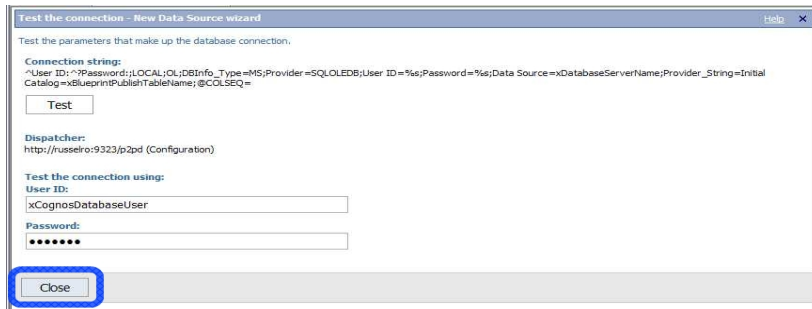
Click Test to verify the connection is setup correctly



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



Click Close





Select the import package named 'Strategic_Finance_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 'Strategic_Finance_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"/>		

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 >

A screenshot of the 'Specify the general options - New Import wizard' dialog box. The 'Access permissions' section has 'Apply to new and existing entries' selected. The 'External namespaces' section has 'Do not include references to external namespaces' selected. The 'Entry ownership' section has 'The user performing the import' selected. The 'Apply to:' section has 'New entries only' selected. The 'Next >' button is highlighted with a red box.

Review the summary options selected then click Next >

A screenshot of the 'Review the summary - New Import wizard' dialog box. It shows a summary of the deployment specification, including Name, Description, and Deployment archive. A table shows the public folders content. The 'Options' section lists various settings like 'Include report output versions' and 'Replace existing entries'. The 'Next >' button is highlighted with a red box.

Choose 'Save and run once' then click Finish

A screenshot of the 'Select an action - New Import wizard' dialog box. The 'Action:' section has 'Save and run once' selected. The 'Finish' button is highlighted with a red box.



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

A screenshot of the 'Run with options' dialog box. The 'Time' section has 'Now' selected. The 'Content' list includes 'Content store', 'Directory', 'Cognos namespace', 'Public Folders', and 'Blueprint Name', all of which are checked. The 'Report specification upgrade' section has 'Keep the existing report specification versions' selected. The 'Run' button is highlighted with a red box.

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

A screenshot of a Cognos 8 dialog box. It displays the selected options: 'Time: now' and 'Report specification upgrade: Keep the existing report specification versions'. The checkbox 'View the details of this import after closing this dialog' is checked and highlighted with a red box. The 'OK' button is also highlighted with a red box.

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

A screenshot of the 'View run history details' page for 'Strategic Finance Blueprint'. The page shows 'Start time: October 2, 2008 11:48:59 AM' and 'Status: Executing'. The 'Completion time' is 'Unavailable'. A 'Refresh' link is highlighted with a red box. Below the messages section, there is a table with columns 'Time' and 'Message', and a message 'No entries.' is displayed.



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

Cognos Administration

admin person Log On | Home | Launch ?

Status Security Configuration

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

View an import deployment record - Blueprint Name - Import

View the details of this particular run.

Start time: December 8, 2008 12:57:54 PM

Completion time: December 8, 2008 12:57:55 PM

Status: Succeeded

Messages

Entries: 1 - 1

Message	Name
CM-REQ-2300 Import is complete. 1 object(s) were imported. 0 object(s) failed.	...

Deployment archive

Name: Blueprint Name

Public folders content

Name	Target name	Disable after import
... > Blueprint Name	... > Blueprint Name	

Options:

Include report output versions
Replace existing entries

Include run history
Replace existing entries

Do not include schedules

Directory content

Do not include Cognos groups and roles

Do not include distribution lists and contacts

Do not include data sources and connections

General Options

Do not include access permissions

Do not include references to external namespaces

Set the owner to the user performing the import

Close

4.2. Testing IBM Cognos Dashboards Content

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

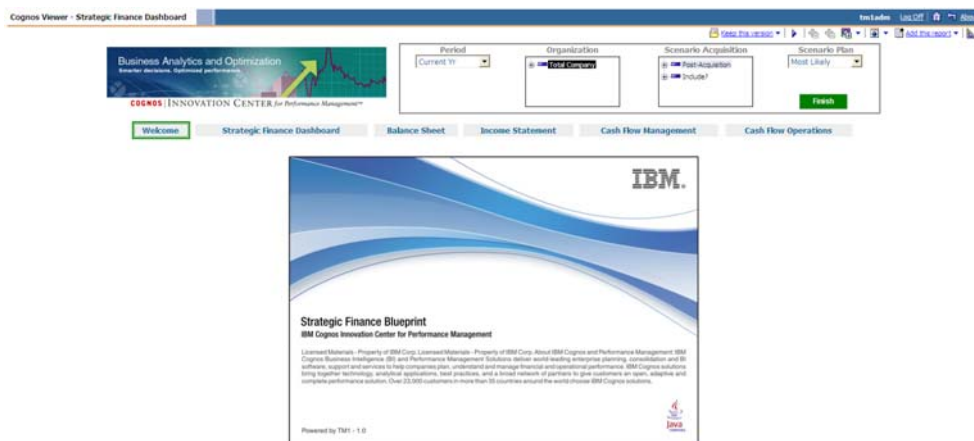


Two different user entry point are available. The First one: "Strategic Finance Dashboard PortalPage" use the IBM Cognos BI dashboard capabilities to make all the content available through multiple portal tabs within one page. And, "Strategic Finance Dashboard" makes all the content available through a single report simulated a multi-page dashboard.

Both user entry point offer the same capabilities with a different user experience.

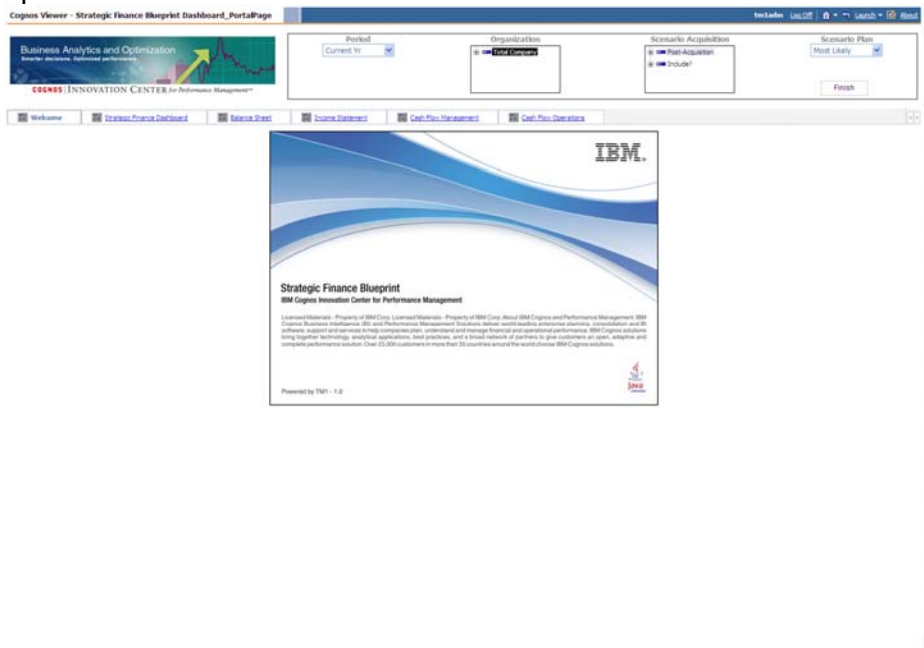
To test the content is coming up correctly; launch either of the following:

- "Strategic Finance Dashboard" shortcut. The following screen should come up:





- "Strategic Finance Dashboard PortalPage" shortcut. 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.