# Sterling Business Intelligence™

## Installation Guide

**Release 8.5**

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**Sterling Commerce**
An AT&T Company

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# Overview of Sterling Business Intelligence

Sterling Business Intelligence is an analytical solution that can be used by users of this application to aggregate the data that is available across supply chain products of Sterling Commerce and generate performance reports relevant to their business.

This document contains instructions for installing the various components of the Sterling Business Intelligence application. It also describes the components of the Sterling Business Intelligence application, and provides information about how to set these up in a typical implementation.

## Intended Audience

This document provides installation and administration information for individuals who are responsible for installing and maintaining the Sterling Business Intelligence application.

This document assumes that the users of Sterling Business Intelligence have working knowledge about installing the IBM®Cognos® 8 Business Intelligence, Version 8.4, suite of products as well as Sterling Commerce's Selling and Fulfillment Foundation™. Therefore, it is recommended that you read the related Cognos documentation and the Selling and Fulfillment Foundation documentation before attempting to install the Sterling Business Intelligence application.

# Prerequisites for Installing Sterling Business Intelligence

Following are the prerequisites for installing Sterling Business Intelligence:

✦ Successful installation and configuration of Selling and Fulfillment Foundation™, Release 8.5, and Sterling Call Center and Sterling Store, Release 8.5. For more information about installing and configuring Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide.* For more information about installing and configuring Sterling Call Center and Sterling Store™, refer to the *Sterling Call Center and Sterling Store Installation Guide.*

✦ Successful installation and configuration of IBM® Cognos® 8 Business Intelligence, Version 8.4. For more information about installing and configuring IBM Cognos 8 Business Intelligence, Version 8.4, refer to the *IBM Cognos 8 Business Intelligence Installation and Configuration Guide*, which is available in the Cognos installation CD.

   **Note**: The 64-bit version of IBM Cognos 8 Business Intelligence, Version 8.4, is not compatible with the IBM Cognos 8 Analytic Applications. You must, therefore, install the 32-bit version of IBM Cognos 8 Business Intelligence, Version 8.4.

✦ You must ensure that the database schema is created and configured for both the Sterling Staging Database and the Sterling Data Mart Database. For more information about configuration settings for the data warehouse database, refer to the *IBM Cognos 8 Analytic Applications Adaptive Warehouse User Guide*. After the database is set up, you must have the following information pertaining to both the Sterling Staging Database and Sterling Data Mart Database:

   ◆ Database user name and password

   ◆ Database host name and port
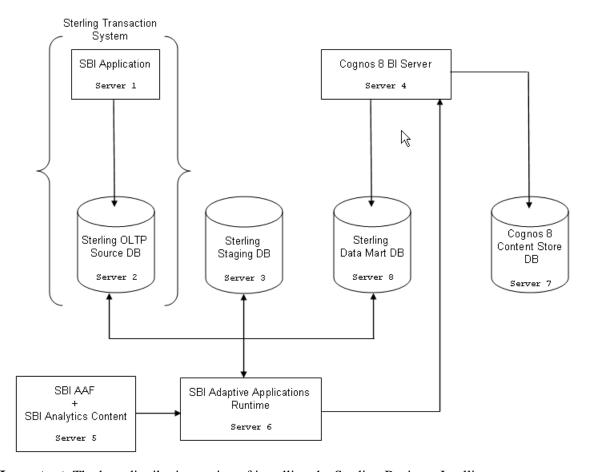
   ◆ Database catalog name

# Checklist for Sterling Business Intelligence Installation

Use the following checklist to guide you through the Sterling Business Intelligence installation tasks:

1. Ensure that you have the necessary prerequisites to install and run the Sterling Business Intelligence solution as listed in the topic "Prerequisites for Installing Sterling Business Intelligence".

2. Ensure that you have understood the Sterling Business Intelligence ecosystem and the necessary system requirements to install and run the Sterling Business Intelligence application as described in the topic "Understanding the Sterling Business Intelligence Ecosystem". It is recommended that you use the same vendor for the platform and the database, that you used for the Sterling Transaction System (server 1) and the Sterling Source Database (server 2) respectively.

3. Install the Sterling Business Intelligence Application component. For more information about this, refer to the topic "Install the Sterling Business Intelligence Application".

4. Install the Sterling Business Intelligence Adaptive Applications Framework. For more information about this, refer to the topic "Install the Sterling Business Intelligence Adaptive Applications Framework".

5. Install the Sterling Business Intelligence Analytics Content component. For more information about this, refer to the topic "Install the Sterling Business Intelligence Analytics Content".

6. Install the Sterling Business Intelligence Adaptive Applications Runtime component. For more information about this, refer to the topic "Install the Sterling Business Intelligence Adaptive Applications Runtime".

7. Install the Sterling Business Intelligence Analytics Content for IBM® Cognos® 8 Business Intelligence. For more information about this, refer to the topic "Install the Sterling Business Intelligence Content for IBM Cognos 8 Business Intelligence".

8. Deploy the Sterling Business Intelligence Application components. For more information about this, refer to the topic "Deploy Sterling Business Intelligence".

9. Verify the Sterling Business Intelligence installation. For more information about this, refer to the topic "Verify the Sterling Business Intelligence Installation".

# Understanding the Sterling Business Intelligence Ecosystem

This topic explains the Sterling Business Intelligence application ecosystem, which is illustrated here.



**Important**: The best distribution option of installing the Sterling Business Intelligence components depends on your individual requirements, resources, and preferences. It is strongly recommended that you install each of the components on different servers.

The Sterling Business Intelligence ecosystem consists of the following:

✦ Sterling Business Intelligence Application
✦ Sterling Source Database
✦ Sterling Staging Database
✦ Cognos 8 Business Intelligence Server
✦ Sterling Business Intelligence Adaptive Applications Framework
✦ Sterling Business Intelligence Components and Content for IBM Cognos 8 Business Intelligence
✦ Sterling Business Intelligence Adaptive Applications Runtime
✦ Sterling Business Intelligence Components and Content for IBM Cognos 8 Business Intelligence
✦ Sterling Data Mart Database

## Sterling Business Intelligence Application

The Sterling Business Intelligence application is installed on Selling and Fulfillment Foundation. The Sterling Business Intelligence application is installed on server 1. The application consists of a Web User Interface (UI) and related APIs that help you select the reports criteria and generate reports. The application also installs framework components related to efficient change data capture, and other configuration data essential for the application to work.

For more information about installing the Sterling Business Intelligence application component, refer to the topic "Install the Sterling Business Intelligence Application".

## Sterling Source Database

The Sterling Source Database hosts the online transaction processing (OLTP) database server, which is installed on server 2. This is used as a source data server. The technical stack requirements for this system are the same as that required for a database server in Selling and Fulfillment Foundation. For more information about the technical stack requirements for this system, refer to the *Selling and Fulfillment Foundation Installation Guide*.

## Sterling Staging Database

The Sterling Staging Database is the source for the data mart database, and is installed on server 3. The staging environment consists of a database in which the incremental transaction data that is extracted, transformed, and loaded (ETL) from the source is stored. For information about the technical stack requirements for this system, refer to the *Selling and Fulfillment Foundation Installation Guide*.

## Cognos 8 Business Intelligence Server

The Cognos 8 Business Intelligence server is the environment in which the IBM Cognos 8 Business Intelligence server is hosted. This is installed in server 4. For information about the technical stack requirements for the IBM Cognos 8 Business Intelligence server, refer to the *IBM® Cognos® 8 Analytics Applications Installation and Configuration Guide*.

## Sterling Business Intelligence Adaptive Applications Framework

The Sterling Business Intelligence Adaptive Applications Framework component includes the IBM Cognos Adaptive Applications Framework. This component is installed on server 5.

The IBM Cognos Adaptive Applications Framework includes:

✦ Adaptive Warehouse
✦ Adaptive Analytics

Adaptive Warehouse is a data modeling environment used to design and populate a target data warehouse. It provides an interface that facilitates the extraction, transformation, and loading of application-specific data from the source database into the target data warehouse. It helps you construct a source model that describes the rules for querying the source database.

Adaptive Analytics provides a set of reports for performance monitoring, analysis, and operational reporting. These role-based report layouts allow you to quickly analyze the data in your warehouse in the context of each application.

For more information about installing the Sterling Business Intelligence Adaptive Applications Framework component, refer to the topic "Install the Sterling Business Intelligence Adaptive Applications Framework".

## Sterling Business Intelligence Analytics Content

The Sterling Business Intelligence Analytics Content component consists of Analytics content files for your system. Analytics content files are metadata files that serve as the data mart model as well as the report specification. This component is installed on server 5.

For more information about installing the Sterling Business Intelligence Adaptive Analytics Content component, refer to the topic "Install the Sterling Business Intelligence Analytics Content".

## Sterling Business Intelligence Adaptive Applications Runtime

The Sterling Business Intelligence Adaptive Applications Runtime component consists of the IBM Cognos Adaptive Warehouse Runtime. This component is used by the Adaptive Warehouse user interface and scripts. The Sterling Business Intelligence Adaptive Applications Runtime helps to run the extract, transform, and load (ETL) scripts in different environments. The Sterling Business Intelligence Adaptive Applications Runtime component is installed on server 6.

For more information about installing the Sterling Business Intelligence Analytics Applications Runtime component, refer to the topic "Install the Sterling Business Intelligence Adaptive Applications Runtime".

## Sterling Business Intelligence Components and Content for IBM Cognos 8 Business Intelligence

The IBM Cognos 8 Business Intelligence Content comprises dashboard reports and files required for communication between the Cognos Business Intelligence server and the Sterling Business Intelligence application. This component is installed on server 7.

For more information about installing the IBM Cognos 8 Business Intelligence Content component, refer to the topic "Install the Sterling Business Intelligence Content for IBM Cognos 8 Business Intelligence".

## Sterling Data Mart Database

The Sterling Data Mart database is the environment in which the data mart database is hosted. This is installed on server 8. The data in this database is dimensionally modeled data that is analytics-friendly. For information about the technical stack requirements for this system, refer to the *Selling and Fulfillment Foundation Installation Guide*.

## Supported Stacks

The following table describes the stacks that are supported by Sterling Business Intelligence:

| Component | OS Version | JDK Version | DB Version | Application Server |
|---|---|---|---|---|
| Sterling Business Intelligence Application | Microsoft® Windows®, UNIX (HP, IBM AIX, Sun Solaris™), and Linux® | JDK1.5 or later version | NA | BEA WebLogic 10.3, IBM WebSphere 6.1.0.11, 7.0.0.3 JBoss 4.3 |
| Sterling Business Intelligence Adaptive Applications Framework | Microsoft Windows (32-bit) (excluding Microsoft Windows 2008) | JDK1.5 | NA | NA |
| Sterling Business Intelligence Adaptive Applications Runtime | Microsoft Windows, and UNIX (IBM AIX, Sun Solaris) (32-bit) (excluding Microsoft Windows 2008) | JDK1.5 | NA | NA |
| Sterling Business Intelligence Analytics Content | Microsoft Windows | JDK1.5 or later version | NA | NA |
| Sterling Business Intelligence Components and Content for IBM Cognos 8 Business Intelligence | Microsoft Windows, UNIX (HP, IBM AIX, Sun Solaris), and Linux | JDK1.5 or later version | Oracle® 10.2, Oracle 11G | NA |

## Internet Browser and Plug-In Requirements

The following table describes the Internet browser and Java plug-in requirements:

| Internet Browser | Operating System | JRE |
| --- | --- | --- |
| Microsoft Internet Explorer 6.0 SP2 | Microsoft Windows 2000, Windows XP, or Windows 2003 R2 | Java Plug-in 1.5.0_11 |
| Microsoft Internet Explorer 7.0 | Microsoft Windows XP | Java Plug-in 1.5.0_11 |
| Mozilla Firefox® 3.0.6 | Microsoft Windows 2000, Windows XP, or Windows 2003 R2 | Java Plug-in 1.5.0_11 |

## Third-Party Software Requirements

The following table describes the third-party software requirement for Sterling Business Intelligence:

| Third-Party Software | Version | OS |
| --- | --- | --- |
| IBM Cognos 8 Business Intelligence | 8.4 | All operating systems |

# Install the Sterling Business Intelligence Application

Prior to installing the Sterling Business Intelligence application, ensure that you have installed Selling and Fulfillment Foundation, Release 8.5. You must also ensure that the database schema is created and configured for both the Sterling Staging Database and the Sterling Data Mart Database. For more information about the configuration settings for the data warehouse database, refer to the *IBM® Cognos® 8 Analytic Applications Adaptive Warehouse User Guide*.

The Sterling Business Intelligence application should be installed on server 1, as described in the topic "*Understanding the Sterling Business Intelligence Ecosystem*".

**Note:** You will be directed to perform either a single schema installation or a multischema installation based on the configuration of Selling and Fulfillment Foundation, Release 8.5.

Ensure that there is at least 1 GB of free space available for installation.

## Single Schema Installation

To perform a single schema installation in a Windows environment, perform these steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Business_Intelligence_Application` folder.

3. Copy `SCIInstallWizard.jar` and `sbi.jar` to your designated path, for example, `D:/sbi/CDROM/SCIINSTALLWizard.jar`.

4. Execute the following command to start the installation wizard:

   `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

   The Installation dialog box is displayed.

   **Note:** You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command.

5. Click **Next** to start the installation.

   The License Conditions screen is displayed.

6. Review the license agreement and click **Accept** to accept the terms.

7. In the Selling and Fulfillment Foundation Folder screen, enter the path to the folder in which Selling and Fulfillment Foundation, Release 8.5, is installed. Alternatively, click **Select Folder** and navigate to the location in which Selling and Fulfillment Foundation, Release 8.5, is installed, and click **Select Folder**. This displays the folder's path in the Selling and Fulfillment Foundation Folder screen.

8. Click **Next**.

9. In the Confirming Input Information screen that is displayed, verify that you have selected the correct folder, and click **Next**. (To select another folder, click **Back** and repeat steps 6, 7, and 8).

   The Data Mart Database Connection Information screen is displayed, with the Database Vendor name populated in the corresponding field.

10. Enter the relevant information in the applicable fields for Sterling data mart database, as described in the following table.

   **Note**: Determine and record information about your Oracle, Microsoft SQL server 2000/2005, or DB2 database server on which the schema for the Sterling data mart database is created. Ensure that the schema is created with the UTF-8 character set enabled. For more details about enabling the UTF-8 character set, refer to the documentation pertaining to the corresponding database.

| Field | Description |
|---|---|
| Database user name | Name of the database user. |
| Database password | Password to access the database. |
| Confirm database password | Re-enter the password. |
| Database catalog name | Name of the database catalog, for example, OracleSID. |
| Database schema name | Name of the database schema. This field is optional. If no value is entered, for DB2 and Oracle database, the default value for the schema name is the same as the user name. For Microsoft SQL server, the default value for the schema name is `dbo`. |
| Database host name | IP address or host name of the location in which the database is installed. |
| Database port | Port number of the database. |
| JDBC driver file | Path to the database driver file, for example, `D:/sbi/ojdbc14.jar` <br> **Note**: If your database is DB2, enter your second JDBC driver file path also. |

11. Enter the relevant information in the applicable fields for Sterling staging database, as described in the following table.

   **Note**: Determine and record information about your Oracle, Microsoft SQL server 2000/2005, or DB2 database server on which the schema for the Sterling staging database is created. Ensure that the schema is created with the UTF-8 character set enabled. For more details about enabling the UTF-8 character set, refer to the documentation pertaining to the corresponding database.

| Field | Description |
|---|---|
| Database user name | Name of the database user. |
| Database password | Password to access the database. |
| Confirm database password | Re-enter the password. |
| Database catalog name | Name of the database catalog, for example, OracleSID. |

| Field | Description |
| --- | --- |
| Database schema name | Name of the database schema. This field is optional. If no value is entered, for DB2 and Oracle database, the default value for the schema name is the same as the user name. For Microsoft SQL server, the default value for the schema name is dbo. |
| Database host name | IP address or host name of the location in which the database is installed. |
| Database port | Port number of the database. |

12. Click **Next**.

13. In the Installation Progress screen that is displayed, click **Install** to proceed with the installation. To view detailed information about the progress of the installation, click **Show Details**.

14. After the installation is completed, click **Exit**.

   For details about errors that may have occurred during installation, refer to the `SBI_PreInstallSI.log` file available in the `<INSTALL_DIR>` directory.

   **Note:** During the installation of Selling and Fulfillment Foundation, if you had chosen to install with no database DDLs and factory setup, you must execute the following steps:

   a. Install the database DDLs by executing the `dbverify` utility to verify the database schema. For more information about verifying the database schema, refer to the *Selling and Fulfillment Foundation Installation Guide*.

   b. Load the factory setup. To load the Sterling Business Intelligence database factory defaults after the product installation, load the defaults using the script applicable to your operating system. From the command line, run the `<INSTALL_DIR>/bin/loadDefaults.sh` command on UNIX or Linux, and the `<INSTALL_DIR>\bin\loadDefaults.cmd` command on Windows, and pass the absolute file path to the installer XML file, and the absolute path to the factory setup XMLs:

   ◆ On UNIX or Linux:

   ```
   loadDefaults.sh
   <INSTALL_DIR>/installed_data/sbi/factorysetup/installer.xml
   <INSTALL_DIR>/installed_data/sbi/factorysetup/XMLS
   ```

   ◆ On Windows:

   ```
   loadDefaults.cmd
   <INSTALL_DIR>\installed_data\sbi\factorysetup\installer.xml
   <INSTALL_DIR>\installed_data\sbi\factorysetup\XMLS
   ```

To perform a single schema installation in UNIX environment, perform these steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Business_Intelligence_Application` folder.

3. Copy `SCIInstallWizard.jar` and `sbi.jar` to your designated path, for example, `D:/sbi/CDROM/SCIINSTALLWizard.jar`.

4.  Execute the following command to start the installation wizard:

    `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

    **Note**: You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command.

5.  Press **Enter** to view the license agreement.

6.  Click **Y** to accept the license and **N** to reject the license agreement.

7.  Enter the path to the directory where Selling and Fulfillment Foundation is installed.

8.  Press **Enter**.

9.  In the Data Mart Database Connection Information screen, enter the database user name.

10. Press **Enter**.

11. Enter the database password.

12. Press **Enter**.

13. Enter the database catalog name.

14. Press **Enter**.

15. Enter Database schema name.

16. Press **Enter**.

17. Enter the database host name.

18. Press **Enter**.

19. Enter the database port.

20. Press **Enter**.

21. Enter the path to the JDBC driver file.

22. Press **Enter**.

23. Enter the path to the second JDBC driver file, if required.

24. Press **Enter**.

    The Confirming Input Information message, with values for the user name, password, catalog, host name, port, and the path to the JDBC driver, is displayed.

25. Press **Enter** to confirm the value for each attribute.

    The database version validation details are displayed.

26. Press **Enter**.

27. In the Staging Database Connection Information screen, enter the staging database user name.

28. Press **Enter**.

    The Confirm Staging Database password message is displayed.

29. Press **Enter**.

30. Enter Staging database catalog name.

31. Press **Enter**.

32. Enter Staging database schema name.

33. Press **Enter**.

34. Enter Staging database host name.

35. Press **Enter**.

36. Enter Staging database port.

37. Press **Enter**.

   The Confirm Staging Database Information message, with values for catalog name, host name, and port, is displayed.

38. Press **Enter** to confirm the value for each attribute.

   The following message is displayed:

   ```
   Database Version Validation Completed Successfully
   ```

39. Press **Enter**.

   The Installation Progress screen is displayed. After the installation is complete, the following message is displayed:

   ```
   Installation is completed successfully
   ```

## Multischema Installation

To perform a multischema installation in Windows environment, perform these steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Business_Intelligence_Application` folder.

3. Copy `SCIInstallWizard.jar` and `sbi.jar` to your designated path, for example, `D:/sbi/CDROM/SCIINSTALLWizard.jar`.

4. Execute the following command to start the installation wizard:

   ```
   <JAVA_HOME>/bin/java -jar SCIInstallWizard.jar
   ```

   The Installation dialog box is displayed.

   **Note**: You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command. Click **Next** to start the installation.

   The License Conditions screen is displayed.

5. Review the license agreement and click **Accept** to accept the terms.

6. In the Selling and Fulfillment Foundation Folder screen, enter the path to the folder in which Selling and Fulfillment Foundation, Release 8.5, is installed. Alternatively, click **Select Folder** and navigate to the location in which Selling and Fulfillment Foundation, Release 8.5, is installed, and click **Select Folder**. This displays the folder's path in the Selling and Fulfillment Foundation Folder screen.

7. Click **Next**.

8. In the Confirming Input Information screen that is displayed, verify that you have selected the correct folder, and click **Next**. (To select another folder, click **Back** and repeat steps 6, 7, and 8).

9. In the Installation Progress screen that is displayed, click **Install** to proceed with the installation. To view detailed information about the progress of the installation, click **Show Details**.

10. After the installation is completed, click **Exit**.

For details about errors that may have occurred during installation, refer to the `SBI_PreInstallSI.log` file in the `<INSTALL_DIR>` directory.

Set up a database pool for the data warehouse schema and staging schema. For each colony, you must associate the database pool pertaining to the data warehouse schema and staging schema to the table types `BI` and `BI_STAGING` respectively. For more information about managing database pools and colonies, refer to the *Enterprise Onboarding for Multi-Tenancy Guide.*

**Note:** During the installation of Selling and Fulfillment Foundation, if you had chosen to install with no database DDLs and factory setup, execute the following steps:

a. Install the database DDLs by executing the `dbverify` utility to verify the database schema. For more information about verifying the database schema, refer to the *Selling and Fulfillment Foundation Installation Guide*.

b. Load the factory setup. To load the Sterling Business Intelligence database factory defaults after the product installation, load the defaults using the script applicable to your operating system. From the command line, run the `<INSTALL_DIR>/bin/loadDefaults.sh` command on UNIX or Linux, and or the `<INSTALL_DIR>\bin\loadDefaults.cmd` command on Windows, and pass the absolute file path to the installer XML file, and the absolute path to the factory setup XMLs:

◆ On UNIX or Linux:

```
loadDefaults.sh
<INSTALL_DIR>/installed_data/sbi/factorysetup/installer.xml
<INSTALL_DIR>/installed_data/sbi/factorysetup/XMLS
```

◆ On Windows:

```
loadDefaults.cmd
<INSTALL_DIR>\installed_data\sbi\factorysetup\installer.xml
<INSTALL_DIR>\installed_data\sbi\factorysetup\XMLS
```

To perform a multischema installation in UNIX or Linux environment, perform these steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Business_Intelligence_Application` folder.

3. Copy `SCIInstallWizard.jar` and `sbi.jar` to your designated path, for example, `D:/sbi/CDROM/SCIINSTALLWizard.jar`.

4. Execute the following command to start the installation wizard:

   `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

   **Note**: You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command.

5. Press **Enter** to view the license agreement.

6. Press **Y** to accept the license and **N** to reject the license agreement.

7. Enter the path to the directory where Selling and Fulfillment Foundation is installed.

8. Press **Enter**.

   The Installation Progress screen is displayed. After the installation is complete, the following message is displayed:

   `Installation is completed successfully`

# Install the Sterling Business Intelligence Adaptive Applications Framework

Prior to installing the Sterling Business Intelligence Adaptive Applications Framework, ensure that JDK1.5 or later version is installed in the system.

The Sterling Business Intelligence Adaptive Applications Framework component can be installed only on Microsoft® Windows®. This installer installs the *IBM® Cognos®* Adaptive Warehouse, the IBM Cognos Adaptive Analytics Development Studio environment, and the Sterling Business Intelligence Analytics components.

The Sterling Business Intelligence Adaptive Applications Framework is installed on server 5, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem".

**Note:**  Ensure that there is at least 1 GB of free space available for installation.

To install the Sterling Business Intelligence Adaptive Applications Framework, perform the following steps:

1.  Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2.  From the installation DVD, navigate to `Adaptive_Analytics_Framework` folder.

3.  Copy `SCIInstallWizard.jar` to your designated path, for example,
    `D:/sbi/CDRomAnalytics_Framework`.

4.  Execute the following command to start the installation wizard:

    `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

    The Installation dialog box is displayed.

    **Note:**   You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command.

5.  Click **Next** to start the installation.

    The License Conditions screen is displayed.

6.  Review the license agreement and click **Accept** to accept the terms.

    The JDK Directory screen is displayed.

7.  Enter the path of the location in which JDK is installed. Alternatively, click **Select Folder** and navigate to the location in which JDK is installed, and click **Select Folder.**

8.  Click **Next** to select the installation directory. Alternatively, click **Select Folder** and navigate to the directory in which you want to install the Sterling Business Intelligence Adaptive Applications Framework components, and click **Select Folder**.

    The path to the directory in which you want to install the Sterling Business Intelligence Adaptive Applications Framework is displayed in the Installation Directory screen. This directory is referred to as `<INSTALL_DIR>` in subsequent prompts.

9.  Click **Next**.

10. In the Installation Progress screen that is displayed, click **Install** to proceed with the installation. To view detailed information about the progress of the installation, click **Show Details**.

11. After the installation is completed, click **Exit**.

    The `adapappsfw_win32_8.4.27.16_ml.tar.gz` file is now available in the `<INSTALL_DIR>` directory.

    For details about any errors that may have occurred during the installation, refer to the `SBI_Analytics_Framework_PreInstallSI.log` file in the `<INSTALL_DIR>` directory.

12. Unzip the `adapappsfw_win32_8.4.27.16_ml.tar.gz` file.

    The `adapappsfw_win32_8.4.27.16_ml.tar` file is extracted.

13. Unzip `adapappsfw_win32_8.4.27.16_ml.tar` file.

    The corresponding files are extracted to the respective folders.

14. Run the `issetup.exe` in the `<unzipped folder>/win32` directory.

    For completing the installation and configuration of the Adaptive Analytics Framework, refer to the *IBM® Cognos® 8 Analytics Applications Installation and Configuration Guide*.

    **Note:** After the installation is complete, open the IBM Cognos Configuration and click **Save**. This ensures that the cryptographic information is regenerated.

# Install the Sterling Business Intelligence Adaptive Applications Runtime

The Sterling Business Intelligence Adaptive Applications Runtime component can be installed on Microsoft® Windows®, UNIX (HP, IBM AIX®, Sun Solaris™). It cannot, however, be installed on Linux®. This installer installs the IBM Cognos Adaptive Applications Runtime environment.

This runtime installation is used to execute the extract, transform, and load (ETL) scripts that have been generated from the Adaptive Warehouse (development environment).

The Sterling Business Intelligence Adaptive Applications Runtime is installed on server 6, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem".

**Note:** Ensure that there is at least 1 GB of free space available for installation.

To install the Sterling Business Intelligence Adaptive Applications Runtime in Windows environment, perform these steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Adaptive_Analytics_Runtime` folder.

3. Copy `SCIInstallWizard.jar` to your designated path, for example, `D:/sbi/CDRomAnalytics_Runtime`.

4. Execute the following command to start the installation wizard:

   `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

   The Installation dialog box is displayed.

   **Note:** You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command.

5. Click **Next** to start the installation program.

   The License Conditions screen is displayed.

6. Review the license agreement and click **Accept** to accept the terms.

   The JDK Directory screen is displayed.

7. Enter the path of the location in which JDK is installed. Alternatively, click **Select Folder** and navigate to the location in which JDK is installed and click **Select Folder**.

8. Click **Next** to select the installation directory. Alternatively, click **Select Folder** and navigate to the location where you want to install the Sterling Business Intelligence Adaptive Applications Runtime components and click **Select Folder**.

   The path to the directory in which you want to install the Sterling Business Intelligence Adaptive Applications Runtime to be installed is displayed in the Installation Directory screen. This directory is referred to as `<INSTALL_DIR>` in subsequent prompts.

9. Click **Next**.

10. In the Installation Progress screen, click **Install** to proceed with the installation. To view detailed information about the progress of the installation, click **Show Details**.

11. After the installation is completed, click **Exit**.

   The `adapappsfw_win32_8.4.27.16_ml.tar.gz` file is now available in the `<INSTALL_DIR>/Analytics` directory.

   For details about any errors that may have occurred during the installation, refer to the `SBI_PreInstallSI.log` file in the `<INSTALL_DIR>` directory.

12. Unzip the `adapappsfw_win32_8.4.27.16_ml.tar.gz` file.

   The `adapappsfw_win32_8.4.27.16_ml.tar` file is extracted.

13. Unzip `adapappsfw_win32_8.4.27.16_ml.tar` file.

   The corresponding files are extracted to the respective folders.

14. Locate the `issetup.exe` file and run it.

   For completing the installation and configuration of the Adaptive Applications Runtime, refer to the *IBM® Cognos® 8 Analytics Applications Installation and Configuration Guide*.

To install the Sterling Business Intelligence Adaptive Applications Runtime components in UNIX environment, perform these steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Adaptive_Analytics_Runtime` folder.

3. Copy `SCIInstallWizard.jar` to your designated path.

4. Execute the following command to start the installation wizard:

   `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

    **Note:** You must be in the directory where the `SCIInstallWizard.jar` file resides when executing this command.

5. Press **Enter** to view the license agreement.

6. Press **Y** to accept the license and **N** to reject.

7. Enter the path of the location in which JDK is installed and press **Enter**.

8. Enter the path to the installation directory in which you want to install Sterling Business Intelligence Adaptive Applications Runtime.

9. Press **Enter**.

   After the installation is complete, the following message is displayed:

   `BUILD SUCCESSFUL`

# Install the Sterling Business Intelligence Analytics Content

Prior to installing the Sterling Business Intelligence Analytics Content, ensure that JDK1.5 or later version is installed in the system.

The Sterling Business Intelligence Analytics Content component is available only for Microsoft® Windows®. This installer installs the application content files in your system.

The Sterling Business Intelligence Analytics Content is installed on server 5, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem".

**Note:** Ensure that there is at least 50 MB of free space available for installation.

To install the Sterling Business Intelligence Analytics Content, perform these steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Adaptive_Analytics_Content` folder.

3. Copy `SCIInstallWizard.jar` to your designated path, for example, `D:/sbi/CDRomAnalytics`.

4. Execute the following command to start the installation wizard:

   `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

   The Installation dialog box is displayed.

   **Note:** You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command.

5. Click **Next** to start the installation.

   The License Conditions screen is displayed.

6. Review the license agreement and click **Accept** to accept the terms.

   The JDK Directory screen is displayed.

7. Enter the path to the folder in which JDK is installed. Alternatively, click **Select Folder** and navigate to the location in which JDK is installed, and click **Select Folder**.

8. Click **Next** to select the installation directory. Alternatively, click **Select Folder** and navigate to the folder in which you want to install the Sterling Business Intelligence Analytics Content component and click **Select Folder**.

   The path to the directory in which you want the Sterling Business Intelligence Analytics Content component to be installed is displayed in the Installation Directory screen. This directory is referred to as `<AC_INSTALL_DIR>` in subsequent prompts.

9. Click **Next**.

10. In the Installation Progress screen, click **Install** to proceed with the installation. To view detailed information about the progress of the installation, click **Show Details**.

11. After the installation is completed, click **Exit**.

    For details about any errors that may have occurred during the installation, refer to the `BI_Analytics_PreInstallSI.log` file in the `<AC_INSTALL_DIR>` directory.

# Install the Sterling Business Intelligence Content for IBM Cognos 8 Business Intelligence

Prior to installing the Sterling Business Intelligence Content for IBM Cognos 8 Business Intelligence, ensure that JDK1.5 or later version is installed in the system.

IBM Cognos 8 Business Intelligence Content can be installed on all platforms. This installer installs the Dashboard reports and files required for communication between the IBM Cognos 8 Business Intelligence server and Sterling Business Intelligence in your system. As part of this installation, the Sterling Business Intelligence Content is deployed on the Cognos server.

The IBM Cognos 8 Business Intelligence Content is installed on server 4, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem".

**Note:** Ensure that there is at least 50 MB of free space available for installation.

To install the Sterling Business Intelligence Content for IBM Cognos 8 Business Intelligence, perform the following steps:

1. Place the Sterling Business Intelligence installation DVD in the appropriate drive.

2. From the installation DVD, navigate to `Cognos_8_BI_Content` folder.

3. Copy `SCIInstallWizard.jar` to your designated path, for example,
   `D:/sbi/CDRomAnalytics_Cognos_8_BI_Content`.

4. Execute the following command to start the installation wizard:

   `<JAVA_HOME>/bin/java -jar SCIInstallWizard.jar`

   The Installation dialog box is displayed.

   **Note**: You must be in the directory in which the `SCIInstallWizard.jar` file resides when executing this command.

5. Click **Next** to start the installation.

   The License Conditions screen is displayed.

6. Review the license agreement and click **Accept** to accept the terms.

   The JDK Directory screen is displayed.

7. Enter the path in which the JDK is installed. Alternatively, click **Select Folder** and navigate to the location where the JDK is installed and click **Select Folder**.

8. Click **Next** in the Installation Directory screen to select the installation directory. Alternatively, click **Select Folder** and navigate to the directory in which you want to install the Cognos 8 Business Intelligence Content component and click **Select Folder**.

   In the Installation Directory screen, the path to the directory in which you want to install the Cognos 8 Business Intelligence Content is displayed. This directory is referred to as `<BI_COGNOS8_HOME>` in subsequent prompts.

9. Click **Next**.

10. In the Installation Progress screen, click **Install** to proceed with the installation. To view detailed information about the progress of the installation, click **Show Details**.

11. After the installation is completed, click **Exit**.

   For details about any errors that may have occurred during the installation, refer to the `BI_Analytics_Cognos_8_BI_Content_PreInstallSI.log` file in the `<BI_COGNOS8_HOME>` directory.

# Deploy Sterling Business Intelligence

To deploy Sterling Business Intelligence, perform the following steps:

1. Deploy the Sterling Business Intelligence Application
2. Set Up the Sterling Business Intelligence Authentication Mechanism
3. Set Up Access to IBM Cognos Administration and Reporting
4. Configure the IBM Cognos 8 Business Intelligence Server
5. Setup for Accessing the Cognos 8 Business Intelligence Server from the Sterling Business Intelligence Application
6. Set Up Environment for IBM Cognos Analytic Applications
7. Configure the IBM Cognos 8 Analytic Applications
8. Deploy Analytics Content
9. Deploy the Dashboard Reports to Content Store

## Deploy the Sterling Business Intelligence Application

Perform the following steps in the Sterling Transaction System (server 1) in which the Sterling Business Intelligence Application is installed.

To create an application `EAR` file, run the following command from the `<INSTALL_DIR>/bin` directory `.\buildear.sh` (`.cmd` for Windows) `-Dappserver=jboss` (for BEA WebLogic or IBM WebSphere)

`-Dwarfiles=smcfs,sma,sbc,sbi -Dearfile=smcfs.ear create-ear`

Running this command includes the `sbi.war` file into the `smcfs.ear` file.

For more information about deploying the WAR and EAR files, refer to the *Selling and Fulfillment Foundation Installation Guide*.

## Set Up the Sterling Business Intelligence Authentication Mechanism

Prior to setting up the Sterling Business Intelligence Authentication Mechanism, perform the following tasks:

1. Copy the `<BI_COGNOS8_HOME>/lib/sscap-auth.jar` file to the `<Cognos 8 Installation Directory>/c8/webapp/p2pd/WEB-INF/lib` folder into the machine in which IBM Cognos 8 server has been installed.
2. Copy the `<BI_COGNOS8_HOME>/analytics.properties.sample` file to the `<Cognos 8 Installation Directory>/webapps/p2pd/WEB-INF/classes` folder.
3. Save the `<Cognos 8 Installation Directory>/webapps/p2pd/WEB-INF/classes/analytics.properties.sample` file as `analytics.properties` in the same folder.

4. Change the value of the `sscap.app.url` property to point to the Selling and Fulfillment Foundation URL:

```
sscap.app.url=http://hostname:port/smcfs
```

To set up the Sterling Business Intelligence Authentication Mechanism, perform the following tasks:

1. Launch IBM Cognos Configuration.

2. Click **Security > Authentication> Cognos**.

3. Select `False` from the **Allow anonymous access** drop-down list.

4. Add a new resource namespace, smcfs, of the type Custom Java Provider.

5. Select **Security > Authentication**.

6. Right-click and select **New Resource > Namespace** and enter the namespace ID smcfs.

7. In the Resource Properties panel, enter com.yantra.authenticator.YantraAuthentication as the Java class name.

8. Restart IBM Cognos Configuration.

# Set Up Access to IBM Cognos Administration and Reporting

To help increase the security of your business systems and data with Sterling Business Intelligence, you can be selective in assigning access to the IBM Cognos administrative functions, reports, folders, and packages. Use the Sterling Business Intelligence Administrator platform resource to assign these permissions.

To set up access to IBM Cognos Administration and Reporting, perform the following tasks:

✦ Control access to IBM Cognos Administration

✦ Control access to IBM Cognos Reports, Folders, and Packages

## Controlling Access to IBM Cognos Administration

To limit user access to the IBM Cognos administrative functions you must grant the necessary permissions to the Sterling Business Intelligence Administrator resource in Sterling Business Intelligence.

**Note:** Before performing the task of assigning permissions, ensure that you have created the corresponding security groups in the Applications Manager.

1. Launch Applications Manager.

2. Select **Application > Platform**.

3. From the Application Rules Side panel, select **Security > Groups**.

    The Groups screen is displayed in the work area.

4. Select the group to which you want to provide the Sterling Business Intelligence Administrator resource permission.

5. From the Permissions screen, select **Application > Sterling Business Intelligence > Entities > Business Intelligence Admin**.

6. Right click and select **Grant Permissions**.

7. Click **Save**.

**Editing the System Administrator Role in IBM Cognos**

To limit access to the Cognos administration functionality, modify the System Administrator role. You can complete this task after you set the necessary access to Cognos administration.

When a user launches Cognos Connection through the Console, all the user groups to which the corresponding user belongs are displayed. If the user has permission to access the Business Intelligence Administrator, the user is able to view all the groups defined in the database, and an additional group called smcfs/SYSTEM. Otherwise, the user can view only the groups to which the user belongs.

By default, all the users have administrative capabilities because the Everyone group (which includes all the users) is included under the System Administrator role.

**Adding the smcfs/SYSTEM Group**

When you grant BI Admin rights to a user in the Applications Manager, a new group called SYSTEM is displayed in the user's list of groups under the smcfs namespace.

To add the smcfs/SYSTEM  group to the System Administrator role, perform the following tasks:

1. Start your Web browser and enter the URL of your IBM Cognos 8 application (the default is `http://localhost/cognos8`).

   The Home page is displayed.

2. In the IBM Cognos Administration screen, click **Administer IBM Cognos**.

3. Click the **Security** tab.

4. Locate smcfs in the list of roles, and click it.

5. Locate SYSTEM in the list, and click **Set Properties** in the Action column.

   The Set Properties - SYSTEM screen is displayed.

6. Click the **Permissions** tab.

7. Select the Override the access permissions acquired from the parent entry check box.

8. Click **Add**.

   The Select Entries (Navigate) - System screen is displayed.

9. Click the smcfs namespace.

   The Select Entries (Navigate) - System screen is displayed.

10. In Available Entries, select the System check box, and click the arrow to move it to the Selected Entries list.

11. Click **OK**.

**Removing the Everyone Group from the Sys Admin Role**

After adding the smcfs/SYSTEM group to the System Administrator role, remove the Everyone group from the System Administrator role.

To remove the Everyone group from the System Administrator role, perform the following steps:

1. Start your Web browser and enter the URL of your IBM Cognos 8 application (the default is `http://localhost/cognos8`).

   The Home page is displayed.

2. In the IBM Cognos Administration screen, click Administer IBM Cognos content.

3. Click **Security** tab.

4. Locate smcfs in the list of roles, and click **smcfs**.

5. Locate SYSTEM in the list, and click **Set Properties** in the Action column.

   The Set Properties - SYSTEM screen is displayed.

6. Click the **Members** tab.

7. Click **Everyone** and click **Remove**.

   Users who have permission to access the Business Intelligence Administrator will now have administrative capabilities.

## Controlling Access to IBM Cognos Reports, Folders, and Packages

To control access to IBM Cognos reports, folders, and packages through Applications Manager, perform the following tasks:

1. Start your Web browser and enter the URL of your IBM Cognos 8 application (the default is `http://localhost/cognos8`).

   The Home page is displayed.

2. In the IBM Cognos Administration screen, click **Administer IBM Cognos content**.

3. Select **Security > Capabilities**.

4. Locate the entry for which you want to set access permissions.

5. Click **Set Properties** in the Action column.

   The Set Properties screen is displayed.

6. Click **Permissions** tab.

   You can choose to either use the permissions of the parent entry or select permissions specifically for this entry.

   ◆ To use the permissions of the parent entry, clear the Override the access permissions acquired from the parent entry option. If you are prompted to use the parent permissions, click **OK** in the prompt dialog box. Click **OK** in the **Set Properties** screen.

   ◆ To set specific access permissions for the entry, select the Override the access permissions acquired from the parent entry option.

7. To remove an entry from the list, click the entry and click **Remove**.

8. To specify a new entry for which you want to grant or deny access, click **Add**.

9. Click **OK**.

10. Select the smcfs namespace.

    The Select Entries screen is displayed.

11. In Available Entries panel, select the SYSTEM check box and click the arrow to move it to the Selected Entries panel.

12. Select the entries using one of the following methods:

    ◆ To select from the entries list, click the appropriate namespace, and select the corresponding users, groups, or roles.

    ◆ To enter new names, click **Type** and type the names of the groups, roles, or users in the **Entries** field. Separate multiple entries with a semicolon (`;`), for example, `smcfs/SYSTEM;Cognos/Everyone`

13. Click the arrow to move entries to the Selected entries panel.

14. Click **OK**.

    The Set Properties screen is displayed.

15. Click the **Permissions** tab.

16. Click **Add**.

    The Select Entries screen is displayed.

17. Select smcfs  and click the arrow to move smcfs to the Selected Entries panel.

18. Click **OK**.

    The Set Properties screen is displayed. Notice that smcfs is added to the Name column.

19. To specify permissions for a user, group, or role, select the appropriate check box in the Name column, and then select the appropriate permission check boxes in the Grant or Deny columns. The icon next to each user, group, or role in the Permissions column represents the type of access granted or denied. Repeat this step for each user, group, and role.

20. If you want to replace the existing permissions of the child entries with the permissions you set for this entry, in the Option section, select the Delete the access permissions of all child entries check box.

    **Note**: This option appears only in the context of entries that are containers.

21. Click **OK**.

# Configure the IBM Cognos 8 Business Intelligence Server

You should apply Sterling Business Intelligence-specific styles to the IBM Cognos 8 Business Intelligence reports, and add the `system.xml` definition to enable the relevant toolbar actions for the reports.

To apply Sterling Business Intelligence-specific styles to reports, perform the following tasks:

**Note:** It is recommended that you take a back up of the existing `reportstudio_en.xml` and `GlobalReportStyles.css` files.

◆ Edit the `GlobalReportStyles.css` file under `<c8_installation>\c8\bin`, `<c8_installation>\c8\reportstyles`, `<c8_installation>\c8\webcontent\reportstyles`, and `<c8_installation>\c8\webcontent\schemas` to add the content of `<BI_COGNOS8_HOME>\rs-export\Style_Sheet\SBIReportStyles.css` at the end.

◆ Edit the `reportstudio_en.xml` file under `<c8_installation>\c8\mgsdk` and `<c8_installation>\c8\webcontent\pat\res` to add the content of `<BI_COGNOS8_HOME>\rs-xport\Style_Sheet\SBI_reportstudio_en_sample.xml` at the end, just before the `</section>` tag. You must add only the content between the comment tags `<!-- SBI STARTS -->` & `<!-- SBI ENDS -->`

**Note**: To localize the Global Class Extensions in the IBM Cognos Report Studio, you must use the contents in the `SBI_report_Studio_en.xml` file. Localize the contents in the required language, and copy the contents into the `reportstudio_<languange>.xml file`. For example, if you want to view the Global Class Extensions in the IBM Cognos Report Studio in French, localize the contents of `SBI_report_Studio_en.xml` in French and copy the contents into the `reportstudio_fr.xml`

- ◆ Add the `blue-top.png` image file taken from `<BI_COGNOS8_HOME>\rs-export\Style_Sheet`, and copy the `blue-top.png file` into `<c8 intallation>\c8\webcontent\samples\images`.

  **Note:** Ensure that the `<c8 intallation>\c8\webcontent\samples\images` directory has been created and the appropriate permissions granted to users read from this directory.

To add the `system.xml` definition, perform the following task:

Add the following lines to `system.xml` under `<cognos install location>\c8\templates\ps\portal\` and `<cognos install location>\c8\templates\ps\`. If you have not defined the `ui_hide` parameter in `system.xml`, add the instructions provided here. If you have already defined the `ui_hide` parameter, add only those line items that are not defined.

```
    <param name="ui_hide">
        <RV_HEADER/>
        <RV_TOOLBAR_BUTTONS_DOWNLOAD/>
        <RV_TOOLBAR_BUTTONS_SAVE/>
        <RV_TOOLBAR_BUTTONS_SAVEAS/>
        <RV_TOOLBAR_BUTTONS_SEND/>
        <RV_TOOLBAR_BUTTONS_HISTORY/>
        <RV_TOOLBAR_BUTTONS_RUN/>
        <RV_TOOLBAR_BUTTONS_XLS/>
        <RV_TOOLBAR_BUTTONS_XLS_CSV/>
        <RV_TOOLBAR_BUTTONS_XML/>
        <RV_TOOLBAR_BUTTONS_XLS_SPREADSHEETML/>
        <RV_TOOLBAR_BUTTONS_XLS_XLWA/>
        <RV_TOOLBAR_BUTTONS_XLS_XLS/>
        <RV_TOOLBAR_BUTTONS_XLS_SINGLEXLS/>
        <RV_TOOLBAR_BUTTONS_DRILLDOWN/>
        <RV_TOOLBAR_BUTTONS_DRILLUP/>
        <RV_TOOLBAR_BUTTONS_GOTO/>
        <RV_TOOLBAR_BUTTONS_ADD_THIS_REPORT/>
        <RV_TOOLBAR_BUTTONS_ADD_TO_MY_BOOKMARKS/>
        <RV_TOOLBAR_BUTTONS_ADD_TO_MY_FOLDERS/>
        <RV_TOOLBAR_BUTTONS_KEEP_THIS_VERSION/>
    </param>
```

## Setup for Accessing the Cognos 8 Business Intelligence Server from the Sterling Business Intelligence Application

To launch Cognos 8 Business Intelligence Server from Sterling Business Intelligence, you must configure the `analytics.reportnet.url` property in the `<INSTALL_DIR>/properties/customer_overrides.properties` file.

The Cognos 8 Business Intelligence Server URL format is:

```
http://<machinename>/cognos8/cgi-bin/cognos.cgi
```

**Note:** In this URL, replace `<machinename>` with the machine name or the IP address of the Cognos 8 Business Intelligence Server installation machine. Also, if you have changed the reference URL for Cognos using the Cognos Configurator, replace `cognos8` with the correct path.

For additional information about modifying properties and the `customer_overrides.properties` file, refer to the *Selling and Fulfillment Foundation Installation Guide*.

You must also configure the `analytics.namespace` property in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. This property indicates the namespace that is to be configured to authenticate users in Cognos 8 Business Intelligence.

## Set Up Environment for IBM Cognos Analytic Applications

To set up the environment for the IBM Cognos 8 Analytic Applications, perform the following steps:

1. Set up the Content Store (on server 7).

2. Set up database connectivity for the Content Store (from server 4).

3. Configure the Web server (involves setting up virtual directories on server 4).

4. Set up data sources (from Cognos Connection on server 4). Ensure that you create the following data sources in the Cognos 8 Business Intelligence server:

   For staging schema:

   ◆ Sterling Staging Data Source: This data source is mapped to the staging schema.

   ◆ Master Staging Data Source: This data source is mapped to the OLTP source database master schema.

   ◆ Transaction Staging Data Source: This data source is mapped to the OLTP source database transaction schema.

   ◆ Configuration Staging Data Source: This data source is mapped to the OLTP source database configuration schema.

   For data mart schema:

   ◆ Sterling Data Source: This data source is mapped to the Sterling Data Mart database schema.

   ◆ Configuration Data Source: This data source is mapped to the staging database.

   ◆ Master Data Source: This data source is mapped to the staging database.

   ◆ Transaction Data Source: This data source is mapped to the staging database.

**Note:** In a distributed installation, you must ensure that the Connect String provided in the data source connection is the same in all the database clients.

For more information about setting up the environment for the Cognos 8 Analytic Applications, refer to the *IBM® Cognos® 8 Analytic Applications Installation and Configuration Guide* and for data source connections, refer to the *IBM® Cognos® 8 Analytic Applications Installation and Configuration Guide* and

the *IBM® Cognos® 8 Analytic Applications Adaptive Warehouse User Guide* that is shipped along with the Sterling Business Intelligence Adaptive Applications Framework component.

## Configure the IBM Cognos 8 Analytic Applications

You must configure the IBM Cognos 8 Analytic Applications to make it work in your IBM Cognos environment.

Ensure that the cryptographic settings are completed. If you have a distributed installation, it is recommended that you set the value of the Store Symmetric Key field to False locally. For more information about changing the cryptographic settings and configuring the IBM Cognos 8 Analytics Applications, refer to the *IBM® Cognos® 8 Analytics Applications Installation and Configuration Guide*. This guide contains separate instructions for single-computer installation and distributed installation. Follow the appropriate configuration instructions.

## Deploy Analytics Content

Deploying the Analytics Content includes the following steps:

1. Set Up the Adaptive Warehouse Content
2. Deploy the Adaptive Warehouse Content to Content Store
3. Set Up the Adaptive Analytics Content
4. Deploy the Adaptive Analytics Content to Content Store

### Set Up the Adaptive Warehouse Content

Setting up the Adaptive Warehouse content includes setting up content for both the staging schema and the warehouse schema.

To set up the Adaptive Warehouse content for the staging schema, perform these steps:

1. Launch the Cognos Adaptive Warehouse application from the Cognos AAF Development server (on server 5, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem").

2. Create a new project. It is recommended that you create a project with the name Sterling Staging Data Source. The target of this project should point to the staging schema on the Sterling Staging Database server (installed on server 3, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem"). For more information about creating a project, refer to the *IBM® Cognos® 8 Analytic Applications Adaptive Warehouse User Guide.*

3. From the **Actions** menu, select **Import from Content Library**.

4. Click **Browse** and select the `/<AC_INSTALL_DIR>/aw-export/sterling staging data source export/sterling staging data source.pwi` library index file.

5. Click **Open**.

6. In the Conflict Resolution screen, select Full Upgrade that you want to apply. By default, Full Upgrade is selected.

7. Click **Next**.

   The details of the objects that you are importing are displayed.

8. Click **Finish** to run the import.

9. In the Data Source Mapping dialog box, select the Cognos 8 Content Manager data sources corresponding to the following:

   ◆ Configuration Staging Data Source

   ◆ Master Staging Data Source

   ◆ Transaction Staging Data Source

   **Notes**:

   ◆ For single schema, all these data sources should point to the Sterling Source Database schema, (installed on server 2, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem)".

   ◆ For multischema, these data sources should point to the respective Sterling Source Database schemas, for example, the Configuration Staging data source should point to the Configuration Sterling Source Database schema.

10. Click **OK**.

11. From the **Actions** menu, select **Synchronize Target Metadata**.

12. From the **File** menu, select **Save** to save the project.

To set up the Adaptive Warehouse content for the Data Mart warehouse schema, perform these steps:

1. Launch the Cognos Adaptive Warehouse application from the Cognos AAF Development server (installed on server 5, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem)".

2. Create a new project. It is recommended that you create a project with the name Sterling Data Source.

   For more information about creating a project, refer to the *IBM® Cognos® 8 Analytic Applications Adaptive Warehouse User Guide.*

3. From the **Actions** menu of the Adaptive Warehouse application, select **Import from Content Library**.

4. Click **Browse**, and select the library index file that you want to import from. This file is available in the directory in which the Adaptive Warehouse content is installed, and has a `.pwi` extension, for example, /<AC_INSTALL_DIR>/aw-export/sterling data source export/sterling data source export.pwi.

5. Click **Open**.

6. In the Conflict Resolution screen, select Full Upgrade that you want to apply. By default, Full Upgrade is selected.

7. Click **Next**.

   The details of the objects that you are importing are displayed.

8. Click **Finish** to run the import.

   The Validation Results screen is displayed.

9.  Click **Close**.

10. In the Data Source Mapping dialog box, select the Cognos 8 Content Manager Data Sources corresponding to the following:

    ♦ Configuration Data Source

    ♦ Master Data Source

    ♦ Transaction Data Source

    **Notes**:

    ♦ For single schema all the data sources mentioned above should point to the Sterling Staging Database schema, (installed on server 3, as described in the topic "Understanding the Sterling Business Intelligence Ecosystem)".

    ♦ For multischema, the data sources mentioned above should point to the respective Sterling Staging Database schemas, for example, the configuration data source should point to Configuration Sterling Staging Database schema.

11. Click **OK**.

    A pop-up window is displayed with warning messages. You can ignore the warning messages pertaining to Common Code Union Source and Category Union.

12. Click **Proceed**.

13. Click **OK**.

14. From the **Actions** menu, select **Synchronize Target Metadata**.

15. From the **File** menu, select **Save** to save the project.

For more information about working with projects in Adaptive Warehouse, refer to the *IBM® Cognos® 8 Analytic Applications Adaptive Warehouse User Guide.*

## Deploy the Adaptive Warehouse Content to Content Store

Deploying the Adaptive Warehouse content includes deploying content for both the staging schema and the Data Mart warehouse schema.

To deploy the Adaptive Warehouse Content for the staging schema to the Content Store, perform these steps:

1.  Open the Sterling Staging Data Source project.

2.  Click the **Target** tab.

3.  Click **Packages**.

    The following packages are displayed:

    ♦ Sterling Staging Data Source

    ♦ Sterling Staging Data Source Source

4.  Select the package you want to publish.

5.  From the **Actions** menu, navigate to **Package > Publish Packages**.

    The Select Publish Location screen is displayed.

6. In the Select Publish Location screen, make a choice about whether to publish the package to the IBM Cognos 8 Content Store or to a network location.

- ◆ To enable model versioning when publishing to IBM Cognos 8 Content Store, select the **Enable model versioning** check box, and enter the number of model versions pertaining to the package that are to be retained.

  **Note:** To delete all but the most recently published version of the model on the server, select the **Delete all previous model versions** check box.

- ◆ To validate your warehouse model prior to publishing, clear the **Verify the package before publishing** check box.

  **Note**: It is recommended that you retain the default selection in order to ensure that the package is complete, and does not contain any errors.

7. Click **Publish**.

   A message is displayed in the Validate Object screen.

8. Click **Finish**.

   To publish other packages, repeat steps 4 to 8.

To deploy the Adaptive Warehouse content for the Data Mart warehouse schema to the Content Store, perform these steps:

1. Open the Sterling Data Source project.

2. Click the **Target** tab.

3. Click **Packages**.

   The following packages are displayed:

   - ◆ Sterling Data Source

   - ◆ Sterling Data Source Source

4. Select the package you want to publish.

5. From the **Actions** menu, navigate to P**ackage > Publish Packages**.

   The Select Publish Location screen is displayed.

6. In the Select Publish Location screen, make a choice about whether to publish the package to IBM Cognos 8 Content Store or to a network location.

- ◆ To enable model versioning when publishing to the IBM Cognos 8 Content Store, select the **Enable model versioning** check box and enter the number of model versions pertaining to the packages that are to be retained.

  **Note:** To delete all but the most recently published version of the model on the server, select the **Delete all previous model versions** check box.

- ◆ To validate your warehouse model prior to publishing, clear the **Verify the package before publishing** check box.

  **Note**: It is recommended that you retain the default selection in order to ensure that the package is complete, and does not contain any errors.

7. Click **Publish**.

8. Click **Finish**.

   A message is displayed in the Validate Object screen.

   To publish other packages, repeat steps 4 to 8.

9. Click **Proceed**.

## Set Up the Adaptive Analytics Content

You must import business content from a content library into a project to take advantage of the content included in Adaptive Analytics. The content library contains information packages, metric types, hierarchies, operational report specifications, and global data pertaining to the Adaptive Analytics application.

To set up the Adaptive Analytics content, perform these steps:

1. Launch the Cognos Adaptive Analytics application.

2. Create a new project. For more information about creating a new project, refer to the *IBM®Cognos® 8 Analytic Applications Adaptive Analytics User Guide*.

3. From the **Actions** menu, select **Import from Content Library**.

4. Click **Browse,** navigate to the location where the Analytics Content is installed, and select the library index file (`.aai`) that contains the Adaptive Analytics content, for example, `/<AC_INSTALL_DIR>/aa-export/Export.aai` that is necessary for the reports that you want to create.

5. Click **Open**.

   The Import screen is displayed. By default, all the objects are selected.

6. Click **OK**.

   A pop-up window is displayed with messages that state: "Warning: Unable to find a time hierarchy". You can ignore these messages.

7. Click **Proceed**.

8. From the **File** menu, select **Save** to save the project.

9. From the **Actions** menu, select **Assignment Editor** to assign a user to the Sterling Analytics Package.

For more information about assigning a user to the information package, refer to the *IBM®Cognos® 8 Analytic Applications Adaptive Analytics User Guide*.

## Deploy the Adaptive Analytics Content to Content Store

To deploy the Adaptive Analytics content to Content Store, you must create a deployment archive in Adaptive Analytics. To create a deployment archive, perform these steps:

1. From the **Actions** menu in the Cognos Adaptive Analytics application, select **Generate Deployment Archive**.

2. Click **Browse,** navigate to the IBM Cognos 8 deployment folder.

   The default location is `<installation location>/cognos/c8/deployment`.

3. In the **File Name** box, enter a name for the archive.

4. Click **Save**.

   A message is displayed in the Validate Object screen.

5. Click **Proceed**.

The deployment archive is created, and you can now publish your reports in IBM Cognos Connection.

For more information about publishing your reports in IBM Cognos Connection, refer to the *IBM®Cognos® 8 Analytic Applications Adaptive Analytics User Guide*.

**Note:** Until load management is run and data is loaded into the staging and data mart warehouse, only the content is published. To run load management, your database administrator must execute a bulk load (to populate the data mart) and set up load management scripts for incremental load. For more information about setting up load management, refer to the *Sterling Business Intelligence Implementation Guide*.

## Deploy the Dashboard Reports to Content Store

**Note:** `Dashboards.zip` should be imported to content store only after importing Adaptive Analytics Deployment Archive.

To deploy the dashboards to Content Store, perform the following steps:

1. Copy the `<BI_COGNOS8_HOME>/Dashboards.zip` file to the `<COGNOS_HOME>/c8/deployment` folder.

2. Launch Cognos Connection

3. Import the `Dashboards.zip` file to Content Store.

   For more information about importing the deployment archive to Content Store, refer to the *IBM®Cognos® 8 Administration and Security Guide*.

# Verify the Sterling Business Intelligence Installation

To verify the Sterling Business Intelligence installation, you must launch the Sterling Business Intelligence application, launch the reports, and perform load management.

**Note:** It is assumed that all the services and servers have been restarted after the execution of configuration-related tasks.

To launch Sterling Business Intelligence, perform these steps:

1. Open a browser and type the corresponding URL in the address bar, for example,
   `http://<hostname>:<port>/sbi/bi/login/login.jsp`.

2. Click **Go**.

   The Sterling Business Intelligence Login page is displayed.

3. Enter a valid Login ID and Password.

4. Click **Sign In**.

   The Sterling Business Intelligence application home page is displayed.

**Note:** The Sterling Business Intelligence application screens have been designed for 1024x768 resolution. For better viewing experience, change the display resolution accordingly.


To launch a Sterling Business Intelligence report, perform these steps:

1. Launch the Sterling Business Intelligence application.

   The Sterling Business Intelligence application home page is displayed.

2. From the **Order** menu, select the report you want to view.

   The corresponding report is displayed.

After the verification is completed, you must load data into the data mart database. Prior to starting the load management activities, ensure that all servers are time synched using services like Network Time Protocol (NTP) to a single clock source. In case the Platform considerations do not allow for time synching, the Cognos server should run one minute slower than the OLTP server. For more information about load management, refer to *Sterling Business Intelligence Implementation Guide*.

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