WORKFORCE PLANNING BLUEPRINT
WORKFORCE PLANNING SETUP GUIDE
A WEB-BASED PERFORMANCE MANAGEMENT SOLUTION

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Blueprint Overview

This document explains the content and provides installations steps for a web-based solution reporting for the Workforce Planning Blueprint.

IBM Cognos Blueprints are pre-defined data, process, and policy software models developed in partnership with leading academic institutions to address specific business process problems. 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 strategic performance and track it in a consistent, logical manner. It also provides a simple yet powerful way to monitor different Metrics and KPIs to better evaluate and take actionable items to increase performance.

Blueprint Contents:

1. **Workforce Planning Blueprint Content.zip**
   This is the entire file structure for the BI deployment, Framework Manager Model, TM1 model and graphics with a categorized folder structure to house the extracted files.

2. **WorkforcePlanning V2 TM1 Application.zip**
   This file contains the TM1 Workforce Planning Application files. The TM1 Application will must be configured to point at your existing TM1 9.5 Environment.

3. **Workforce Planning BI Deployment.zip**
   This is the BI Deployment file consisting of reports and portal pages specific to this Blueprint.

4. **Workforce Planning Blueprint Setup Guide.pdf**
   Description of the necessary files and steps needed to setup both environments for the Planning and BI portions of the Blueprint.

5. **Workforce Planning Images.zip**
   Images required when rendering dashboards and reports (for this blueprint there are no images).

6. **Workforce Planning V2.zip**
   This file is the Contributor Deployment file which will be imported through the TM1 Administration user interface.

7. **Workforce Planning.lnk**
   This is a shortcut which can be modified to launch the Workforce Planning Blueprint TM1 Application.

Making Content Files Available for Each Application

2.1 Unzipping the 'Workforce Planning Blueprint Content'

Unzipping the **'Workforce Planning Blueprint Content'** file will create the following directories:

Name ▲	Size	Type	Date Modified
Deployment File - Reports		File Folder	12/22/2009 1:08 AM
Documentation		File Folder	12/22/2009 12:26 AM
Framework Manager Model		File Folder	12/22/2009 12:44 AM
Graphics, Files, etc		File Folder	12/22/2009 12:26 AM
TM1 Application		File Folder	12/22/2009 12:48 AM
TM1 Application Shortcut and Deployment		File Folder	12/22/2009 12:49 AM

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

2.2 Copying the Necessary Files

1. Copy the "**Workforce Planning BI Deployment.zip"** file from the '**Deployment File – Reports**' folder to the **<IBM Cognos 8 install location>\deployment** folder.

   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.

2. Copy the contents from the '**Graphics, Files, etc'** folder to the **<IBM Cognos 8 install location>/webcontent/samples/images** folder.
   (For the Workforce Planning Blueprint there are no 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. Copy the contents of the 'TM1 Application' folder and both files located in the TM1 Application Shortcut and Deployment folder to a directory of your choice, for example purposes we will use
   C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint

IBM Cognos TM1 Content

The following steps will navigate through the steps required to create a new IBM Cognos TM1 Server instance and configure the objects needed for the IBM Cognos TM1 content to work properly.

3.1 Configure a new IBM Cognos TM1 Server instance

The following steps provide a quick guideline on how to get a new IBM Cognos TM1 server instance, however a more detailed explanation can be found in the IBM Cognos TM1 Server Administration document.

To configure a new IBM Cognos TM1 Server instance the following files are required:

1. Tm1s.cfg
2. Tm1s.lic
3. A shortcut to execute tm1s.exe using the Blueprint content as the working directory.

3.1.1 Copy the tm1s.lic File

The **tm1s.lic** file is included in your IBM Cognos TM1 installation. This file can be copied from <YourIBMCognosTM1_DirectoryInstall>/bin folder. The content of this file is similar to:

DATABASE_TYPE=TM1 PROPRIETARY
CLASS=505
LICENSE=<YourLicense>
MAX_USERS=99999
MAX_READONLY_USERS=99999
EXPIRE_DT=<YourExpiryDate>
LOCATION=
ORGANIZATION=<YourCompany>
LICENSOR=16699
INSTALL_ID=13108
PRODUCT=TM1Server8
……

Copy the **tm1s.lic** file to '**C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint'** to create a new server instance.

3.1.2 Modify the Tm1s.cfg server configuration file

From the **'C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint'** folder, modify the '**tm1s.cfg'** file.

This file needs to be modified to **point to the IBM Cognos TM1 Admin Server on your environment**.

The file is provided as:

```
[TM1S]
ServerLogging=F
SecurityPackageName=Kerberos
IntegratedSecurityMode=1
UseSSL=T
ServerName=Financial Analytics
DataBaseDirectory=C:\IBM\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint
AdminHost=localhost
PortNumber=11111
ClientMessagePortNumber=12346
Language=ENG
SaveTime=
DownTime=
ProgressMessage=True
AuditLogOn=F
AuditLogMaxFileSize=100 MB
AuditLogUpdateInterval=60
DefaultMeasuresDimension=T
```

The parameters highlighted in **red** need to be reviewed and modified accordingly for your company's environment. If there is certainty that the default TCP ports above are not being used, they can be left unchanged.

The "AdminHost" parameter would need to be changed to reflect the IBM Cognos TM1 Admin Sever host setting in your environment.

3.1.3 Modify/Create the Server Shortcut

Navigate to **'<YourIBMCognosTM1_DirectoryInstall>/bin'** folder; **create a shortcut** to tm1s.exe.
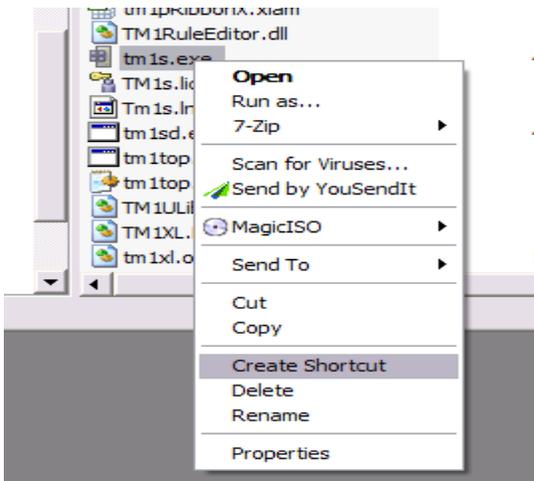
1. **Copy the shortcut** created to '**C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint**'
2. **Rename the shortcut** to be "Workforce Planning Blueprint"
3. **Edit the Shortcut Properties**
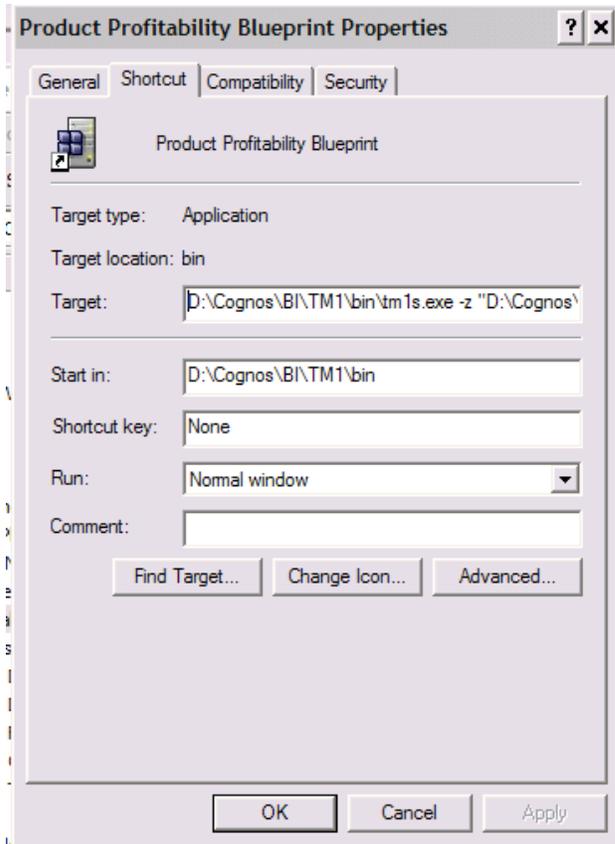
The **"Target" property** of the shortcut needs to be changed to read:

<YourIBMCognosTM1InstallFolder>\bin\tm1s.exe -z 'C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint'

Notice that the last portion of the command is the folder where the IBM Cognos TM1 content was extracted to.

Click onto **OK** to save the changes.

An example of the Workforce Planning Blueprint shortcut has been included in the TM1 Application Shortcut and Deployment Folder

3.2 Testing the new IBM Cognos TM1 Server instance

From the '**C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint**' folder, double click the 'Workforce Planning Blueprint' shortcut.

The following dialog will appear:
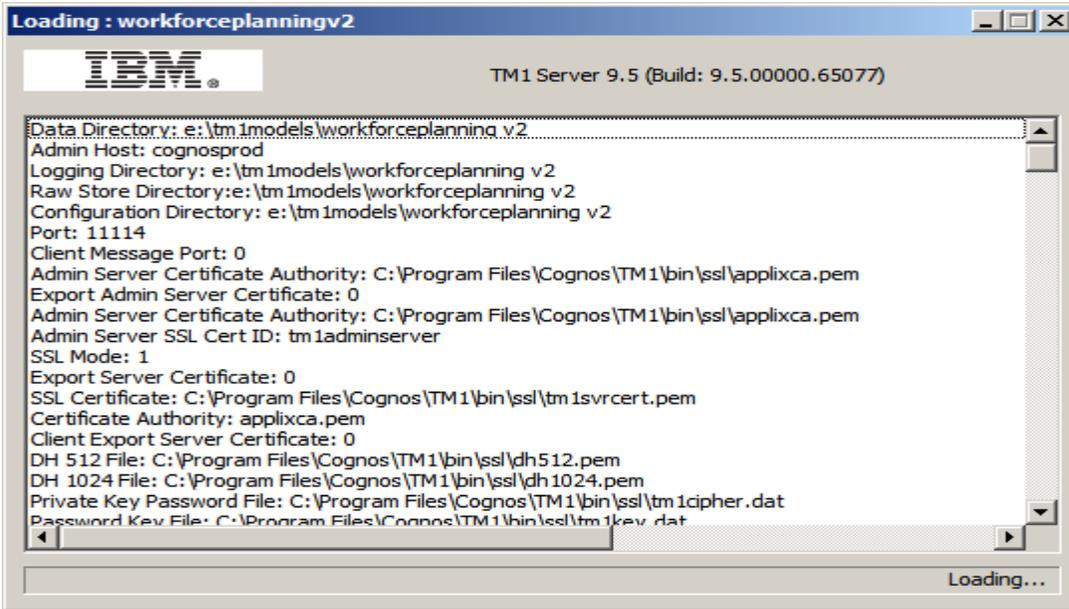
After all cubes have been loaded, the lower right corner of the dialog will display **Running…**:
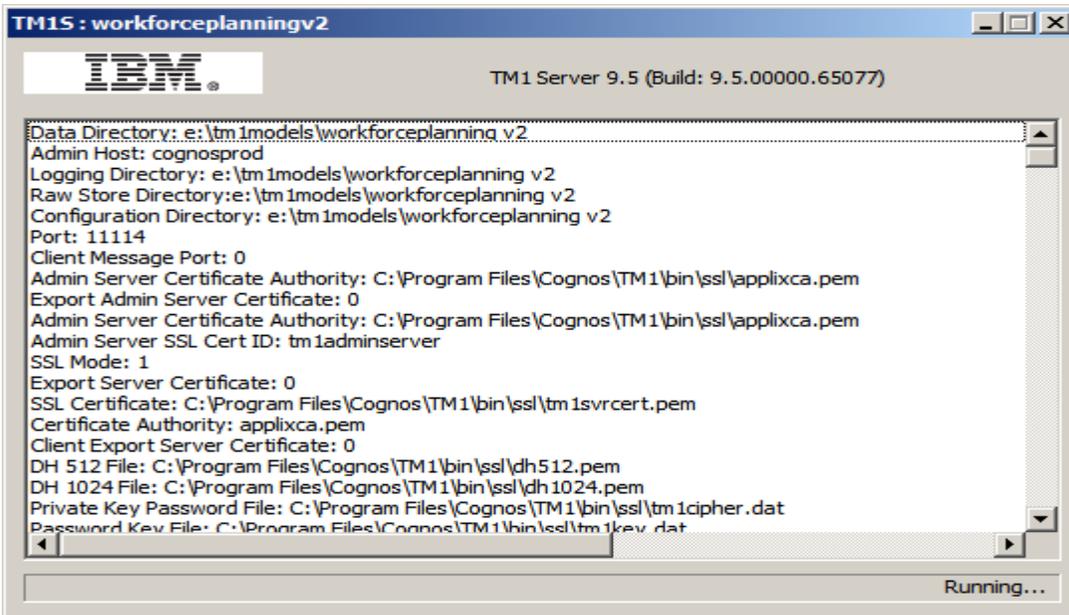
Once the newly created IBM Cognos TM1 Server instance is up and running, Architect and/or IBM Cognos TM1Web can be used to navigate through the content.

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3.3 Setting Up the Contributor Application

3.3.1 Open TM1 **Architect**

3.3.2 Double click the **workforceplanningv2** application and **Login** as User: **admin** and Password: **apple**

3.3.3 Click on the Menu Item – **View** and validate **Display Control Objects** is **checked**
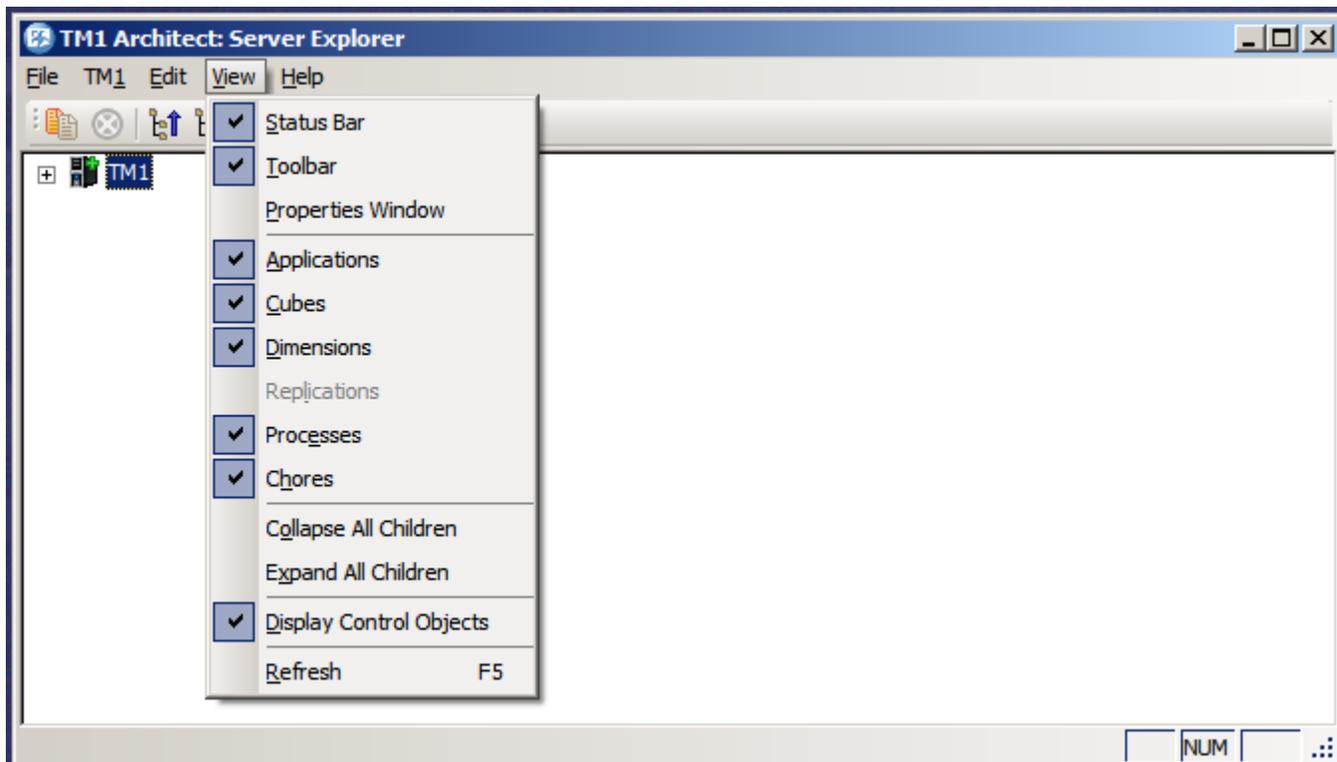
3.3.4 Expand **Processes** node and double click **}tp_admin_delete_all**
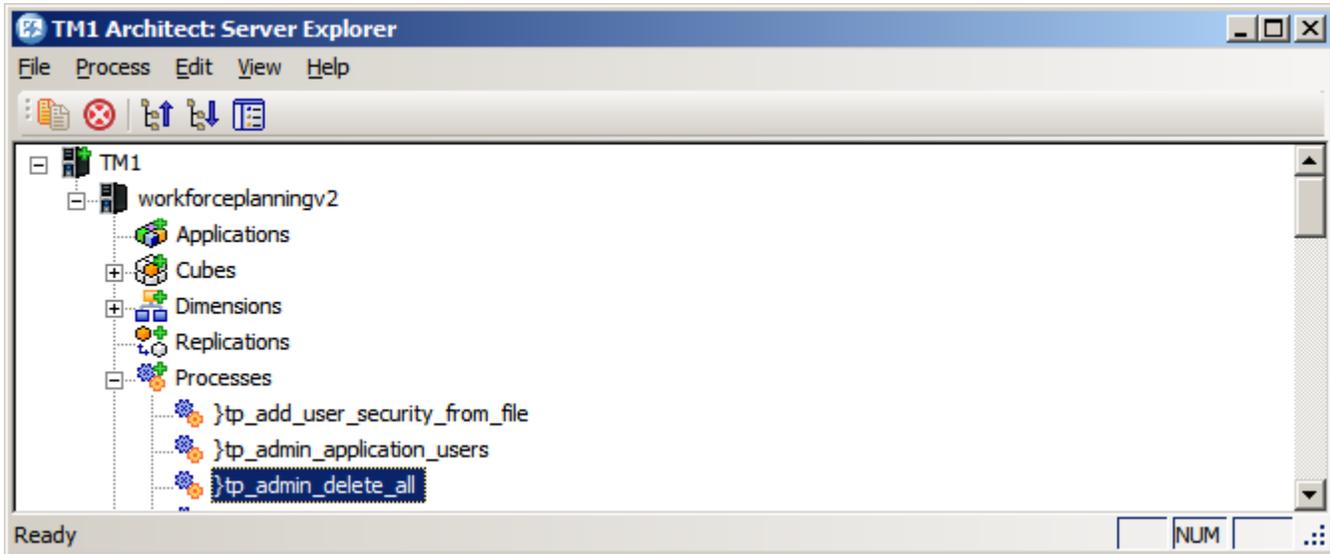
3.3.5 Click **run**
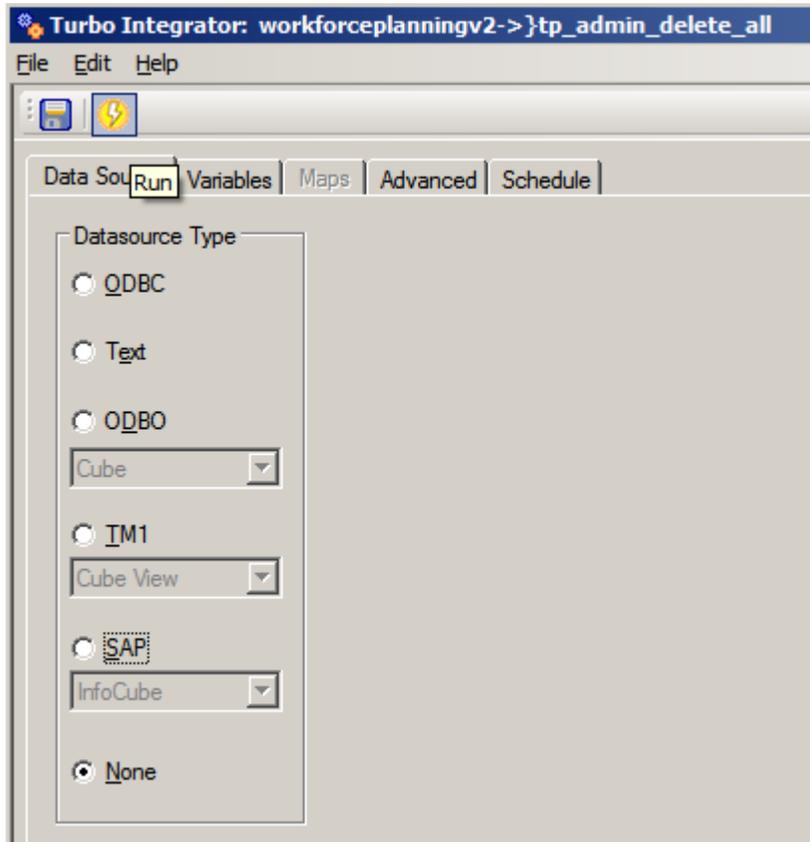
3.3.6 Copy the "Workforce Planning V2.zip" file into
C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint

3.3.7 **Launch** your TM1 Contributor environment, for example, http://yourTM1_Server/pmpsvc/ and **Login** as User: **admin** and Password: **apple**

3.3.8 Click **Administer IBM Cognos TM1 Contributor**
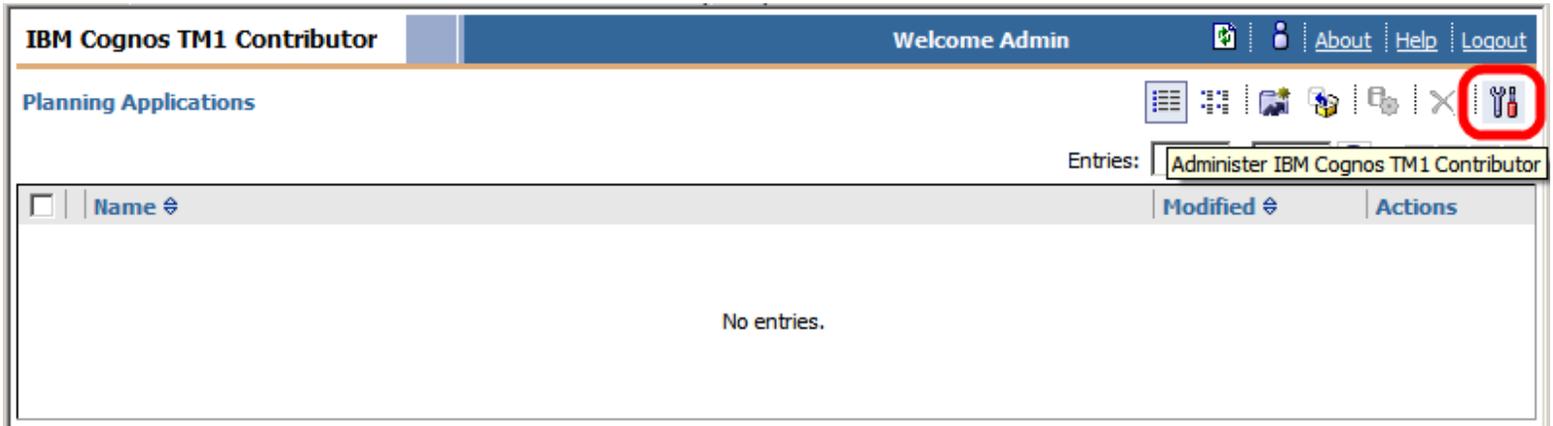
3.3.9 Click **Add...** under the Server Names: section

3.3.10 Enter your **TM1 Admin Host** and click the **Refresh** icon

3.3.11 For the Server Name: select **workforceplanningv2** and **OK**
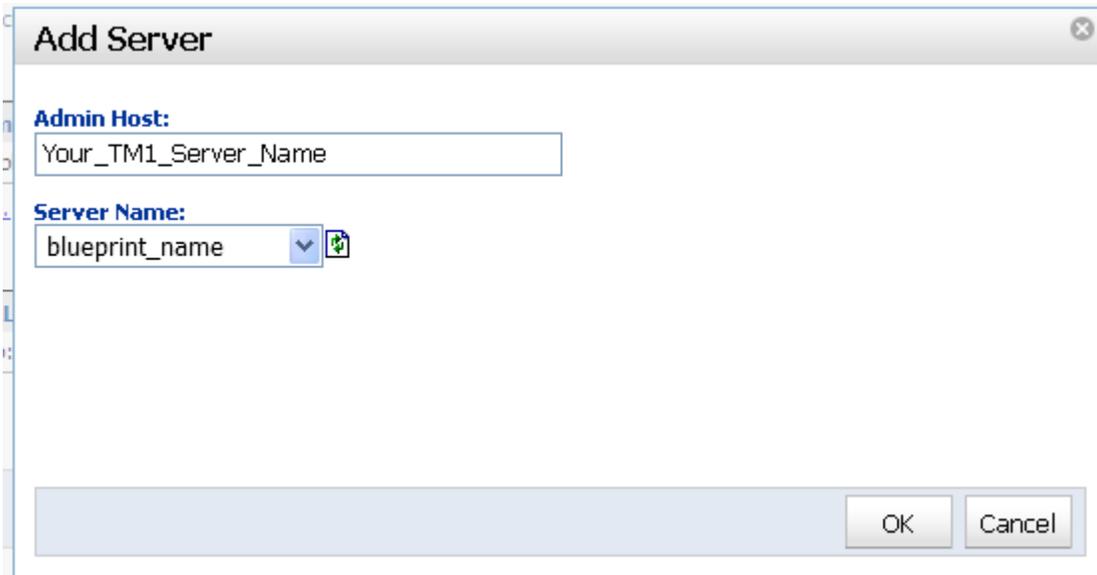
3.3.12 Click **OK**

3.3.13 Click **OK**

3.3.14 Click the **Import Application** icon

3.3.15 Choose **yourTM1ServerName:workforceplanningV2** for the TM1 Server

3.3.16 Browse to **C:\Cognos Innovation Center\Blueprints\Workforce Planning Blueprint** and select the "**Workforce Planning V2.zip**"

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3.3.17 Uncheck Import application security and Click **Import**

3.3.18 Click the **Activate Application** icon

3.3.19 Click the **Workforce Application** link to test, if installed correctly it should resemble the following

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.

4.1 Create the BI data source

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

4.1.2   Click **Launch** and select **IBM Cognos Administration**
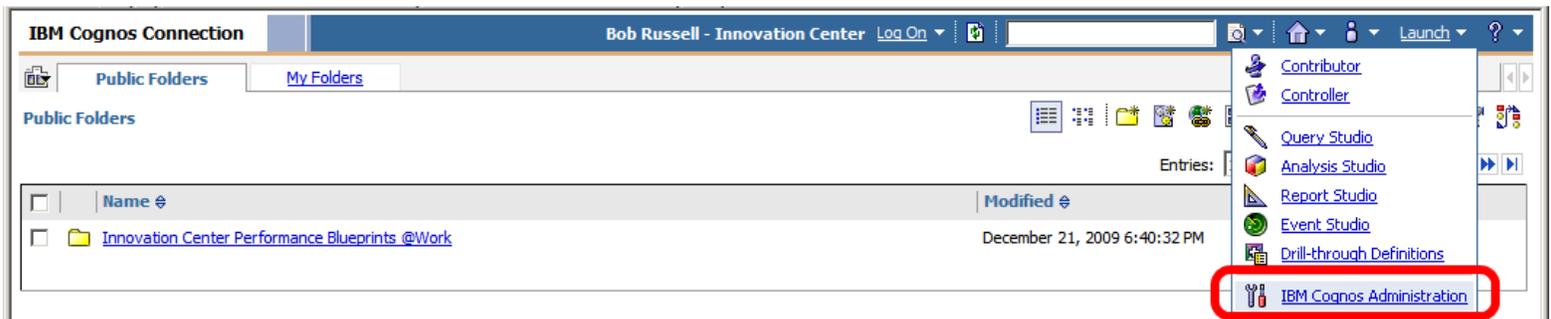
4.1.3   Click on the **Configuration tab**; make sure **'Data Source Connections'** is selected

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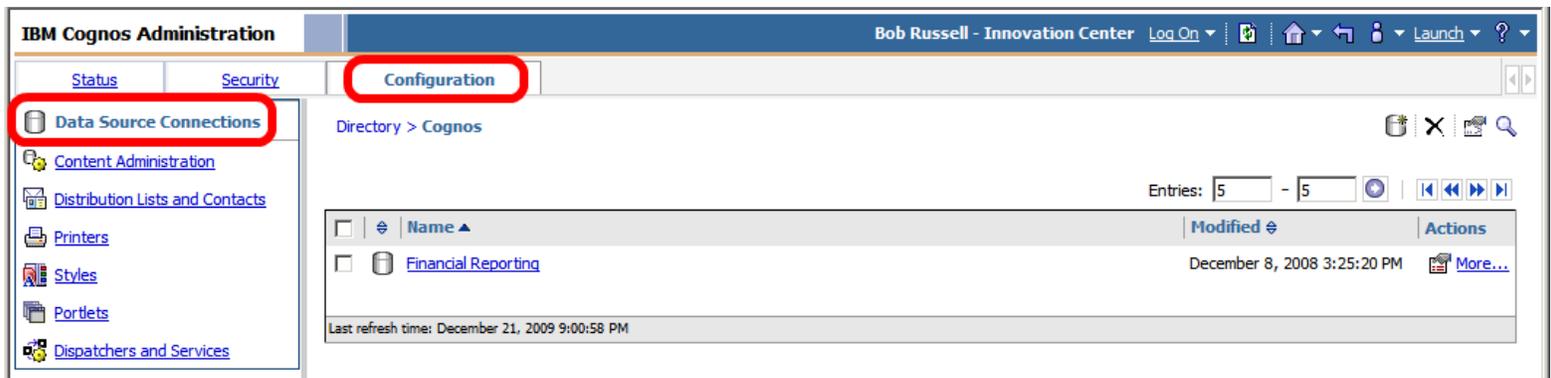
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4.1.4 Click the New Data Source icon

4.1.5 Name the Data Source exactly as: "WorkforcePlanningTM1_BI" then click Next >

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4.1.6 Select the **'TM1'** option; then click **Next** >

IBM Cognos Administration

Bob Russell - Innovation Center Log On ▾ | 🖻 | 🏠 ▾ ↰ 👤 ▾ Launch ▾ ? ▾

| Status | Security | **Configuration** | | ◁▷ |

Data Source Connections

- **Content Administration**
- **Distribution Lists and Contacts**
- **Printers**
- **Styles**
- **Portlets**
- **Dispatchers and Services**

Specify the connection - New Data Source wizard   Help   ✕

Specify the parameters for the connection of this new data source. The name of the data source is used to set the name of the connection.

Type:

TM1   ▾

Isolation level:

◉ Use the default object gateway

○ Specify a value:

Cursor stability   ▾

[Cancel]   [< Back]   [**Next >**]   [Finish]

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4.1.7   Fill in the parameters for the TM1 connection then click **Test the connection...**

4.1.8   Click Test to verify the connection is setup correctly

4.1.9 The following screen should indicate **Succeeded** below the Status then click **Close**
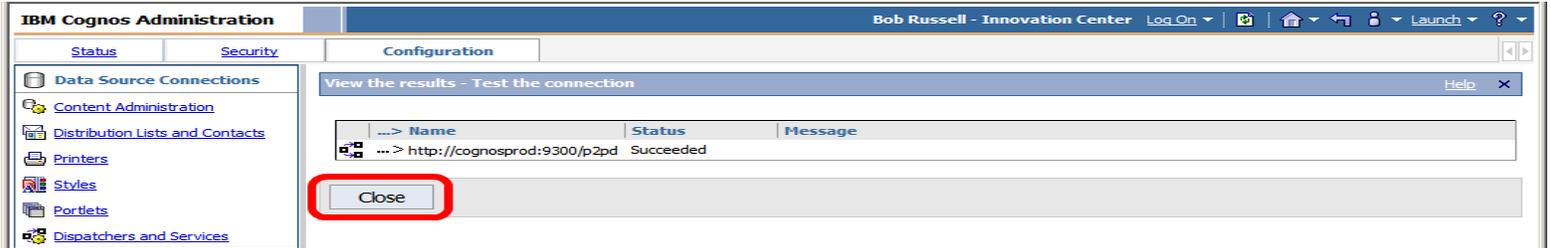
4.1.10 Click **Close** again
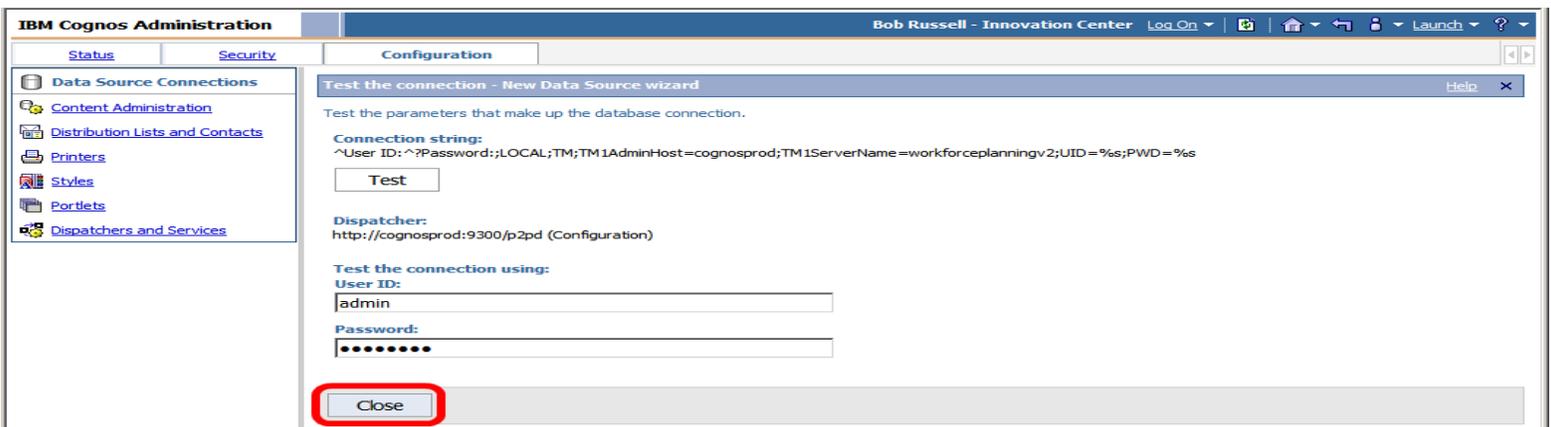
4.1.11 Click **Finish** to add the new data source
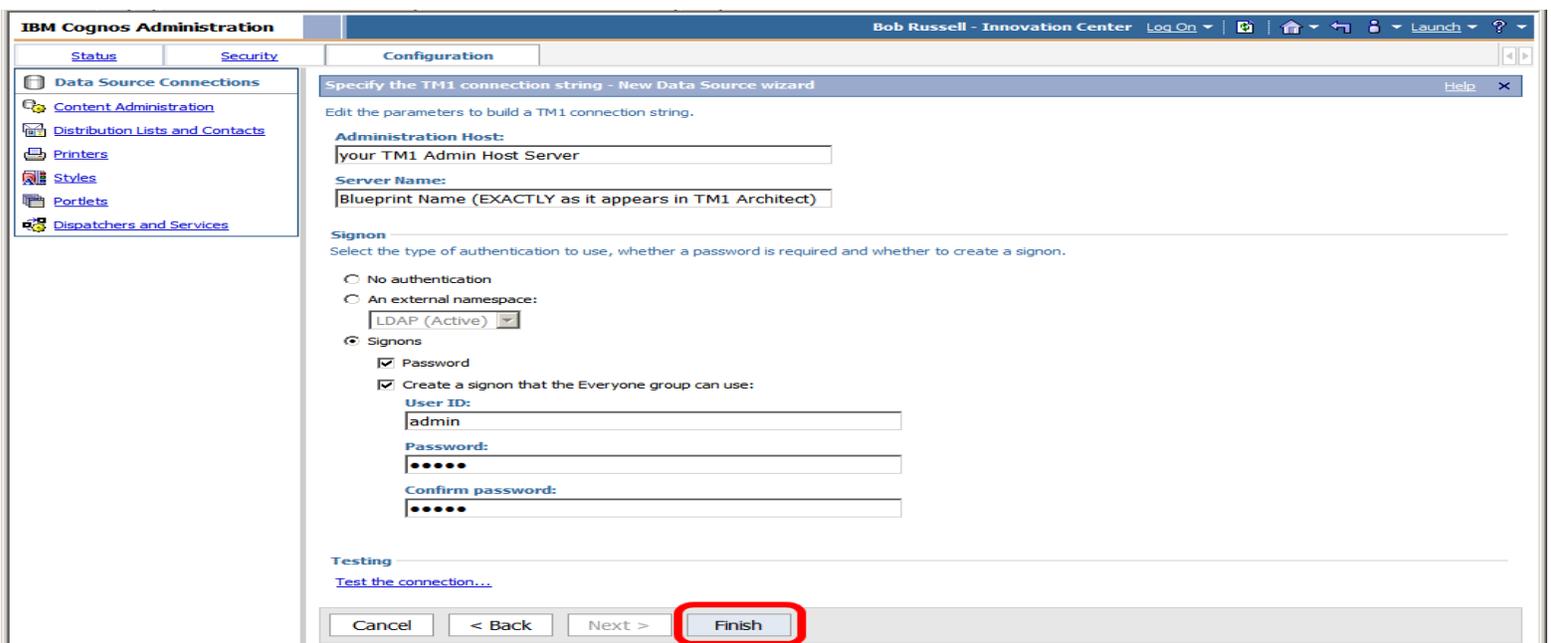
4.2 Import BI Deployment Package

4.2.1 Run the Import Wizard to bring in the BI Content into the IBM Cognos Connection portal

4.2.2 From the screen in the previous step, select **Content Administration**
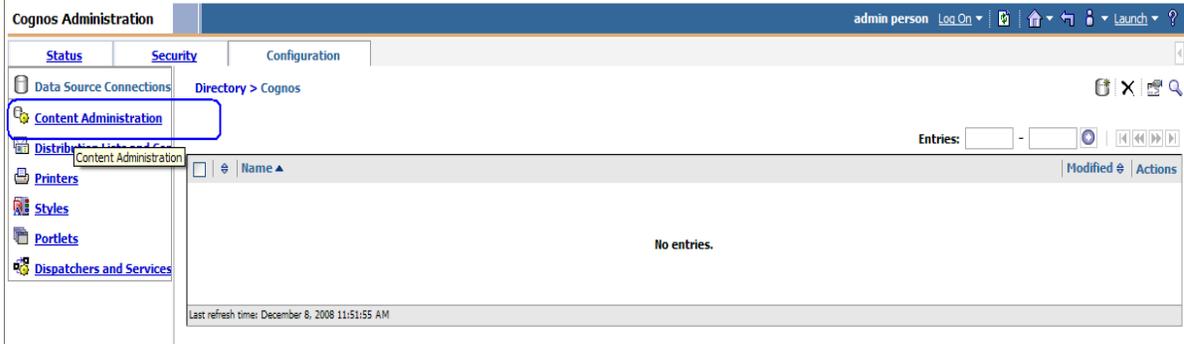
4.2.3 Click the **New Import** icon

4.2.4 Select the import package named '**Workforce Planning BI Deployment**' then click **Next** >

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4.2.5 Verify the Name is 'Workforce Planning BI Deployment' then click **Next** >

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

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

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4.2.8   Review the summary options selected then click **Next** >

4.2.9   Choose 'Save and run once' then click **Finish**

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

4.2.11   Check 'View the details of this import after closing this dialog' then click OK
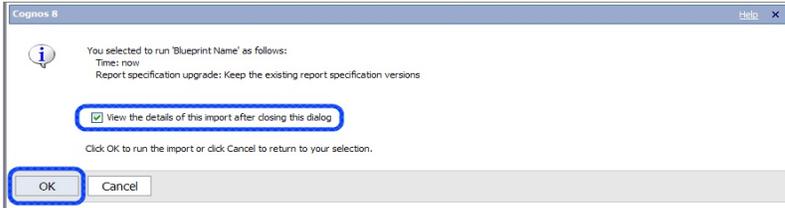
4.2.12   Initial view of the import deployment record will be blank press the '**Refresh**' hyperlink.


4.2.13   If the deployment import has not finished click on 'Refresh' again until it shows a completion time then click **Close.**
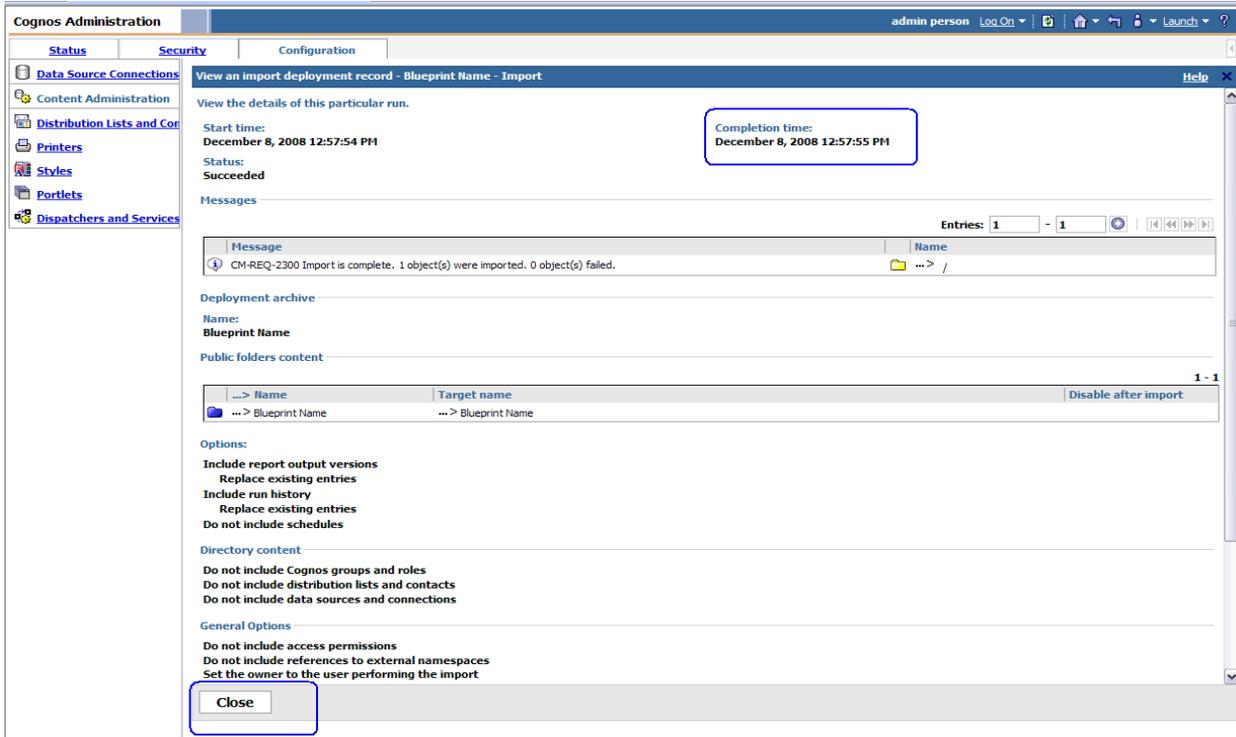
4.3 Testing IBM Cognos Dashboard Content

After the Import is performed a new folder will appear named '**Workforce Planning TM1 Blueprint**' in the IBM Cognos Connection portal. The content of this folder will display as:
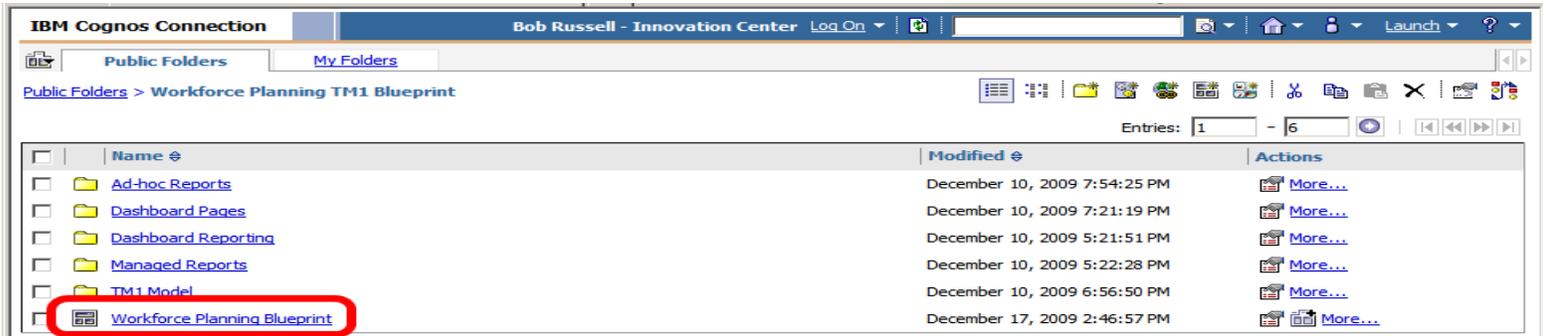
To test the content is coming up correctly, click the 'Workforce Planning Blueprint' link as highlighted above:

Testing can then be performed on each of the dashboard pages to obtain the dashboards displaying your organization's data.