

Client Servicing Wealth & Asset Manager Blueprint Setup Instructions

IBM Cognos BI Content

Pre-requisite technologies:

- Cognos 8.4 Business Intelligence
- SQL Server 2005 or above
- A web server configuration with a root virtual directory named cognos8

Contents:

1. Client Servicing 8.4.rar

1. Extracting files required for setup steps

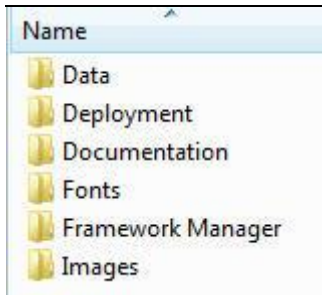
2. Steps for setting up Cognos 8 Business Intelligence system:

- 2.1. Configure security
- 2.2. Copy the necessary files into their respective directories
- 2.3. Attach reporting database files and create data source
- 2.4. Run the import wizard to deploy the BI content
- 2.5. Test the Blueprint report(s)

2. Extracting files required for Setup steps

2.1. Unzipping Client Servicing 8.4.rar

2.1.1. After unzipping the “Client Servicing 8.4.rar” it will create the following directories:



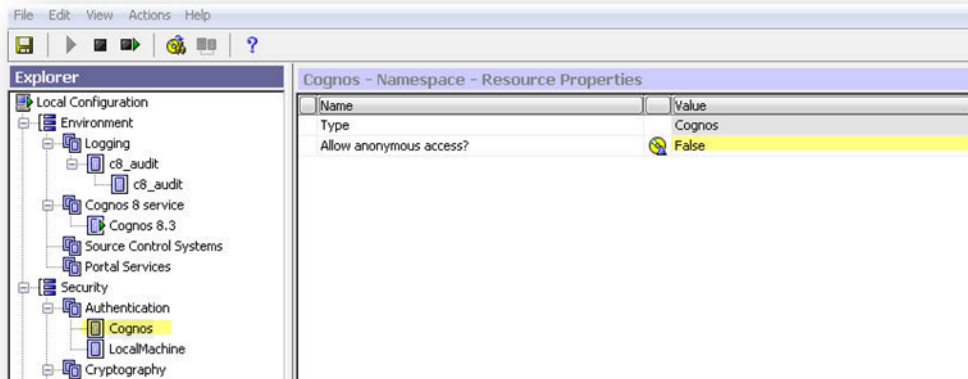
We will reference these directories, which store the applicable files

2. Steps for setting up Cognos 8 Business Intelligence system

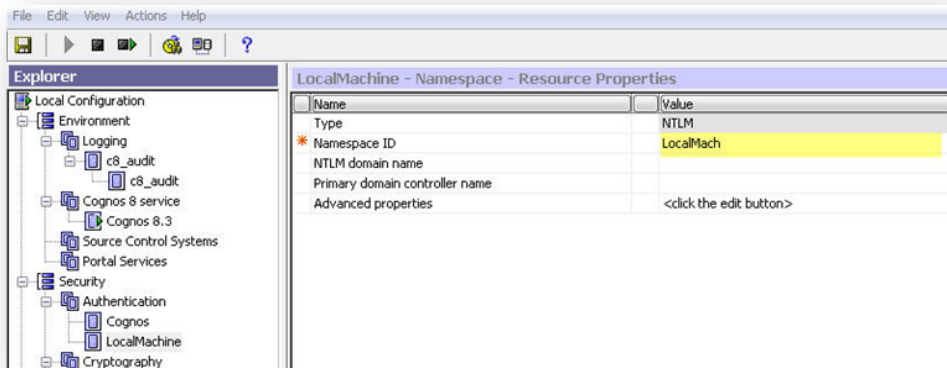
2.1. Configure Security

2.1.1. Open IBM Cognos Configuration

2.1.2. Go to Security-->Authentication-->Cognos and set 'Allow anonymous access?' to "False"



2.1.3. If you have an existing namespace, please skip to the next step; otherwise, create a new namespace. Please note: NTLM was used in this example. It is not a required resource for this blueprint module.

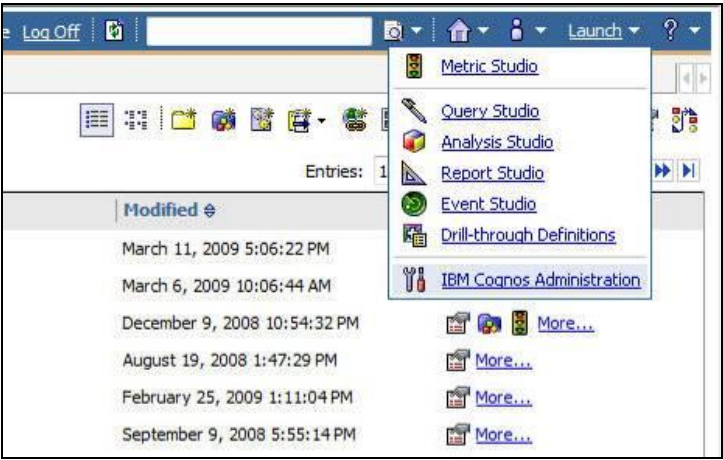


2.1.4 Save the configuration and restart the services

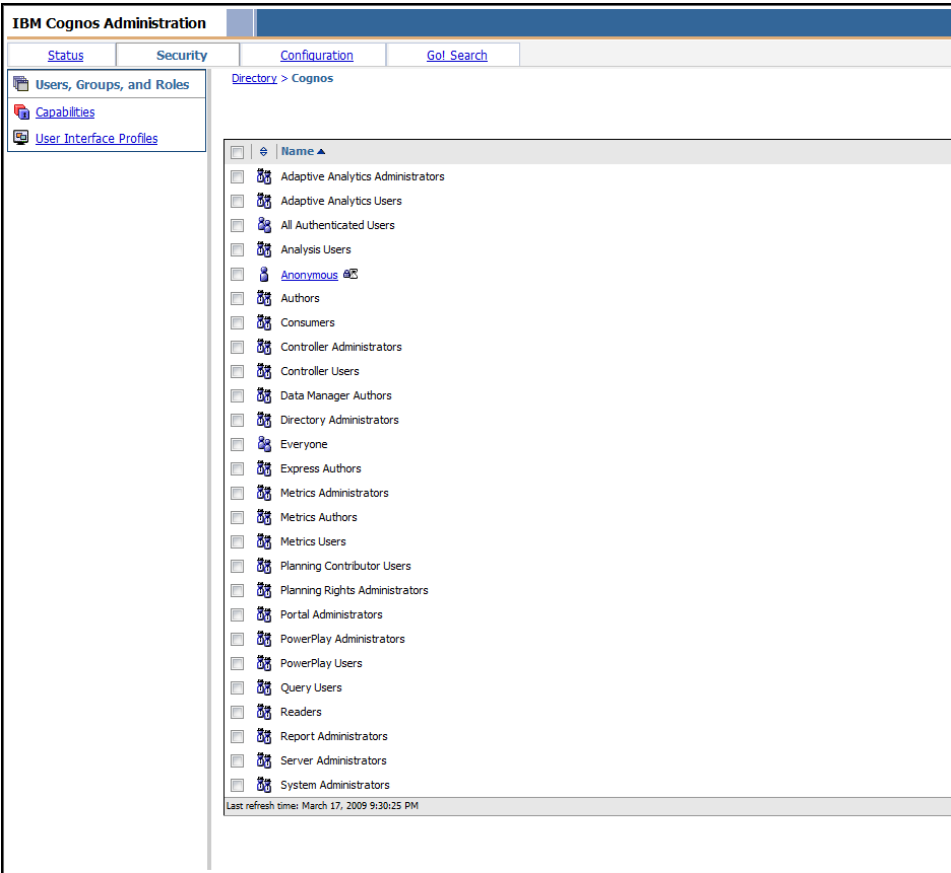
2.1.5 In the security source, make sure the following user account login id exists exactly as shown : **Terry Hargrove**

2.1.6 Open a browser window and go to IBM Cognos Connection. Login as a user assigned to the Directory Administrator role.

2.1.7 Click on to Launch and select “IBM Cognos Administration”



2.1.8 Navigate to Security>Users, Groups, and Roles. Ensure user “Terry Hargrove” is a member of an active group or role. (see the *IBM Cognos 8 Administration and Security Guide* for further details)



2.1.9 Minimize your browser window

2.2. Copy the necessary files into their respective directories

2.2.1. Unzip barcode_font.zip from the **/Fonts** folder and copy **barcodefont.ttf** to C:/Windows/Fonts.

2.2.2. Copy all files from **/Images** to < *cognos 8.4 install folder* >/webcontent/samples/images

Note: For a distributed architecture, the images would need to be copied to the aforementioned directory on the gateway host(s). Verify with your BI Administrator before copying the files.

2.2.3. Copy files from **/Data** directory into a designated SQL Server data directory.

Note: It is not a requirement to move the database files to a common data source directory, but it is recommended.

2.3. Attach the reporting database files and create data source connection

For MS SQL Server 2005:

Launch SQL Server Management Studio

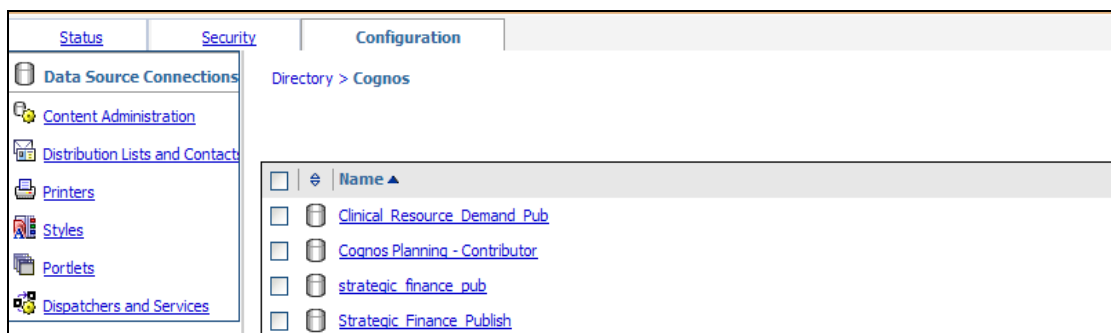
Expand the Database Server

Right click onto Databases and select Attach

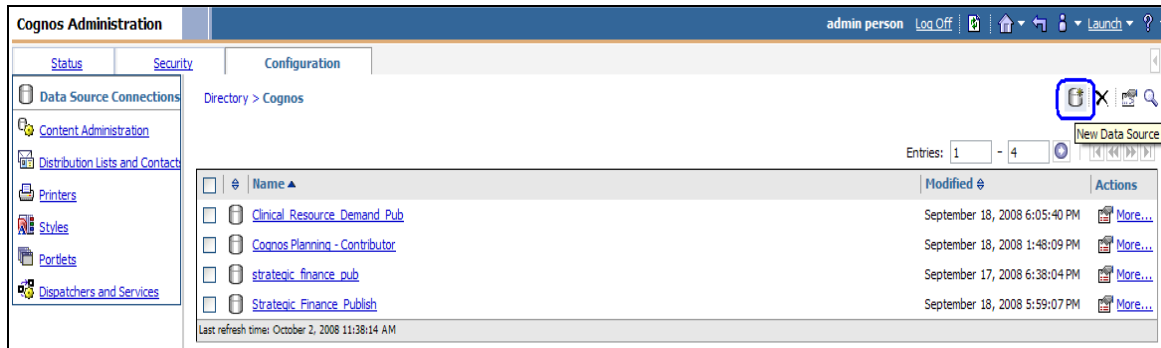
Browse to the location where the Reporting Database is stored and select

Refer to SQL Server Help files for help on attaching databases.

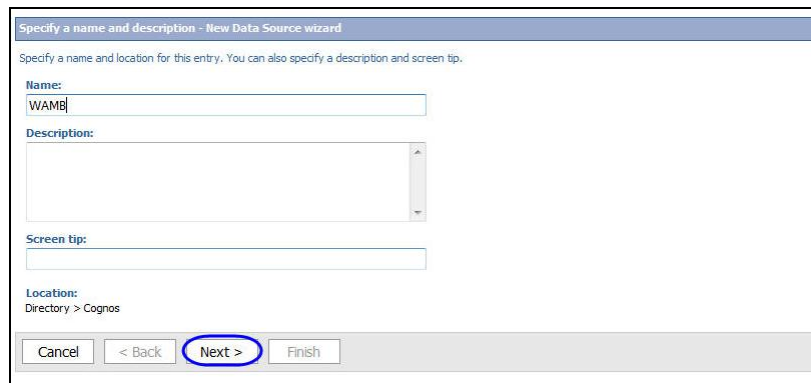
2.3.1.1. Restore your browser window, click on the Configuration tab and select 'Data Source Connections'



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



2.3.1.3. Name the Data Source exactly as: "WAMDB" then click Next >



The screenshot shows the 'Specify a name and description - New Data Source wizard' dialog box. The 'Name' field is set to 'WAMDB'. The 'Next >' button is highlighted with a red circle.

Name: WAMDB

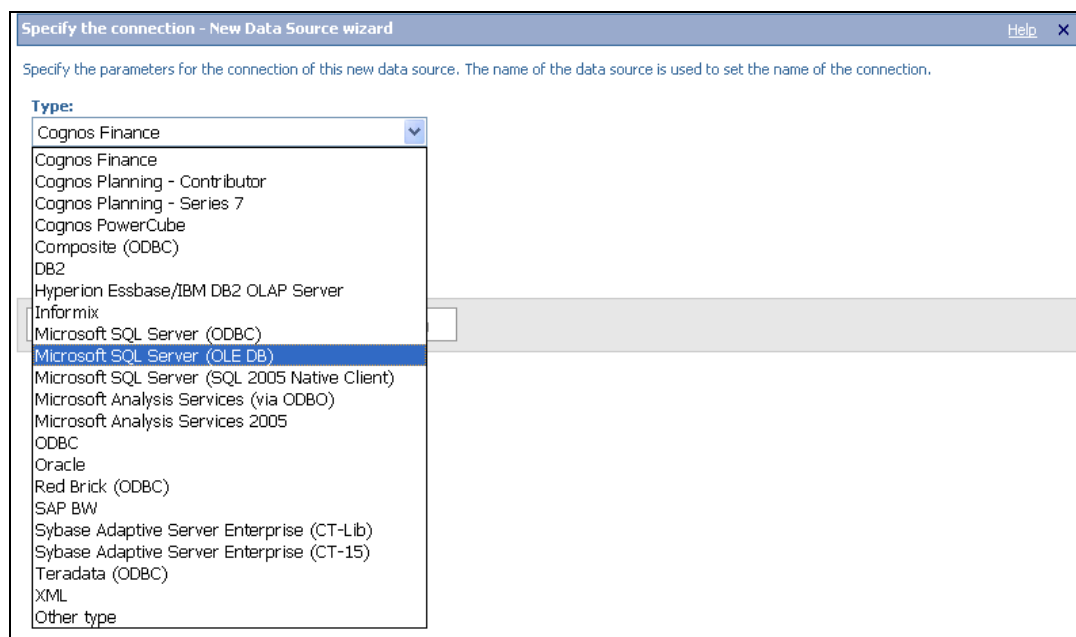
Description:

Screen tip:

Location: Directory > Cognos

Buttons: Cancel, < Back, Next >, Finish

2.3.1.4. Specify the database type of the connection created during the publish container connection then click Next >



The screenshot shows the 'Specify the connection - New Data Source wizard' dialog box. The 'Type' dropdown menu is open, showing various database types. 'Microsoft SQL Server (OLE DB)' is selected.

Type: Cognos Finance

- Cognos Finance
- Cognos Planning - Contributor
- Cognos Planning - Series 7
- Cognos PowerCube
- Composite (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
- Red Brick (ODBC)
- SAP BW
- Sybase Adaptive Server Enterprise (CT-Lib)
- Sybase Adaptive Server Enterprise (CT-15)
- Teradata (ODBC)
- XML
- Other type

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

Specify the Microsoft SQL Server (OLE DB) connection string - New Data Source wizard

Fill the parameters to build a Microsoft SQL Server (OLE DB) connection string.

Server name:
xDatabaseServerName

Database name:
☐ Master
☒ xBlueprintPublishTableName

Application name:
Collation sequence:

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

☐ No authentication
☒ Cognos 8 service credentials
☐ An external namespace:

☒ Signons
☒ Password
☒ Create a signon that the Everyone group can use:
User ID:
xCognosDatabaseUser
Password:
Confirm password:

Testing
Test the connection...

Cancel < Back Next > Finish

Database Name: WAMDB

Type in the credentials (if required) to access the database

2.3.1.6. Click Test to verify the connection is setup correctly

Test the connection - New Data Source wizard

Test the parameters that make up the database connection.

Connection string:
^User ID:^?Password:;LOCAL;OL;D8Info_Type=MS;Provider=SQLOLEDB;User ID=%s;Password=%s;Data Source=xDatabaseServerName;Provider_String=Initial Catalog=xBlueprintPublishTableName;@COLSEQ=

Test

Dispatcher:
http://russeiro:9323/p2pd (Configuration)

Test the connection using:
User ID:
xCognosDatabaseUser
Password:
masked characters

Close

2.3.1.7. If the test Status indicates 'Succeeded,' click 'Close' to proceed

View the results - Test the connection

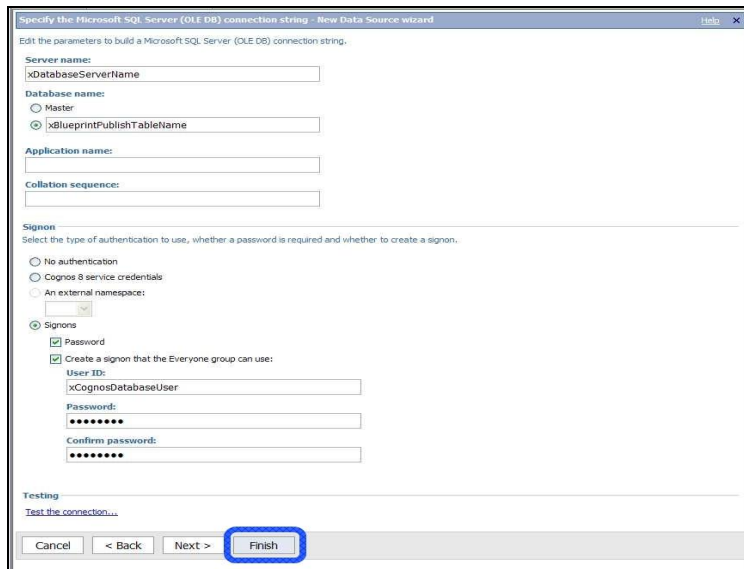
Name	Status	Message
http://russeiro:9323/p2pd	Succeeded	

Close

2.3.1.8. Click Close

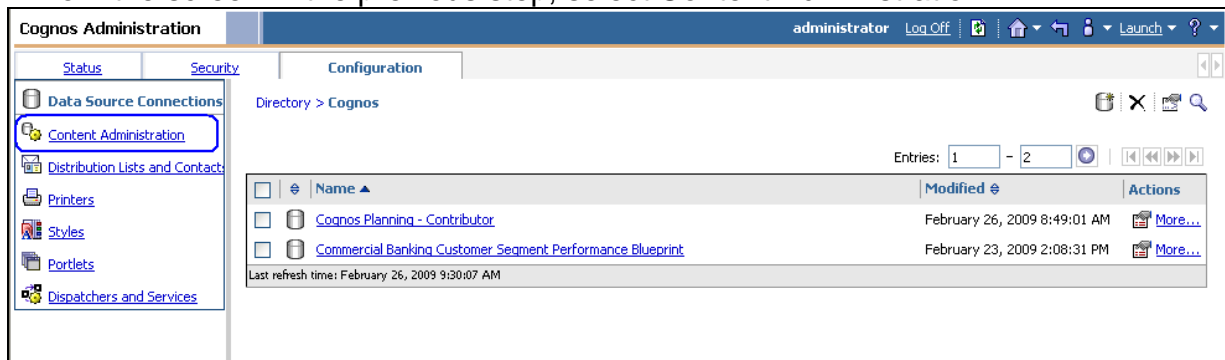


2.3.1.9. Click Finish to add the new data source

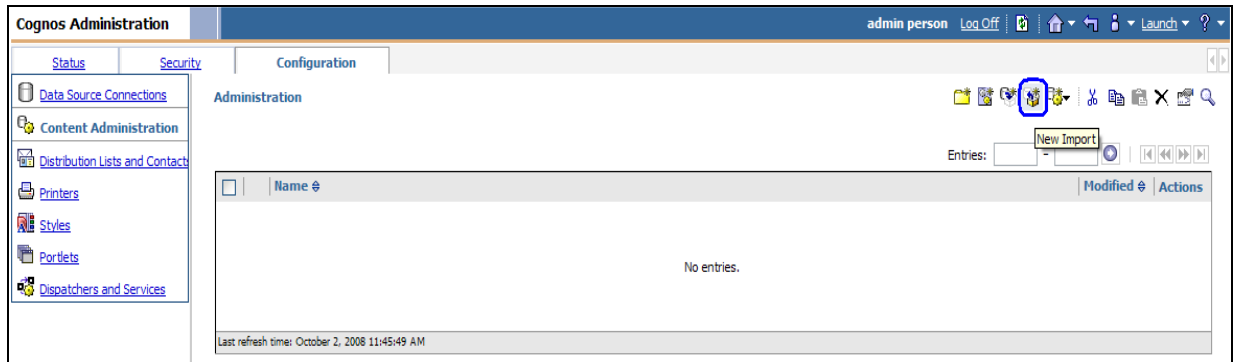


2.4. Run the import wizard to deploy the BI Content

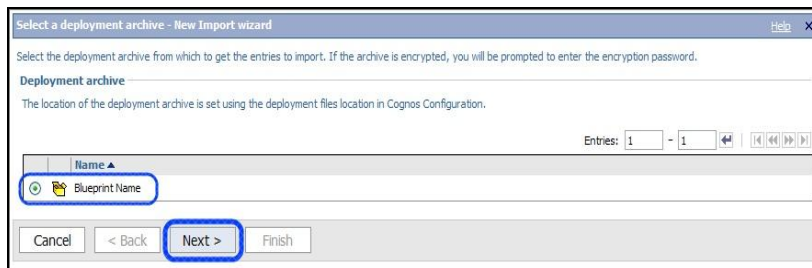
2.4.1. From the screen in the previous step, select Content Administration



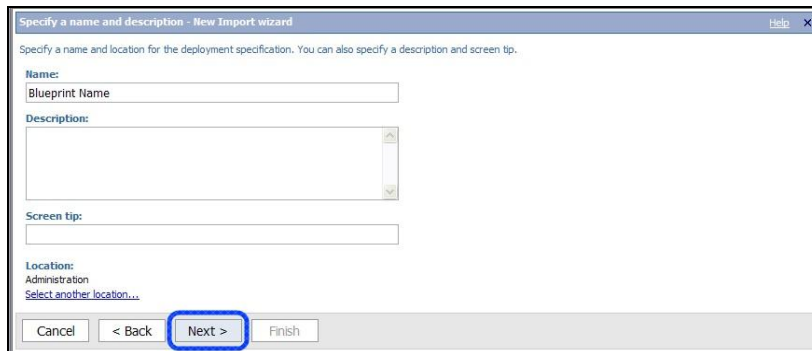
2.4.2. Click the New Import icon



2.4.3. Select the import package named “Client Servicing - Wealth Asset Manager 8.4” then click Next >



2.4.4. Verify the Name is “Client Servicing - Wealth Asset Manager 8.4” then click Next >



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

Select the public folders content - New Import wizard

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

Public folders content

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

Entries: 1 - 1

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

Options

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

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

☒ include schedules
Conflict resolution:
☐ Keep existing entries
☒ Replace existing entries

Cancel < Back **Next >** Finish

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

Specify the general options - New Import wizard

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

Access permissions

☒ Include access permissions
☐ Apply to new entries only
☒ Apply to new and existing entries

External namespaces

☐ Include references to external namespaces
☒ Do not include references to external namespaces

Entry ownership

Set the owner to:
☐ The owner from the source
☒ The user performing the import

Apply to:
☒ New entries only
☐ New and existing entries

Cancel < Back **Next >** Finish

2.4.7. Review the summary options selected then click Next >

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

Deployment specification

Name: Blueprint Name Description:

Deployment archive

Name: Blueprint Name

Public folders content

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

Options:

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

Directory content

Cancel < Back **Next >** Finish

2.4.8. Choose 'Save and run once' then click Finish

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

Action:

☒ Save and run once
☐ Save and schedule
☐ Save only

Cancel < Back Next > **Finish**

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

Select when you want to run this import.

Time:

☒ Now
☐ Later:
May 22, 2008
2 : 48 PM

Content:

Name:

- ☒ Content store
- ☒ Directory
- ☒ Cognos namespace
- ☒ Public Folders
- ☒ Blueprint Name

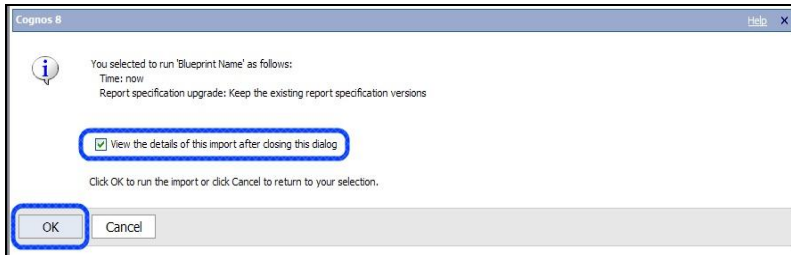
Report specification upgrade

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

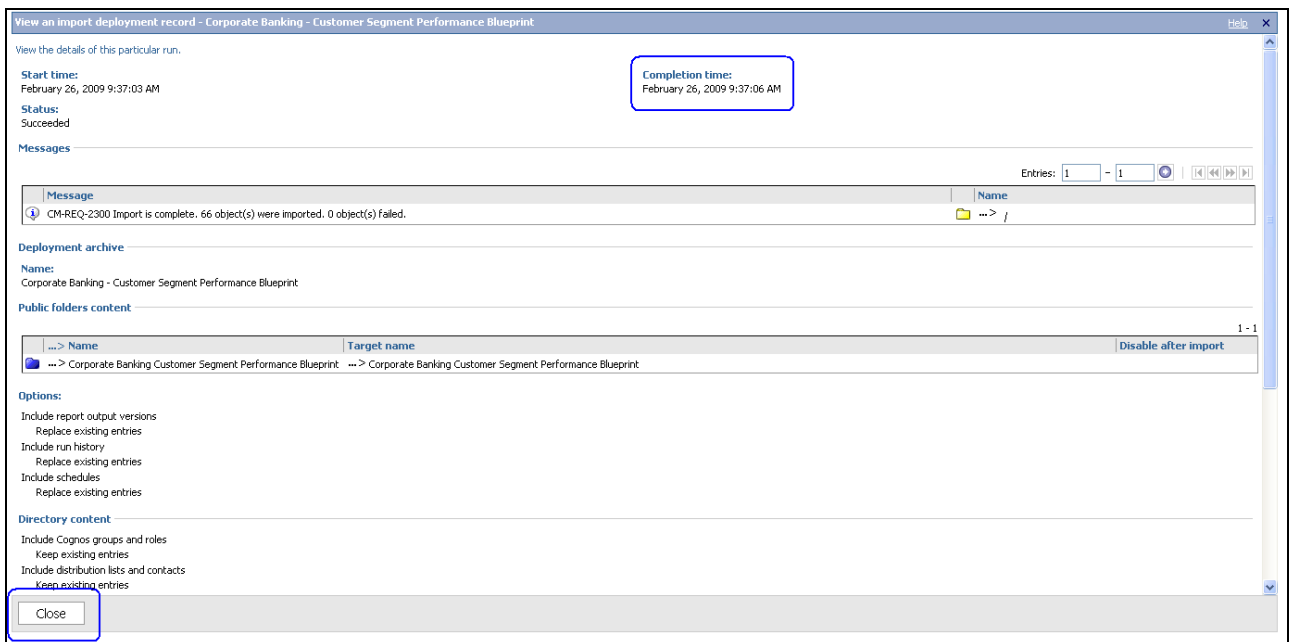
2.4.10. Check 'View the details of this import after closing this dialog' then click OK



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



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



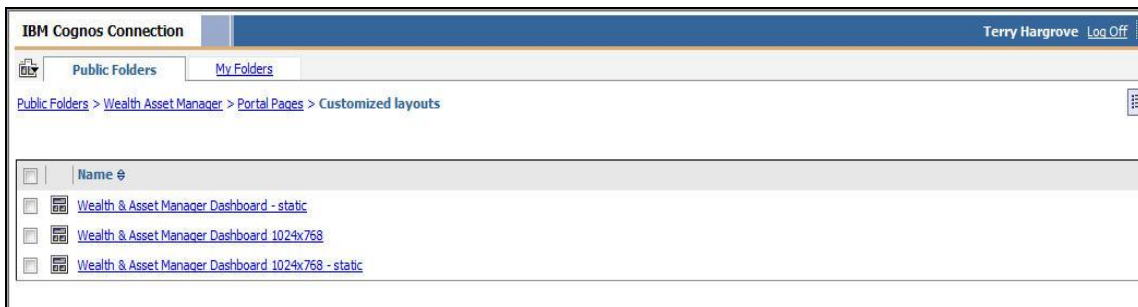
2.4.13 Log off IBM Cognos Connection

2.5. Test the Blueprint report(s)

- 2.5.1. Log in to IBM Cognos Connection using the credentials for Terry Hargrove (see 2.1.5)
- 2.5.2. Navigate to Public Folders and click the 'Wealth Asset Manager' folder then click the "Wealth & Asset Manager Dashboard" link



Note: In the Customized layouts folder, there are multiple iterations of the Wealth & Asset manager dashboard. These are for demonstration purposes, as they are adjusted to meet varying screen resolutions and internet connectivity availability.



- 2.5.2.1 Wealth & Asset Manager Dashboard - static – For screen resolutions greater than 1024x768 and computers with no active internet connection
- 2.5.2.2 Wealth & Asset Manager Dashboard 1024x768 – For screen resolutions of 1024x768 and computers with active internet connections
- 2.5.2.3 Wealth & Asset Manager Dashboard - static – For screen resolutions of 1024x768 and computers with no active internet connection

2.5.3. If installed correctly the dashboard will display as follows

