



CAPITAL PLANNING BLUEPRINT
PERFORMANCE BLUEPRINT SETUP DOCUMENT
A WEB-BASED PERFORMANCE MANAGEMENT SOLUTION

Table of Content

1. Blueprint Overview	2
2. Making Content Files available for each application	3
2.1. Unzipping the "Capital_Planning_Blueprint_Content"	3
2.2. Copying the necessary files into their respective directories	3
Copy the content of TM1 Application to the folder hosting the TM1 Applications:	3
3. IBM Cognos TM1 Content	4
3.1. Extract the IBM Cognos TM1 Content.....	4
3.2. Configure a new IBM Cognos TM1 Server instance.....	4
3.2.1. Modify the Tm1s.cfg server configuration file	5
3.2.2. Modify/Create the shortcut to Server	6
3.3. Testing the new IBM Cognos TM1 Server instance	8
3.4. Setting up the Contributor Application.....	9
4. IBM Cognos 8 BI Content	13
4.1. Create 'Capital Planning Blueprint' data source.....	13
4.2. Run the import wizard to bring the BI Content into the IBM Cognos Connection portal	18
4.3. Testing IBM Cognos Dashboards Content	22



1. Blueprint Overview

This document explains the content and provides installations steps for web-based solution reporting for the Capital Expense Planning Blueprint.

IBM Cognos Blueprints are pre-defined data, process, and policy software models developed in partnership with leading academic institutions. They are essentially “quick-start” data models that IBM Cognos customers can download and implement at no extra cost.

Using the Blueprint with your IBM Cognos performance management system will enable users to clearly identify their performance and track it in a consistent, logical manner. This tool gives the user a simple yet powerful way to have insight into different Metrics and KPIs in order to better understand how they have been performing.



2. Making Content Files available for each application

2.1. Unzipping the "Capital_Planning_Blueprint_Content"

After unzipping the file "Capital_Planning_Blueprint_Content", it will create the following directories:

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

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

2.2. Copying the necessary files into their respective directories

Copy the Capital_Planning_Blueprint_BI_Deployment.zip file from 'Deployment File – Reports' into <IBM Cognos 8 install location>/deployment

Note: Depending upon the BI environment configuration the location of the deployment folder may be setup to a different server, confirm the location with the BI administrator.

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

Note: For multi-server installation the images would need to be copied over the Gateway servers. Verify with the BI Administrator the architecture of the BI environment before copying the files.

Copy the content of TM1 Application to the folder hosting the TM1 Applications:
<Your_TM1_Applications_folder>



3. IBM Cognos TM1 Content

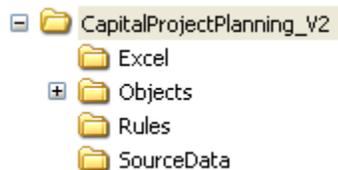
The purpose of the TM1 data model is to act as a generic model for driver based Expense planning as well as a data source for the Business Intelligence Analytics. For proven practices for specific planning processes please refer to the blueprints designed to support industry sector blueprints.

The following steps will navigate through the steps required to create a new IBM Cognos TM1 Server instance and configure the objects needed for the IBM Cognos TM1 content to work properly.

3.1. Extract the IBM Cognos TM1 Content

Go to folder <Your_TM1_Applications_folder> to unzip the file "Capital_Planning_Blueprint_TM1_Content.zip".

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



3.2. Configure a new IBM Cognos TM1 Server instance

The following steps provide a quick guideline on how to create a new IBM Cognos TM1 server instance, however a more detailed explanation can be found in the IBM Cognos TM1 Server Administration document.

To configure a new IBM Cognos TM1 Server instance the following files are required:

Tm1s.cfg
Tm1s.lic

Additionally, a shortcut to execute tm1s.exe using the Blueprint content as the working directory is needed.

The tm1s.lic file is included in your IBM Cognos TM1 installation. This file can be copied from <YourIBMCognosTM1_DirectoryInstall>/bin folder. The content of this file is similar to:

```
DATABASE_TYPE=TM1 PROPRIETARY  
CLASS=505  
LICENSE=<YourLicense>
```



```
MAX_USERS=99999
MAX_READONLY_USERS=99999
EXPIRE_DT=<YourExpiryDate>
LOCATION=
ORGANIZATION=<YourCompany>
LICENSOR=16699
INSTALL_ID=13108
PRODUCT=TM1Server8
.....
```

This file should be copied to the following folder:

<Your_TM1_Applications_folder>\CapitalProjectPlanning_V2\Objects"
In order to create a new IBM Cognos TM1 Server instance.

3.2.1. Modify the Tm1s.cfg server configuration file

Within the folder

<Your_TM1_Applications_folder>\CapitalProjectPlanning_V2\Objects"
The file "tm1s.cfg" is provided.

This file needs to be modified to point to the IBM Cognos TM1 Admin Server on your environment. The file is provided as:

```
[TM1S]
ServerLogging=F
SecurityPackageName=Kerberos
IntegratedSecurityMode=1
UseSSL=T
ServerName=capital project planning_v2
DataBaseDirectory=<Your_TM1_Applications_folder>\CapitalProjectPlanning_V2\Objects
AdminHost=localhost
PortNumber=80003
ClientMessagePortNumber=12346
Language=ENG
SaveTime=
DownTime=
ProgressMessage=True
AuditLogOn=F
AuditLogMaxFileSize=100 MB
AuditLogUpdateInterval=60
DefaultMeasuresDimension=T
```

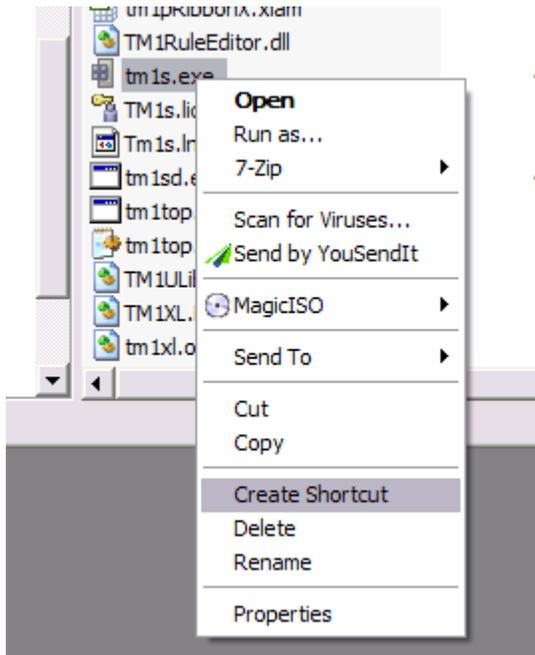
The parameters highlighted in orange would need to be reviewed and modified in accordance with your company environment. If there is certainty that the TCP ports set in the previous parameters are not being used, they can be left unchanged.



However the "AdminHost" should be changed to the IBM Cognos TM1 Admin Sever host in your environment.

3.2.2. Modify/Create the shortcut to Server

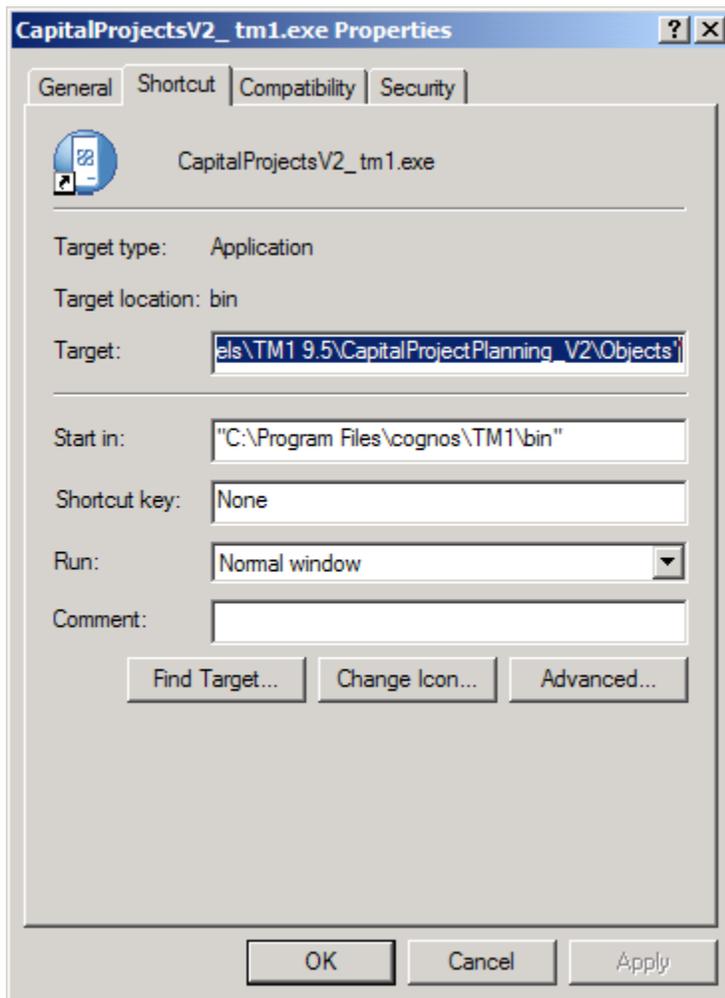
Navigate to "<YourIBMCognosTM1_DirectoryInstall>/bin" folder; create a shortcut to tm1s.exe.





Copy the shortcut created to <Your_TM1_Applications_folder>

- Rename the shortcut to "CapitalProjectPlanning_V2"
- Edit the Shortcut Properties



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

<YourIBMCognosTM1 InstallFolder>\bin\tm1s.exe -z "<Your_TM1_Applications_folder>\CapitalProjectPlanning_V2\Objects"

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

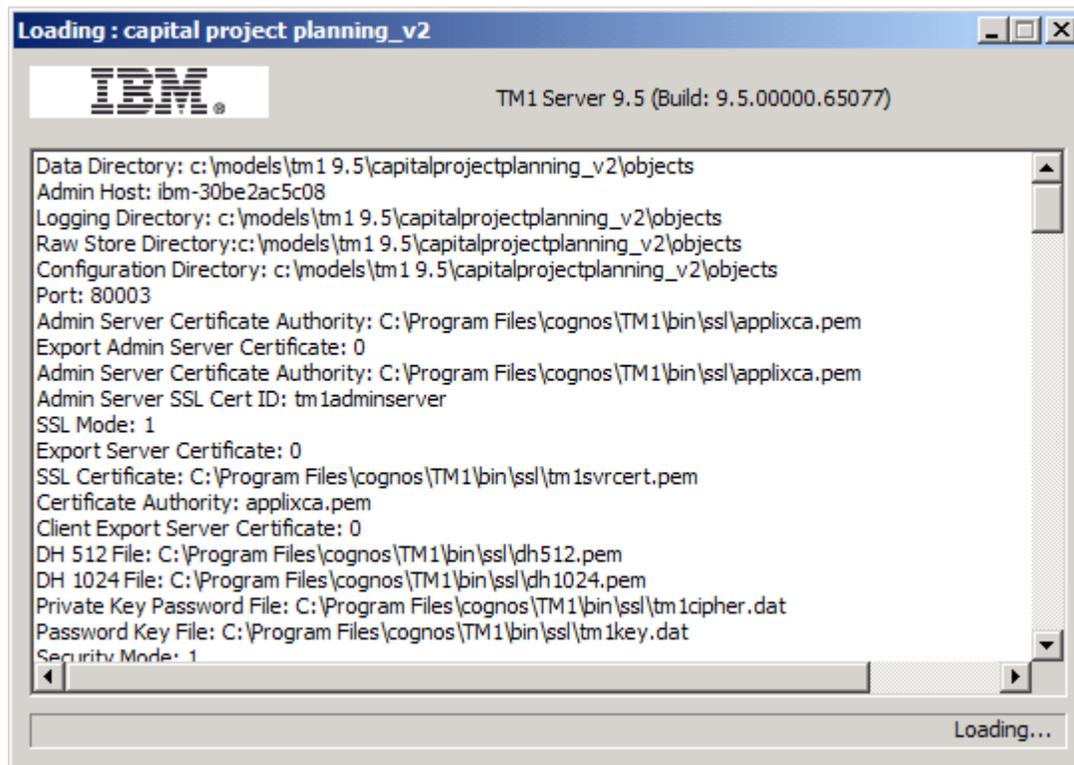
- Click OK to save the changes.



3.3. Testing the new IBM Cognos TM1 Server instance

Double click the shortcut "CapitalProjectPlanning_V2" located in the folder:
<Your_TM1_Applications_folder>

After all the cubes have loaded the last lines in the dialog will display:



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

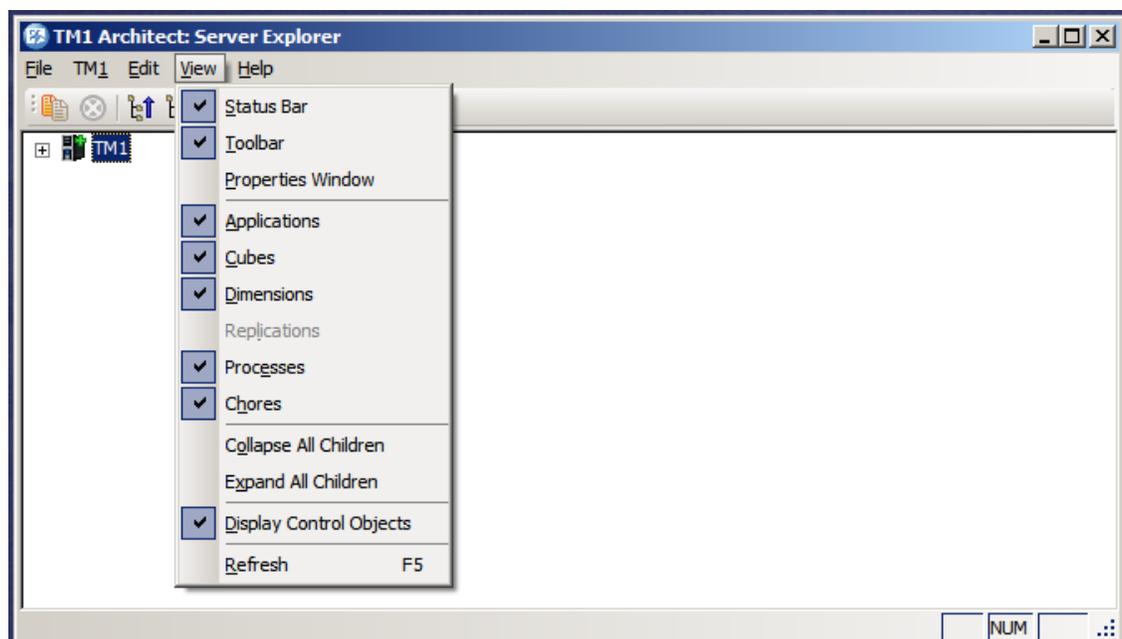


3.4. Setting up the Contributor Application

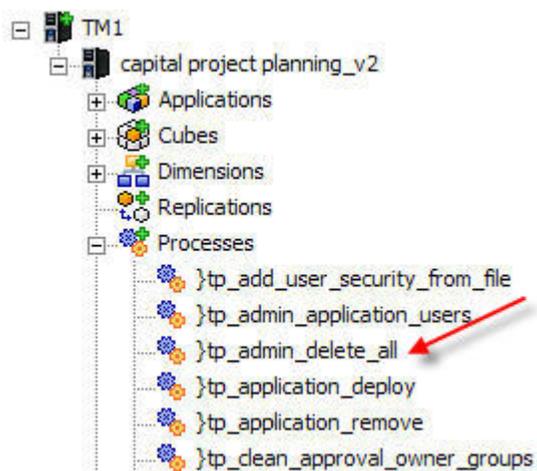
3.4.1. Open TM1 Architect

3.4.2. Double click the **capital project planning_v2** application and **Login** as User: **admin** (no password)

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

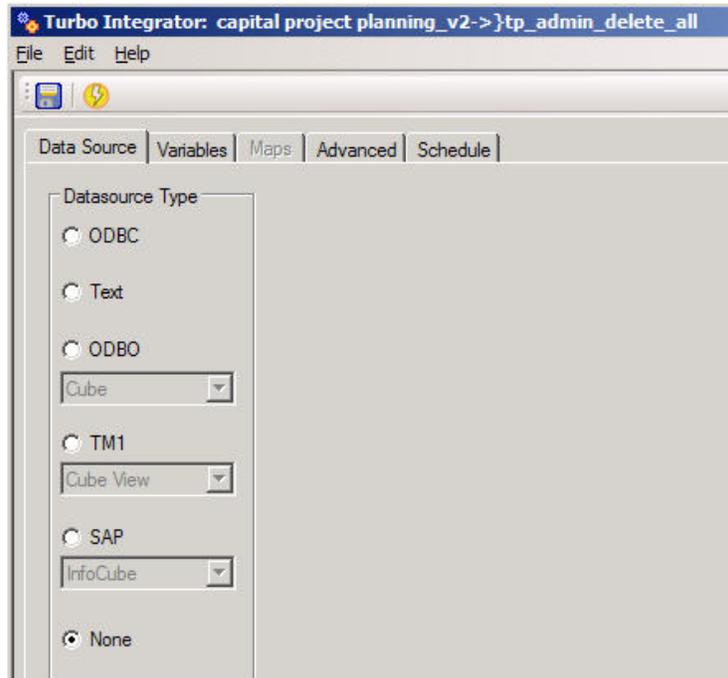


3.4.4. Expand Processes node and double click }tp_admin_delete_all



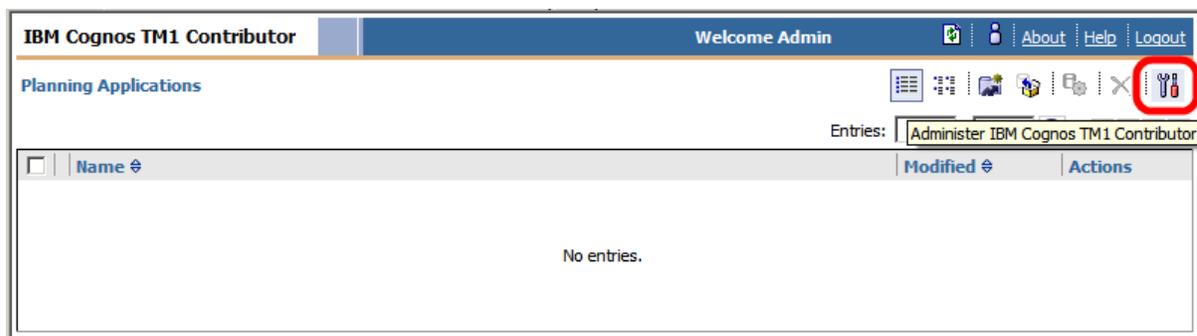


3.4.5. Click run



3.4.6. Launch your TM1 Contributor environment, for example, http://<yourTM1_Server>/pmpsvc/ and login as Admin

3.4.7. Click Administer IBM Cognos TM1 Contributor



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

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



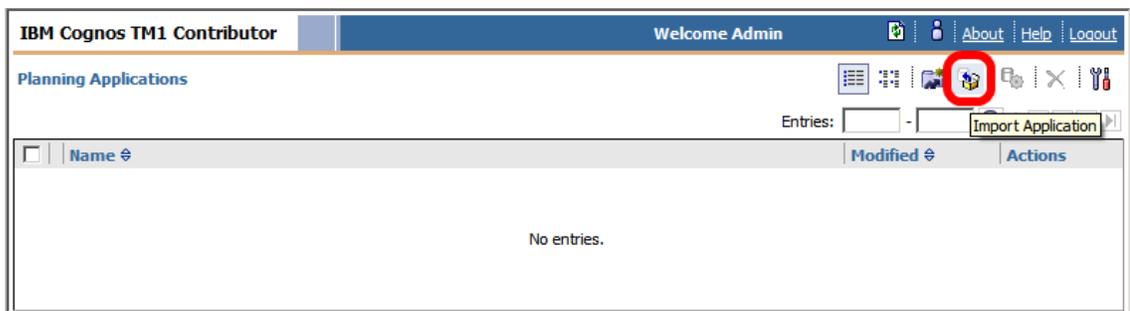
3.4.10. For the Server Name: select **capital project planning_v2** and **OK**

The screenshot shows a dialog box titled "Add Server". It has two main input fields: "Admin Host:" with a text box containing "Your_TM1_Server_Name", and "Server Name:" with a dropdown menu showing "blueprint_name" and a small icon to its right. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

3.4.11. Click **OK**

3.4.12. Click **OK**

3.4.13. Click the **Import Application** icon



3.4.14. Choose **<yourTM1ServerName>:capital project planning_V2** for the TM1 Server

3.4.15. Browse to **<Your_TM1_Application_folder>\Capital Project Planning_v2** and select the **"Capital Project Planning_V2.zip"**



3.4.16. Uncheck Import application security and Click Import

Application Import

Specify your import file and import settings.

TM1 Server:

Application file:

Import application security
 Import application properties

3.4.17. Click the **Activate Application** icon

IBM Cognos TM1 Contributor Welcome Admin About Help Logout

Planning Applications

Entries: 1 - 1

Name	Modified	Actions
<input type="checkbox"/> Blueprint Name	December 21, 2009 1:12:30 PM PST	

Activate Application - Blueprint Name

3.4.18. Click the **Capital Project Planning** link to test, if installed correctly it should resemble the following

IBM Cognos TM1 Contributor Welcome Admin About Help Logout

You are a reviewer or contributor for:

Name	State	Ownership	Reviewer	Last Data Commit
US Controller	Not Started	None	None	Never committed
US FP&A	Not Started	None	None	Never committed
US Treasury	Not Started	None	None	Never committed
UK FP&A	Not Started	None	None	Never committed
UK Controller	Work In Progress	Admin	None	December 22, 2009 10:13:57 AM PST
Australia FP&A	Not Started	None	None	Never committed
Australia Controller	Not Started	None	None	Never committed
France Controller	Not Started	None	None	Never committed
France FP&A	Not Started	None	None	Never committed

User Instructions



4. IBM Cognos 8 BI Content

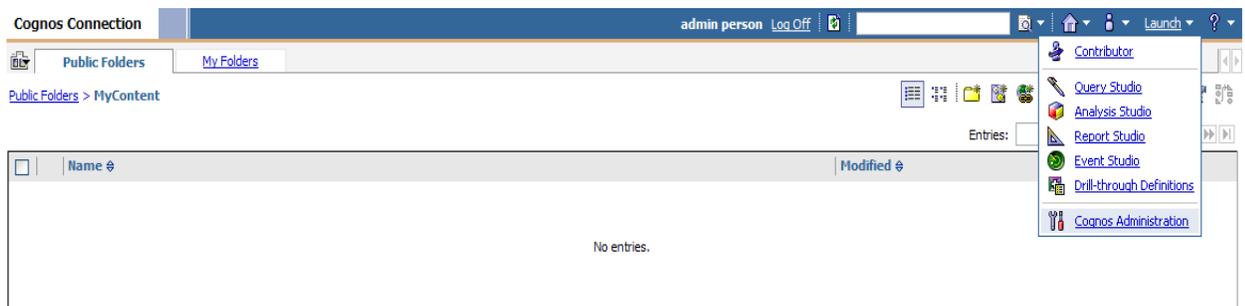
The following steps are required to configure the objects needed for the IBM Cognos BI content to work properly.

4.1. Create 'Capital Planning Blueprint' data source

First, we will look into creating the connection to the data source.

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

Click on to Launch and select IBM Cognos Administration

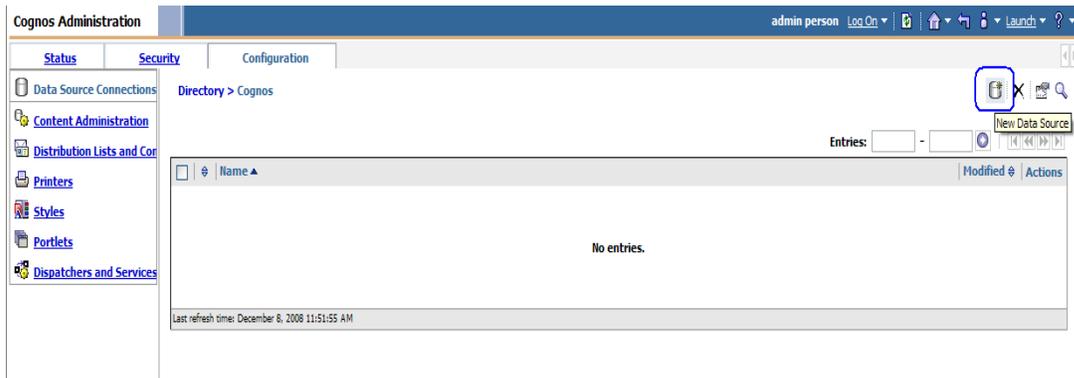


Click on the Configuration tab; make sure 'Data Source Connections' is selected

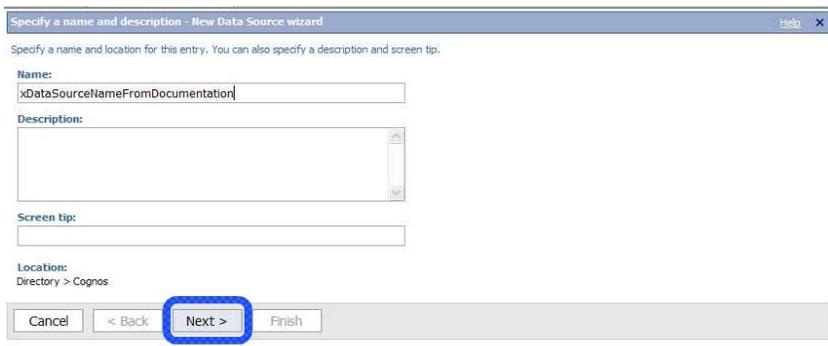




Click the Data Sources tab then click the New Data Source Icon 



Name the Data Source: "Capital Planning Blueprint", then click Next >



Innovation Center for Performance Management

Your connection to best practices and industry leaders

Information Management

Cognos.
software

Select the 'TM1' option; then click Next >

Specify the connection - New Data Source wizard

Specify the parameters for the connection of this new data source. The name of the data source is used to set the name of the connection.

Type:

IBM Cognos Finance
IBM Cognos Finance
IBM Cognos Now! Cube
IBM Cognos Planning - Contributor
IBM Cognos Planning - Series 7
IBM Cognos PowerCube
IBM InfoSphere Warehouse cubing services (XMLA)
Composite (ODBC)
IBM Cognos Virtual View Manager (ODBC)
DB2
Hyperion Essbase/IBM DB2 OLAP Server
Informix
Microsoft SQL Server (ODBC)
Microsoft SQL Server (OLE DB)
Microsoft SQL Server (SQL 2005 Native Client)
Microsoft Analysis Services (via ODBO)
Microsoft Analysis Services 2005
ODBC
Oracle
Progress OpenEdge
Red Brick (ODBC)
SAP BW
Sybase Adaptive Server Enterprise (CT-Lib)
Sybase Adaptive Server Enterprise (CT-15)
Teradata (ODBC)
TM1
XML
Other type



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

Administration Host:

localhost

Server Name:

capital project planning_v2

Signon

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

- No authentication
- An external namespace:

NTLM (Active) ▼

Signons

Password

Create a signon that the Everyone group can use:

User ID:

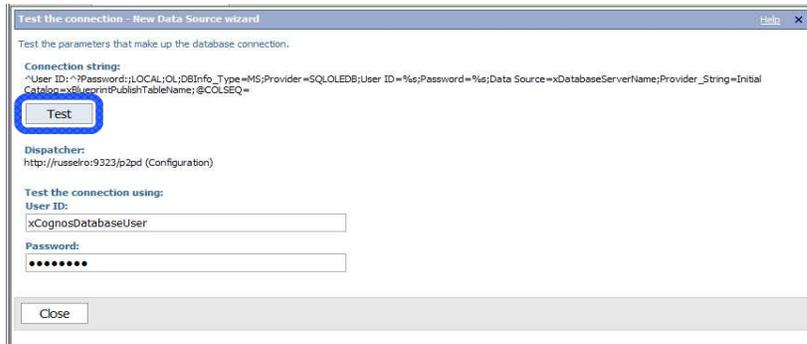
admin

Password:

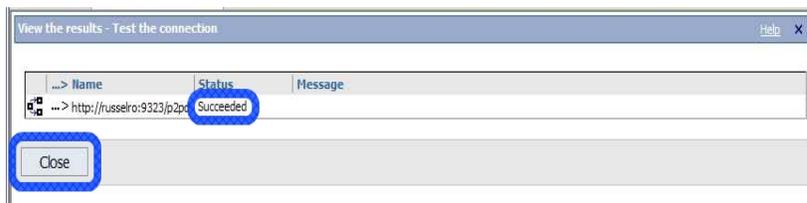
Confirm password:



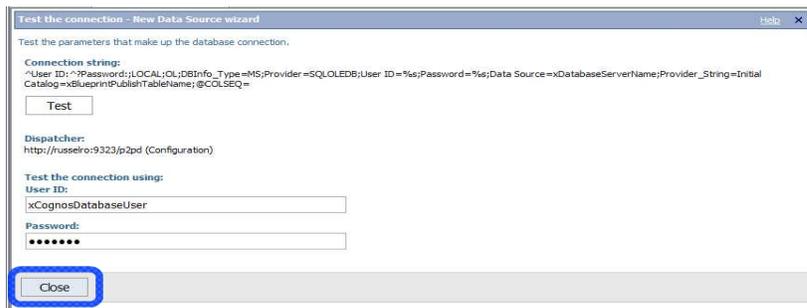
Click Test to verify the connection is setup correctly



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

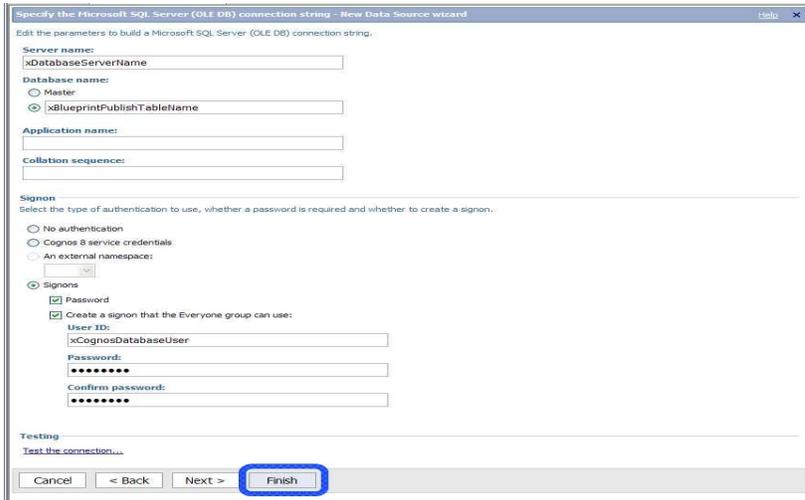


Click Close



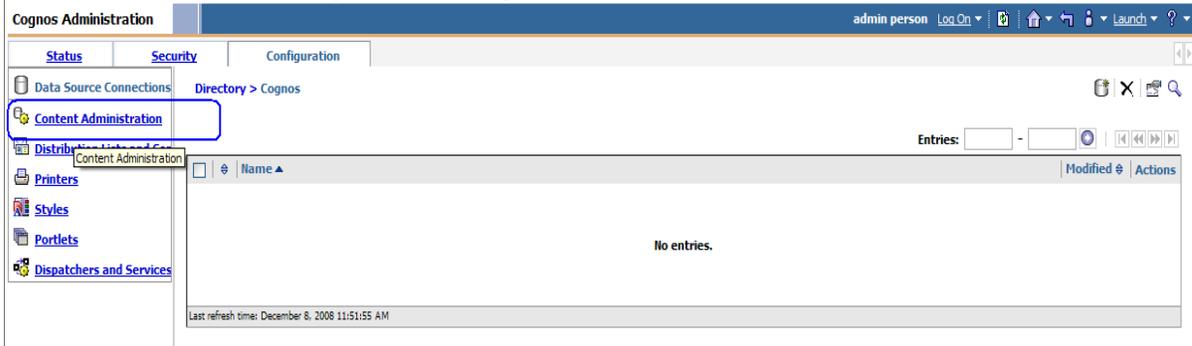


Click Finish to add the new data source

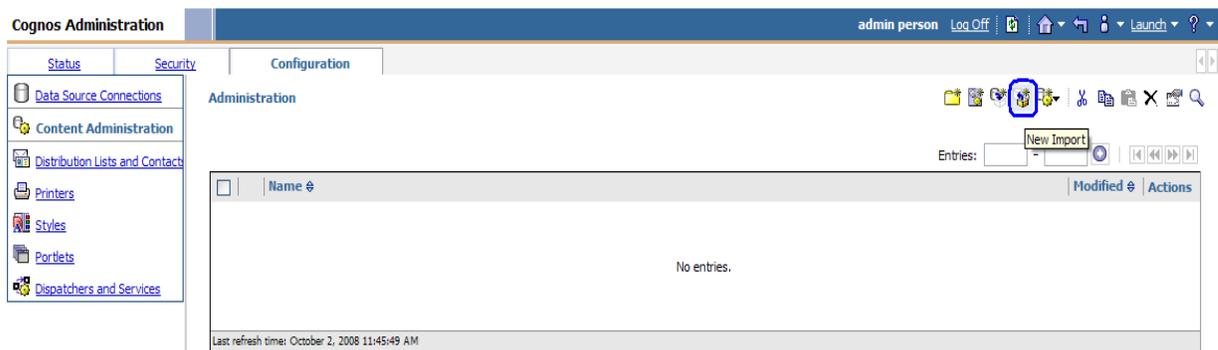


4.2. Run the import wizard to bring the BI Content into the IBM Cognos Connection portal

From the screen in the previous step, select Content Administration

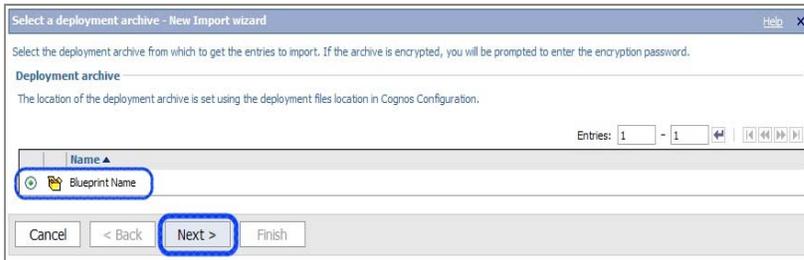


Click the New Import icon





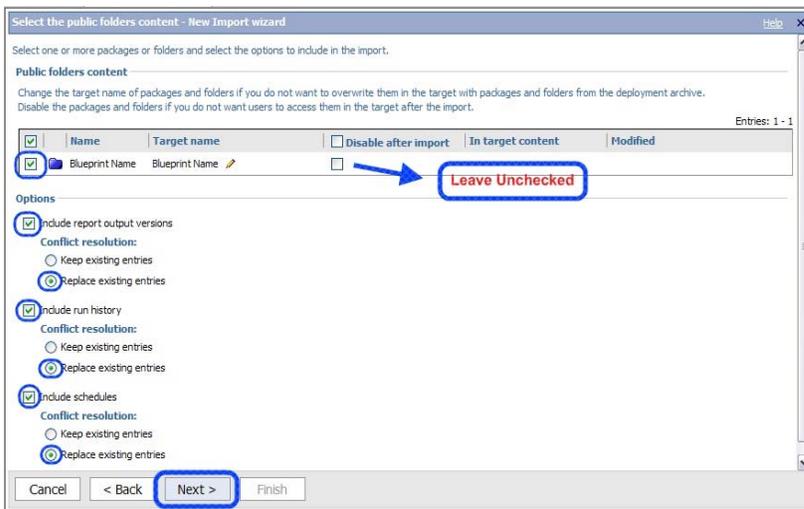
Select the import package named 'Capital_Planning_Blueprint_BI_Deployment'; then click Next >



Verify the Name is 'Capital_Planning_Blueprint_BI_Deployment' then click Next >



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





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

Specify the general options - New Import wizard

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

Access permissions

Include access permissions

- Apply to new entries only
- Apply to new and existing entries

External namespaces

- Include references to external namespaces
- Do not include references to external namespaces

Entry ownership

Set the owner to:

- The owner from the source
- The user performing the import

Apply to:

- New entries only
- New and existing entries

Buttons: Cancel, < Back, Next >, Finish

Review the summary options selected then click Next >

Review the summary - New Import wizard

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

Deployment specification

Name: Blueprint Name Description:

Deployment archive

Name: Blueprint Name

Public folders content

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

Options:

- Include report output versions
 - Replace existing entries
- Include run history
 - Replace existing entries
- Include schedules
 - Replace existing entries

Directory content

Buttons: Cancel, < Back, Next >, Finish

Choose 'Save and run once' then click Finish

Select an action - New Import wizard

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

Action:

- Save and run once
- Save and schedule
- Save only

Buttons: Cancel, < Back, Next >, Finish



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

Run with options - Blueprint Name

Select when you want to run this import.

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

Content:

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

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

Run Cancel

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

Cognos 8

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

View the details of this import after closing this dialog

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

OK Cancel

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

View run history details - Strategic Finance Blueprint

View the details of this particular run. Refresh

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

Status: Executing

Messages

Severity: (All) Entries: 0 - 0

Time	Message
No entries.	

Close



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

The screenshot shows the Cognos Administration console. The main window displays "View an import deployment record - Blueprint Name - Import". The status is "Succeeded" and the completion time is "December 8, 2008 12:57:55 PM". A message box indicates "CM-REQ-2300 Import is complete. 1 object(s) were imported. 0 object(s) failed." Below this, there is a table for "Deployment archive" with one entry: "Blueprint Name" with target name "Blueprint Name" and a "Disable after import" checkbox. The "Options" section includes "Include report output versions" (with sub-options "Replace existing entries" and "Include run history"), "Do not include schedules", "Directory content" (with sub-options "Do not include Cognos groups and roles", "Do not include distribution lists and contacts", and "Do not include data sources and connections"), and "General Options" (with sub-options "Do not include access permissions", "Do not include references to external namespaces", and "Set the owner to the user performing the import"). A "Close" button is located at the bottom left of the window.

4.3. Testing IBM Cognos Dashboards Content

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



IBM Cognos Connection tm1adm Log Off

Public Folders My Folders

Public Folders > Capital Planning Blueprint

Entries: 1 - 4

Name	Modified	Actions
Dashboard Pages	December 9, 2009 8:52:33 AM	More...
Packages	November 12, 2009 8:55:50 AM	More...
Reports	December 9, 2009 11:29:00 PM	More...
Capital Planning Blueprint	December 10, 2009 10:27:35 AM	More...

To test the content is coming up correctly; launch the 'Capital Planning Blueprint' Page at the bottom of the list. The following screen should come up:

Cognos Viewer - Capital Planning Blueprint tm1adm Log Off Launch

Welcome [Capital Project Planning Dashboard](#) [Project Manager Dashboard](#)



Capital Planning Blueprint

IBM Cognos Innovation Center for Performance Management

Licensed Materials - Property of IBM Corp. About IBM Cognos BI and Performance Management: IBM Cognos business intelligence (BI) and performance management solutions deliver world-leading enterprise planning, consolidation and BI software, support and services to help companies plan, understand and manage financial and operational performance. IBM Cognos solutions bring together technology, analytical applications, best practices, and a broad network of partners to give customers an open, adaptive and complete performance solution. Over 23,000 customers in more than 35 countries around the world choose IBM Cognos solutions.

BUILT ON
 

1.0

Then, testing can be performed on each of the dashboard pages to obtain the dashboards displaying IBM Cognos TM1 data.