Planning Analytics sample databases and books installation guide

IBM Planning Analytics on Cloud is an integrated planning, budgeting, and forecasting solution.

This guide explains how to install and configure the sample databases and books that are available from the IBM Accelerator Catalog.

First, you configure the database, then you migrate books into the workspace.

Configure the IBM Planning Analytics Workspace database

Local cloud with on-premises TM1 users

Note: For Private or Public Cloud users, create a ticket for CloudOps to add the 24Retail or Small Business Kit databases to your Cloud environment.
If the 24Retail database is available on your local cloud environment from the sample install, you do not need to do this step for this database.

Make sure that the firewall setting allows you to the Cloud servers you need.

Go to Import and migrate Planning Analytics Workspace books.

Steps
1. Extract the files from loaded .zip and place them on your local drive.
2. Open tm1s.cfg in a text editor and configure/verify the parameters described in the table below. Do this for each new database.
3. Save all the changes to tm1s.cfg file.
4. In Cognos Configuration, add and start the tm1 database server. See: https://www.ibm.com/support/knowledgecenter/SSD29G_2.0.0/com.ibm.swg.ba.cognos.tm1_inst.2.0.0.doc/t_tm1_inst_usingcognosconfigurationtoaddanexistingcognostm1server.html

Configuration parameters

Parameter	Description	Syntax example
ServerName	Sets the name of the TM1 Database. Type a unique database name	ServerName=*24RetailNew*
DataBaseDirectory	Specifies the data directory from which the server loads cubes, dimensions, and other objects.	DataBaseDirectory =*C:\Program Files\Cognos\TM1\Custom\TM1Data\24 RetailNew*
ServerLogging	Generates a log with the security activity details on the IBM® TM1®	ServerLogging=T

	Server that are associated with Integrated Login.	
PortNumber	Sets the server port number used to distinguish between multiple servers running on the same computer. Port number must be unique	PortNumber=*12345*
HTTPPortNumber	Sets the port number on which the TM1 Server listens for incoming HTTP(S) requests. This number must be unique	HTTPPortNumber=*5001*
AdminHost	Specifies the computer name or IP address of the Admin Host on which an Admin Server is running.	AdminHost=*customer_local_server_address*
IntegratedSecurityMode	Sets the user authentication mode to be used by the IBM® TM1® Server. Default username=admin password=apple	IntegratedSecurityMode=1
EnableNewHierarchyCreation	Specifies whether multiple hierarchy creation is enabled or disabled.	EnableNewHierarchyCreation=T

Import and migrate Planning Analytics Workspace books

You must have the Admin role in Planning Analytics Workspace to perform these steps.
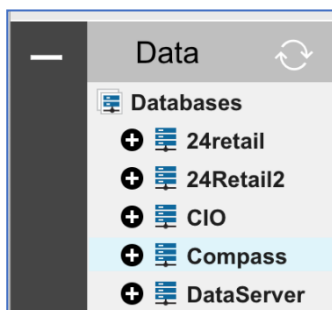Note: Download Planning Analytics model solution asset from Accelerator Catalog site and extract the .gz file from the unzip folder.
Important: Do not unzip the book .gz file.

Steps to import the books
These steps are the same for Local and Private or Public cloud users.

1. In Planning Analytics Workspace, make sure that the database used in model solution asset is available. For example, if **24Retail book set** model solution is downloaded, the following database should be available in the left pane.

2. Go to the **Administration** page. You access the **Administration** page from your username in the Planning Analytics Workspace window.

3. Go to **Lifecycle Management** tab. This is where you migrate your workspace asset.
4. Click **Manage Snapshots**, then click **Import** and select the *.gz* file that is extracted from the downloaded zip file.
5. Select the imported file in the **Manage Snapshots**.
6. Select the **Snapshot content** tab. The available books are listed in the **Snapshot content** column.
7. Click **Migrate**, and then **Migrate** button again.
8. Type a unique folder name in **Select target environment**.
9. Select your source environment.
10. Select **Keep the folder structure while deploying** option and click **Migrate**.
11. On the Database validation window, select the database that is used in the model solution asset (you may have a different name for this database in your environment or tenant).
12. Click **Migrate now**.
13. Go to PAW Welcome page and open your Personal folder from the left pane and find the folder that contains the books that are migrated from the downloaded model solution asset. Try launching the **Reports and Analysis** portal and navigate to different reports and dashboards.
14. You can move the books to Shared folder. Click the ellipsis on the right top corner of the tile. Select **Move** and place the books where needed.