

Upstream Oil And Gas Blueprint Setup Instructions

Pre-requisite technologies:

- Cognos 8.3 Business Intelligence
- Cognos 8.3 Planning

Contents:

- 1. Upstream Oil And Gas Blueprint.zip**
This is the entire file structure for the BI deployment, Framework Manager Model and graphics with a categorized folder structure to house the extracted files.
- 2. Upstream Oil And Gas Blueprint Planning Deployment.zip**
This file contains the Analyst library, Contributor model and data. You can import this model into a test or production environment. The deployment package must be saved in the deployment directory location set in Cognos Configuration.
- 3. Upstream Oil And Gas BI Deployment.zip**
This is the BI Deployment file consisting of reports and portal pages specific to this Blueprint.
- 4. Upstream Oil And Gas Blueprint Setup Instructions.pdf**
Description of the necessary files and steps needed to setup both environments for the Planning and BI portions of the Blueprint.
- 5. Upstream Oil And Gas Images.zip**
Images required to render dashboards and reports.

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

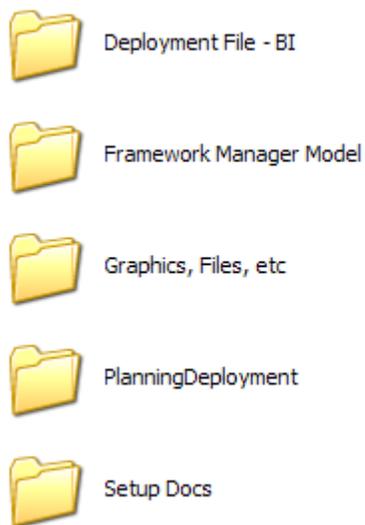
- 3.1. Copy the necessary files into their respective directories**
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1. Extracting files required for Setup steps

1.1. Unzipping the Upstream Oil And Gas Blueprint.zip

1.1.1. After unzipping the “Upstream Oil And Gas Blueprint.zip” it will create the following directories:

- a) Deployment File – BI
- b) Framework Manager Model
- c) Graphics,Files,etc
- d) PlanningDeployment
- e) Setup Docs



We will reference these directories, which store the pertinent files

2. Steps for setting up environment within Contributor Administration

2.1. Import the Planning Application

The deployment package is contained in the file Upstream Oil And Gas Blueprint Planning Deployment.zip. This file is stored in the folder: PlanningDeployment mentioned on Section 1.

This file contains the Analyst library, Contributor model and data. You can import this model into a test or production environment. If you encounter errors during the extract, use the unzip option to 'extract to here'. The extracted files must be saved in the deployment directory location set in Cognos Configuration. For example, **drive_letter:\Program Files\cognos\c8\deployment**. Once the files are extracted the following the structure should be under the folder

Upstream Oil And Gas Blueprint Planning Deployment

NAME	SIZE	TYPE
applications		File Folder
libraries		File Folder
security		File Folder
done.txt	1 KB	Text Document
limited_export.txt	1 KB	Text Document
progress.xml	14 KB	XML Document
request.xml	3 KB	XML Document
request_guid.txt	1 KB	Text Document

Through the import process, you can change the target datastore and security for your model. The Deployment wizard will attempt to map security settings for users, groups, and roles. As you are using different namespaces and users, groups, and role mappings, you will have to complete the mapping manually.

The security settings for the source will be applied to the user, group, or role mapped. Source users, groups, and roles can be mapped together or individually to any single target user, group, or role. When mapping a number of users, groups, or roles, the target maintains the greatest level of security privileges. Any unmapped items are mapped to Planning Rights Administrator and do not appear individually as a users, groups, or roles in the target.

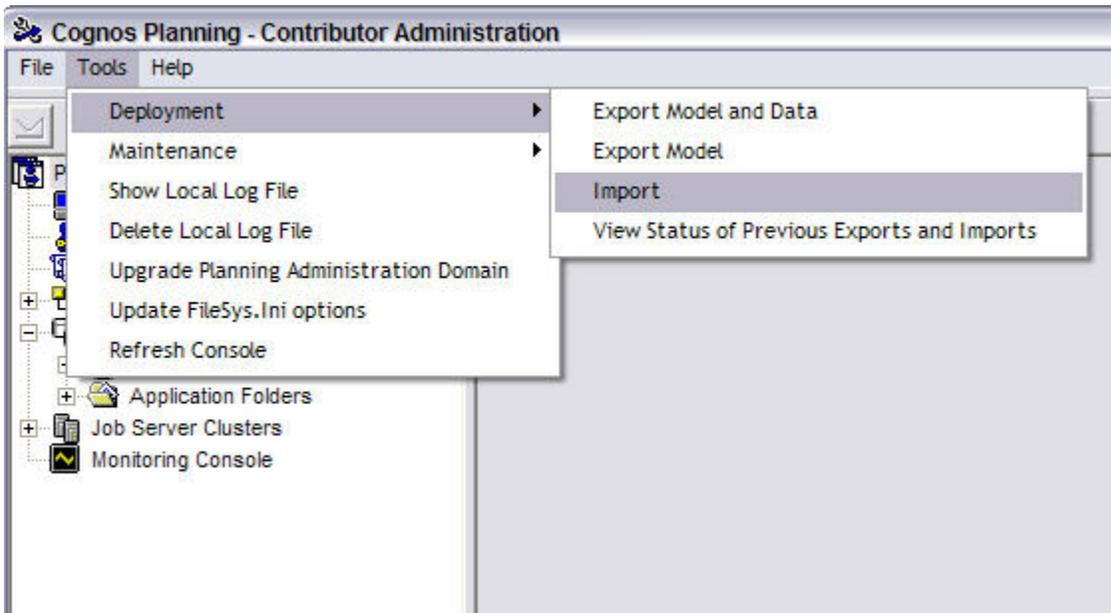
Application IDs and object names must be unique within a planning network. During the import processes, if duplicate names or IDs are found, you are warned. If you proceed with the import without changing names and IDs, then any existing applications or objects with common names or IDs will be overwritten.

To import Contributor applications, you must have at least one configured datastore and the Planning content store must be added to a job server. A datastore is not required to import Analyst libraries, macros, or administration links.

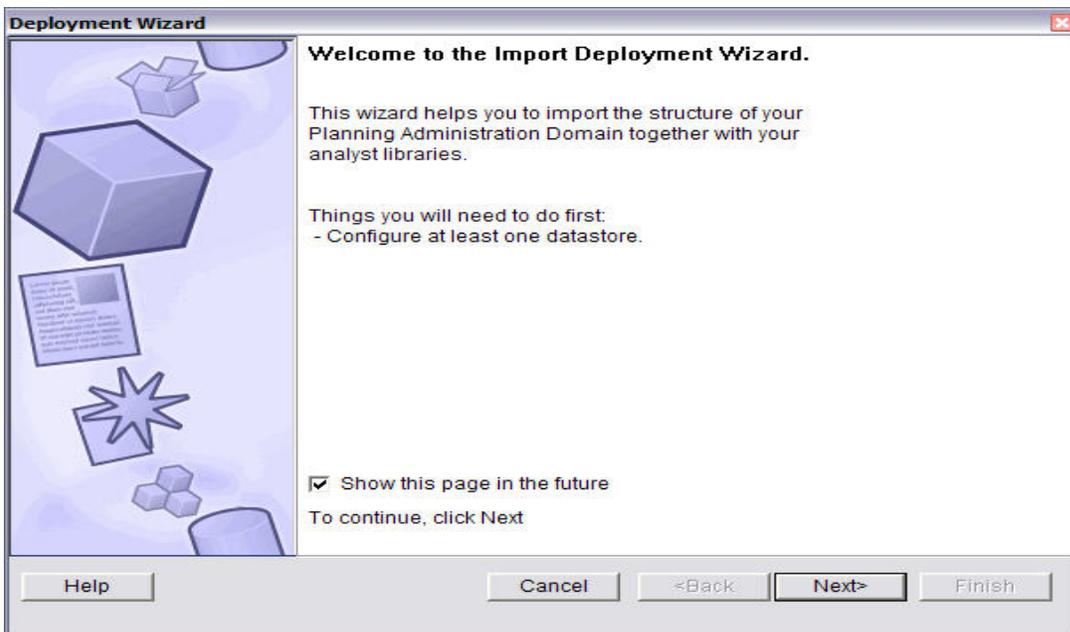
2.1.1. **Launch Contributor Administration** console and login with an administrator credential

2.1.2. Go to **Tools/Deployment** to perform the import of the planning content

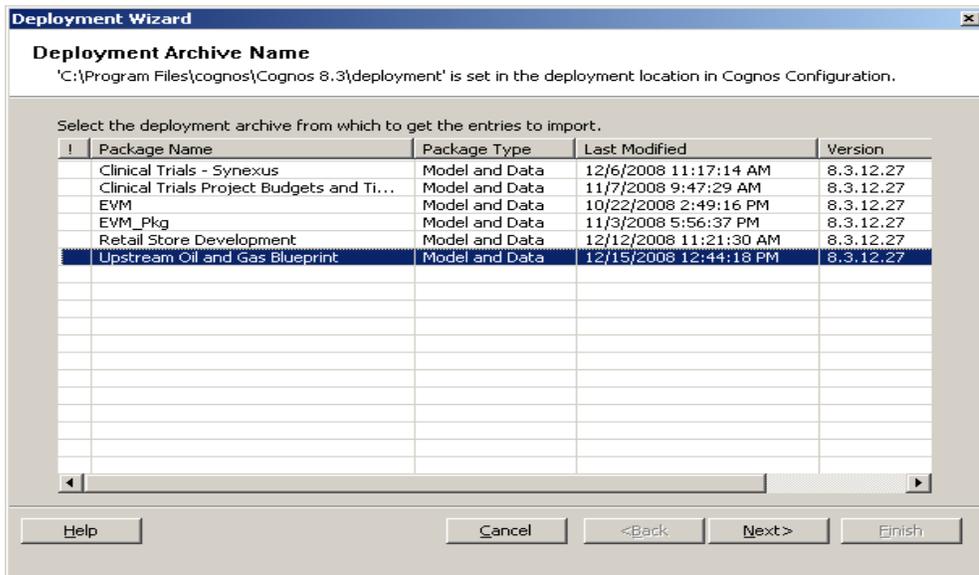
2.1.3. From the **Tools** menu, click **Deployment** and then click **Import**.



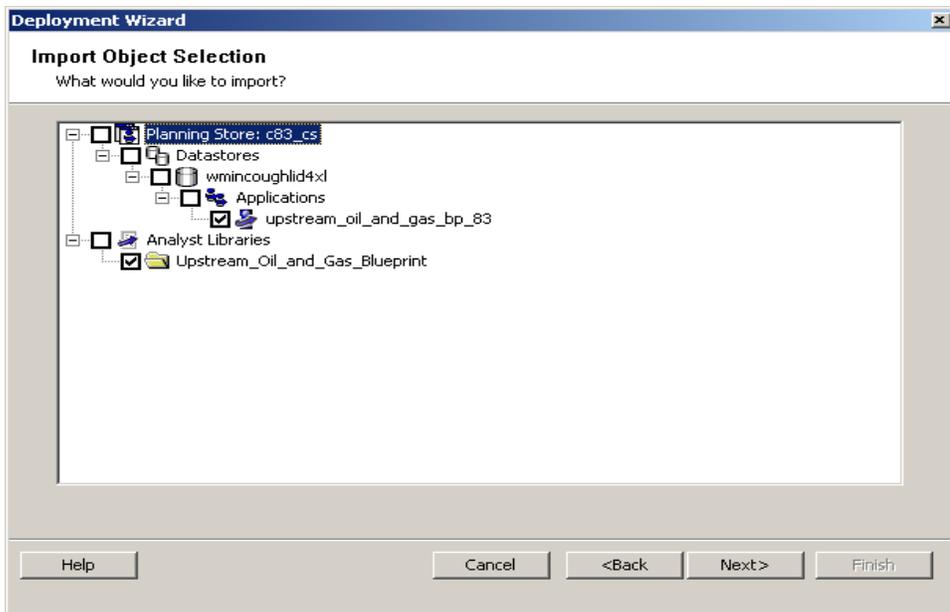
2.1.4. In the **Welcome to the Import Deployment Wizard** page, click **Next**.



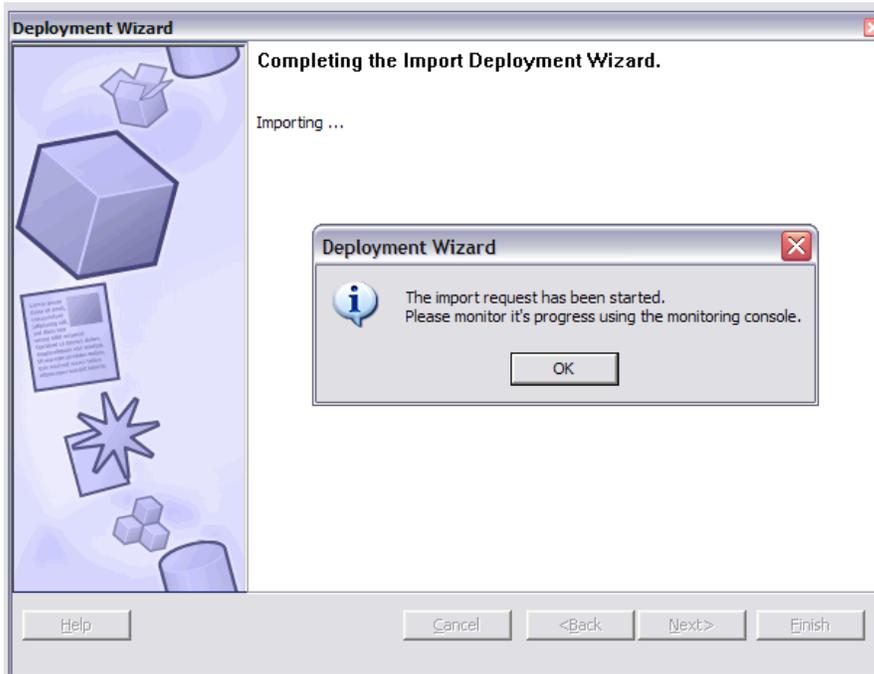
2.1.5. In the Deployment Archive Name page, select the deployment to import and click **Next**.



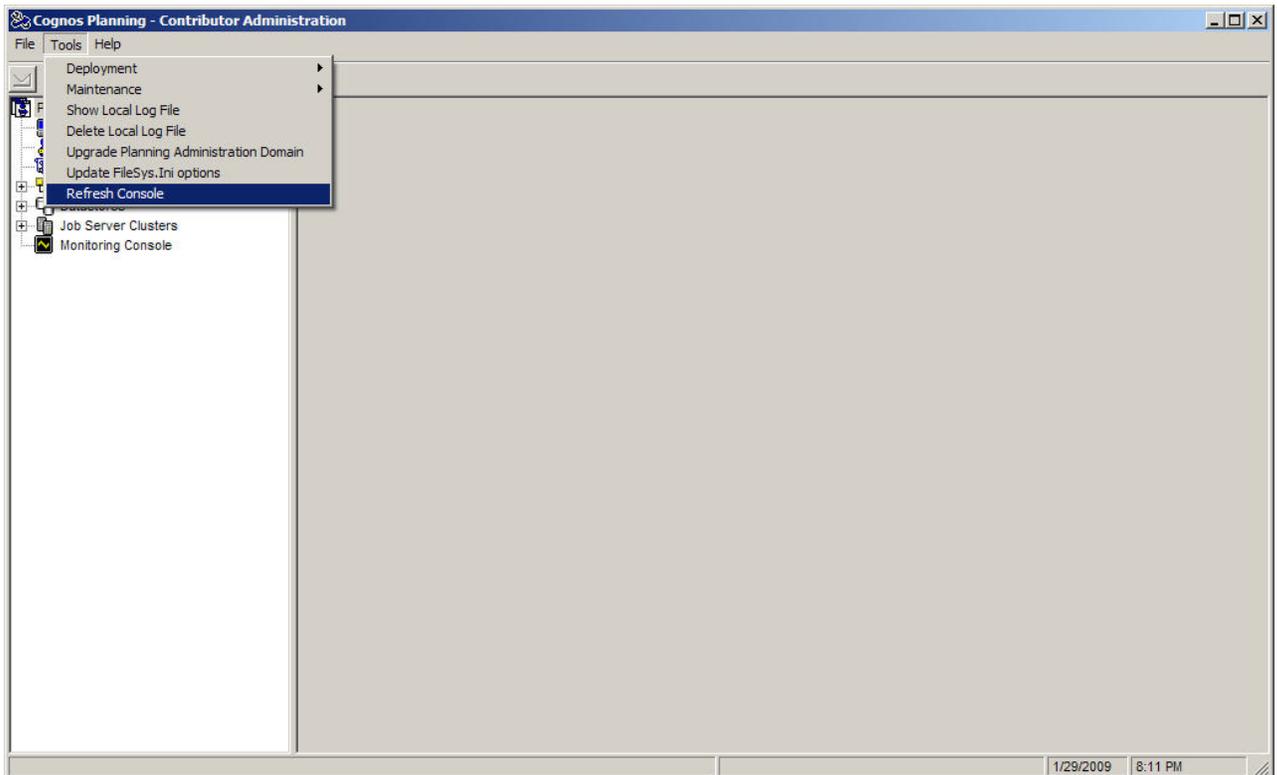
2.1.6. In the **Import Object Selection** page, uncheck the Planning Store and Analyst Libraries objects. Select the **Upstream_Oil_and_Gas_Blueprint** application and **Upstream_Oil_and_Gas_Blueprint** Analyst library objects for import and click **Next**. Only the Application(s) and Analyst Library(s) should be selected as shown below.



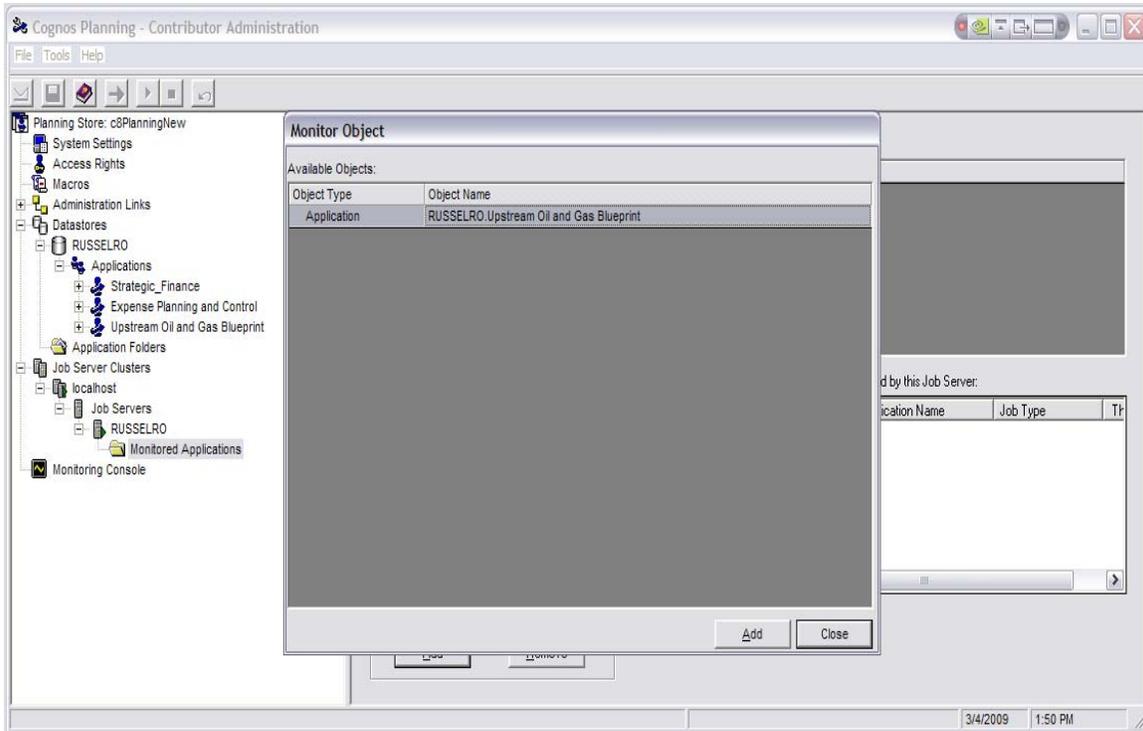
2.1.8. Click on **'Finish'**: the following dialog will appear:



2.1.9. Select **Tools** from the Contributor Admin Console Menu and **Refresh Console**. You will then see the application under your server.



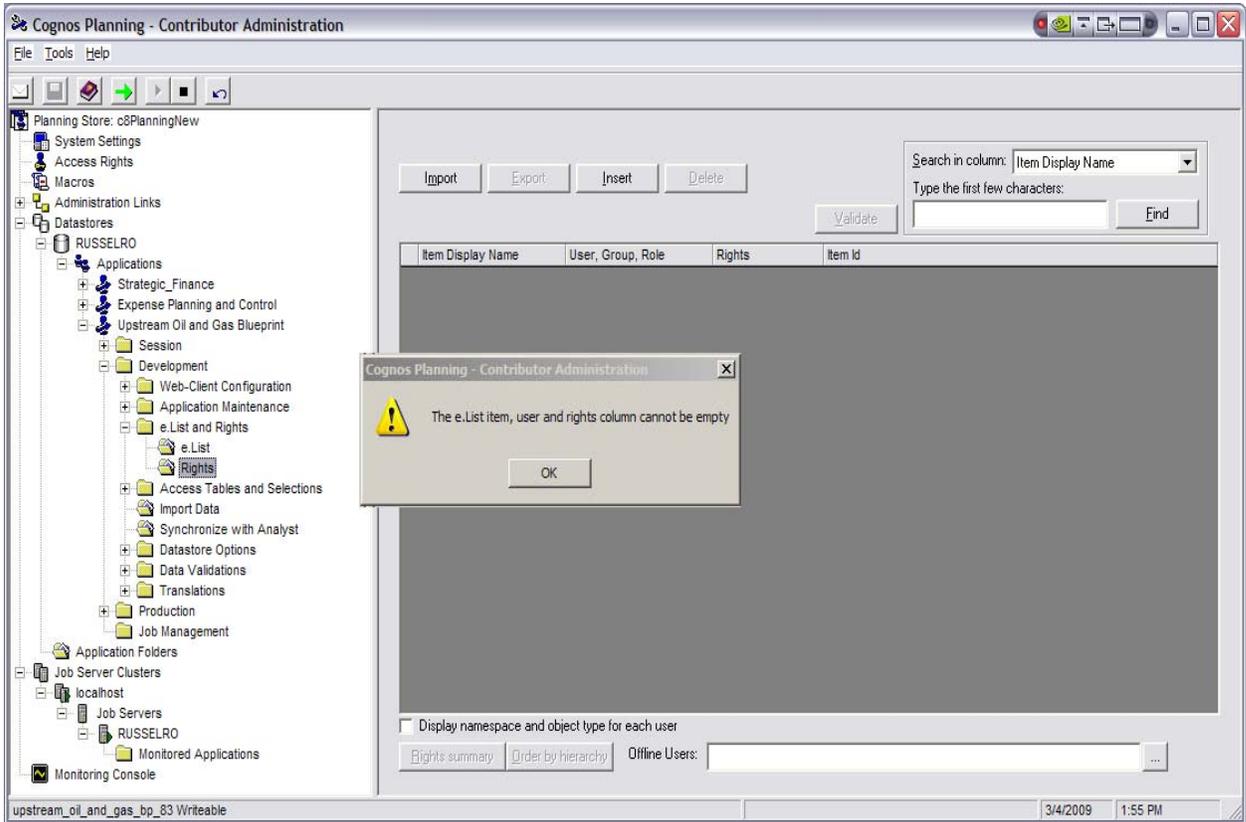
- 2.1.10. **Add the application to the monitored objects** by selecting your Job Server| Monitored Applications. If the application is not available on the first attempt, wait and refresh the console again as the first steps of the Import process must be completed before the applications can be monitored.



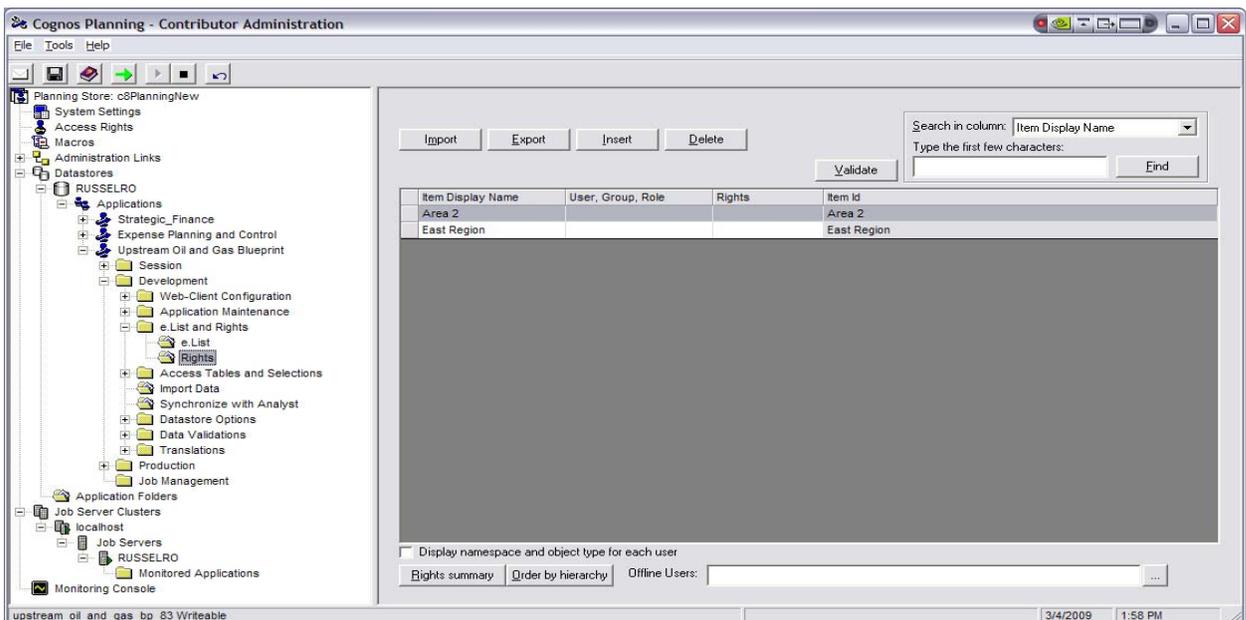
- 2.1.11. The import request starts on the server. You can view the progress of the import in the Monitoring Console on the Deployments tab.

Tip: During the import process, some application options are excluded from the transfer because they do not apply to the new application location, for example, display names, backup location, and publish options are excluded.

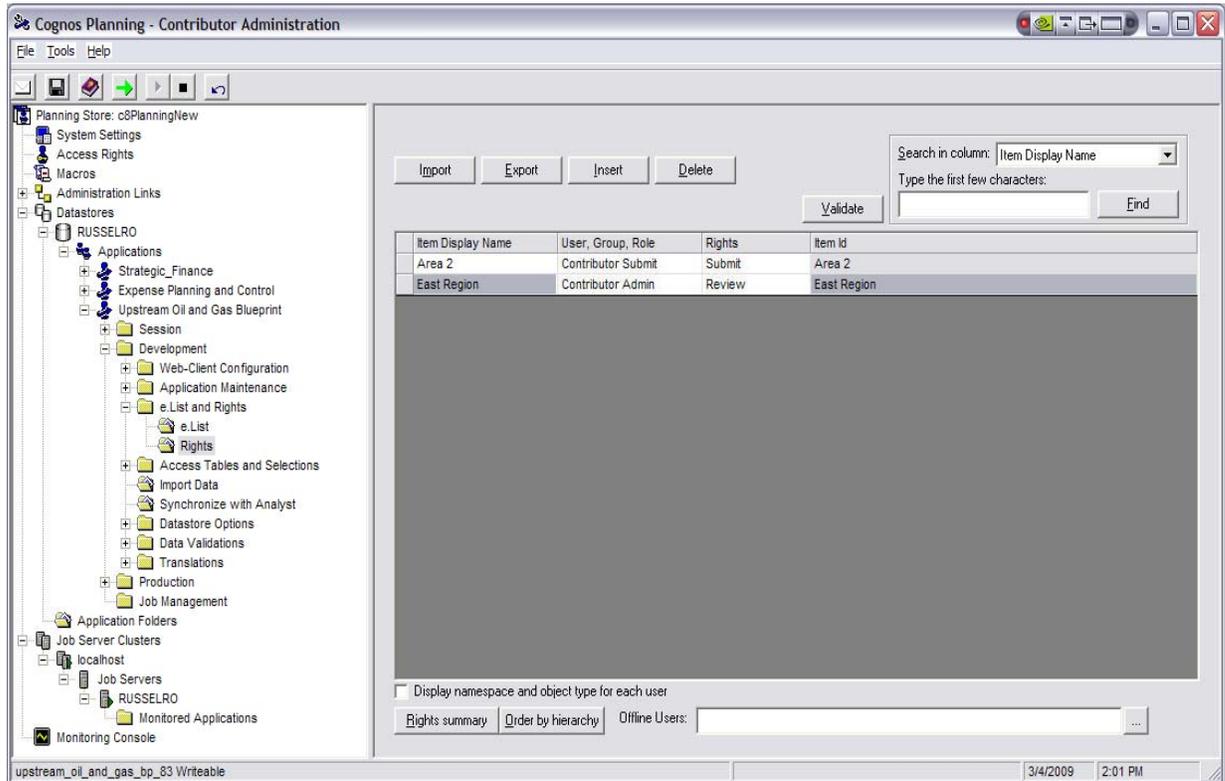
2.1.12. Select the application. Expand the Development folder | e.List and Rights | Rights. You will see a window warning that the e.List, user and rights column cannot be empty. Click **OK** and select Rights.



Once **OK** is clicked on the following screen will come up:

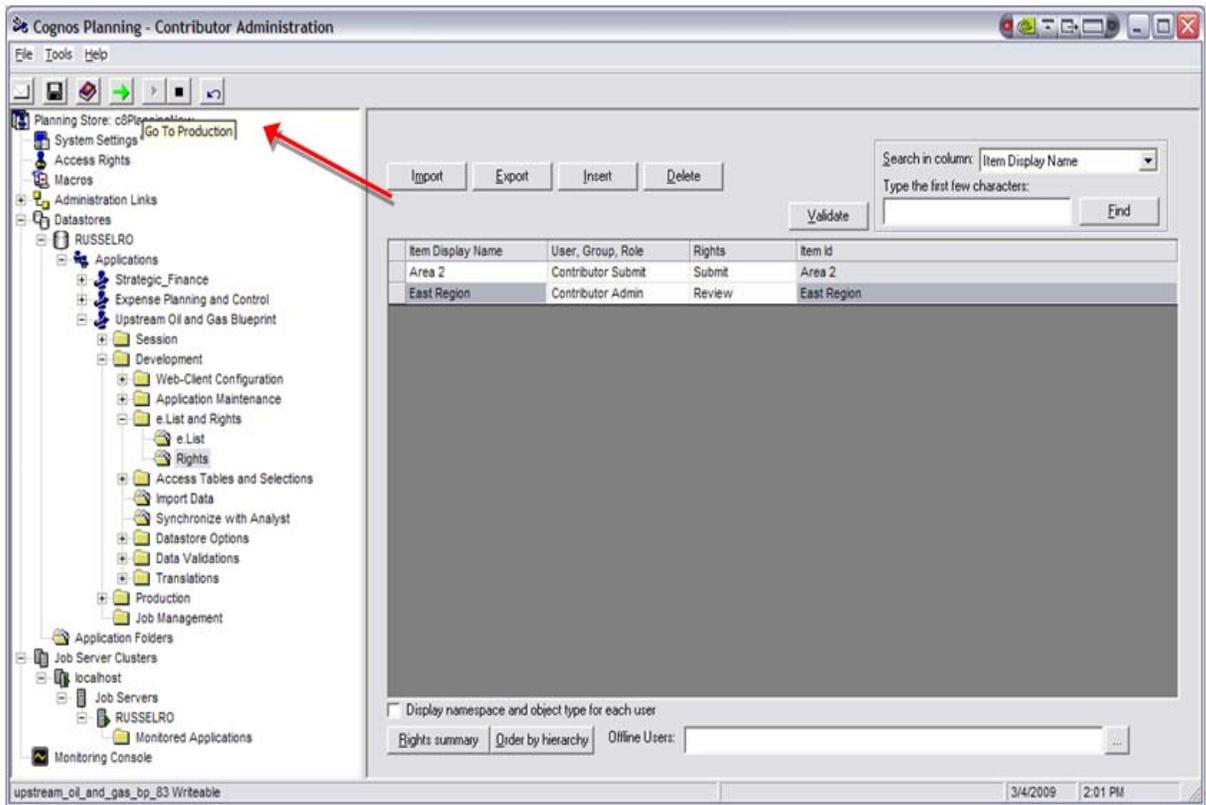


- 2.1.13. Since there are no Access Rights for any User, Group, Role. Select each entry and make sure that at least one user can submit to Consolidated.
 The following screen depicts how the access may be granted. On this example we have granted rights to "Contributor Submit", however access rights can be granted to any user, group or role on the namespace.



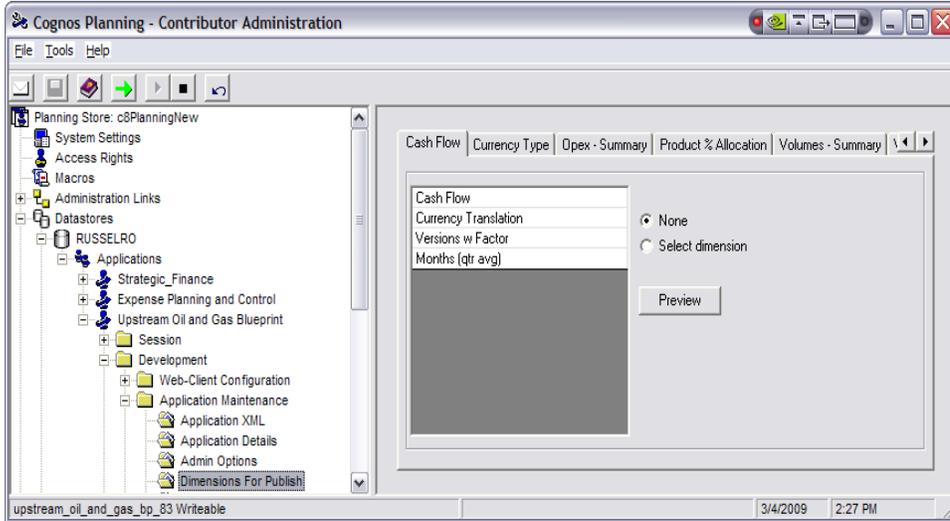
Once Access Rights are granted, save the changes by clicking on the diskette icon on the top right corner of the contributor administration window.

2.1.14. You must perform a **GO TO PRODUCTION** to make the application available to users on the web



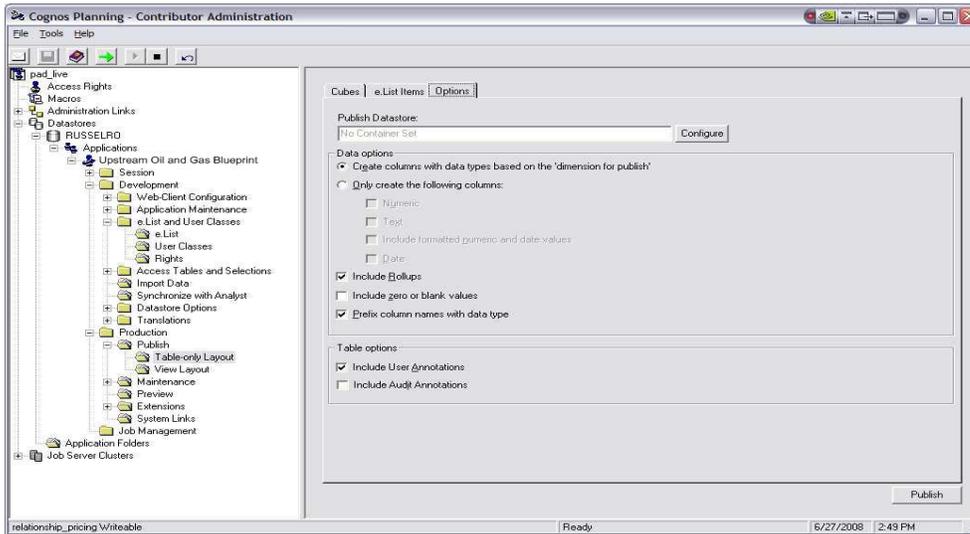
2.2. Set dimensions for publish

2.2.1. Ensure that the dimensions for Publish are all set to **None**

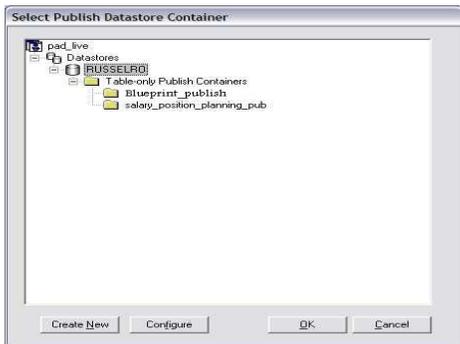


2.3. Create a Publish Container

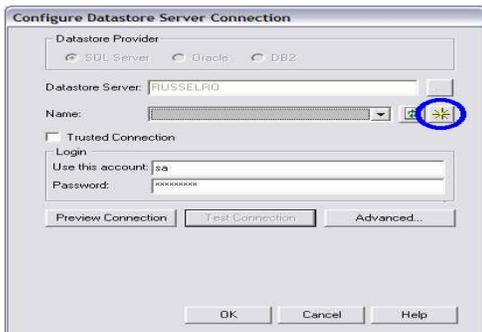
- 2.3.1. Expand the **Production Folder**
- 2.3.2. Expand the **Publish Folder**
- 2.3.3. Select the **Table-only Layout** folder
- 2.3.4. Select the **'Options'** tab and click on the **Configure** button



2.3.5. Select the Datastore then click on the **Create New** button



2.3.6. Click the '**Yellow Star** Button', which is highlighted in blue below, to open the 'Create a New Publish Container' dialogue



2.3.7. Type the name of the new Database exactly as follows: "**upstream_o_and_g_bluepri_table**" and set the location to where the datastore files will be stored.



2.3.8. Click **Create**

2.3.9. Click the **Test Connection** Button then OK after the test result dialog comes up.

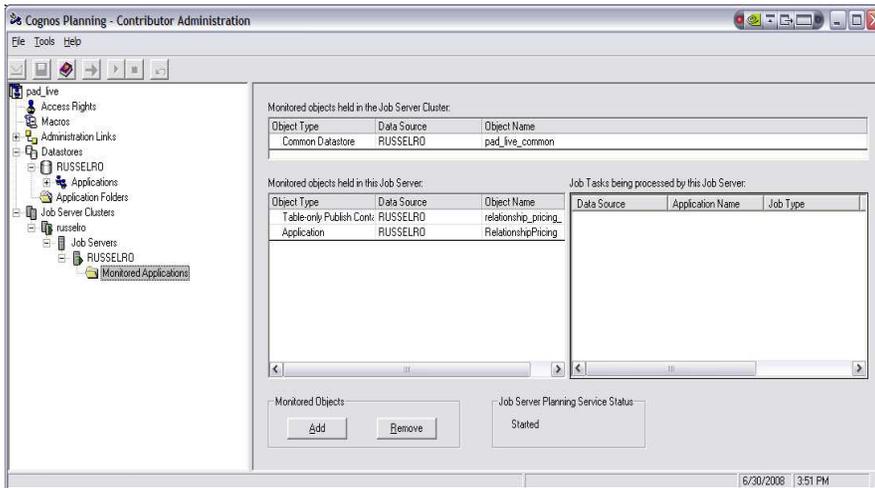


2.3.10. Click on **OK** in the 'Configure Datastore Server Connection' window

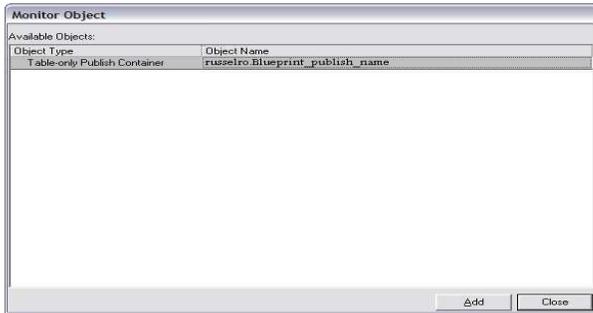
2.3.11. Select the newly created Publish Container then click **OK**.

2.4. Add the publish container to the Job Server

2.4.1. Expand the Job Servers Cluster to the Monitored Applications folder



2.4.2. Click the **Add** button under Monitored Objects



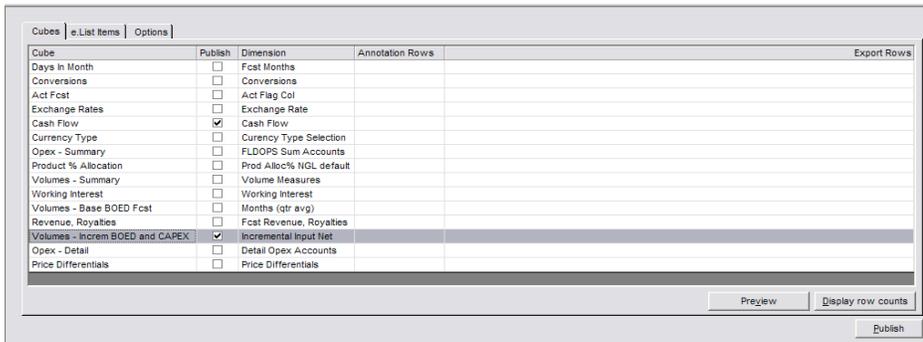
2.4.3. Select the Object Name "<serverName>.upstream_o_and_g_bluepri_table" then click **Add**

2.5. Configure the Publish Options

- 2.5.1. Expand the **Applications Folder** for the datastore hosting the application
- 2.5.2. Expand the **Strategic Finance Folder**
- 2.5.3. Expand the **Production Folder**
- 2.5.4. Expand the **Publish Folder**
- 2.5.5. Select **Table-only Layout** and choose the **Cubes** tab

On the Cubes tab, ensure the following items are selected:

- a) Volumes – Increm BOED and CAPEX
- b) Cash Flow



Note: The order of the cubes on screen may differ from your application

2.5.6. **Highlight the Volumes – Increm BOED and CAPEX row** and activate the drop down for the Dimension column and **choose “Versions”**

Cube	Publish	Dimension	Annotation Rows	Export Rows
Days in Month	<input type="checkbox"/>	Fcst Months		
Conversions	<input type="checkbox"/>	Conversions		
Act Fcst	<input type="checkbox"/>	Act Flag Col		
Exchange Rates	<input type="checkbox"/>	Exchange Rate		
Cash Flow	<input checked="" type="checkbox"/>	Cash Flow		
Currency Type	<input type="checkbox"/>	Currency Type Selection		
Opex - Summary	<input type="checkbox"/>	FLDOPS Sum Accounts		
Product % Allocation	<input type="checkbox"/>	Prod Alloc% NGL default		
Volumes - Summary	<input type="checkbox"/>	Volume Measures		
Working Interest	<input type="checkbox"/>	Working Interest		
Volumes - Base BOED Fcst	<input type="checkbox"/>	Months (qtr avg)		
Revenue, Royalties	<input type="checkbox"/>	Fcst Revenue, Royalties		
Volumes - Increm BOED and CAPEX	<input checked="" type="checkbox"/>	Versions		
Opex - Detail	<input type="checkbox"/>	Detail Opex Accounts		
Price Differentials	<input type="checkbox"/>	Price Differentials		

Buttons: Preview, Display row counts, Publish

2.5.7. Click on the e.List Items tabs then choose the **Select All** button

Buttons: Clear All, Select All Children, Select All Planners

- Consolidated
 - East Region
 - Area 2
 - Field 4
 - Field 5
 - Area 1
 - Field 1
 - Field 2
 - Field 3
 - West
 - Area 3
 - Field 6
 - Field 7

Button: Publish

2.5.8. Click on the **Options** tab

Buttons: Configure, Publish

Publish Datastore: russelro.Blueprint_publish_name

Data options

- Create columns with data types based on the 'dimension for publish'
- Only create the following columns:
 - Numeric
 - Text
 - Include formatted numeric and date values
 - Date
- Include Rollups
- Include zero or blank values
- Prefix column names with data type

Table options

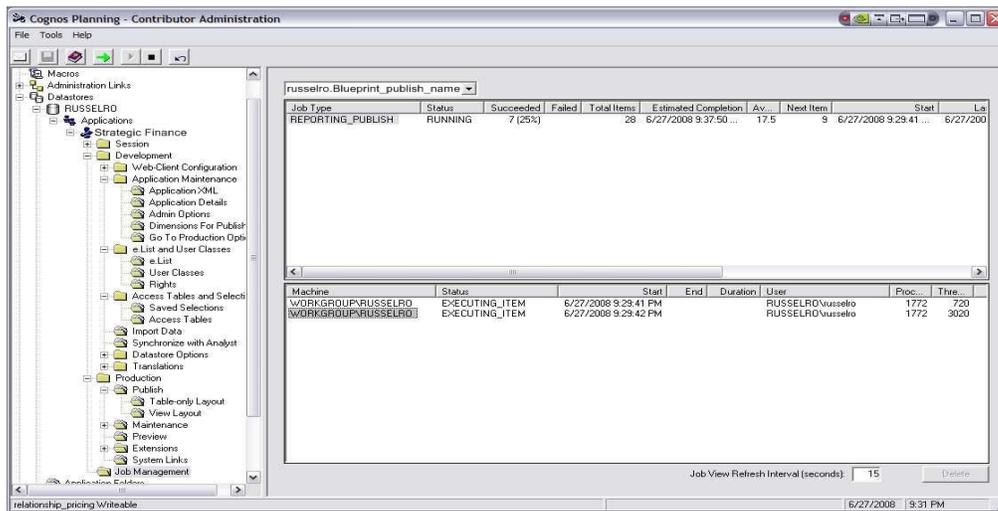
- Include User Annotations
- Include Audit Annotations

2.5.9. **Select the following options:**

- 2.5.9.1. **Create columns with data types based on the 'dimension for publish'**
- 2.5.9.2. Set the option to **'Include Rollups'**
- 2.5.9.3. Set the option to **'Include zero or blank values'**
- 2.5.9.4. **Clear** the checkmark from **'Include User Annotations'**
- 2.5.9.5. After selecting the options click the **Publish** button to execute the publish

2.6. Monitor the publish

- 2.6.1. Navigate to the **Job Management** folder and select the drop down to display the publish database which is running



- 2.6.2. After the process has finished it will display as **'COMPLETE'** in the status column

3. Steps for setting up Cognos 8 Business Intelligence system

3.1. Copy the necessary files into their respective directories

- 3.1.1. Copy the **Upstream Oil And Gas BI Deployment.zip** file into
 < Cognos 8 install location > / deployment

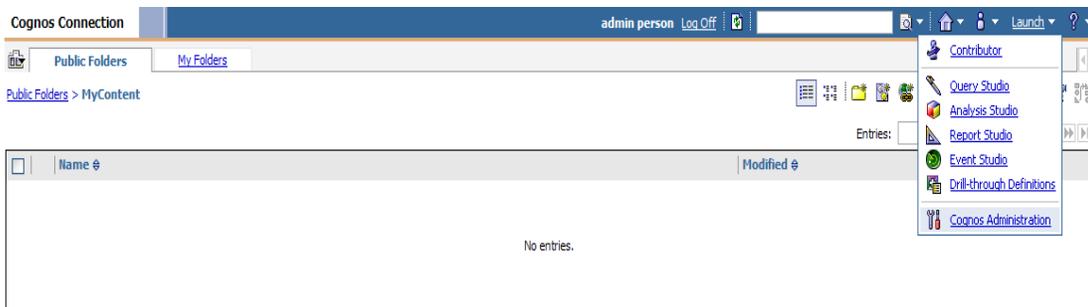
Note: Depending upon the BI environment configuration the location of the deployment folder may be setup to a different server, confirm the location with the BI administrator.

- 3.1.2. **Copy all images from the /Graphics,Files,etc** directory into
 < Cognos 8 install location > / webcontent / samples / images

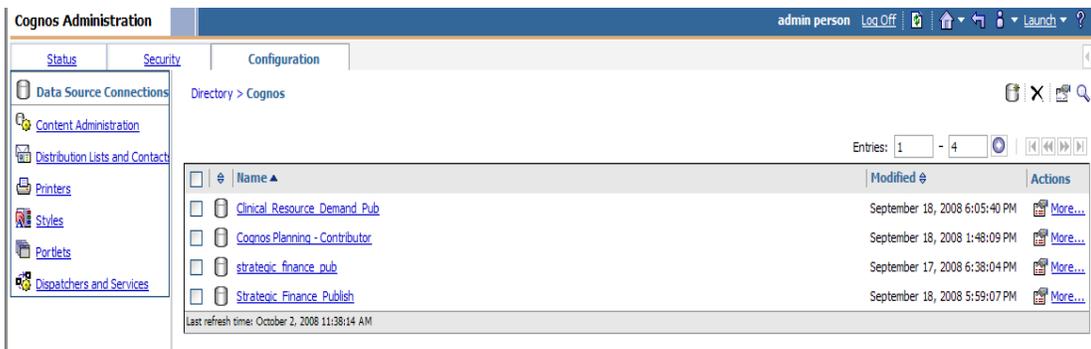
Note: For multi-server installation the images would need to be copied over the Gateway servers. Verify with the BI Administrator the architecture of the BI environment before copying the files.

3.2. Create the Upstream Oil and Gas data source

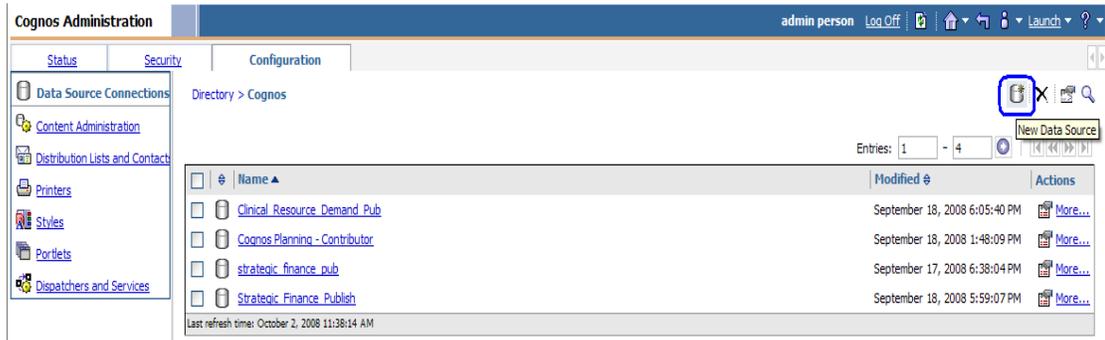
- 3.2.1. Open a browser window and go to **Cognos Connection**. If Authentication is setup, **login** with an **directory administrator user**
- 3.2.2. Click on to **Launch** and select **Cognos Administration**



- 3.2.3. Click on the **Configuration** tab, make sure '**Data Source Connections**' is selected



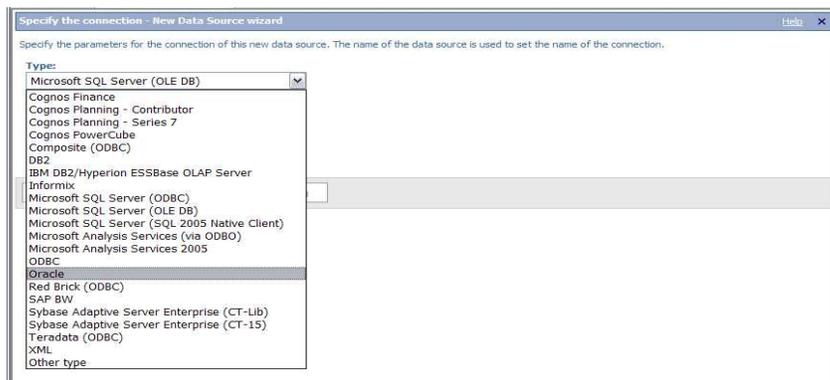
3.2.4. Click the **New Data Source Icon** 



3.2.5. Name the Data Source exactly as: **upstream_o_and_g_bluepri_table** then click **Next >**



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



3.2.7. 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

Edit 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

3.2.8. 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;DBInfo_Type=MS;Provider=SQLEDB;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:

Close

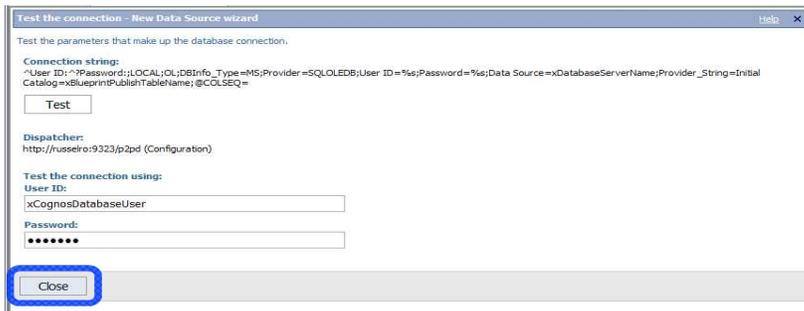
3.2.9. The following screen should indicate Succeeded below the Status then click **Close**

View the results - Test the connection

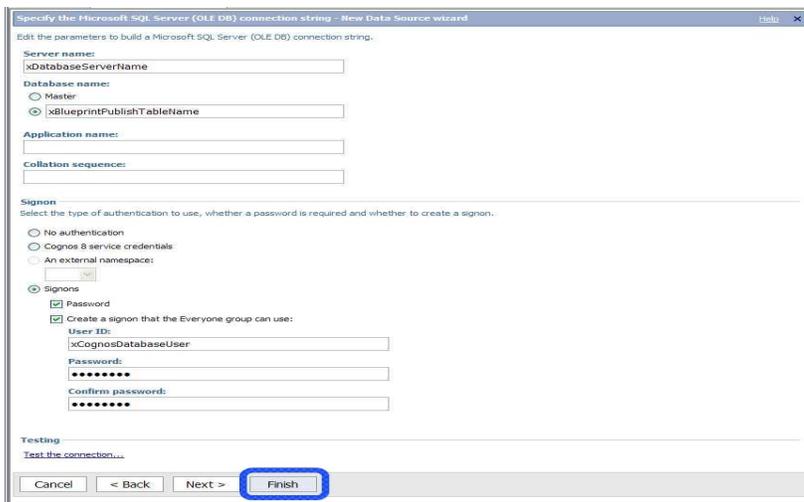
Name	Status	Message
http://russeiro:9323/p2pd	Succeeded	

Close

3.2.10. Click **Close**

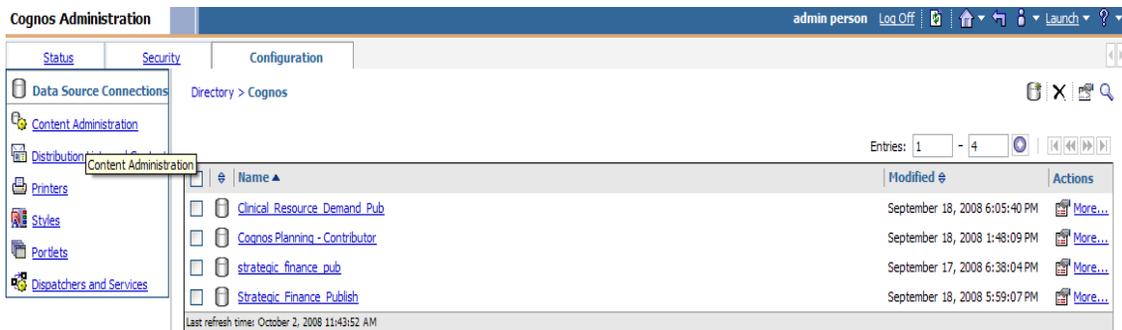


3.2.11. Click **Finish** to add the new data source



3.3. Run the import wizard to bring in the BI Content into the Cognos Connection portal

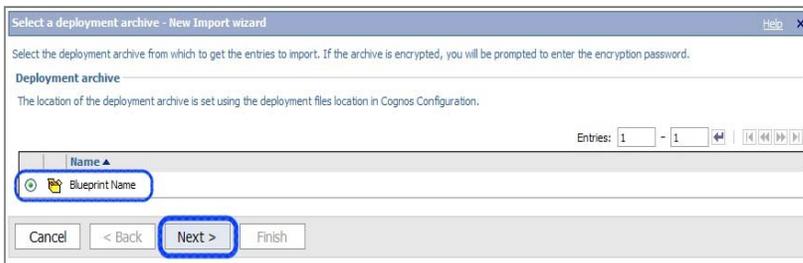
3.3.1. From the screen in the previous step, select **Content Administration**



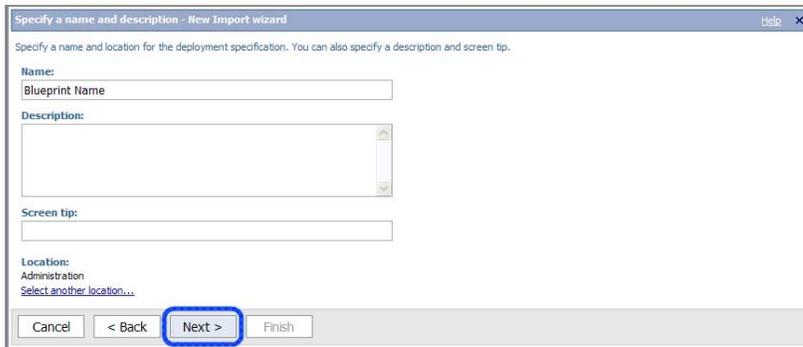
3.3.2. Click the **New Import** icon 



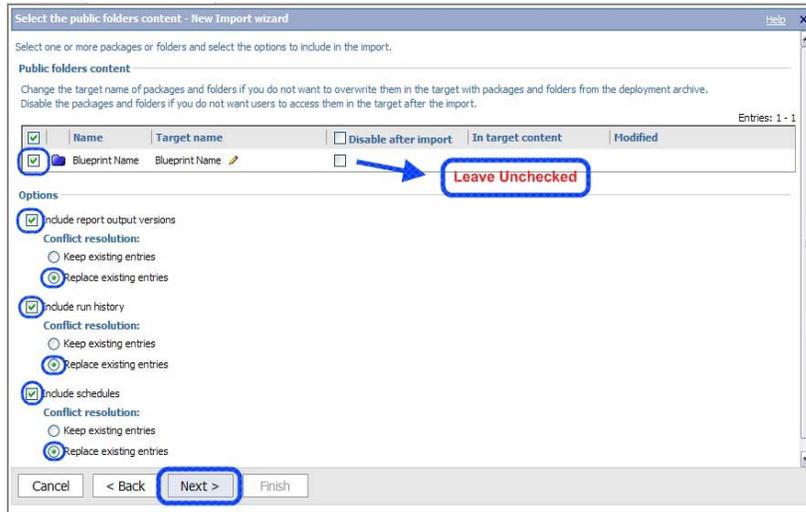
3.3.3. Select the import package named **Upstream Oil And Gas BI Deployment** then click **Next >**



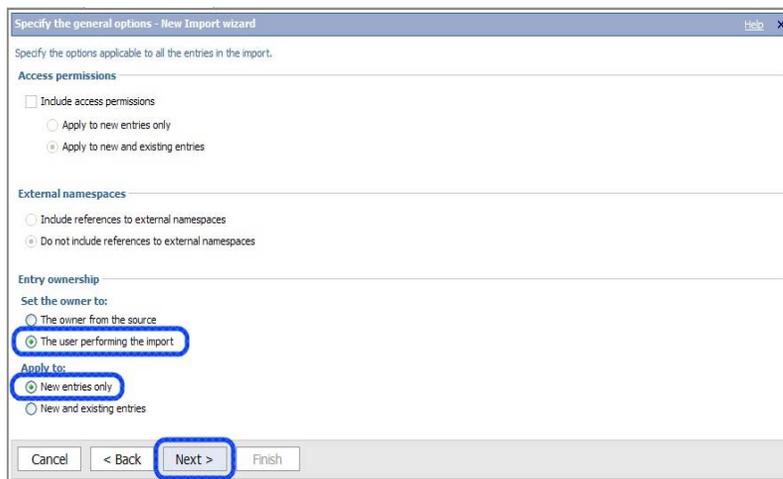
3.3.4. Verify the Name is 'UpstreamOilAndGasBI_Deployment' then click **Next >**



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



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



3.3.7. Review the summary options selected then click **Next >**

The screenshot shows the 'Review the summary - New Import wizard' dialog box. It contains the following sections:

- Deployment specification:** Name: Blueprint Name, Description: (empty)
- Deployment archive:** Name: Blueprint Name
- Public folders content:** A table with columns: Name, Target name, Disable after import, In target content, Modified. One row is visible: 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:** (empty)

At the bottom, there are buttons: Cancel, < Back, **Next >** (highlighted with a blue circle), and Finish.

3.3.8. Choose 'Save and run once' then click **Finish**

The screenshot shows the 'Select an action - New Import wizard' dialog box. It contains the following sections:

- Action:** Three radio buttons: **Save and run once** (selected and highlighted with a blue circle), Save and schedule, and Save only.

At the bottom, there are buttons: Cancel, < Back, Next >, and **Finish** (highlighted with a blue circle).

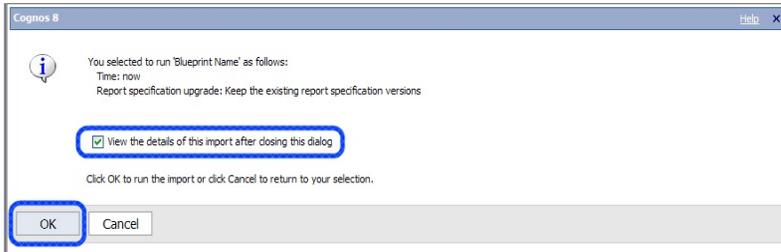
3.3.9. Specify the time as 'Now' and 'Keep the existing report specification versions' then click **Run**

The screenshot shows the 'Run with options - Blueprint Name' dialog box. It contains the following sections:

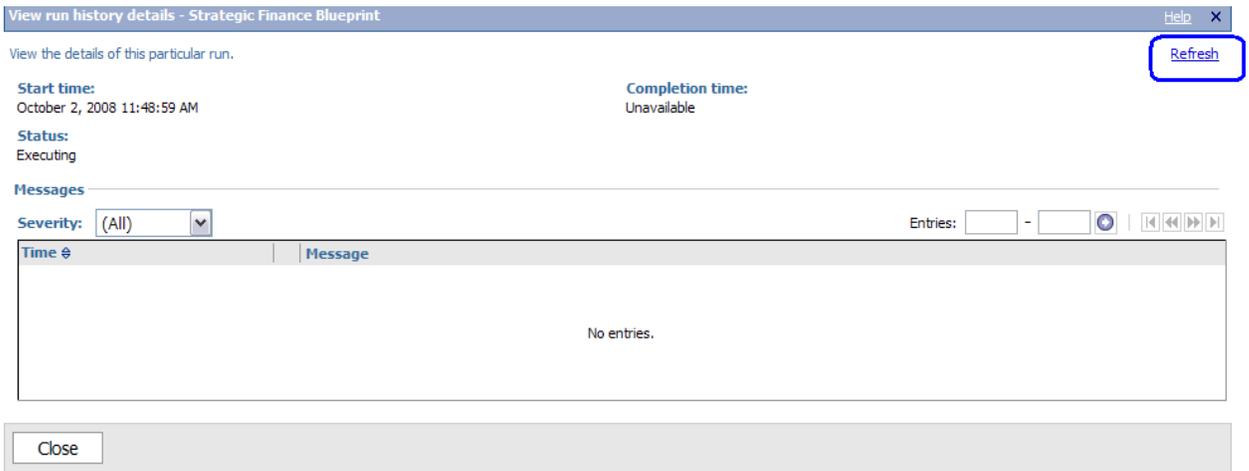
- Time:** Radio buttons: **Now** (selected and highlighted with a blue circle), Later: May 22, 2008, 2 : 48 PM.
- Content:** A tree view with checked items: Content store, Directory, Cognos namespace, Public Folders, and Blueprint Name.
- Report specification upgrade:** Radio buttons: Upgrade all report specifications to the latest version, **Keep the existing report specification versions** (selected and highlighted with a blue circle).

At the bottom, there are buttons: **Run** (highlighted with a blue circle) and Cancel.

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



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



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

Cognos Administration admin person Log On

Status Security Configuration

Data Source Connections

Content Administration

Distribution Lists and Cor

Printers

Styles

Portlets

Dispatchers and Services

View an import deployment record - Blueprint Name - Import

View the details of this particular run.

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

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

Status:
Succeeded

Messages

Entries: 1 - 1

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

Deployment archive

Name:
Blueprint Name

Public folders content

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

Options:

Include report output versions
Replace existing entries

Include run history
Replace existing entries

Do not include schedules

Directory content

Do not include Cognos groups and roles
Do not include distribution lists and contacts
Do not include data sources and connections

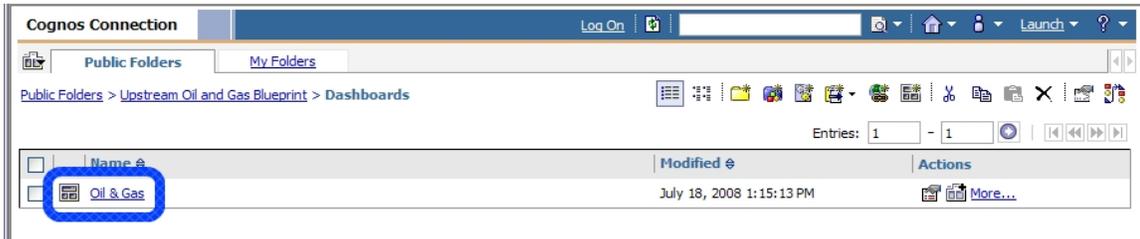
General Options

Do not include access permissions
Do not include references to external namespaces
Set the owner to the user performing the import

Close

3.4. Test the Blueprint report(s)

- 3.4.1. Navigate to **Public Folders** and click the **'Upstream Oil And Gas Blueprint'** folder then click the **Dashboards** Folder then click the **Oil & Gas** link 



- 3.4.2. If installed correctly the dashboard will display as follows

