

IBM Cognos TM1
Version 10.2.2

Getting Started Installation Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 13.

Product Information

This document applies to IBM Cognos TM1 Version 10.2.2 and may also apply to subsequent releases.

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Introduction

This document is intended for use with IBM® Cognos® TM1®.

It provides the information you need to perform a basic installation on a single computer that uses the Microsoft Windows operating system.

Audience

To use this guide, you should be familiar with:

- Basic database concepts
- Basic Windows operating system administration
- Web server configuration

Finding information

To find documentation on the web, including all translated documentation, access IBM Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. This product has accessibility features. For information on these features, see “Accessibility features,” on page 11.

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Chapter 1. Cognos TM1 single-computer installation

This type of installation puts IBM Cognos TM1 on a single computer running the Microsoft Windows operating system and using default settings. Use this kind of installation to get up and running quickly with Cognos TM1 or to install a test or evaluation environment.

To configure and install the full features and optional components of Cognos TM1, see the comprehensive installation guide found at Cognos TM1 Welcome page (<http://www.ibm.com/support/knowledgecenter/SS9RXT/welcome>). Select the version of TM1 you are using, then select the **Install > TM1 Installation and Configuration Guide**.

The single computer installation explains how to install and run:

- Cognos TM1 Admin Server
- Cognos TM1 Server
- Cognos TM1 Perspectives
- Cognos TM1 Architect
- Cognos TM1 Web
- Cognos TM1 Application Server
- Cognos TM1 Application Web
- Cognos Insight
- Cognos TM1 Performance Modeler

This installation scenario assumes:

- You are on a single 32- or 64-bit computer running the Microsoft Windows operating system.
- You use the Apache Tomcat web server software installed by the Cognos TM1 installation.
- You use the default, standard Cognos TM1 authentication.
- You accept the default configurations including English as the language.

Not all Cognos TM1 components are available for 64-bit systems. If the component is available as a 64-bit installation, it is installed in a directory identified as a 64-bit location instead of in the default 32-bit installation directory location. For example, bin64 instead of bin.

Remember: Your browser may use a slightly different interface than the browser used in the steps described here.

Install the prerequisite software

You need the prerequisite software before you install IBM Cognos TM1.

About this task

If you do not have these prerequisites in place, the Cognos TM1 Installation wizard displays a message about them. If you are missing any of the prerequisites, you

need to install them before you can continue. You may already have this software installed.

Procedure

For Cognos TM1 Perspectives or Cognos TM1 Architect, install or confirm that you have:

- Microsoft .NET Framework
- Microsoft Visual C++ 2010 Redistributable Package
- Microsoft Excel

Review the latest list of environments supported by Cognos TM1, including information on operating systems, patches, web servers and web browsers, by visiting Cognos TM1 10.2.2 Software Environments (<http://www.ibm.com/support/docview.wss?uid=swg27040698>).

Install the basic Cognos TM1 components

Use the installation program to select the components you want to install and the location on your computer where you want to install them.

Before you begin

- Ensure that you have administrator privileges for the computer on which you are installing software.
- Ensure that the computer has a TEMP system variable that points to the directory where you want to store temporary files. During installation, files are temporarily copied to this directory.
- Some Microsoft Windows web server software does not support non-ASCII characters in directory names. Ensure that the directories where you install IBM Cognos TM1 components contain only ASCII characters in the path name.
- Ensure that all of the prerequisite software has been installed.
- There are several varieties of installation program available to you. Depending on which operating system you are using, go to the directory where the one you want to install is stored:
 - TM1 for 32-bit Windows
 - TM1 for 64-bit Windows

Procedure

1. To start the installation:
 - Go to the download location for the Cognos TM1 installation program that you want to use.
 - Or, insert the IBM Cognos TM1 product disk.
If the installation wizard does not open automatically, go to the operating system directory to locate the `issetup.exe` command.
2. Depending on your operating system software, right-click or double-click the `issetup.exe` file:
 - On Microsoft Windows Vista, Windows 7, or Windows Server 2008 operating system software, right-click the `issetup.exe` file and click **Run as Administrator**.
 - For all other Windows operating system software, double-click `issetup.exe`.
3. Follow the directions in the installation wizard to select all of the components. The components that you need to run the software are selected by default.

If you do not want to install Cognos Insight or Cognos TM1 Performance Modeler, skip to Step 5.

4. To include Cognos Insight in the installation, expand the **TM1 Client Tier** and the select **Cognos Insight**.
5. To include Cognos TM1 Performance Modeler in the installation, expand the **TM1 Developer Tier** and select **TM1 Performance Modeler**.
6. Click **Next** until the installation begins.

The installation runs until all components have been installed. This may take a significant amount of time.

Tip: For earlier Windows operating systems, you can check **Start Cognos Configuration** on the last screen of the installation to immediately run the configuration tool. On Microsoft Windows Vista, Windows 7, or Windows Server 2008 operating system software, do not check that box and instead use the **Start** menu so you can choose **Run as Administrator** when launching the Cognos Configuration tool.

7. Click **Finish**.

Use Cognos Configuration to start the Cognos TM1 components

Before you can use Cognos TM1, you need to start the IBM Cognos TM1 Admin Server, the TM1 Application Server, and at least one IBM Cognos TM1 sample database server. This action registers the servers in the Windows service registry. Then you need to configure the services so that they run under a specific user. Servers that are running in a Microsoft Windows environment are referred to as “services.”

Procedure

1. If it is not already running, start the configuration tool by clicking **Start > All Programs > IBM Cognos TM1 > IBM Cognos Configuration**.

Remember: Right-click and use **Run as Administrator** on Windows Vista, Windows 7, and Windows Server 2008 operating system software.

2. In the Cognos Configuration **Explorer** pane, expand **Local Configuration > Environment**.
3. Right-click each component that you want to start and select **Start**:
 - a. **TM1 Admin Server** It is best to start the TM1 Admin Server first since that server must be running before any sample database can run.

The Cognos Configuration tool prompts you to save any edits made to the configuration settings. This process will take longer the first time you save a setting as the cryptographic settings and other actions take place for the first time. Click **Yes** in response to the message asking you to save the settings. You will also see this type of message when you close Cognos Configuration.
 - b. **TM1 Application Server**
4. Expand the **Data Access > TM1 Server** node and right-click each Cognos TM1 sample database server that you want to start and select **Start**. For example, start the provided sample databases:
 - a. **SData**
 - b. **Planning Sample**
 - c. **GO_New_Stores**
5. Click **File > Save**.

6. Now that the services are all registered in the Windows services registry, you can reconfigure them to use a specific user account:
 - a. In Cognos Configuration, right-click each service you want to change and select **Stop**.
 - b. Open Windows Services.
 - c. Right-click on each service and select **Properties**.
 - d. Enter a user name and password valid on your system with the appropriate rights for the service. See "User accounts for running Cognos TM1 services on Windows" in the "Planning your Cognos TM1 installation" chapter of the *IBM Cognos TM1 Installation and Configuration Guide* for details about the rights that this user account should have.

You can find the TM1 Installation Guide for the version of TM1 you are using at Cognos TM1 Welcome page (<http://www.ibm.com/support/knowledgecenter/SS9RXT/welcome>).
 - e. Close Windows Services.
7. In Cognos Configuration, right-click each server and select **Start**.
8. Close Cognos Configuration.

Run Cognos TM1 Perspectives

After installation, you can run IBM Cognos TM1 Perspectives.

Procedure

1. From the Windows **Start** menu, click **IBM Cognos TM1 > Perspectives**. If the component does not start, ensure that the servers you started with Cognos Configuration are still running.
2. Click **Enable Macros** when the security warning displays.
3. Click **TM1 > Server Explorer**, then expand **TM1** to see the servers that are available.
4. Double-click a Cognos TM1 Server to log in.

For SData, Planning Sample, or GO_New_Stores use these login credentials:

 - **User name:** admin
 - **Password:** apple

Tip: To load Cognos TM1 Perspectives automatically whenever you start Microsoft Excel, add *TM1_location/Tm1p.xla* to Microsoft Excel's add-in tool list, where *TM1_location* is the file directory where Cognos TM1 is installed. After completing this step, "TM1" displays on the Microsoft Excel menu bar.

Run Cognos TM1 Architect

After installation, you can run the non-Microsoft Excel version of IBM Cognos TM1 called IBM Cognos TM1 Architect.

Procedure

1. From the Windows **Start** click **All Programs > IBM Cognos TM1 > Architect**. If Cognos TM1 Architect does not start up, ensure that the servers you started with Cognos Configuration are still running.
2. Expand **TM1** to see the servers that are available.
3. Double-click a Cognos TM1 Server to log in.

4. Use these credentials to log into the SData, Planning Sample, or GO_New_Stores sample databases:
 - **User name:** admin
 - **Password:** apple

Run Cognos TM1 Web

The IBM Cognos TM1 installation configures IBM Cognos TM1 Web to run with the provided version of the Apache Tomcat web application server.

Procedure

1. In a web browser, enter the following URL: `http://localhost:9510/tm1web/`
You can use the “localhost” term to make the computer location default to use your current computer. Or you can explicitly enter the IP address or name for the computer where you installed Cognos TM1.
2. Depending on what other components you have launched, the Log In box values will usually be automatically entered for you. If they are not, you can enter or change those values as needed.
3. Click **Log In**.

Run the Cognos TM1 Applications portal

IBM Cognos TM1 Applications is the web-based client and portal used to run planning applications built using IBM Cognos TM1 data.

About this task

Cognos TM1 Applications is also used to launch IBM Cognos TM1 Performance Modeler and can be used to launch IBM Cognos Insight.

Procedure

1. In a web browser, enter the following URL: `http://localhost:9510/pmpsvc` where 9510 is the usual port used by Cognos TM1 Application Server. If you used a different port when you installed, enter that other value here.
2. Accept the defaults for all of the configuration settings to identify the Admin Host, server, types of clients, and the URL used by the Cognos TM1 Applications Server.
3. Click **OK**.
4. Enter **admin** and **apple** for the **username** and **password** for the sample database servers.
5. To complete the installation, dismiss the message about editing the following parameters in the `tm1s.cfg` file.
 - **AllowSeparateNandCRules**
 - **ForceReevaluationOfFeedersForFedCellsOnDataChange**
 - **DistributedPlanningOutputDir**

You do not need to edit these parameters until you begin working with the clients.

The portal is empty until you build an application using Cognos TM1 Performance Modeler or import an existing application.

Run Cognos Insight

IBM Cognos Insight is available as an unselected component of the IBM Cognos TM1 installation. Cognos Insight can be used as a client for contributing to applications and also as a dynamic workspace builder for creating interactive contributing user experiences.

Procedure

1. To run Cognos Insight, complete one of the following actions:
 - From the Cognos TM1 Applications portal, click the Cognos Insight icon .
 - Or you can:
 - Right-click a node of an application that has been configured to use Cognos Insight.
 - You can also click the Cognos Insight desktop icon that gets installed.
 - Use the Microsoft Windows Start menu. Click **Start > All Programs > IBM Cognos Insight > IBM Cognos Insight**.
 - Cognos Insight can also be installed as a stand-alone component.
- Remember:** Depending on your browser, you may see slightly different steps used to install downloaded components such as Cognos Insight.
2. Click **OK** with the **Open With IBM Cognos RCP Application Updater** selected on the `provagent.cogr_cp_insight` dialog box.
 3. If you see an Executable file warning, click **OK** to proceed with the installation.

What to do next

See the Cognos Insight Knowledge Center (<http://www.ibm.com/support/knowledgecenter/SSVJ22/welcome>) for details about creating Cognos Insight workspaces and using Cognos Insight as a client for contributing to applications.

Run Cognos TM1 Performance Modeler

IBM Cognos TM1 Performance Modeler is available as an unselected component of the IBM Cognos TM1 installation. You launch Cognos TM1 Performance Modeler from the IBM Cognos TM1 Applications portal.

About this task

After Cognos TM1 Performance Modeler is installed, you can also start the program from the desktop icon that gets installed or from the Microsoft Windows Start menu. Click **Start > All Programs > IBM Cognos TM1 Performance Modeler > IBM Cognos TM1 Performance Modeler**.

Procedure

1. From the Cognos TM1 Applications portal, click the **Open Performance Modeler**  icon.

Remember: Depending on your browser, you may see slightly different steps used to install downloaded components such as Cognos TM1 Performance Modeler.

2. Click **OK** with the **Open with IBM Cognos RCP Application Updater** selected on the `provagent.cogr_cp_modeler` dialog box.

3. Click **OK** to dismiss the configuration settings message and complete the installation.

You do not need to edit those parameters until you begin working with the clients.

4. Click the **Model Design** tab to see the GO_New_Stores data cubes and structure.
5. Click the **Application Design** tab to build a new application using GO_New_Stores.

See Cognos TM1 Welcome page (<http://www.ibm.com/support/knowledgecenter/SS9RXT/welcome>). Select the version of TM1 you are using, then the **Model and Design** category. The *IBM Cognos TM1 Performance Modeler User Guide* provides details on building models.

Use Cognos TM1 Application Web

The IBM Cognos TM1 Application Web is a web-based client used to contribute to planning applications and to work with IBM Cognos TM1 Websheets.

Before you begin

You need a planning application before you can use the Cognos TM1 Application Web client. The application designer identifies which clients can be used with a particular application.

Tip: You can see which clients the designer made available for an application by right-clicking a node of the application when it is displayed in the IBM Cognos TM1 Applications portal.

Procedure

1. In the Cognos TM1 Applications portal, right-click a node in a planning application.
2. Select **Open TM1 Application Web** to launch the Cognos TM1 Application Web client.

See the *IBM Cognos TM1 Web User Guide* for details on how to contribute to an application using the Cognos TM1 Application Web client. Go to Cognos TM1 Welcome page (<http://www.ibm.com/support/knowledgecenter/SS9RXT/welcome>), select the version of TM1 you are using, select the **Analyze and Create** category, then *TM1 Applications Guide*.

Chapter 2. Other Cognos TM1 components and integration options

The IBM Cognos TM1 installation makes many other components available and has many other ways to customize the installation.

See the following guides for details about other ways to install and configure Cognos TM1.

See all the TM1 documentation at Cognos TM1 Welcome page (<http://www.ibm.com/support/knowledgecenter/SS9RXT/welcome>). Select the version of TM1 you are using, then select the category and manual you want.

Other Cognos TM1 components

See the comprehensive *IBM Cognos TMI Installation and Configuration Guide* for details on these additional components and on other ways to install Cognos TM1.

IBM Cognos TM1 Operations Console

The IBM Cognos TM1 Operations Console is a tool used by administrators to monitor the activity of TM1 servers on the network. See the *IBM Cognos TM1 Operations Console Guide* for more information.

IBM Cognos TM1 Mobile Contributor

IBM Cognos TM1 Mobile Contributor is a new mobile application for the Apple iPad that connects to an IBM Cognos TM1 Server and enables mobile users to access all their planning applications from IBM Cognos TM1 Applications.

Scorecarding with IBM Cognos TM1

Scorecarding with IBM Cognos TM1 integrates scorecarding and strategy management capabilities into Cognos TM1 to provide better integration of performance management with planning. You can create scorecard solutions that contain interactive impact diagrams, strategy maps, and custom diagrams that monitor your key performance indicators (KPIs). For more information, see the *IBM Cognos TM1 Performance Modeler Guide*.

Cognos TM1 integration with other IBM Cognos software

See the “Cognos TM1 integration with other IBM Cognos software” chapter in the comprehensive *IBM Cognos TMI Installation and Configuration Guide* for details on the following ways to integrate Cognos TM1 with other IBM Cognos software.

IBM Cognos Business Intelligence security

You can configure the Cognos TM1 server to authenticate users using IBM Cognos Business Intelligence (BI) security.

IBM Cognos BI reporting

You can configure IBM Cognos Business Intelligence (BI) to access Cognos TM1 servers and cubes from Cognos BI applications such as Cognos Report Studio and Cognos Query Studio.

iWidgets in IBM Cognos Workspace

You can display IBM Cognos TM1 Web data objects, such as cube views, charts, and Websheets as iWidgets in IBM Cognos Workspace. See the *IBM Cognos TMI Installation and Configuration Guide* for more information.

IBM Cognos Analysis for Microsoft Excel

Use IBM Cognos Analysis for Microsoft Excel with IBM Cognos TM1 data sources to enter and write back values to TM1 cubes.

IBM Cognos TM1 Package Connector

The IBM Cognos TM1 Package Connector is used to import IBM Cognos Framework Manager packages. See the *IBM Cognos TM1 TurboIntegrator Guide* for more information.

Appendix. Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products.

See the IBM Accessibility Center for more information about the commitment that IBM has to accessibility.

The IBM Accessibility Center is available online at <http://www.ibm.com/able>.

Keyboard shortcuts for the installation wizard

Keyboard shortcuts, or shortcut keys, provide you with an easier and often faster method of navigating and using software.

The installation wizard uses standard Microsoft Windows operating system navigation keys in addition to application-specific keys.

Note: The following keyboard shortcuts are based on US standard keyboards.

The following table lists the keyboard shortcuts that you can use to perform some of the main tasks in the installation wizard on the Windows operating system.

Action	Shortcut key
Move to the next field on a page	Tab
Return to the previous field on a page	Shift+Tab
Close the installation wizard	Alt+F4
Move to the next configuration step	Alt+N
Return to the previous configuration step	Alt+B
Move to the next selection in a list	Down arrow
Move to the previous selection in a list	Up arrow

The following table lists the keyboard shortcuts you can use to perform some of the main tasks in the installation wizard on the UNIX or Linux operating system.

Action	Shortcut key
Move to the next field on a page	Tab
Return to the previous field on a page	Shift+Tab
Close the installation wizard	Alt+F4
Move to the next selection in a list	Down arrow
Move to the previous selection in a list	Up arrow

The following table lists the keyboard shortcuts you can use to perform some of the main tasks in the License Agreement page of the installation wizard.

Action	Shortcut key
Accept the license agreement	Alt+A

Action	Shortcut key
Decline the license agreement	Alt+D
Quit the installation wizard	Alt+x

Keyboard shortcuts for Cognos Configuration

Keyboard shortcuts, or shortcut keys, provide you with an easier and often faster method of navigating and using software.

The following keyboard shortcuts are based on US standard keyboards.

The following table lists the keyboard shortcuts that you can use to perform some of the main tasks in IBM Cognos Configuration on the Windows operating system.

Action	Shortcut key
Save the current configuration	Ctrl+S
Close Cognos Configuration	Alt+F4
Rename the selected item	F2
Display the File menu	Alt+F
Display the Edit menu	Alt+E
Display the View menu	Alt+V
Display the Actions menu	Alt+A
Display the Help menu	Alt+H

The following table lists the keyboard shortcuts you can use to perform some of the main tasks in Cognos Configuration on the UNIX or Linux operating system.

Action	Shortcut key
Save the current configuration	Tab
Close Cognos Configuration	Shift+Tab
Rename the selected item	Alt+F4

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