



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

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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

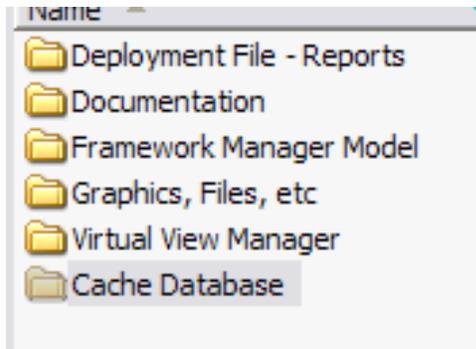
- IBM Cognos Blueprint Solution:
 - o Pre-built report content based on key sales metrics of pipeline, revenue, and forecast, that is mapped to the salesforce.com data model to highlight connectivity to Salesforce.
 - o Easy to use multi-dimensional interface to highlight C8 capabilities
 - o Incorporation 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.

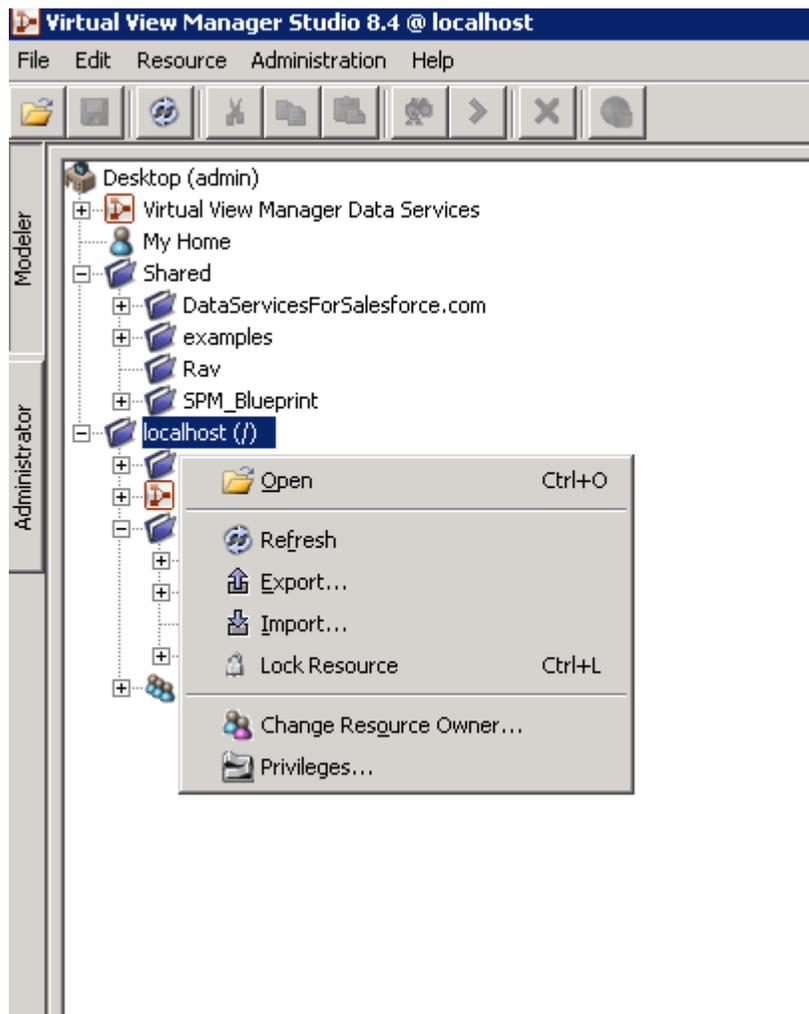
Copy all folders/images from the /Graphics,Files,etc directory into <IBM Cognos 8 install location>/webcontent/samples/images

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.

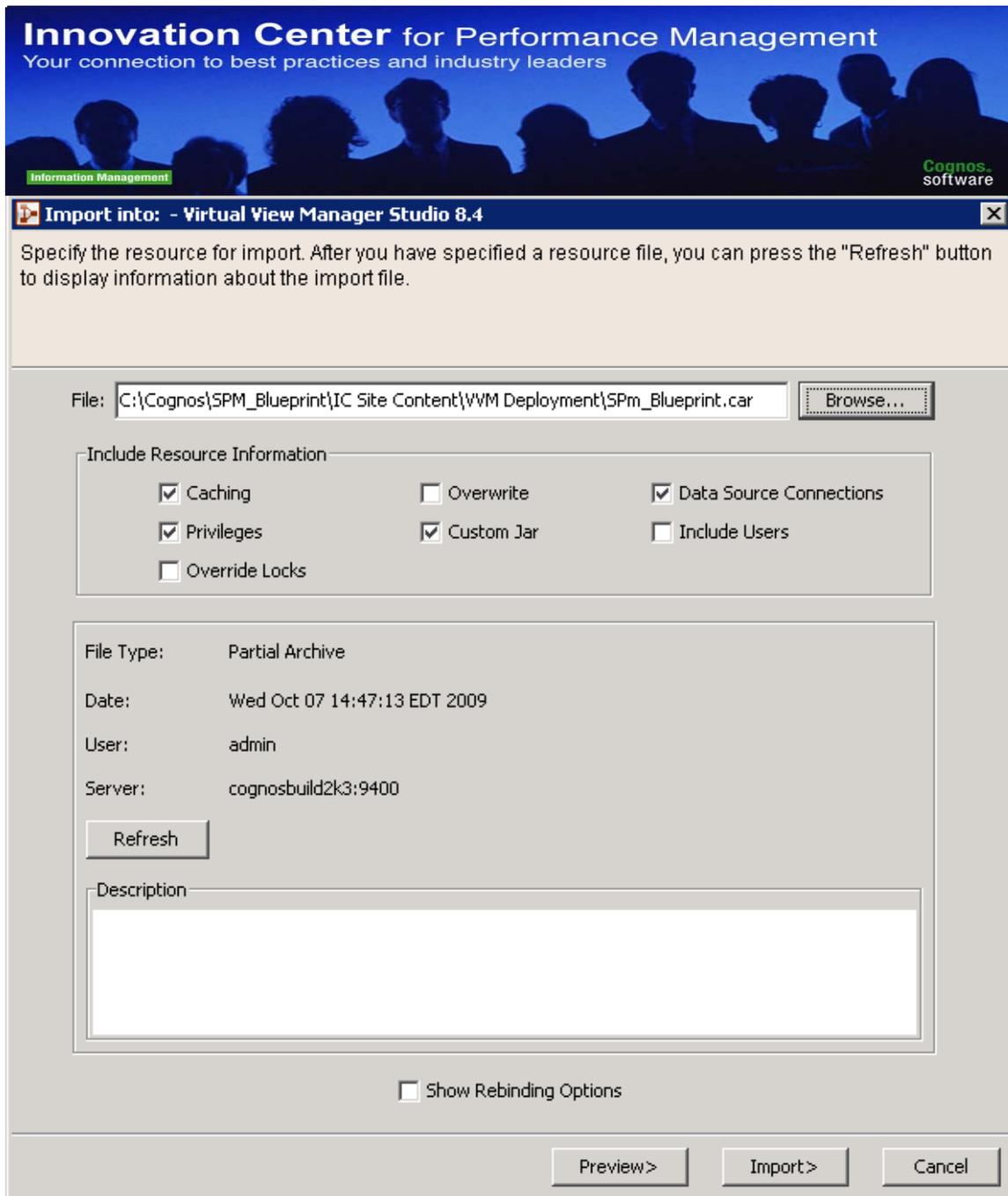
3. Virtual View Manager

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:



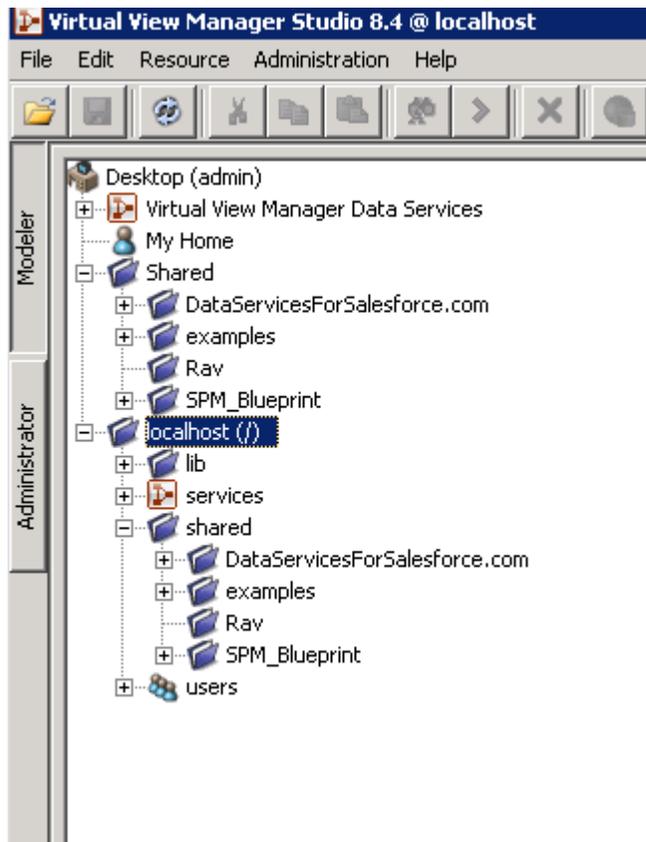
The file location will not be initially populated. Click onto 'Browse' to find the .CAR file included in the Blueprint content.

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

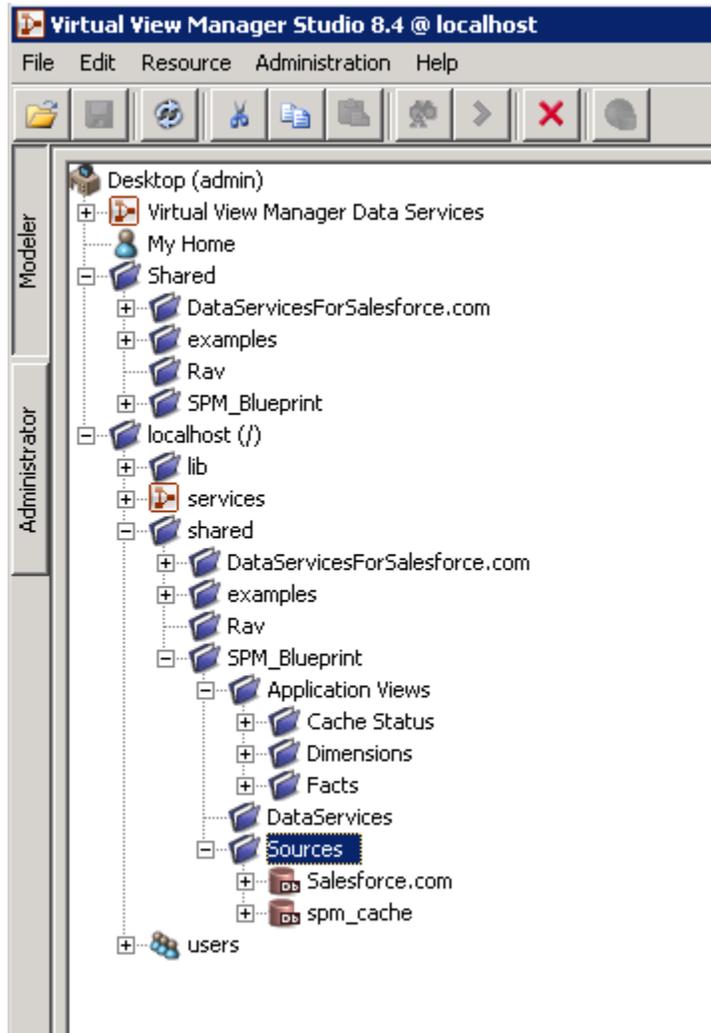
After the content is imported , it is required that the two connections used in Virtual View Manager are modified accordingly to re-direct the connections to the Servers in your organization.

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:

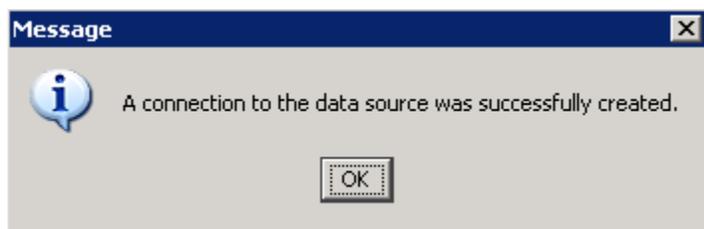
Save Password

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.



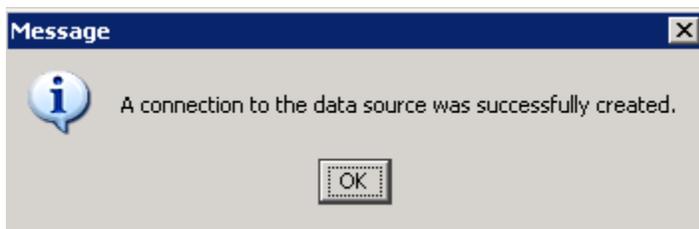
3.2.2. Connection to Cache Database

The following are the steps to update the connection parameters:

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

The screenshot shows a dialog box titled "spm_cache". It has several sections: "Resource" with fields for Name, Type, Owner, Owner Domain, Locked, Lock Owner, Lock Domain, Lock Creation Time, and Lock Type; "Caching" with fields for Status Table and Tracking Table, each with a "Browse..." button; and "Connection Information" with tabs for "Basic" and "Advanced". The "Basic" tab is active, showing fields for Driver Name, Host, Port, Database Name, Login, Password, a "Save Password" checkbox, Pass-through Login, and Transaction Isolation. At the bottom right, there 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

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

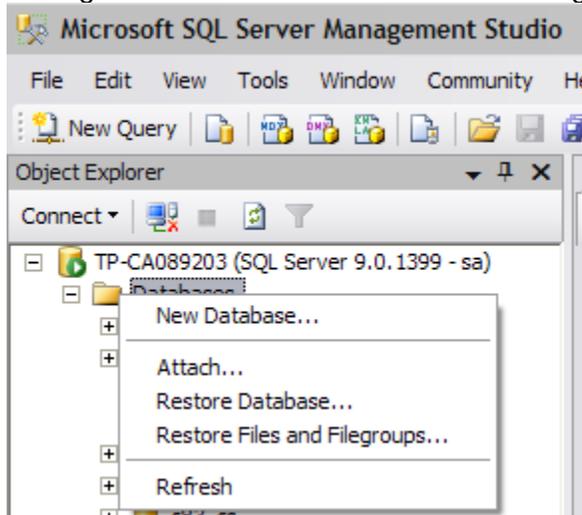
- Click onto Import to proceed with the import. The overwrite option may need to be selected if the content already exist within the Data Services.

4. External Data Sources

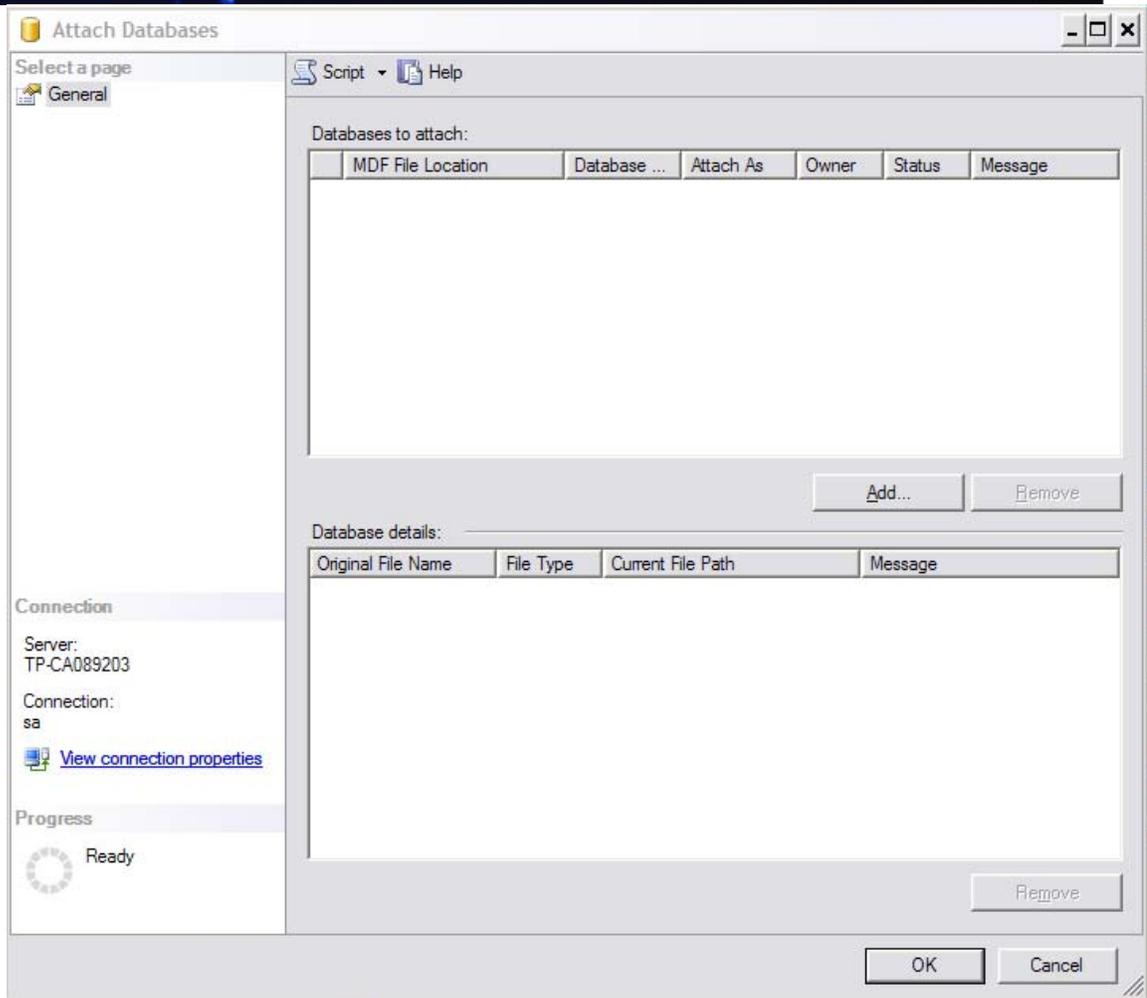
4.1. Importing/Attaching the Cache database - SQL Server Database

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.

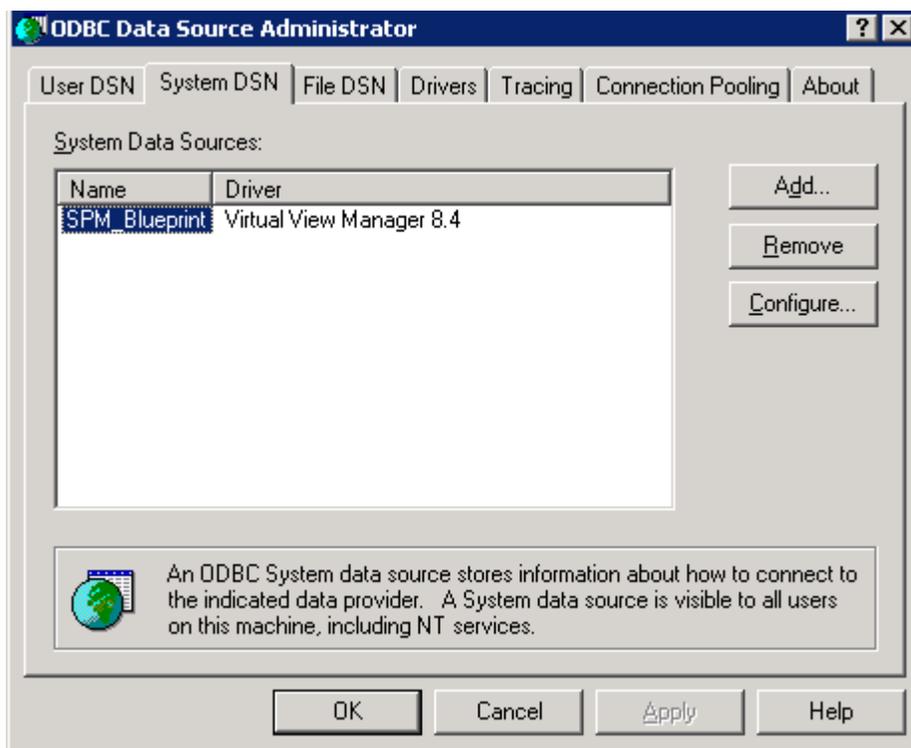
5.1.1. Create the data sources

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

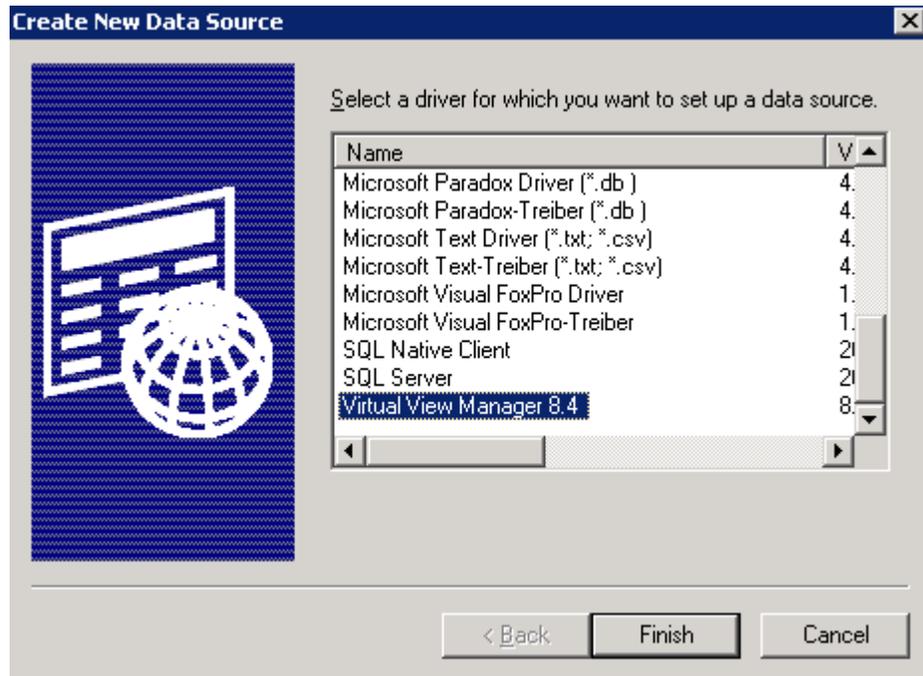
Note: The Blueprint steps assume the installation steps are being followed on a Windows Operating System based Server. If your organization has otherwise, please contact IBM Cognos Support to look for alternatives on setting up ODBC connections on other Operating System environments.

- 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:

Virtual View Manager 8.4 ODBC Driver Configuration

DSN Name: SPM_Blueprint

WM Host: localhost

Port: 9401

User Name: admin

Password: *****

Domain: cognos

Datasource: SPM_Blueprint

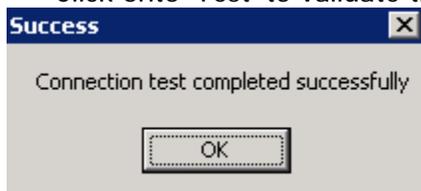
Catalog: SPM_Blueprint

Buttons: OK, Cancel, Refresh, 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:

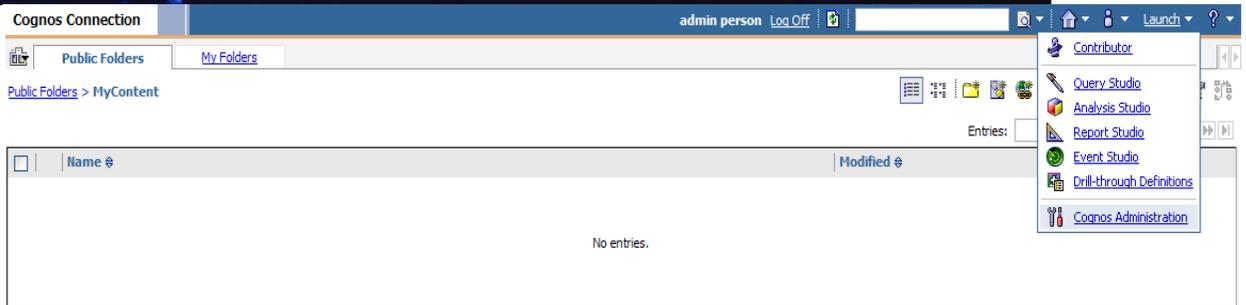


- click onto 'OK', then 'OK' and close the ODBC Connection settings.

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.

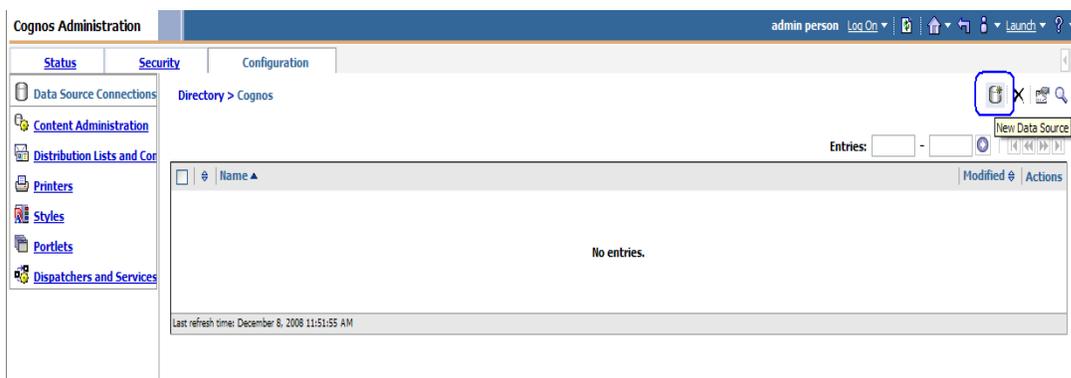
Click on to Launch and select IBM Cognos Administration



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 >

The screenshot shows a dialog box titled "Specify a name and description - New Data Source wizard". The dialog contains several input fields: "Name:" with the text "xDataSourceNameFromDocumentation", "Description:" (empty), "Screen tip:" (empty), and "Location:" with the text "Directory > Cognos". At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish". The "Next >" button is highlighted with a blue circle.

Select the 'ODBC' option; then click Next >

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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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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

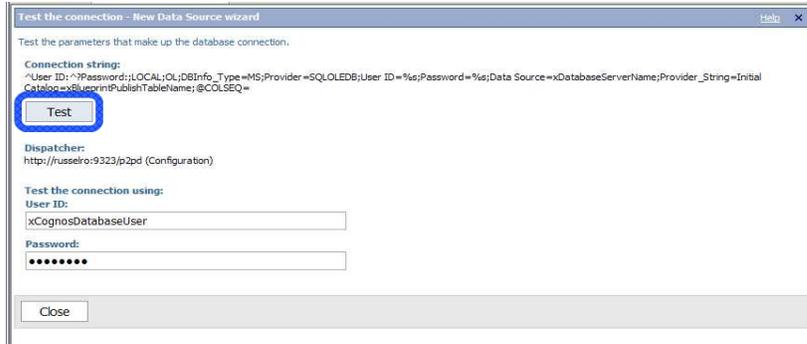
< Back

Next >

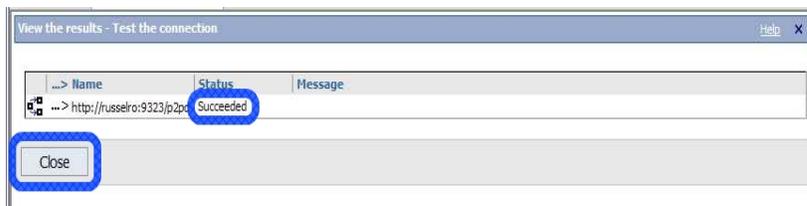
Finish



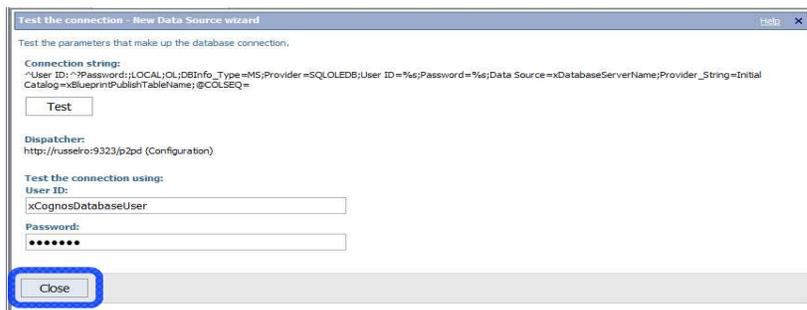
Click Test to verify the connection is setup correctly



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

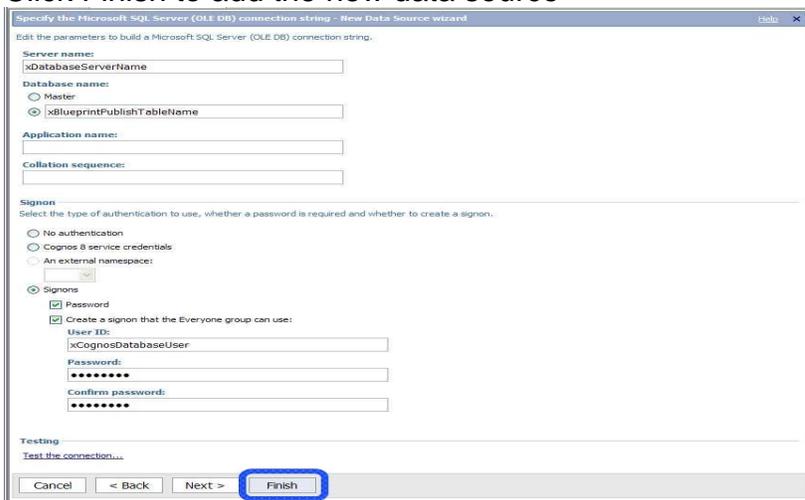


Click Close



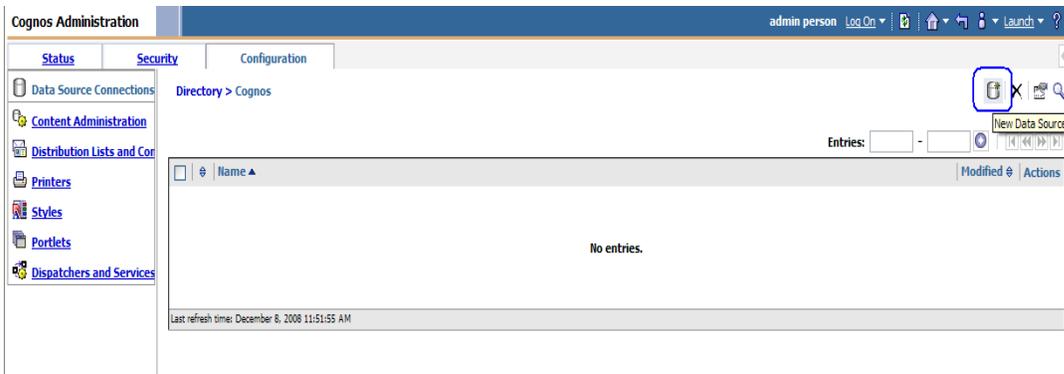


Click Finish to add the new data source



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 >

This is a screenshot of a Windows-style dialog box titled "Specify a name and description - New Data Source wizard". The dialog contains several input fields: "Name:" with the text "xDataSourceNameFromDocumentation" entered; "Description:" with an empty text area; and "Screen tip:" with an empty text area. Below these fields, the "Location:" is set to "Directory > Cognos". At the bottom of the dialog, there are four buttons: "Cancel", "< Back", "Next >" (which is highlighted with a blue circle), and "Finish".

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

This is a screenshot of a Windows-style dialog box titled "Specify the connection - New Data Source wizard". The dialog contains a "Type:" dropdown menu which is open, showing a list of database connection options. The selected option is "Microsoft SQL Server (OLE DB)". Other options in the list 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

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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:

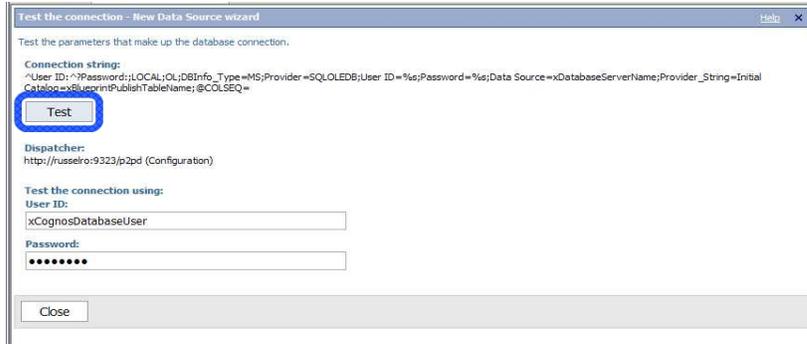
Confirm password:

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

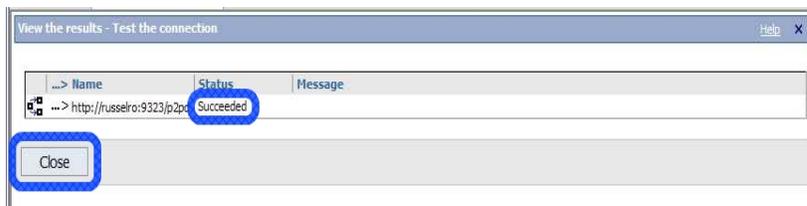
Cancel < Back Next > Finish



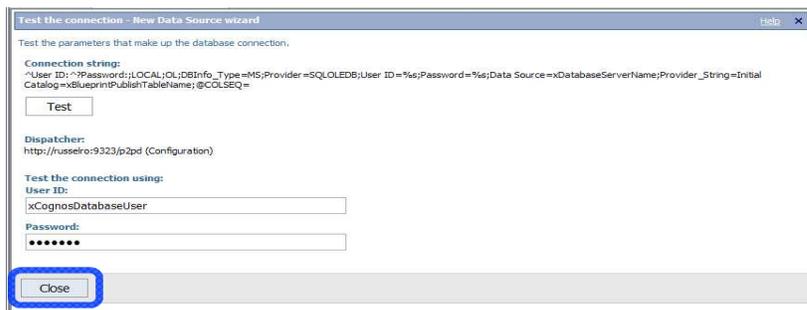
Click Test to verify the connection is setup correctly



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

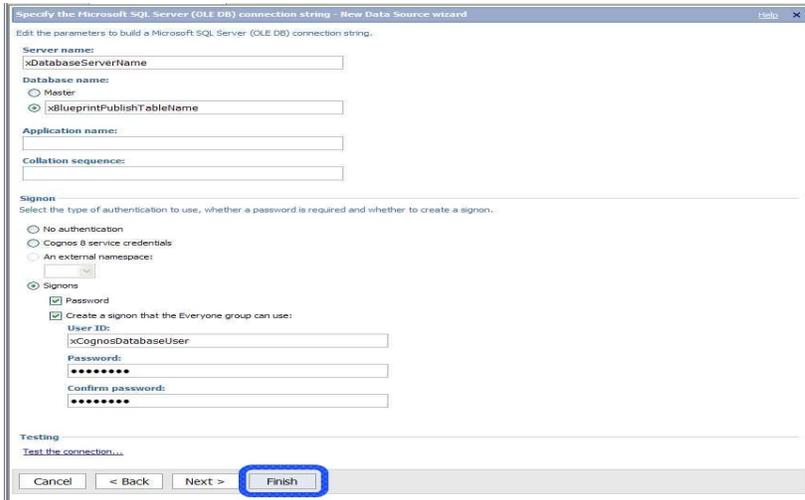


Click Close

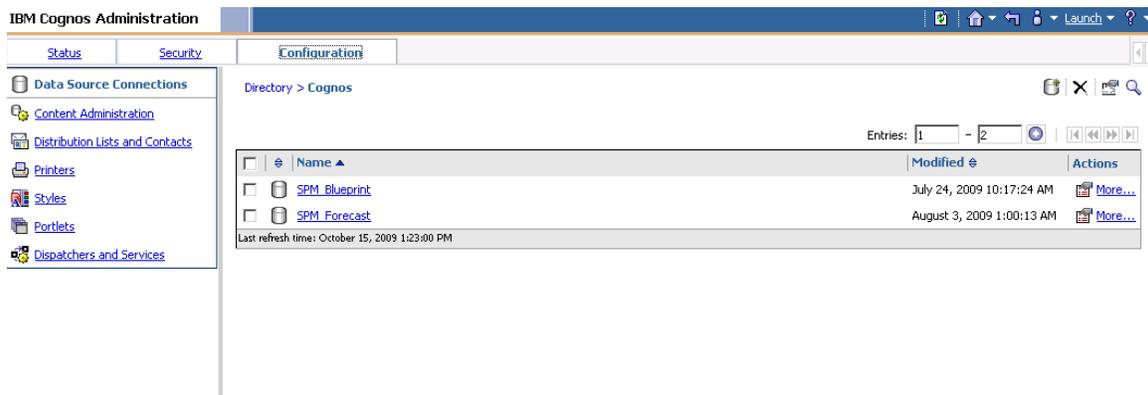




Click Finish to add the new data source



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

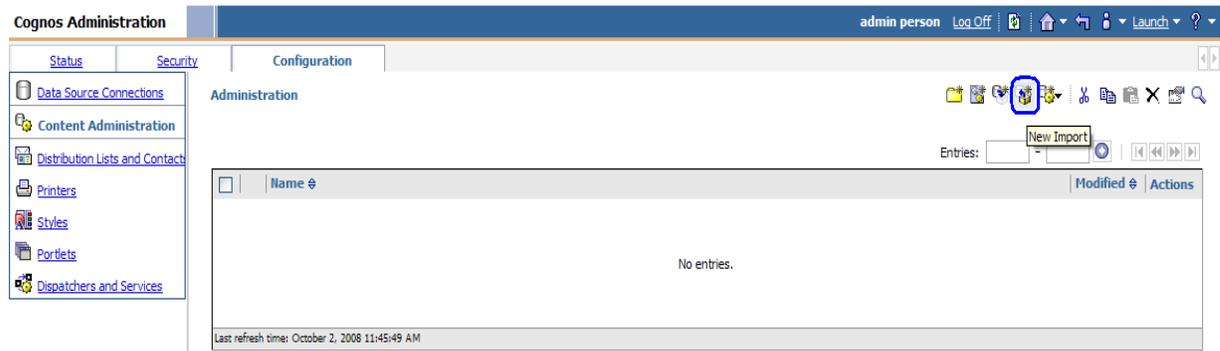


5.1.1.4. Run the import wizard to bring in the BI Content into the IBM Cognos Connection portal

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.

<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 >

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

Review the summary options selected then click Next >

Review the summary - New Import wizard

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

Deployment specification

Name: Blueprint Name Description:

Deployment archive

Name: Blueprint Name

Public folders content

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

Options:

Include report output versions
Replace existing entries

Include run history
Replace existing entries

Include schedules
Replace existing entries

Directory content

Cancel < Back **Next >** Finish

Choose 'Save and run once' then click Finish

Select an action - New Import wizard

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

Action:

Save and run once

Save and schedule

Save only

Cancel < Back Next > **Finish**



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

Run with options - Blueprint Name

Select when you want to run this import.

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

Content:

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

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

Run Cancel

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

Cognos 8

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

View the details of this import after closing this dialog

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

OK Cancel

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

View run history details - Strategic Finance Blueprint

View the details of this particular run.

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

Status: Executing

Messages

Severity: (All)

Entries: [] - [] [Refresh]

Time Message

No entries.

Close

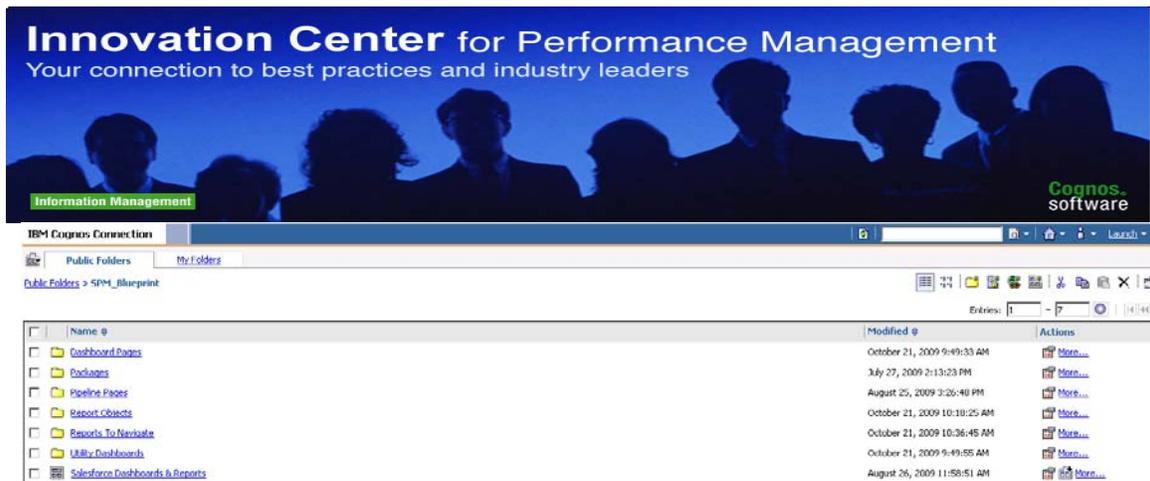


If the deployment import has not finished click on 'Refresh' again until it shows a completion time then click Close

The screenshot shows the Cognos Administration web interface. The main window displays "View an import deployment record - Blueprint Name - Import". The status is "Succeeded" and the completion time is "December 8, 2008 12:57:55 PM". A message box indicates "CM-REQ-2300 Import is complete. 1 object(s) were imported. 0 object(s) failed." Below this, there is a table for "Public folders content" with columns for "Name" and "Target name". The table contains one entry: "Blueprint Name" mapped to "Blueprint Name". There are also sections for "Options" and "General Options" with various checkboxes and settings. A "Close" button is located at the bottom left of the window.

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.