SALES PERFORMANCE MANAGEMENT FOR SALESFORCE.COM BLUEPRINT
PERFORMANCE BLUEPRINT APPLICATION BRIEF
A WEB-BASED PERFORMANCE MANAGEMENT SOLUTION

Table of Content

1. Blueprint Overview

This document explains the content and provides installations steps for a web-based solution reporting off salesforce.com. The solution is an asset for managing and measuring Sales performance data, and helping management to make faster decisions by looking at what is the behavior of Pipeline, Revenue and Forecast across multiple business perspectives.

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 an insight into different Metrics and KPIs to understand better how they have been performing.

The SPM Blueprint, together with your IBM Cognos performance management software, provides a reliable, consistent reporting tool that lets you analyze past, current and future Sales performance at its different stages.

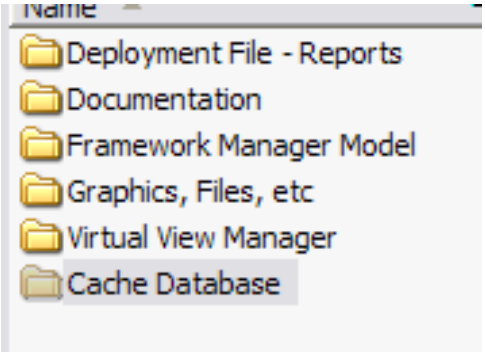
The first stage of this blueprint is focused on Sales Performance Analytics

- SPM / Salesforce Pains:
    - Sales management and their support staff spend too much time 'crunching the numbers' rather than analyzing them to support their measuring, monitoring and planning.
    - While great for operational reporting, the out of the box Salesforce.com analytics lack multi-dimensional capabilities and are not able to incorporate data from additional sources
- IBM Cognos Blueprint Solution:
    - Pre-built report content based on key sales metrics of pipeline, revenue, and forecast, that is mapped to the salesforce.com data model to highlight connectivity to Salesforce.
    - Easy to use multi-dimensional interface to highlight C8 capabilities
    - Incorporation of external data to highlight multiple source capability

2. Making Content Files available for each application

2.1. Unzipping the "SPM_Blueprint_Content"

After unzipping the "SPM_Blueprint_Content" it will create the following directories:



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

2.2. Copying the necessary files into their respective directories

Copy the SPM_Blueprint_BI_Deployment.zip file 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.

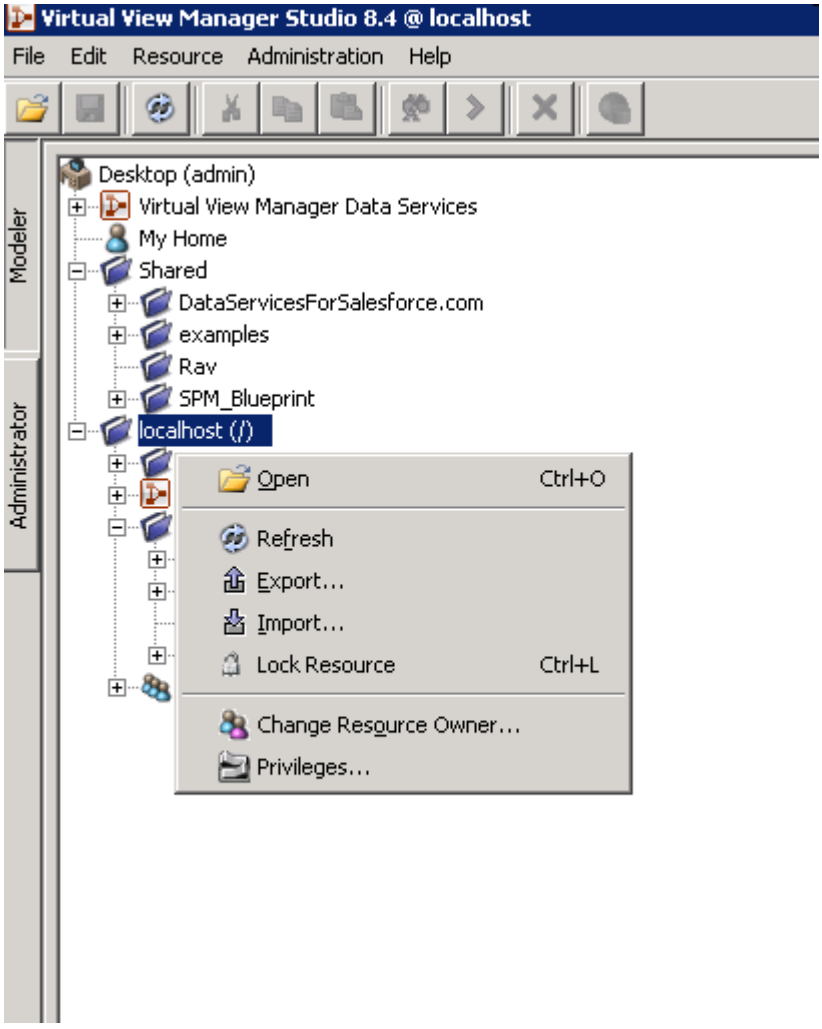
Copy all folders/images from the /Graphics,Files,etc directory into <IBM Cognos 8 install location>/webcontent/samples/images

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.

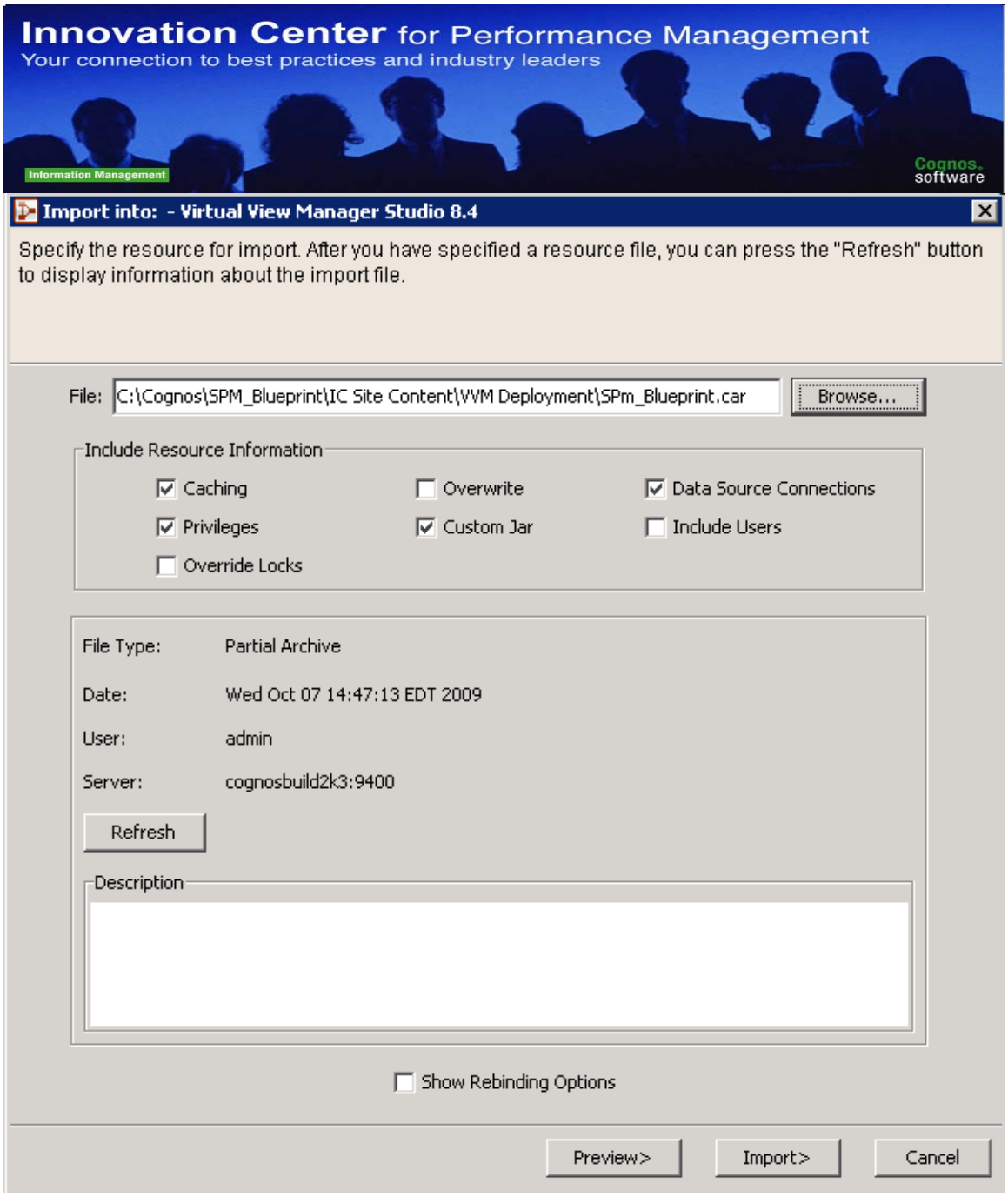
3. Virtual View Manager

3.1. Import the Content

- Right click onto the Object where you would like to import the content to. This action will bring up the context menu as depicted in the following screen cap:



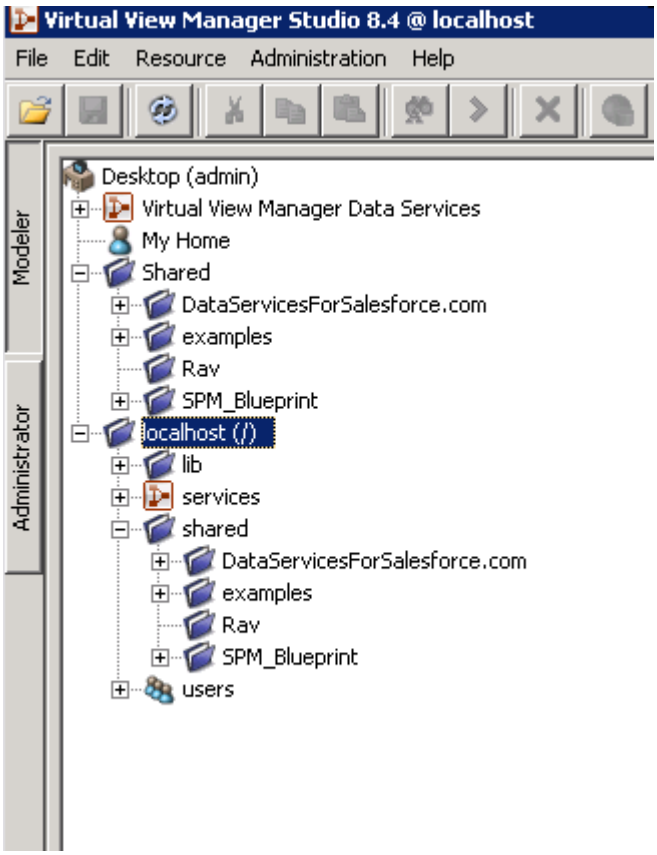
- Select Import, the following dialog will come up:



The file location will not be initially populated. Click onto ‘Browse’ to find the .CAR file included in the Blueprint content.
Then, make sure all the options are selected as in the previous screen capture.

Finally, click onto ‘Import’ to proceed.

- Once the import is executed satisfactorily, a new folder ‘SPM_Blueprint’ with show up in the location selected.



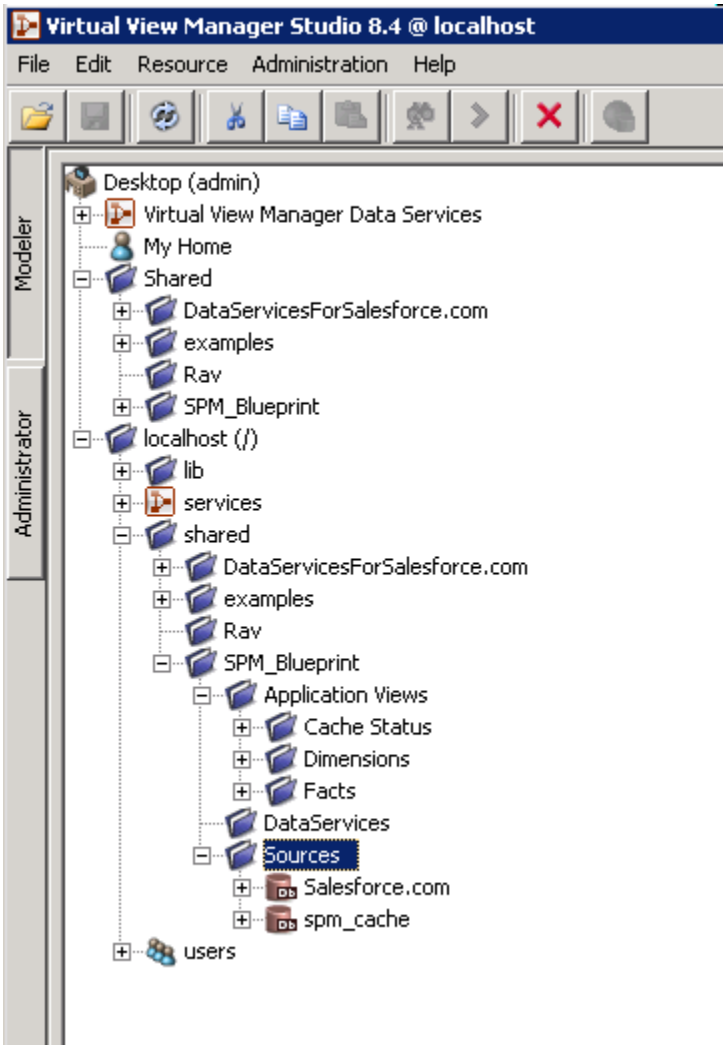
3.2. Update the content with Servers and Credentials

After the content is imported , it is required that the two connections used in Virtual View Manager are modified accordingly to re-direct the connections to the Servers in your organization.

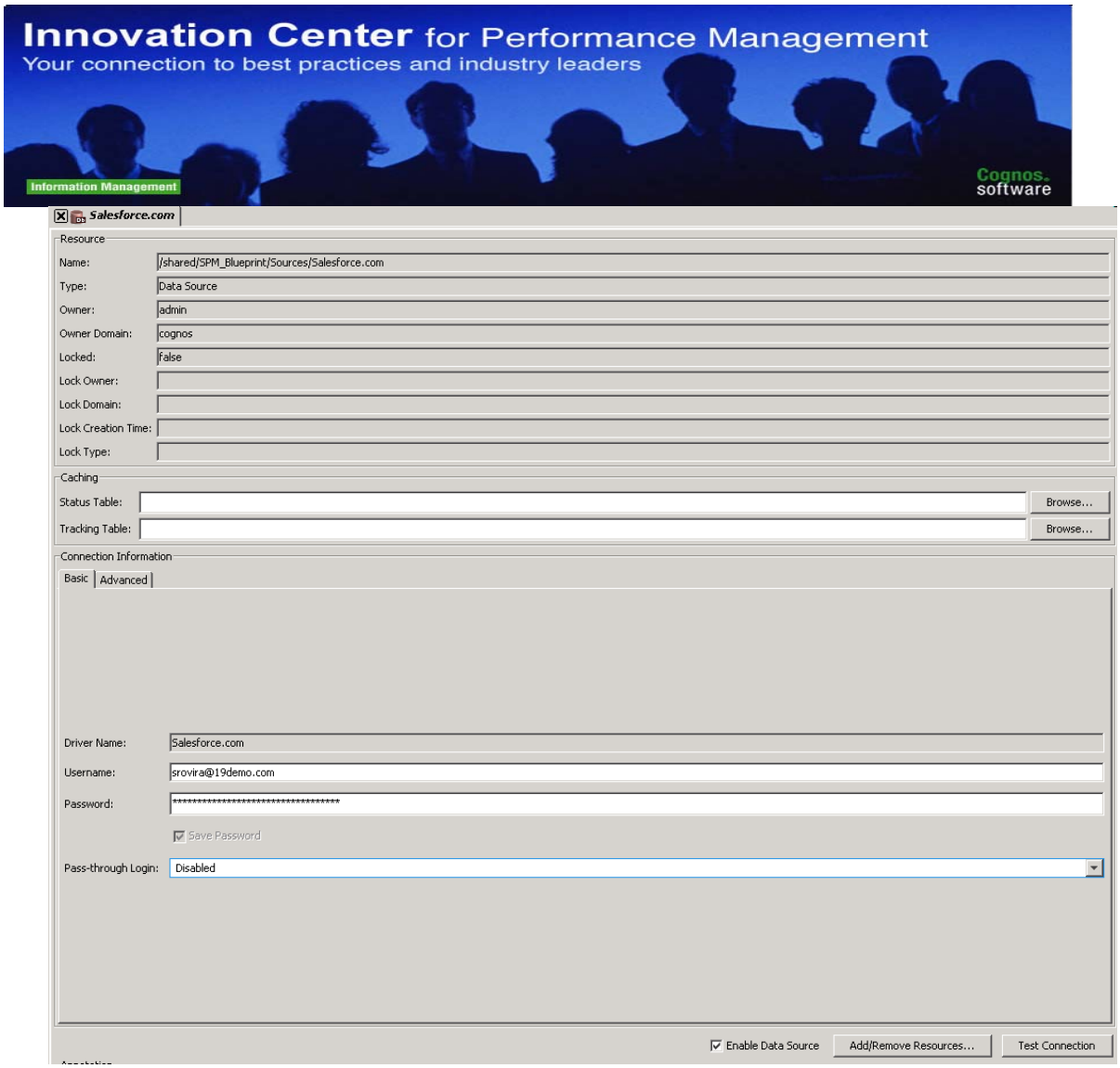
3.2.1. Connection to Salesforce.com

The following are the steps to update the connection parameters:

- Expand the ‘SPM_Blueprint’ folder, then expand the ‘Sources’ folder

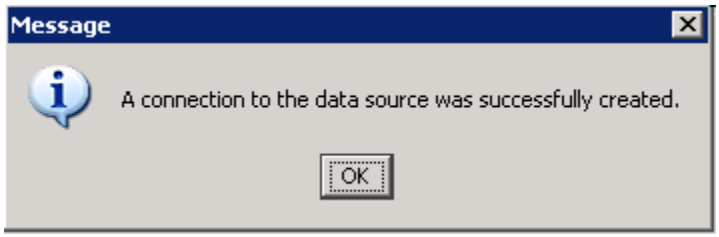


- Right click onto salesforce.com source, click onto ‘Open’



- Modify the 'Username' and 'Password' to have the credentials assigned to your organization. The 'Password' field is to be populated with password and the Security Token assigned to the user.

- Click onto 'Test Connection' to make the connection is successful by getting the following dialog:

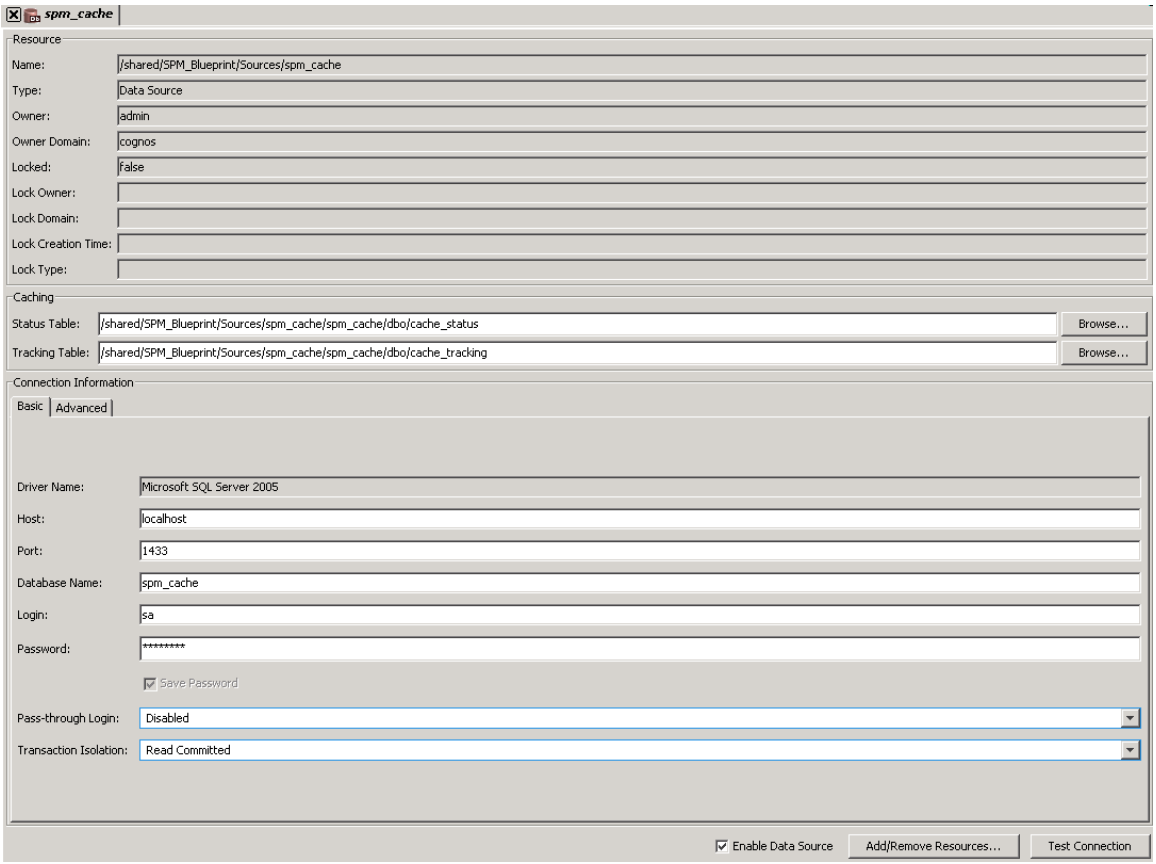


- Click 'OK' . Close the Salesforce.com source connection parameters.

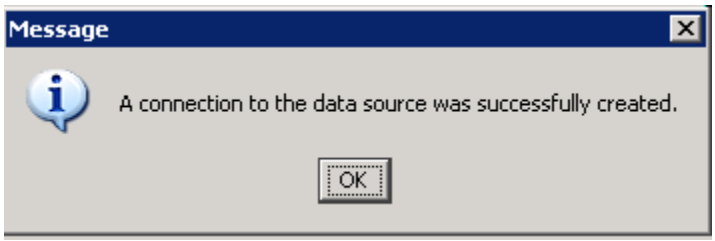
3.2.2. Connection to Cache Database

The following are the steps to update the connection parameters:

- Right click onto ‘spm_cache’ , click onto ‘Open’



- Modify the Host, Port, Database Name, Login and password with the connection parameters for the Server hosting the cache database in your organization.
- Once the changes are performed, test the connection to validate the settings:

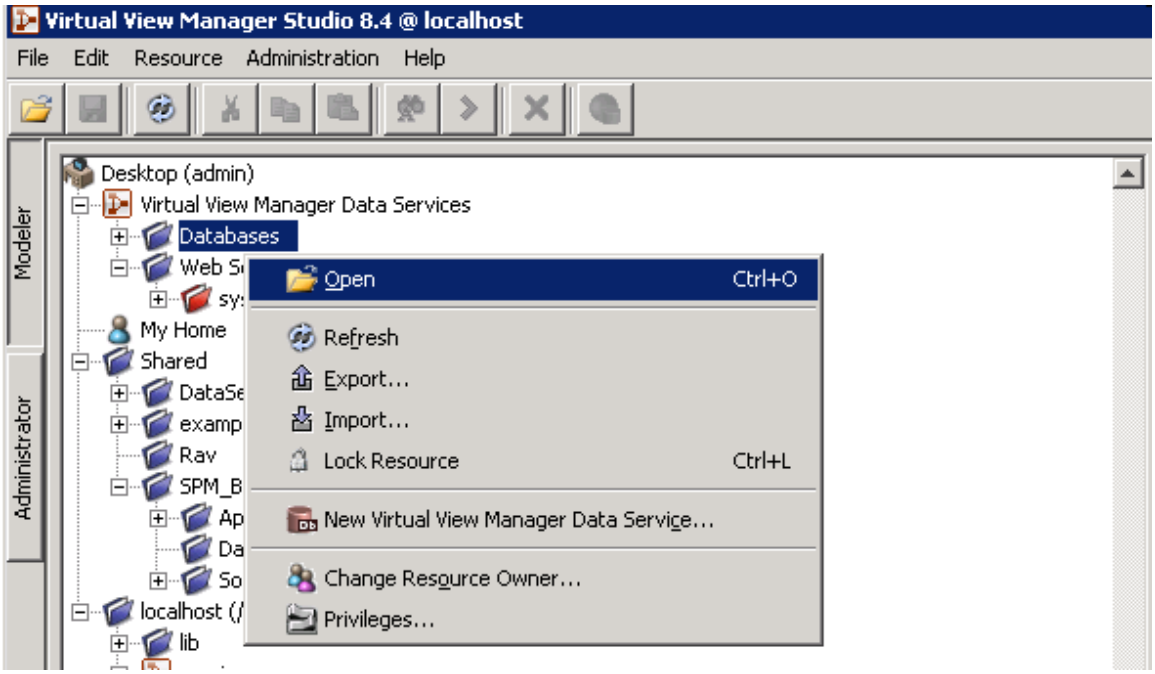


NOTE: To Refresh the content of the cache data it is required that each cache object is edited in IBM Virtual View Manager to issue a "Refresh Now". Once this step is performed for all the cached objects, reports will display the data associated to your Organization's Salesforce environment.

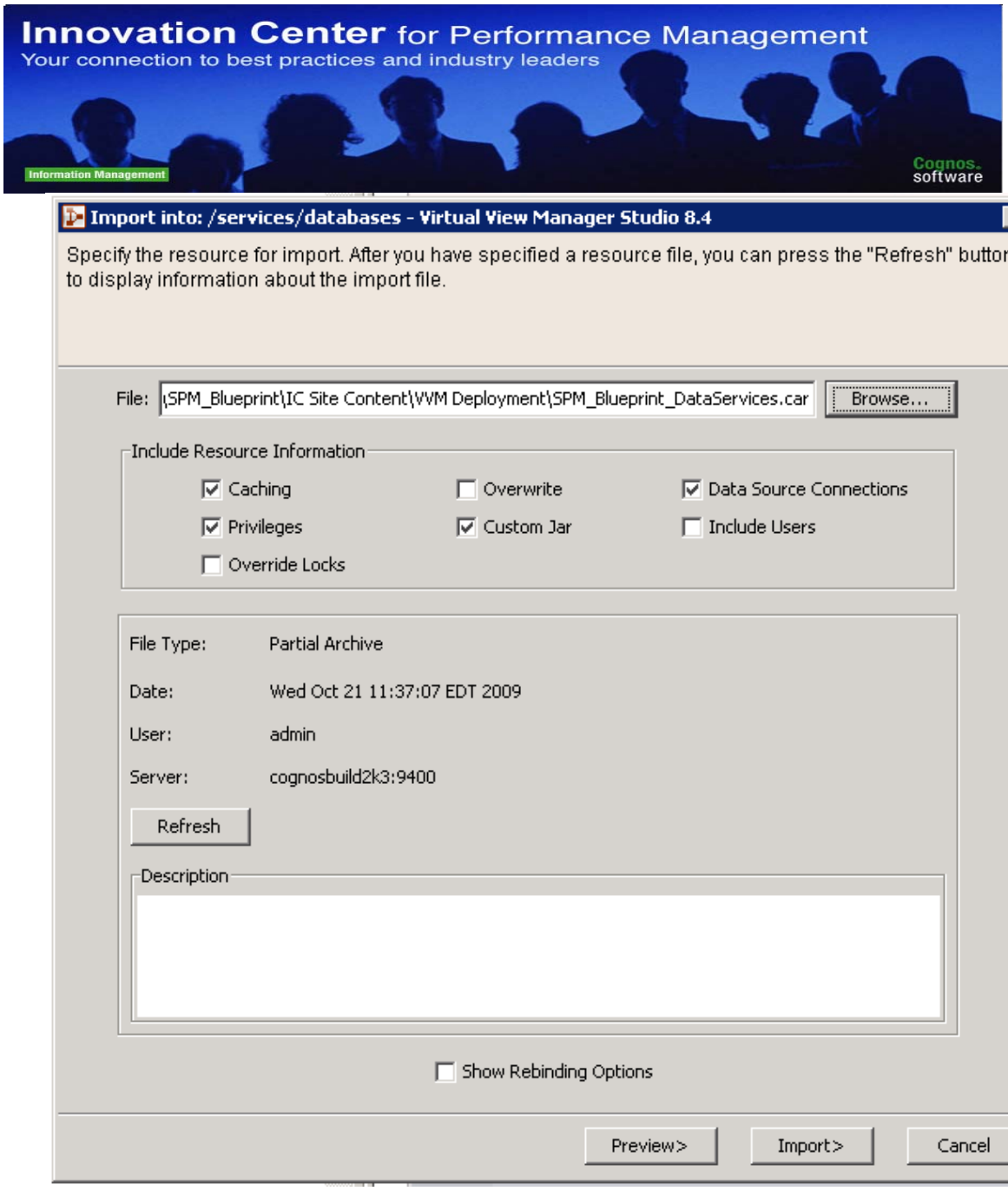
3.3. Importing the Data Services

After the Virtual View Manager Content is imported, the Data Services objects would need to be imported to have the objects exposed in Virtual View Manager for Reporting.

- Expand Virtual View Manager Data Services:



- Select Import and browse to the location of the file:



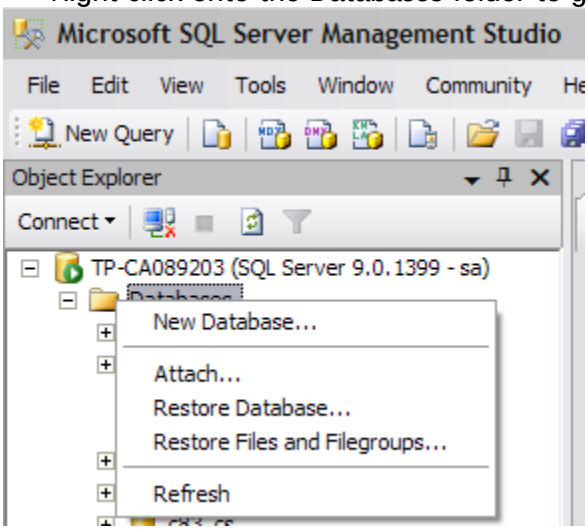
- Click onto Import to proceed with the import. The overwrite option may need to be selected if the content already exist within the Data Services.

4. External Data Sources

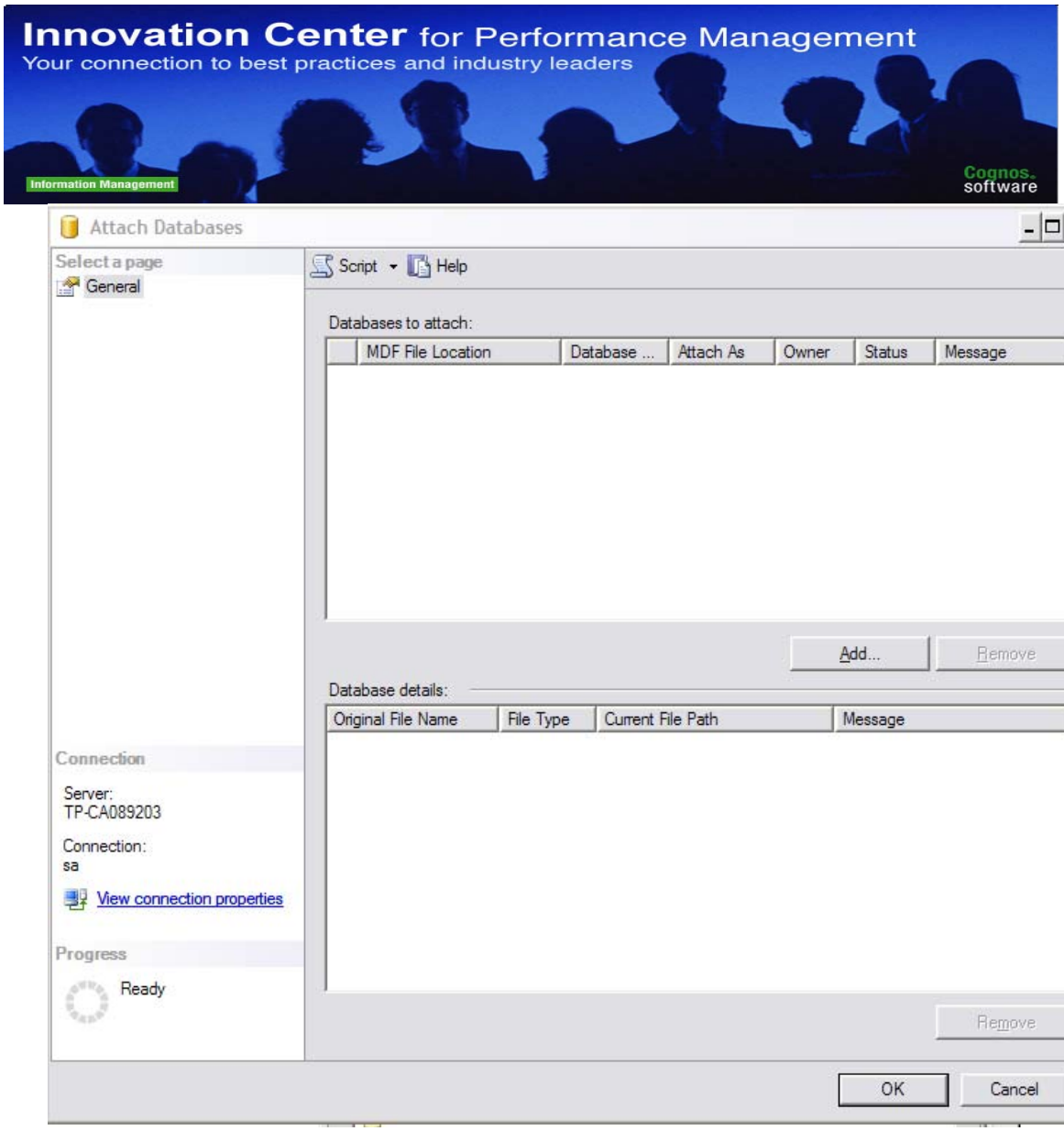
4.1. Importing/Attaching the Cache database - SQL Server Database

Follow the Microsoft SQL Server documentation to attach the database. Simple steps on how to perform this task are included, however verification with the Microsoft SQL Server installed versions is recommended.

- Open SQL Server Management Studio 2005, connect to the database server where the database will be attached to.
- Right click onto the Databases folder to get accces to the context menu:



- Click onto ‘Attach’ to get the following dialog:



- Click onto ‘Add’ button to select the location of the MDF and LOG files.

Follow the steps in the screen to find the MDF file first, then attach the log file as well by clicking onto ‘Add’ again.

Once the database is attached, grant the proper permissions to the user with access permission. Make a note of the credentials as they will be required to configure the connection in both IBM Cognos Virtual View Manager and IBM Cognos BI.

5. IBM Cognos 8 BI Content

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

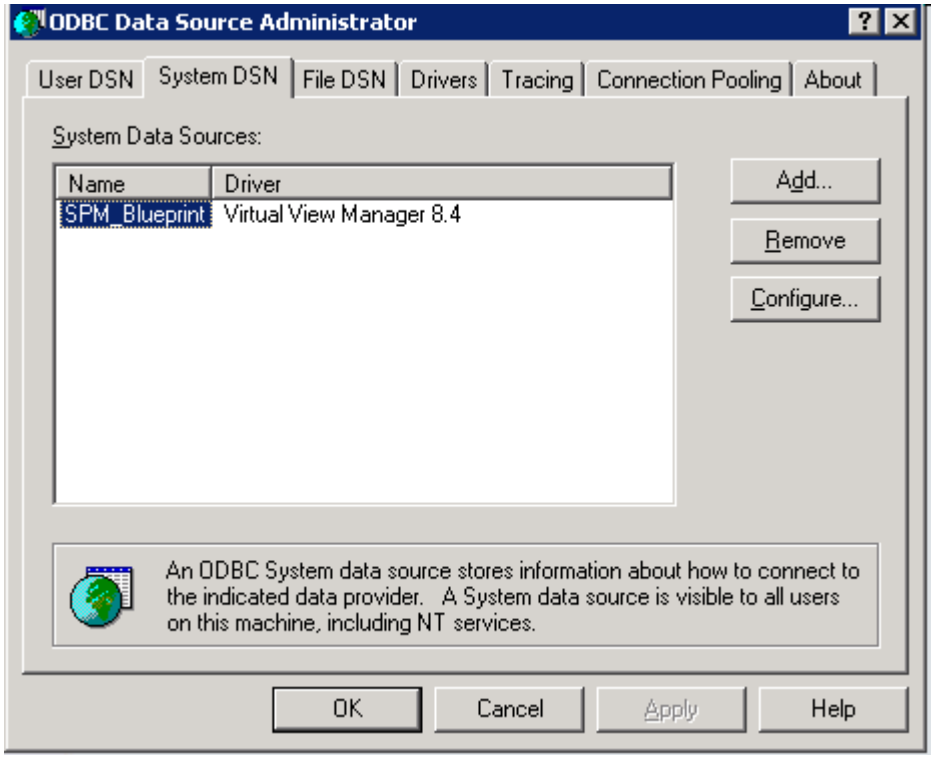
5.1.1. Create the data sources

First, we will look into creating the connections to the data sources.

5.1.1.1. Create the ODBC Connection to access IBM Virtual View Manager data service

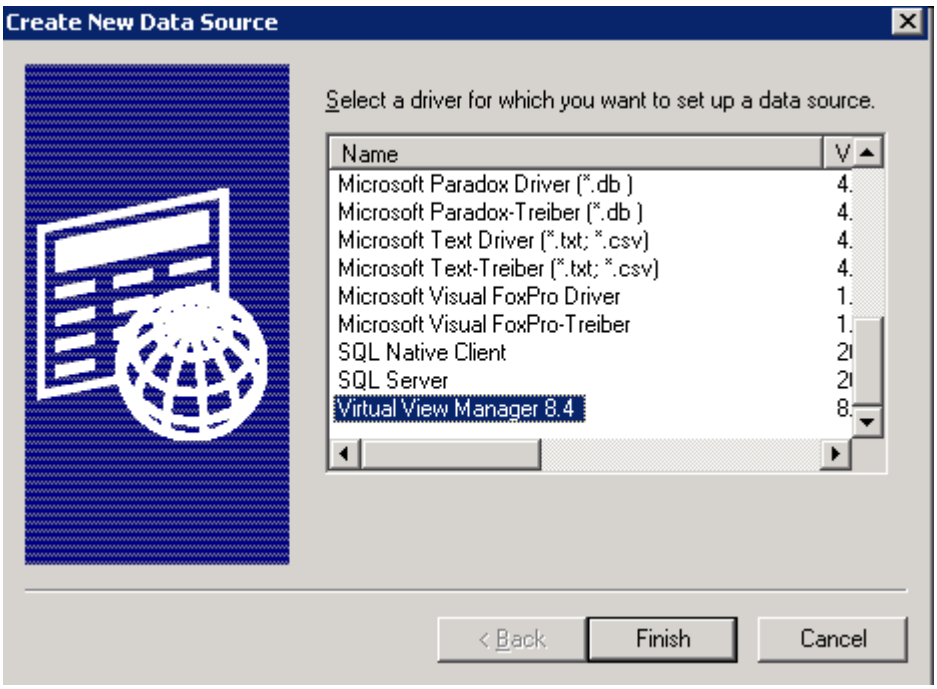
Note: The Blueprint steps assume the installation steps are being following on a Windows Operating System based Server. If you organization has otherwise, please contact IBM Cognos Support to look for alternatives on setting up ODBC connections on other Operating System environments.

- Open 'Data Source (ODBC)' from Administrative tools



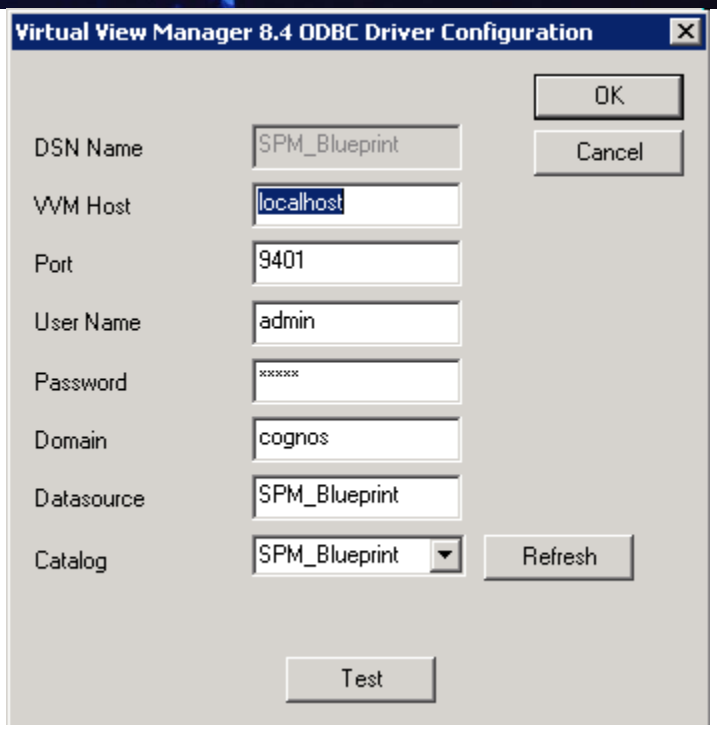
The previous screen shows a data source already created to Virtual View Manager, however the process create a new is:

- Click onto ‘Add’ button



One may need to scroll down to the bottom to see the driver for a Virtual View Manager connection.

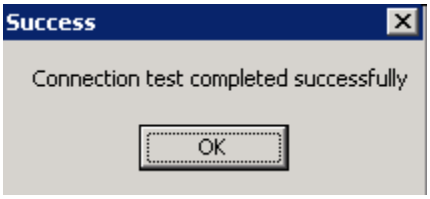
- Click onto ‘Finish’
- On the Connection parameters make sure the following settings are set:



Modify the VVM Host, Port and credentials to match those on your environment.

Domain, Datasource and Catalog are to be set as displayed in the previous screen capture. To obtain the Catalog, one may need to hit the 'Refresh' button to pool the server and have access to the catalogs available.

- Click onto 'Test' to validate the settings:

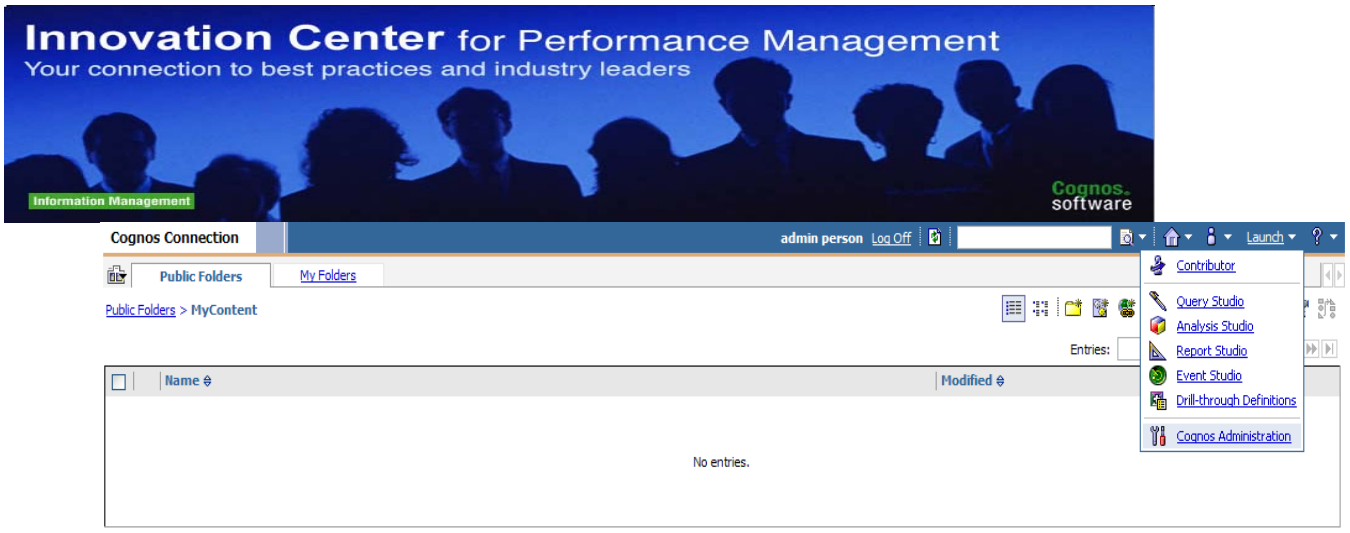


- click onto 'OK', then 'OK' and close the ODBC Connection settings.

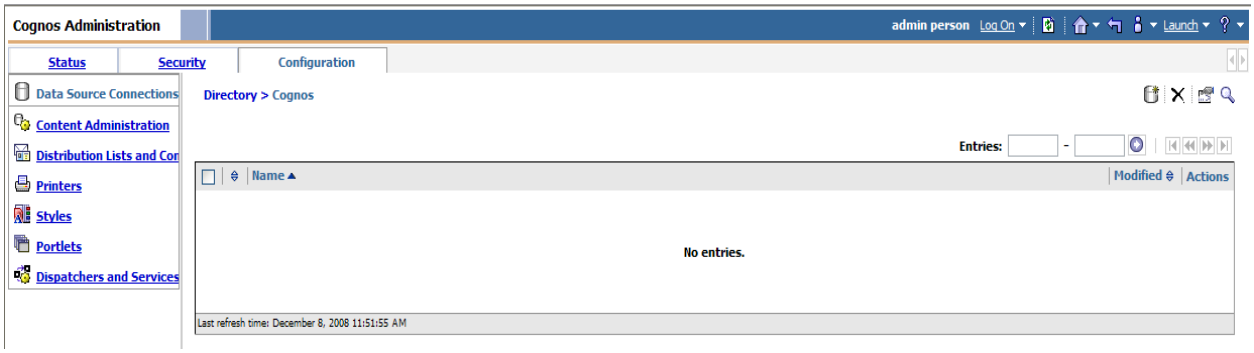
5.1.1.2. Create 'SPM_Blueprint' data source

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

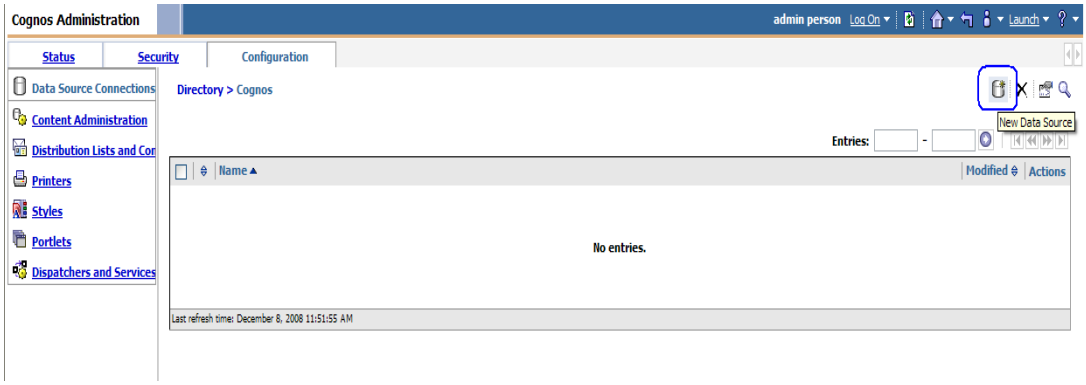
Click on to Launch and select IBM Cognos Administration



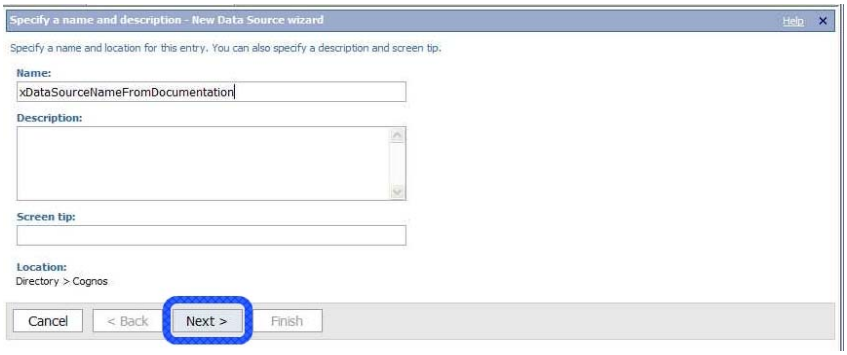
Click on the Configuration tab; make sure ‘Data Source Connections’ is selected



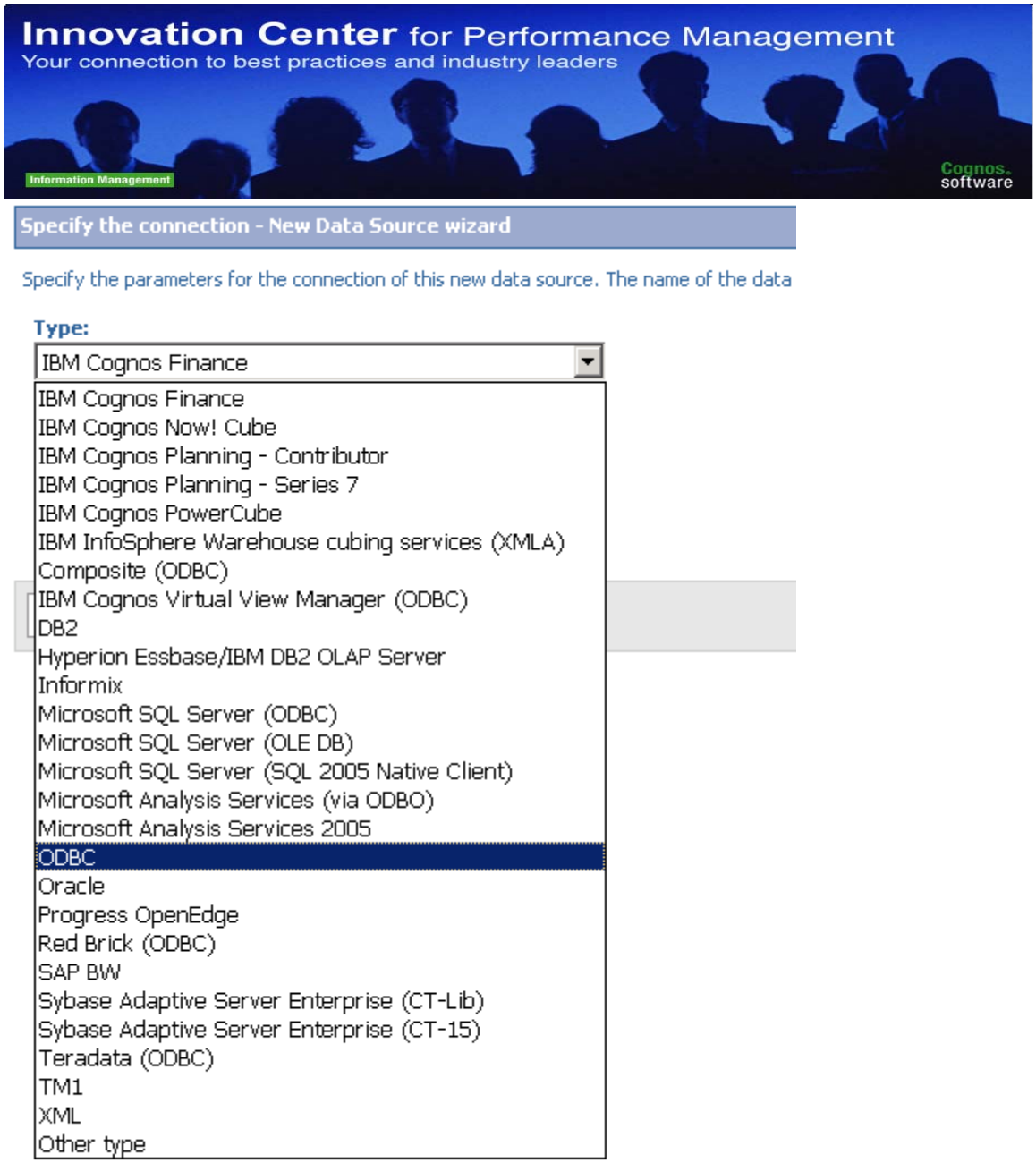
Click the Data Sources tab then click the New Data Source Icon 



Name the Data Source exactly as: “SPM_Blueprint” then click Next >



Select the ‘ODBC’ option; then click Next >



Fill out the options for the connection then click Test the connection…

Specify the ODBC connection string - New Data Source wizard

Edit the parameters to build an ODBC connection string.

ODBC data source:
SPM_Blueprint

ODBC connect string:

Collation sequence:

☐ Open asynchronously

☐ Unicode ODBC

Timeouts

Specify the time in seconds, in which you want the database to connect or wait for your reply before timing out.

Connect time:
0

Reply time:
0

Signon

Select whether a user ID and password is required in the connection string and, if so, whether to create a signon.

☐ User ID

☐ Password

☑ Create a signon that the Everyone group can use:

User ID:

Password:

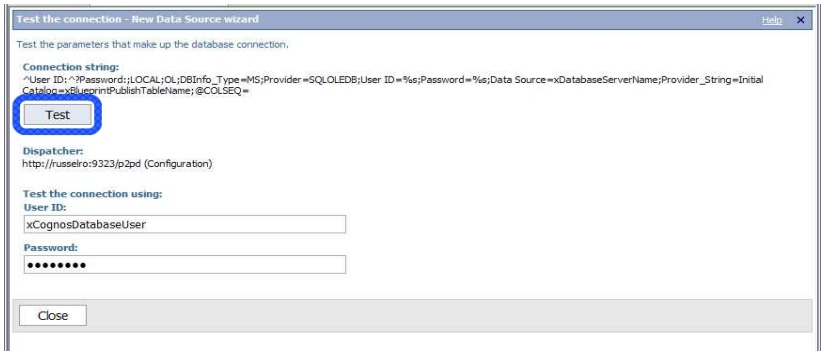
Confirm password:

Testing

Test the connection...

Cancel | < Back | Next > | Finish

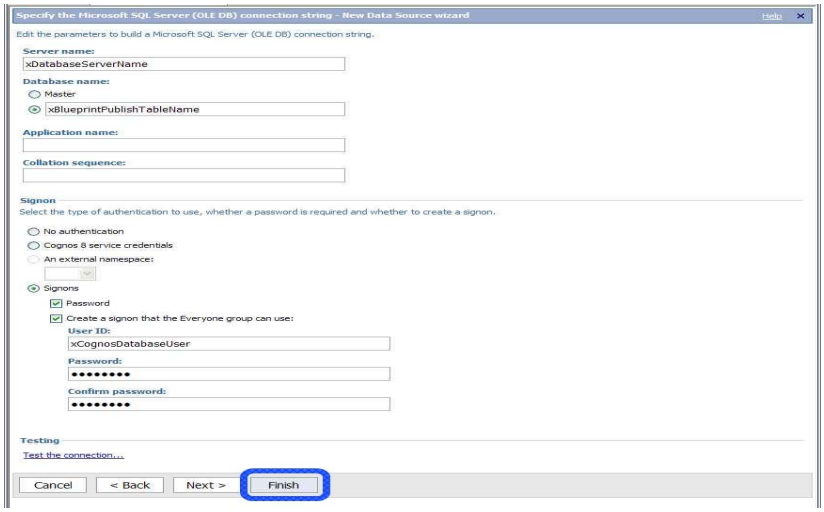
Click Test to verify the connection is setup correctly



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

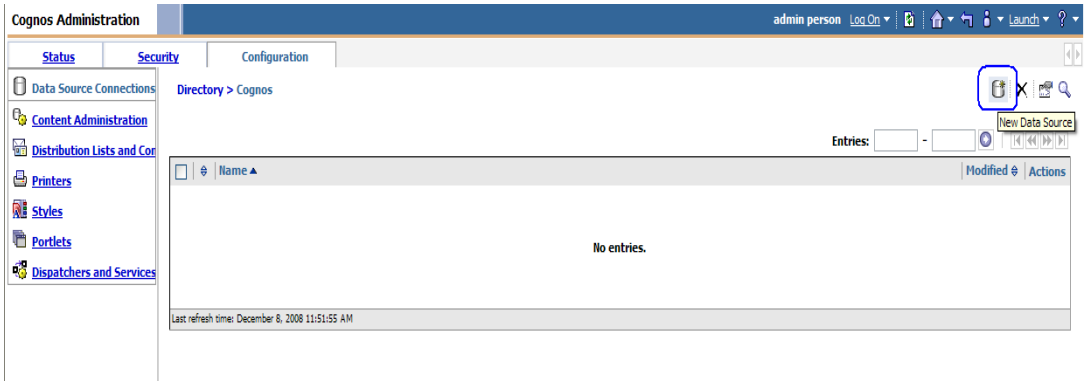
Click Close

Click Finish to add the new data source



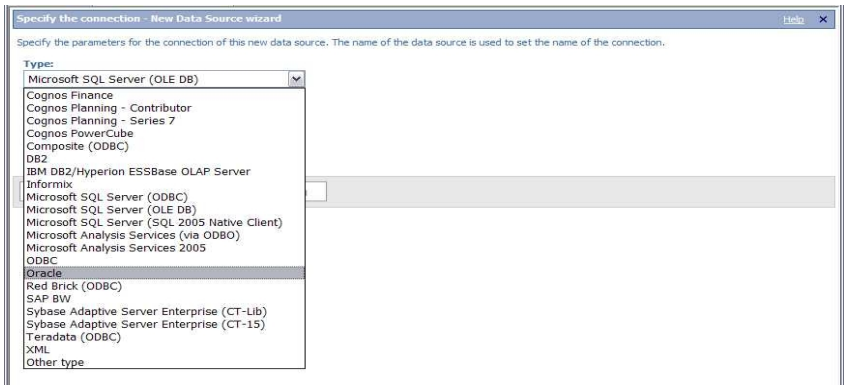
5.1.1.3. Create the ‘SPM_Forecast’ data source

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



Name the Data Source exactly as: “SPM_Forecast” then click Next >

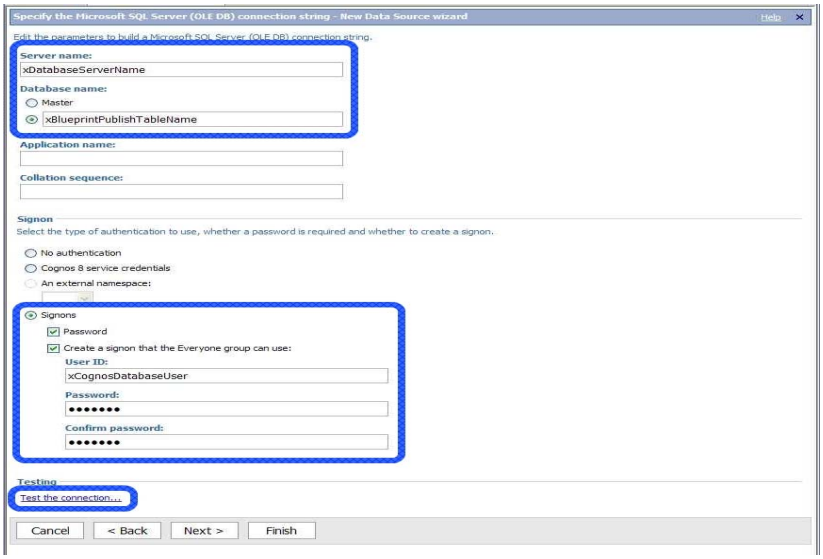
Specify the database type connection –Microsoft SQL Server (OLE DB)- then click Next >



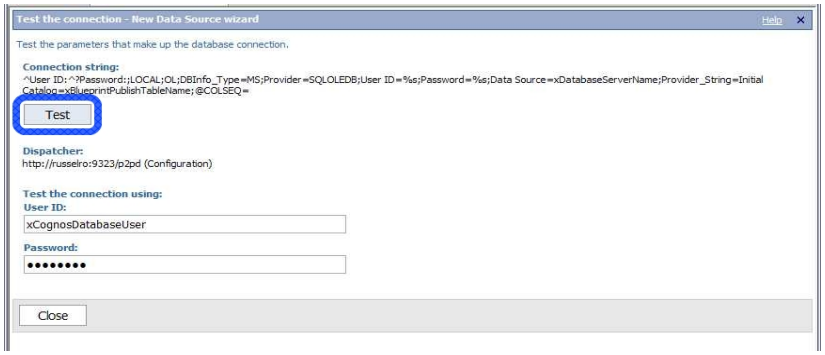
Fill out the options for the connection then click Test the connection…

Database name: spm_cache


Innovation Center for Performance Management
Your connection to best practices and industry leaders
Information Management
Cognos. software


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

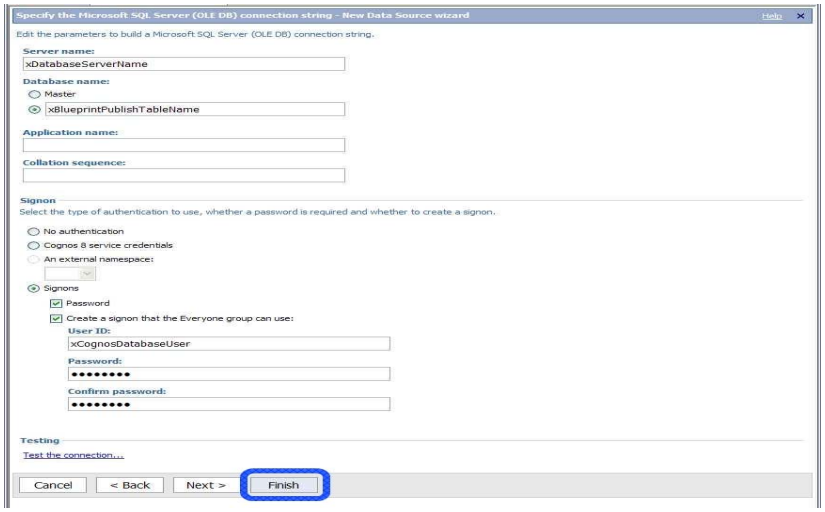
Click Test to verify the connection is setup correctly



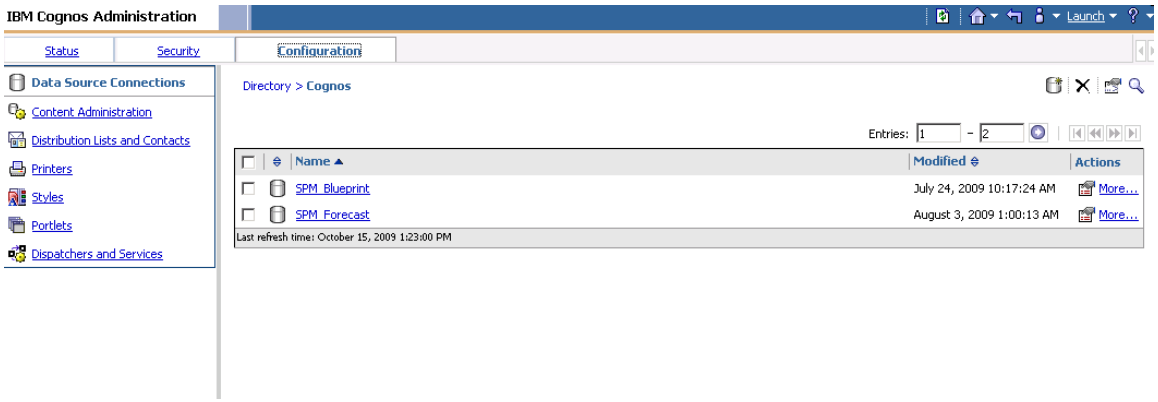
The following screen should indicate Succeeded below the Status then click Close

Click Close

Click Finish to add the new data source

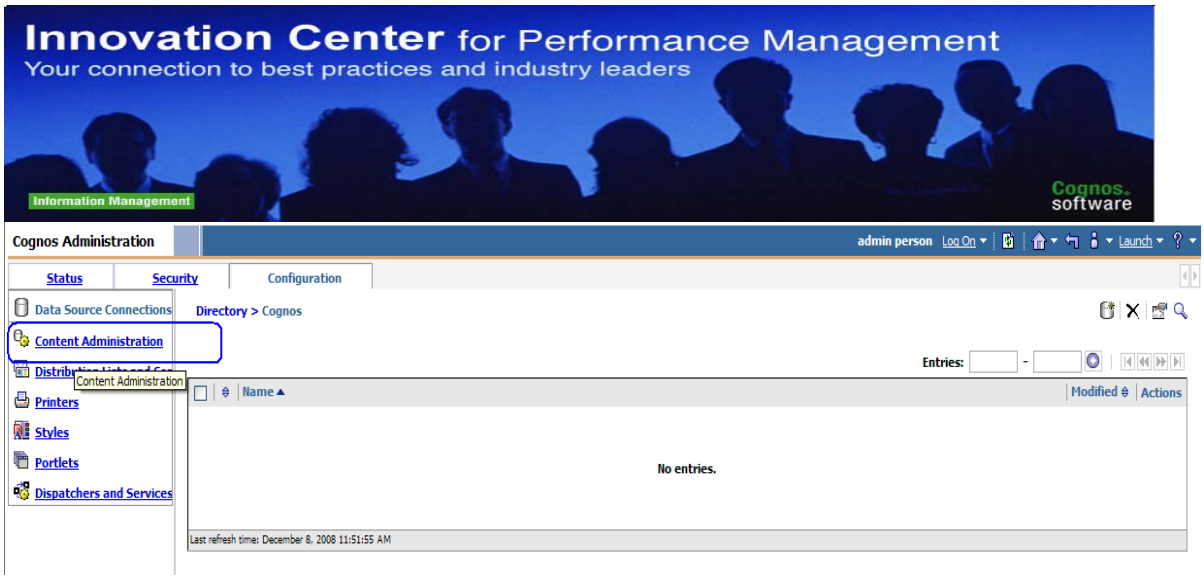


After creating the two datasources, the window for IBM Cognos Administration will display as:

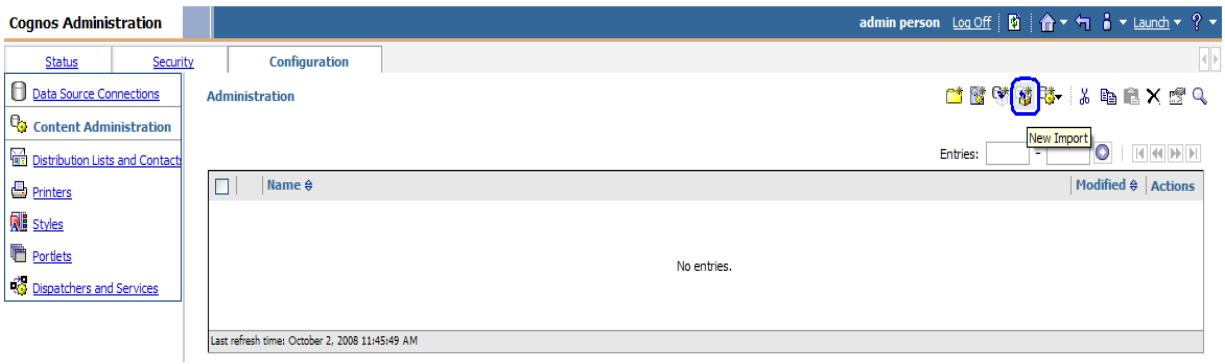


5.1.1.4. Run the import wizard to bring in the BI Content into the IBM Cognos Connection portal

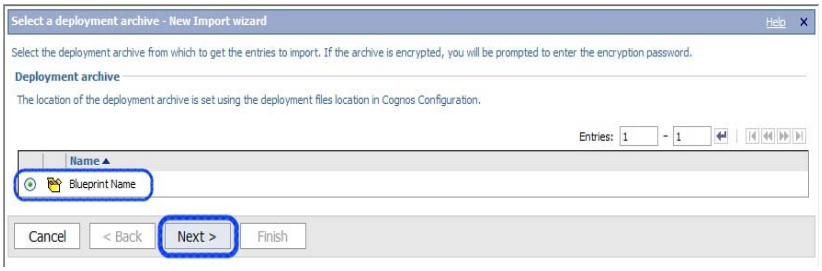
From the screen in the previous step, select Content Administration



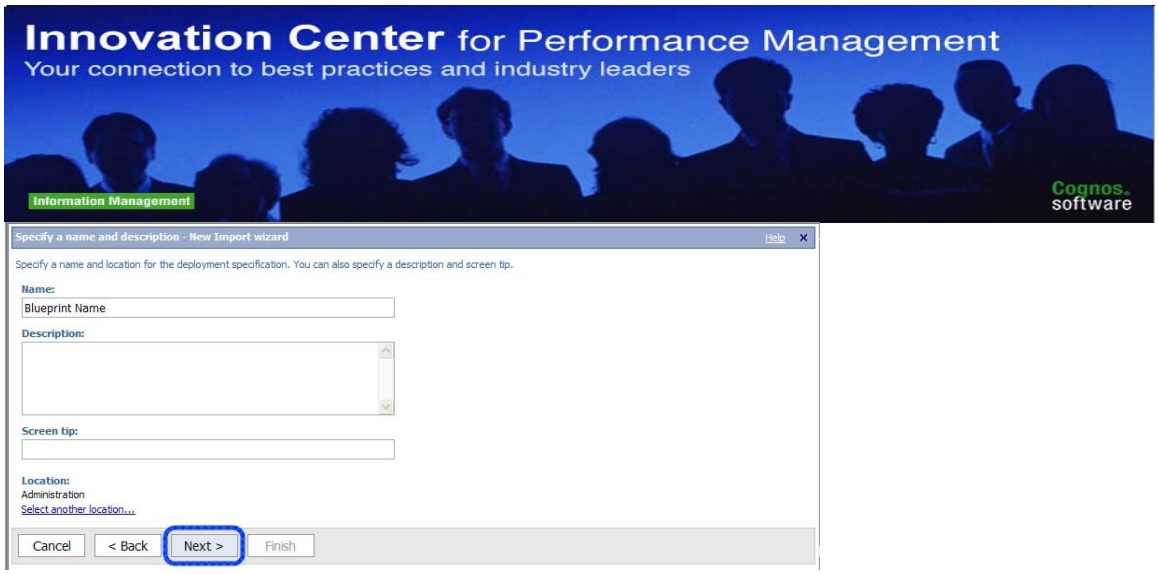
Click the New Import icon



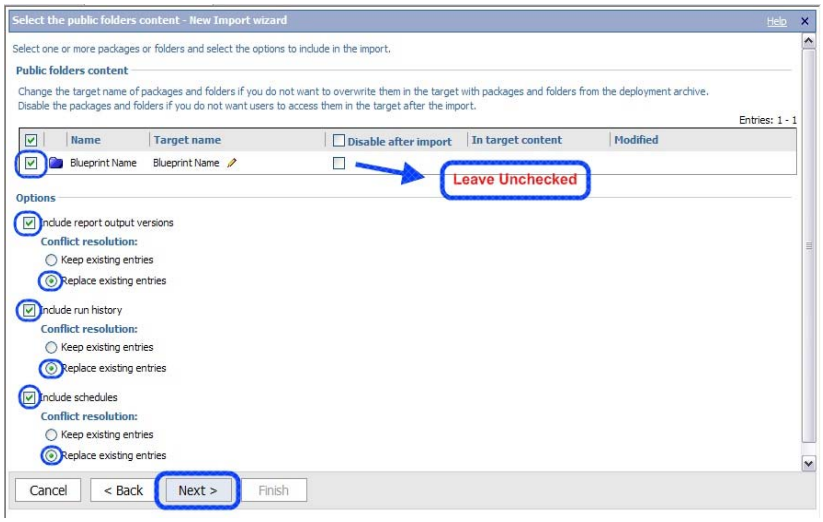
Select the import package named ‘SPM_Blueprint_BI_Deployment’; then click Next >



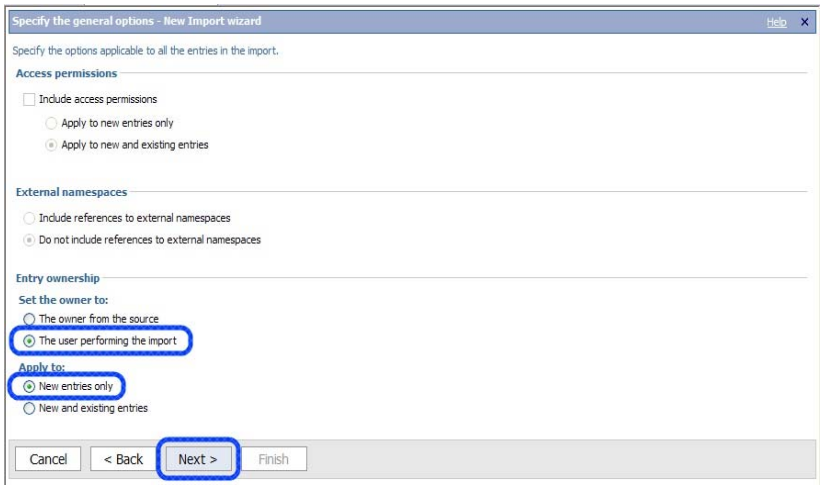
Verify the Name is ‘SPM_Blueprint_BI_Deployment’ then click Next >



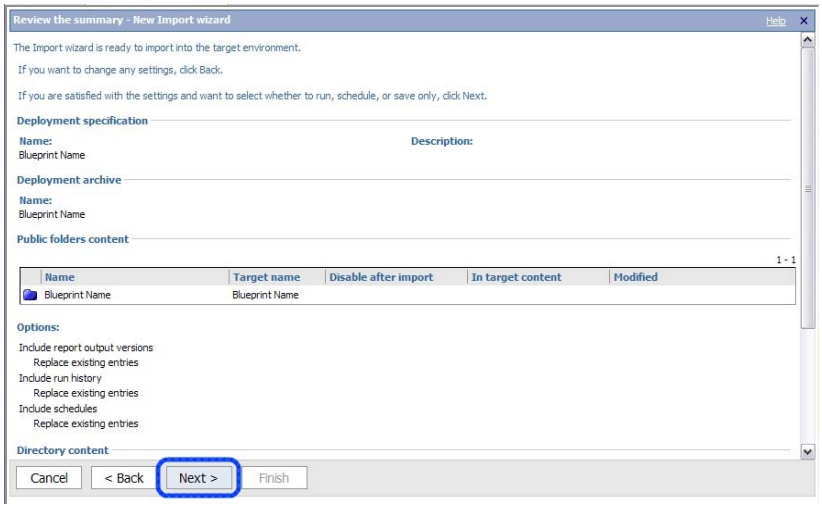
Specify the options and <u>DO NOT</u> check ‘Disable after import’ then click Next >



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

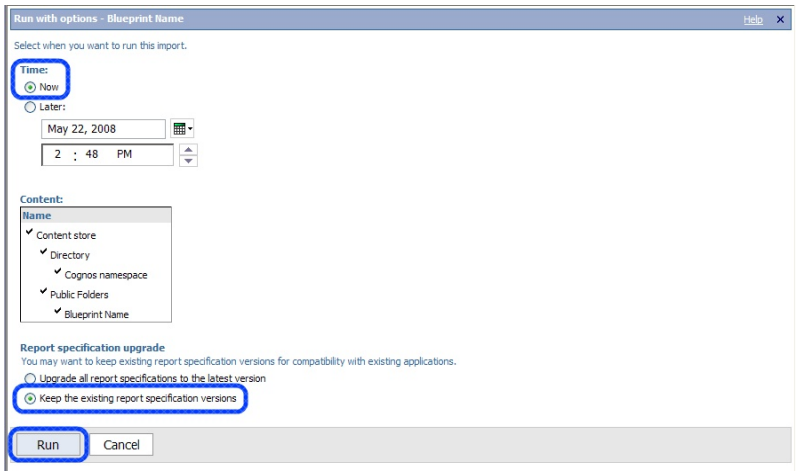


Review the summary options selected then click Next >

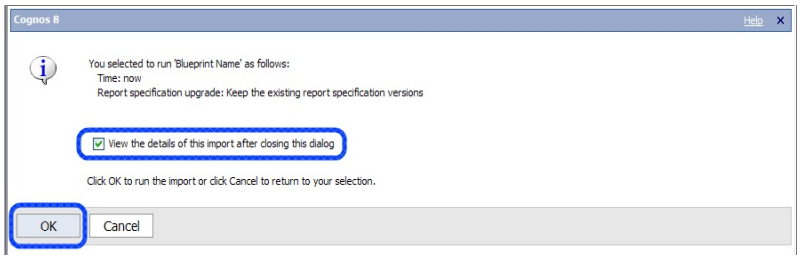


Choose ‘Save and run once’ then click Finish

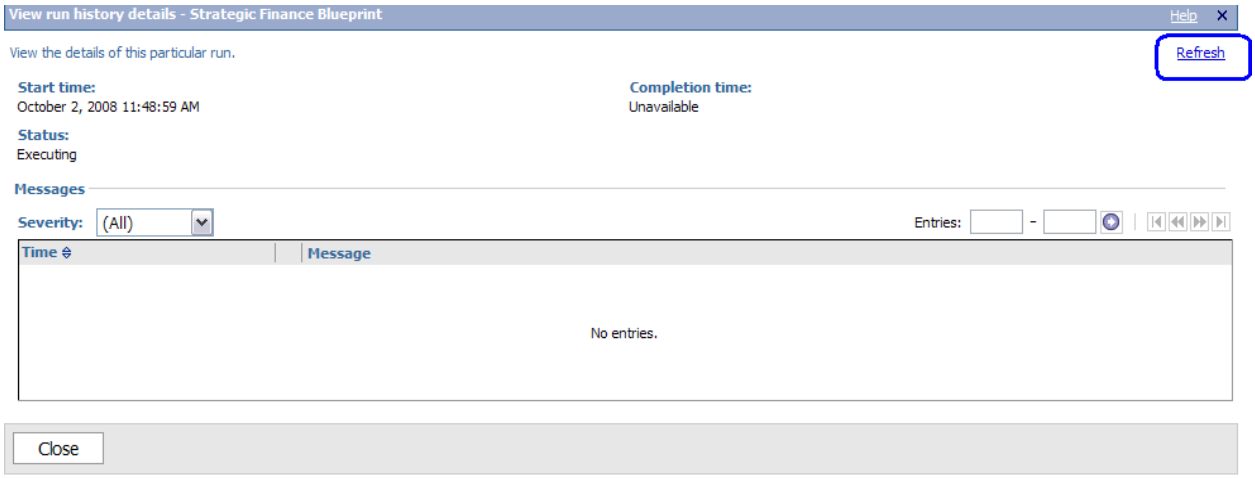
Specify the time to run the import select ‘Now’ and ‘Keep the existing report specifications versions’ then click Run



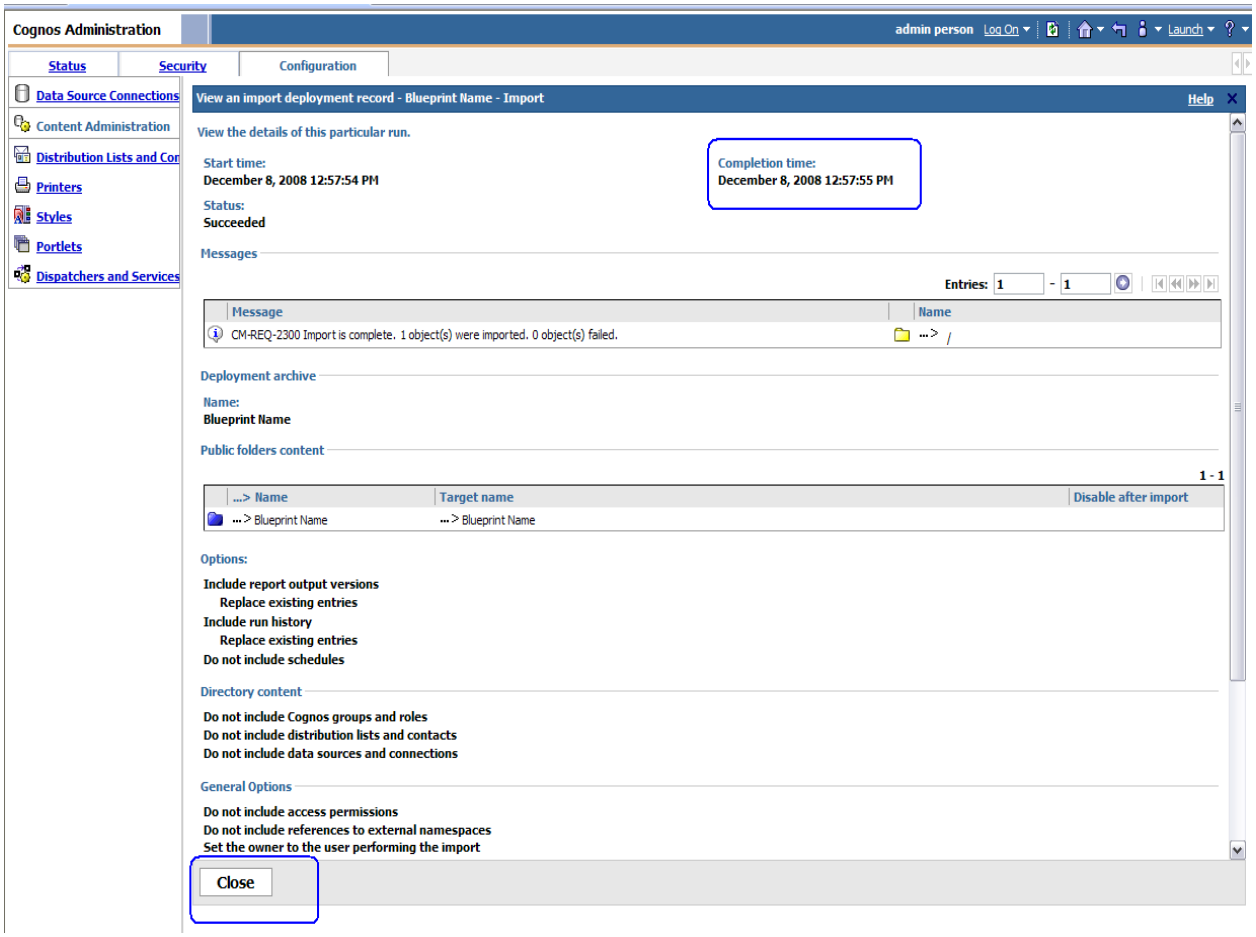
Check ‘View the details of this import after closing this dialog’ then click OK



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

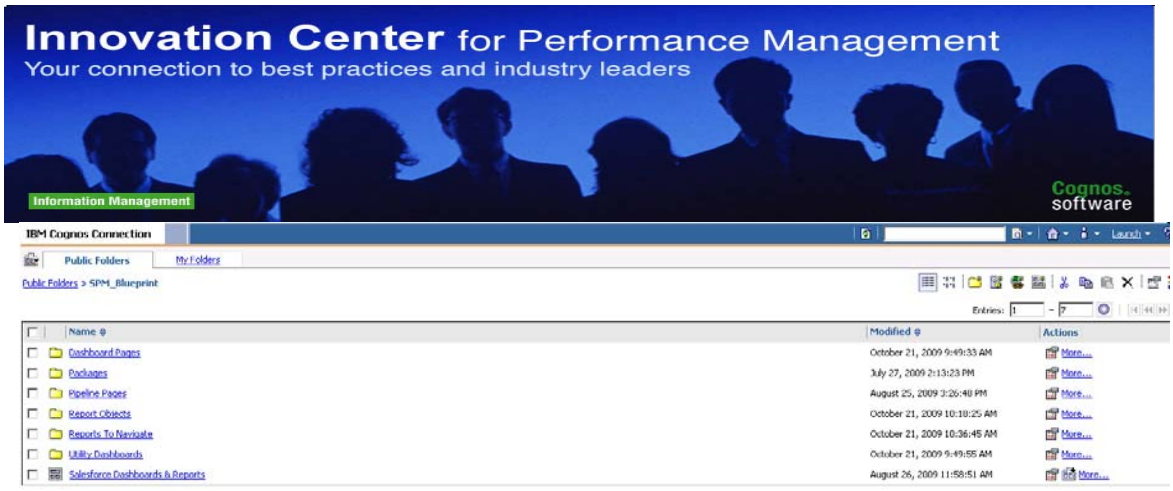


If the deployment import has not finished click on ‘Refresh’ again until it shows a completion time then click Close

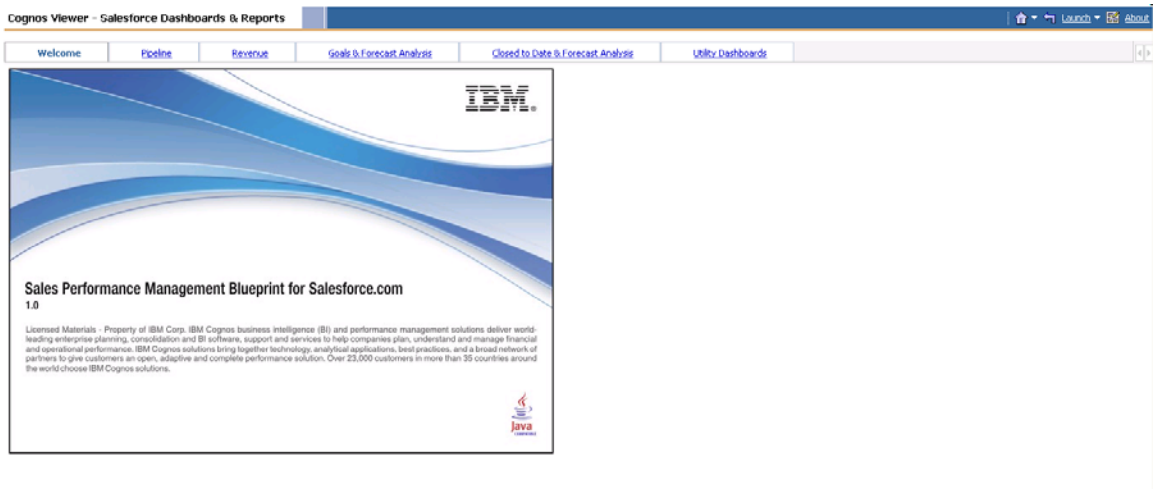


5.2. Testing Content

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



To test the content is coming up correctly, launch the 'Salesforce Dashboards and Reports' Page at the bottom of the list. The following screen should come up:



Then, testing can be performed on each of the dashboard pages to obtain the dashboards displaying your organization's data.

Note: The cache data refresh mentioned in section 3.2.2 is a required step to be able to access your organization data. Otherwise you will see what was included in the cache database with the Blueprint Content.