



SALES PERFORMANCE MANAGEMENT FOR SALESFORCE.COM
BLUEPRINT
PERFORMANCE BLUEPRINT APPLICATION BRIEF
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 "SPM_Blueprint_Content"	3
2.2. Copying the necessary files into their respective directories	3
3. Virtual View Manager	4
3.1. Import the Content	4
3.2. Update the content with Servers and Credentials	6
3.2.1. Connection to Salesforce.com	6
3.2.2. Connection to Cache Database	9
3.3. Importing the Data Services	10
4. External Data Sources	12
4.1. Importing/Attaching the Cache database - SQL Server Database	12
5. IBM Cognos 8 BI Content	14
5.1.1. Create the data sources	14
5.1.1.1. Create the ODBC Connection to access IBM Virtual View Manager data service	14
5.1.1.2. Create 'SPM_Blueprint' data source	16
5.1.1.3. Create the 'SPM_Forecast' data source	22
5.1.1.4. Run the import wizard to bring in the BI Content into the IBM Cognos Connection portal	26
5.2. Testing Content	31



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

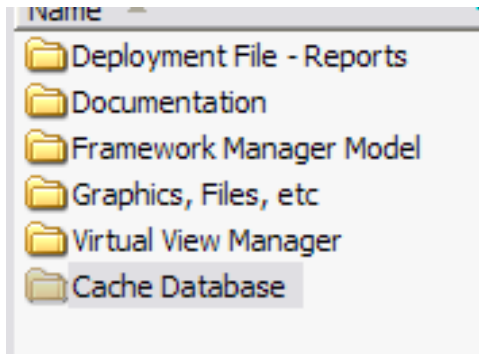
- SPM / Salesforce Pains:
 - o Sales management and their support staff spend too much time ‘crunching the numbers’ rather than analyzing them to support their measuring, monitoring and planning.
 - o While great for operational reporting, the out of the box Salesforce.com analytics lack multi-dimensional capabilities and are not able to incorporate data from additional sources
- IBM Cognos Blueprint Solution:
 - o 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.
 - o Easy to use multi-dimensional interface to highlight C8 capabilities
 - o 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.

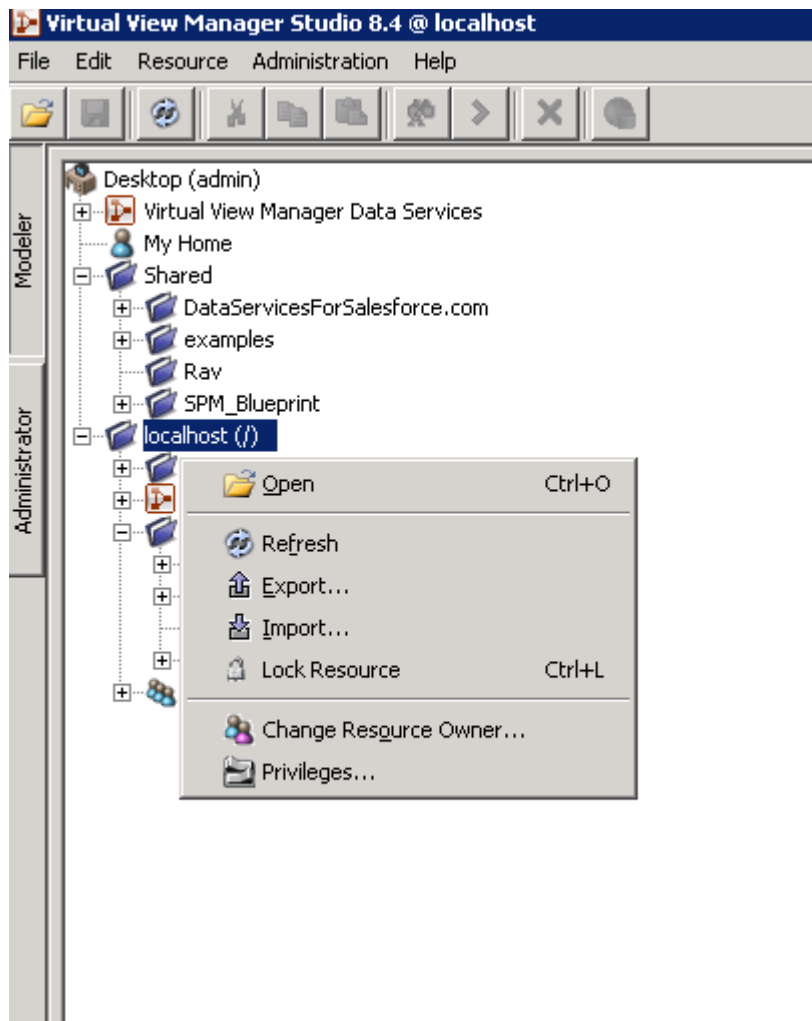
Copy all folders/images from the /Graphics,Files,etc directory into <IBM Cognos 8 install location>/webcontent/samples/images

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:



Specify the resource for import. After you have specified a resource file, you can press the "Refresh" button to display information about the import file.

File: C:\Cognos\SPM_Blueprint\IC Site Content\WVM Deployment\SPm_Blueprint.car

.....
Browse...

☐ Include Resource Information

☒ Caching☐ Overwrite☒ Data Source Connections☒ Privileges☒ Custom Jar☐ Include Users☐ Override Locks

File Type: Partial Archive

Date: Wed Oct 07 14:47:13 EDT 2009

```
User:      admin
```

Server: cognosbuild2k3:9400

Refresh

Description

☐ Show Rebinding Options[Preview >](#)

Import>

Cancel

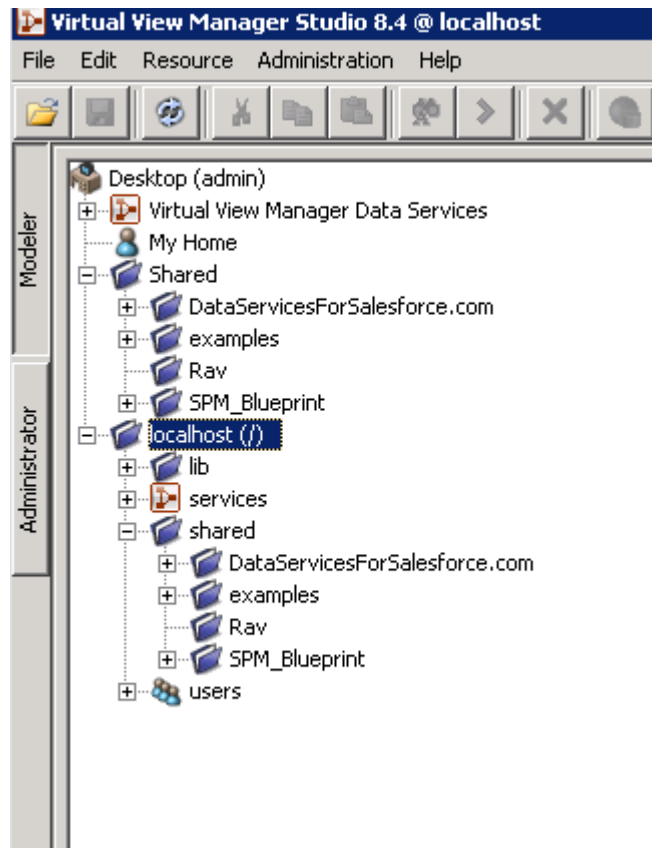
The file location will not be initially populated. Click onto 'Browse' to find the .CAR file included in the Blueprint content.

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

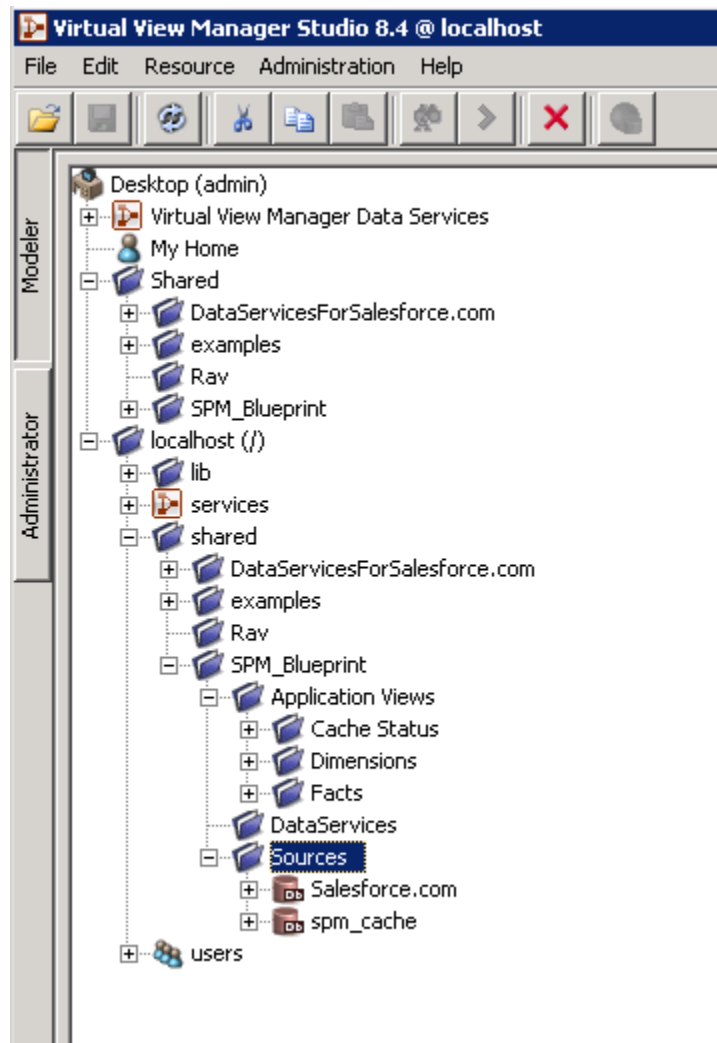
After the content is imported , it is required that the two connections used in Virtual View Manager are modified accordingly to re-direct the connections to the Servers in your organization.

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'



Salesforce.com

Resource

Name: /shared/SPM_Blueprint/Sources/Salesforce.com

Type: Data Source

Owner: admin

Owner Domain: cognos

Locked: False

Lock Owner:

Lock Domain:

Lock Creation Time:

Lock Type:

Caching

Status Table:

Tracking Table:

Connection Information

Basic | Advanced

Driver Name: Salesforce.com

Username: srovira@19demo.com

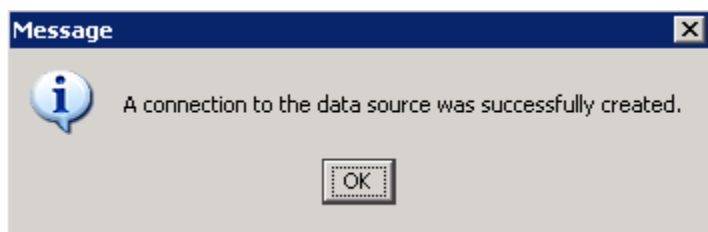
Password:

☒ Save Password

Pass-through Login: Disabled

☒ Enable Data Source

- 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.



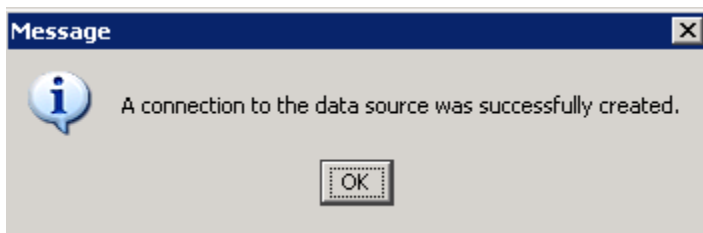
3.2.2. Connection to Cache Database

The following are the steps to update the connection parameters:

- Right click onto 'spm_cache' , click onto 'Open'

A screenshot of the 'spm_cache' connection properties dialog box. The 'Resource' tab is active, showing fields for Name, Type, Owner, Owner Domain, Locked, Lock Owner, Lock Domain, Lock Creation Time, and Lock Type. Below this is the 'Caching' section with 'Status Table' and 'Tracking Table' fields. The 'Connection Information' section has 'Basic' and 'Advanced' tabs. The 'Basic' tab is selected, showing fields for Driver Name, Host, Port, Database Name, Login, Password, and checkboxes for 'Save Password', 'Pass-through Login', and 'Transaction Isolation'. At the bottom are buttons for 'Enable Data Source', 'Add/Remove Resources...', and 'Test Connection'.

- 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:



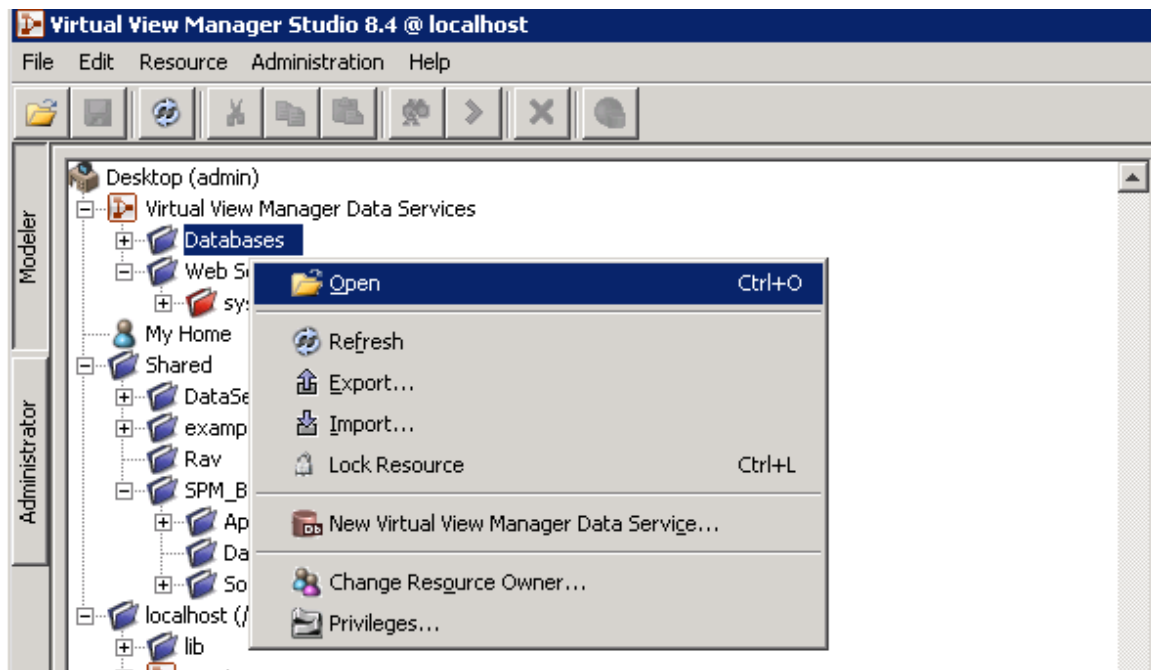


NOTE: To Refresh the content of the cache data it is required that each cache object is edited in IBM Virtual View Manager to issue a "Refresh Now". Once this step is performed for all the cached objects, reports will display the data associated to your Organization's Salesforce environment.

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:



Import into: /services/databases - Virtual View Manager Studio 8.4 [X]

Specify the resource for import. After you have specified a resource file, you can press the "Refresh" button to display information about the import file.

File:

Include Resource Information

<input checked="" type="checkbox"/> Caching	<input type="checkbox"/> Overwrite	<input checked="" type="checkbox"/> Data Source Connections
<input checked="" type="checkbox"/> Privileges	<input checked="" type="checkbox"/> Custom Jar	<input type="checkbox"/> Include Users
<input type="checkbox"/> Override Locks		

File Type: Partial Archive

Date: Wed Oct 21 11:37:07 EDT 2009

User: admin

Server: cognosbuild2k3:9400

Description

☐ Show Rebinding Options

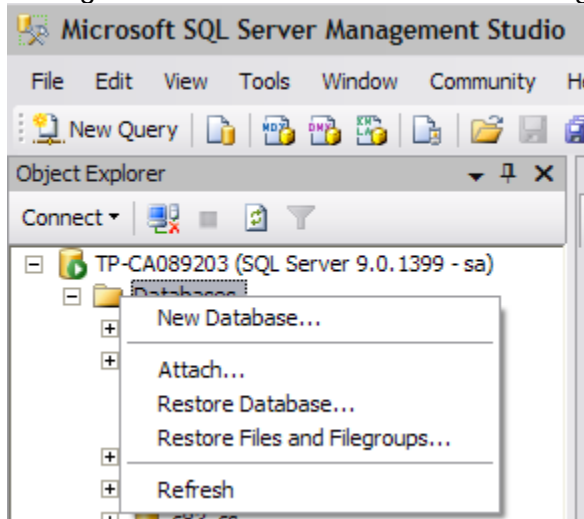
- Click onto Import to proceed with the import. The overwrite option may need to be selected if the content already exist within the Data Services.

4. External Data Sources

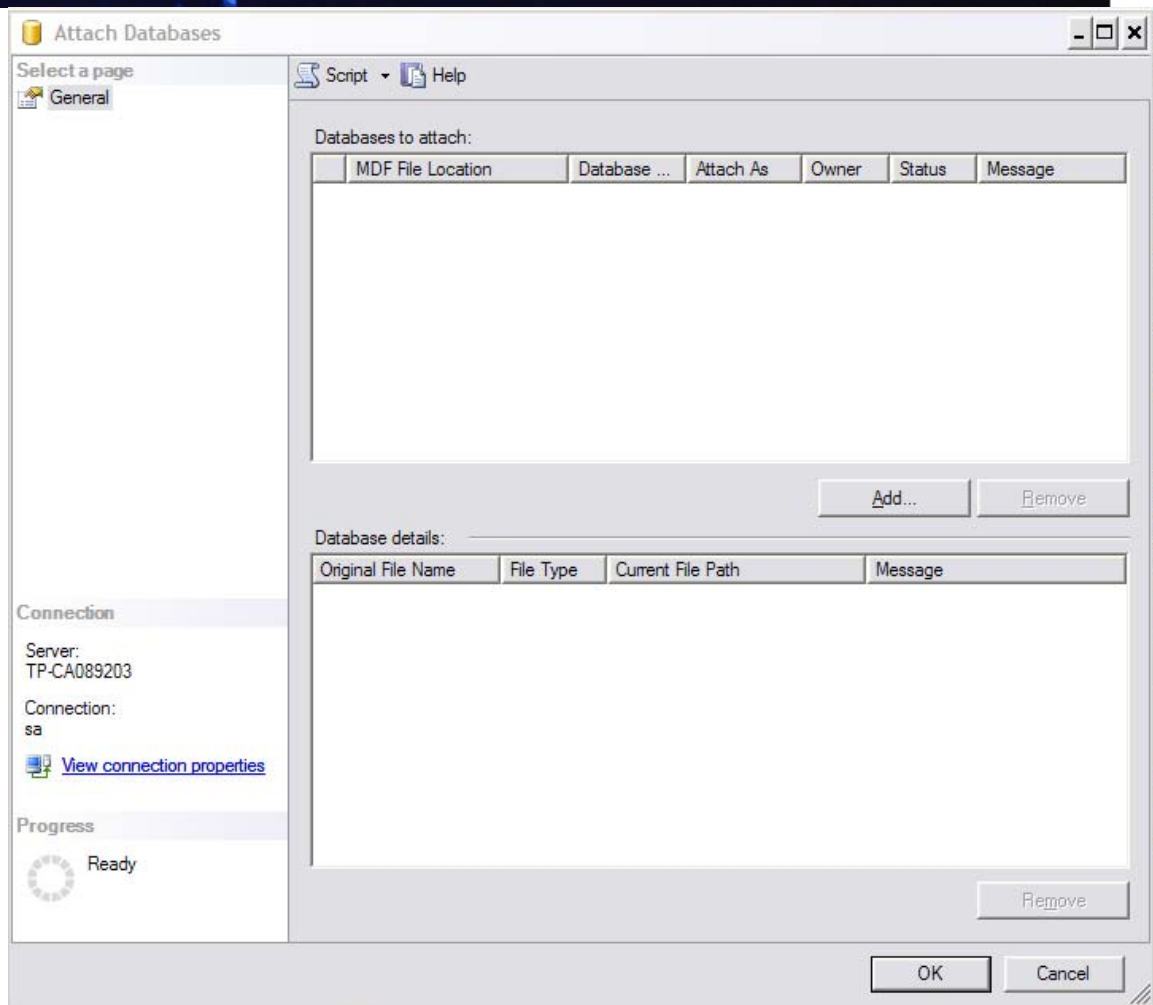
4.1. Importing/Attaching the Cache database - SQL Server Database

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 access 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 through the steps required to configure the objects needed for the IBM Cognos BI content to work properly.

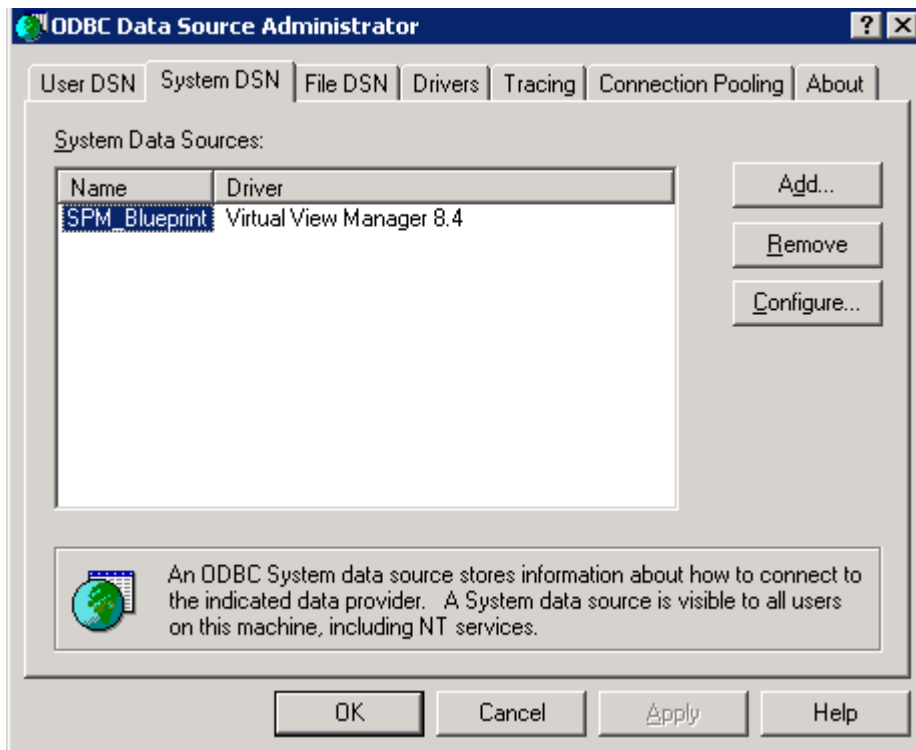
5.1.1. Create the data sources

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 followed on a Windows Operating System based Server. If your organization has otherwise, please contact IBM Cognos Support to look for alternatives on setting up ODBC connections on other Operating System environments.

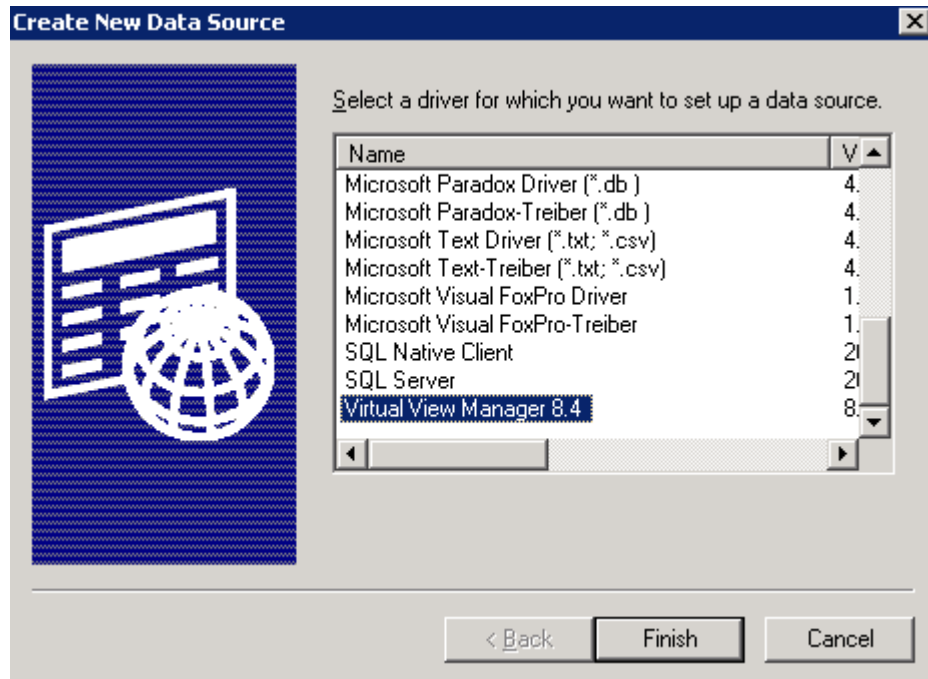
- Open 'Data Source (ODBC)' from Administrative tools



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

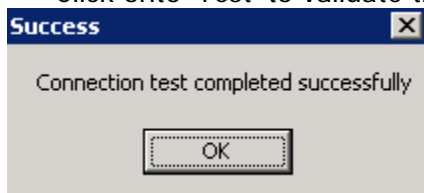
The screenshot shows the 'Virtual View Manager 8.4 ODBC Driver Configuration' dialog box. It contains the following fields and buttons:

- DSN Name:** SPM_Blueprint
- VVM Host:** localhost
- Port:** 9401
- User Name:** admin
- Password:** masked with 'xxxxxx'
- Domain:** cognos
- Datasource:** SPM_Blueprint
- Catalog:** SPM_Blueprint (with a dropdown arrow)
- Buttons:** OK, Cancel, Refresh, and Test.

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:

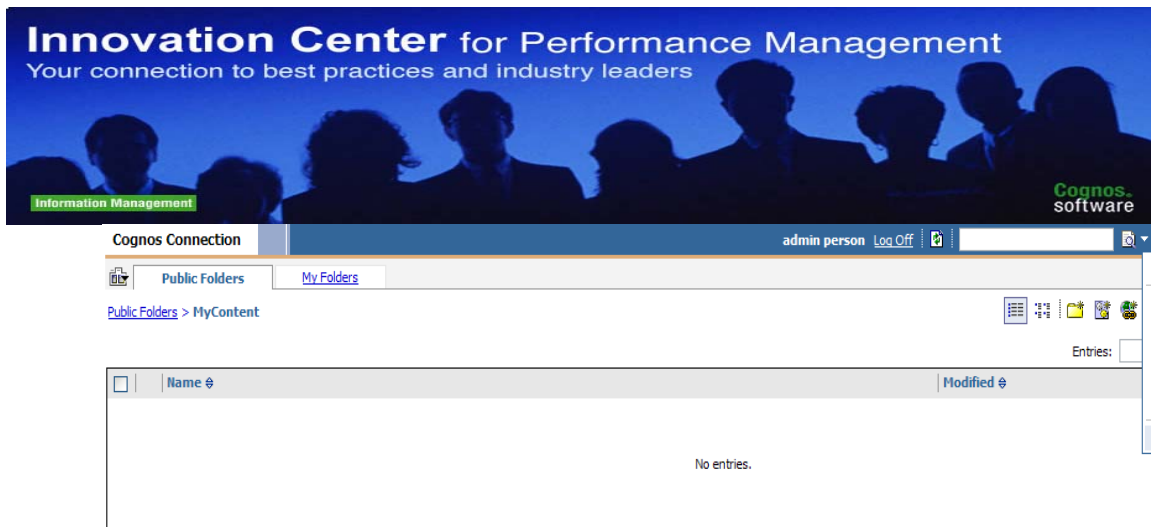


- click onto 'OK', then 'OK' and close the ODBC Connection settings.

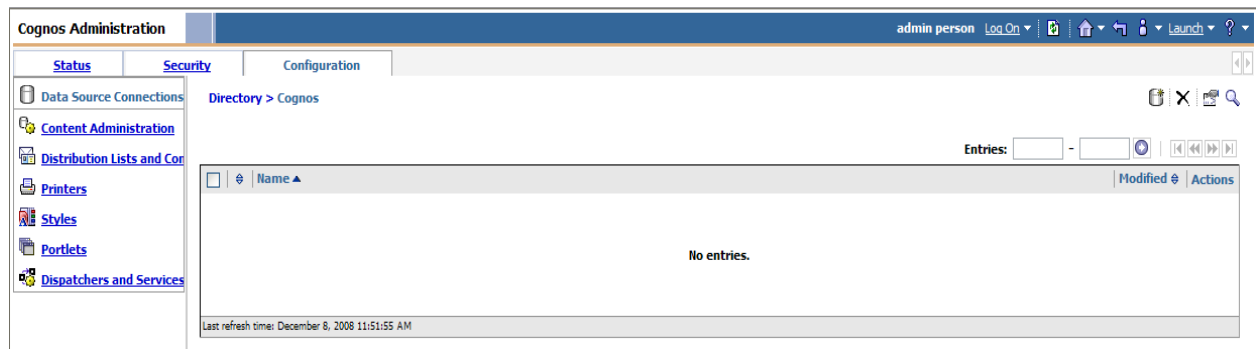
5.1.1.2. Create 'SPM_Blueprint' data source


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 >

Specify a name and description - New Data Source wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:
xDataSourceNameFromDocumentation

Description:

Screen tip:

Location:
Directory > Cognos

Cancel < Back **Next >** Finish

Select the 'ODBC' 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

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...](#)

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software

Specify the ODBC connection string - New Data Source wizard

Edit the parameters to build an ODBC connection string.

ODBC data source:

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:

Reply time:

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

Test the connection - New Data Source wizard

Test the parameters that make up the database connection.

Connection string:
^User ID=^?Password:;LOCAL;OLDBInfo_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

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

Click Close

Test the connection - New Data Source wizard

Test the parameters that make up the database connection.

Connection string:
^User ID=^?Password:;LOCAL;OLDBInfo_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



Click Finish to add the new data source

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:

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 & service credentials
☐ An external namespace:

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

Password:

Confirm password:

Testing
Test the connection...

Cancel < Back Next > **Finish**

5.1.1.3. Create the 'SPM_Forecast' data source

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

Cognos Administration

admin person Log On

Status Security Configuration

Directory > Cognos

Data Source Connections

Content Administration

Distribution Lists and Cor

Printers

Styles

Portlets

Dispatchers and Services

Entries: -

New Data Source

No entries.

Last refresh time: December 8, 2008 11:51:55 AM



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

A screenshot of the 'Specify a name and description - New Data Source wizard' window. The 'Name' field contains 'xDataSourceNameFromDocumentation'. The 'Description' field is empty. The 'Screen tip' field is empty. The 'Location' is set to 'Directory > Cognos'. At the bottom, there are buttons for 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a blue circle.

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

A screenshot of the 'Specify the connection - New Data Source wizard' window. The 'Type' dropdown menu is open, showing a list of database types. 'Microsoft SQL Server (OLE DB)' is selected. Other options include Cognos Finance, Cognos Planning - Contributor, Cognos Planning - Series 7, Cognos PowerCube, Composite (ODBC), DB2, IBM DB2/Hyperion ESSBase 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, and Other type.

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

Database name: spm_cache



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:

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:

Password:

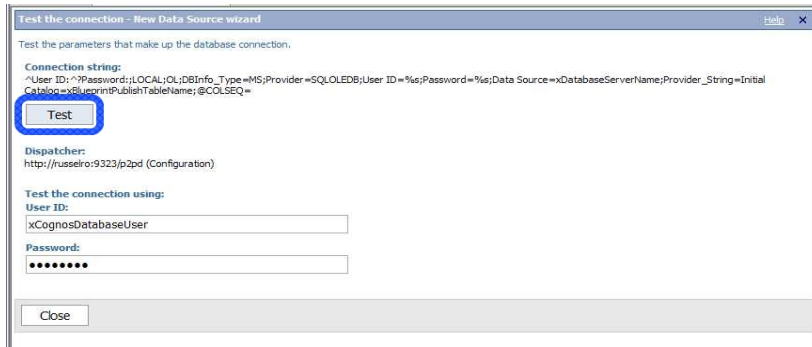
Confirm password:

Testing
[Test the connection...](#)

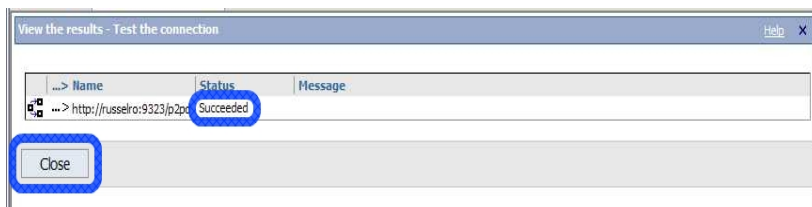
Cancel < Back Next > Finish



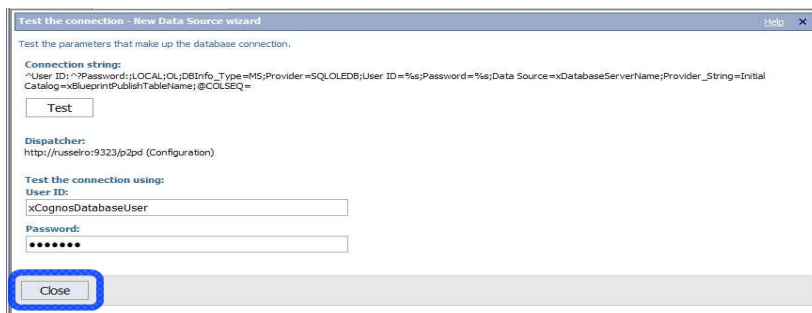
Click Test to verify the connection is setup correctly



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



Click Close





Click Finish to add the new data source

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:

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 & service credentials
☐ An external namespace:

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

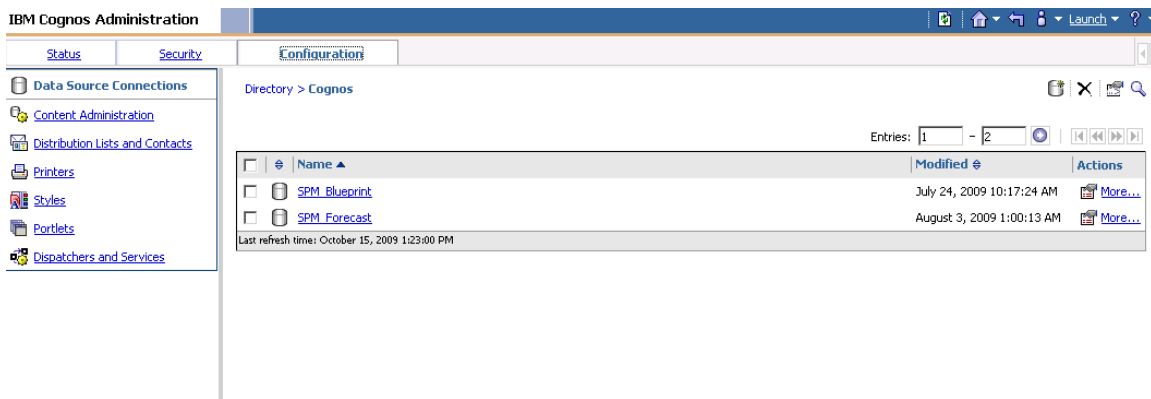
 Password:

 Confirm password:

Testing
 Test the connection...

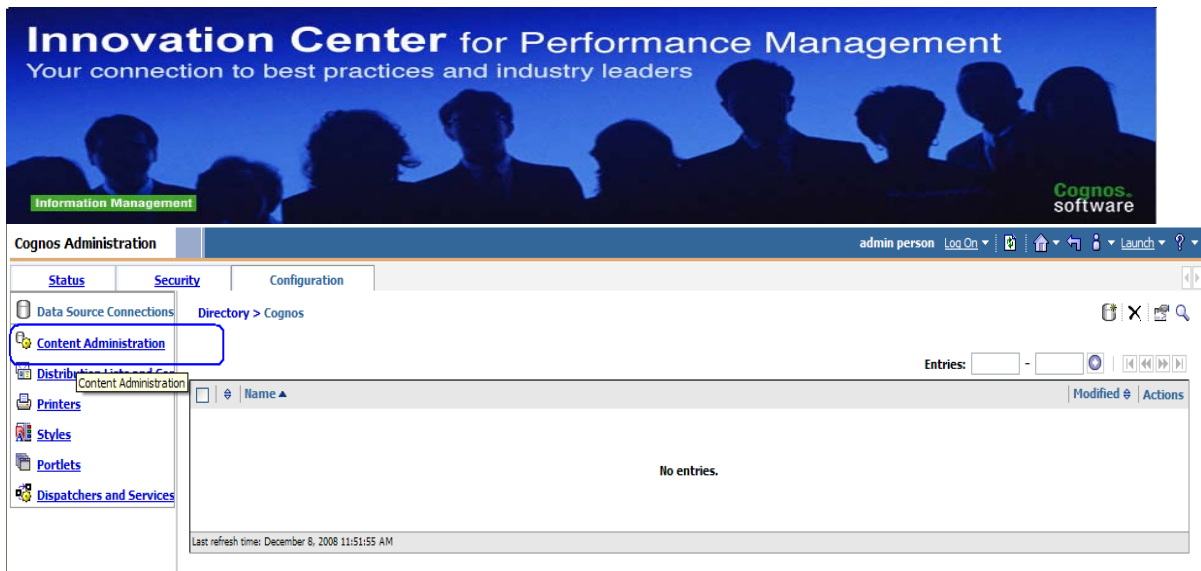
Cancel < Back Next > **Finish**

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

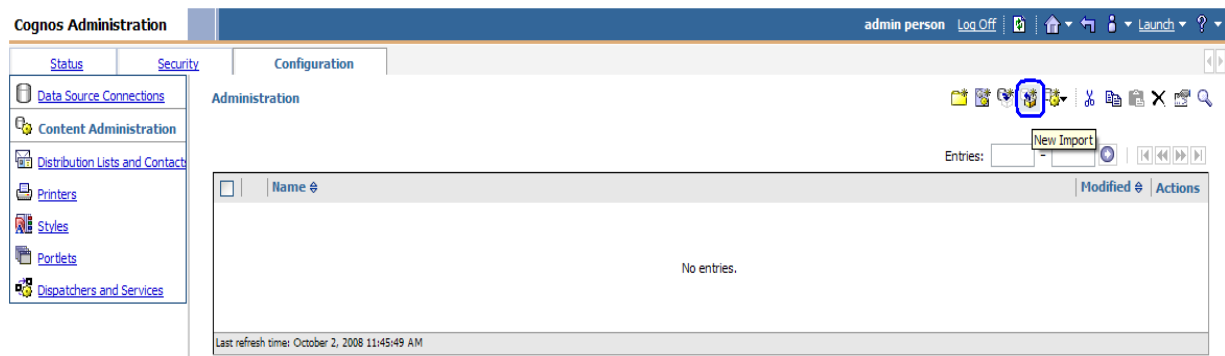


5.1.1.4. Run the import wizard to bring in the BI Content into the IBM Cognos Connection portal

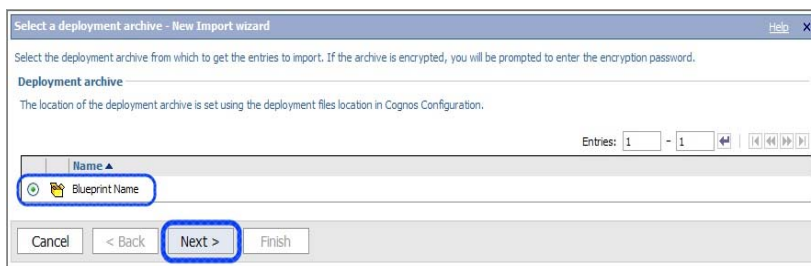
From the screen in the previous step, select Content Administration



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 a name and description - New Import wizard

Specify a name and location for the deployment specification. You can also specify a description and screen tip.

Name:
Blueprint Name

Description:

Screen tip:

Location:
Administration
[Select another location...](#)

Cancel < Back **Next >** Finish

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"/>	<input checked="" 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



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

A screenshot of the 'Specify the general options - New Import wizard' dialog box. It contains several sections with radio button options. The 'Access permissions' section has 'Apply to new and existing entries' selected. The 'External namespaces' section has 'Do not include references to external namespaces' selected. The 'Entry ownership' section has 'The user performing the import' selected. The 'Apply to:' section has 'New entries only' selected. The 'Next >' button at the bottom is highlighted with a red rectangle.

Review the summary options selected then click Next >

A screenshot of the 'Review the summary - New Import wizard' dialog box. It shows a summary of the selected options. The 'Name' and 'Description' fields are both 'Blueprint Name'. The 'Deployment archive' section shows 'Blueprint Name'. The 'Public folders content' section shows a table with one row: 'Blueprint Name'. The 'Options' section shows 'Include report output versions' and 'Include run history' selected. The 'Directory content' section is empty. The 'Next >' button at the bottom is highlighted with a red rectangle.

Choose 'Save and run once' then click Finish

A screenshot of the 'Select an action - New Import wizard' dialog box. It contains a section titled 'Action:' with three radio button options: 'Save and run once', 'Save and schedule', and 'Save only'. The 'Save and run once' option is selected. The 'Finish' button at the bottom is highlighted with a red rectangle.



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
☒ 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

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.

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

Cognos Administration admin person Log On

Status Security Configuration

Data Source Connections Content Administration Distribution Lists and Connections 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	1 - 1
...> Blueprint Name	...> Blueprint Name	Disable after import

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

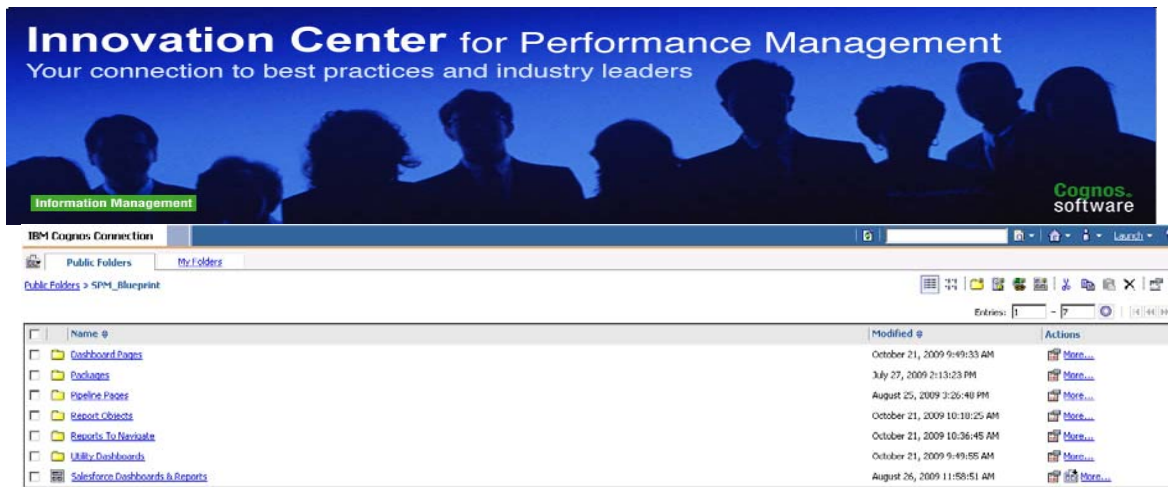
General Options

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

Close

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.