

IBM Cognos Producer Lifecycle and Credential
Management
Version 1.0

Installation and Configuration Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 7.

Product Information

This document applies to IBM Cognos Producer Lifecycle and Credential Management Version 1.0 and may also apply to subsequent releases.

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Introduction

This document is intended for the use with IBM® Cognos® Producer Lifecycle and Credential Management Version 1.0.

IBM Cognos Producer Lifecycle and Credential Management provides a single platform that insurance customers can use for producer and agency onboarding, producer and agency administration, producer self-service, hierarchy management, credential management, and credential validation.

Audience

This guide is intended for administrators who are installing and configuring IBM Cognos Producer Lifecycle and Credential Management.

Finding information

To find IBM Cognos product documentation on the web, including all translated documentation, access the IBM Knowledge Center (<http://www.ibm.com/support/knowledgecenter/SS8KKA/welcome>). Release Notes are published directly to IBM Knowledge Centers, and include links to the latest technotes and APARs.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products.

Chapter 1. Installation overview

The IBM Cognos Producer Lifecycle and Credential Management installation package contains the WAR file necessary for deploying the Cognos Producer Lifecycle and Credential Management application.

The Cognos Producer Lifecycle and Credential Management WAR file can then be deployed using Apache Tomcat.

After deploying the WAR file, you must make changes to the Cognos Producer Lifecycle and Credential Management configuration file, then start and reload the application.

Installation preparation

Before IBM Cognos Producer Lifecycle and Credential Management can be installed, you must download the software that is required to deploy and run the application.

Pre-installation checklist

Before you can deploy IBM Cognos Producer Lifecycle and Credential Management, you must download and install the software that is required to run the application.

You must install the following products:

- **JBoss Drools Guvnor 5.5.0** - this is required to store workflows and business rules used in Cognos Producer Lifecycle and Credential Management.
- **JBoss jBPM Designer 2.4** - this integrates with the Guvnor application to create workflows and business rules used in Cognos Producer Lifecycle and Credential Management.
- **Apache Tomcat** - this is used to deploy the Cognos Incentive Compensation Management WAR file.
- **Oracle Java™ Software Development Kit or Java Runtime Environment or Java Development Kit 7.0** - this is required to run the Apache Tomcat application.
- **Microsoft SQL Server 2008 R2 or 2008 SP3 or 2012** - this is required to create and house the database used by Cognos Producer Lifecycle and Credential Management.

Installing Microsoft SQL Server

You must install Microsoft SQL Server and create a database for IBM Cognos Produce Lifecycle and Credential Management.

Procedure

1. Go to the Microsoft website (<http://microsoft.com>) and download one of the following applications:
 - Microsoft SQL Server 2008 R2
 - Microsoft SQL Server 2008 SP3
 - Microsoft SQL Server 2012
2. Install the software.

What to do next

You must use Microsoft SQL Server Management Studio to create a database for Cognos Producer Lifecycle and Credential Management.

Installing JBoss Drools Guvnor

JBoss Drools Guvnor must be installed and deployed to configure workflows and business rules for IBM Cognos Producer Lifecycle Management.

Procedure

1. Go to the JBoss website (<http://www.jboss.org>).
2. Download JBoss Drools Guvnor 5.5.0.
3. Deploy JBoss Drools Guvnor on your web server.

What to do next

You must install JBoss jBPM Designer to integrate with JBoss Drools Guvnor.

Installing JBoss jBPM Designer

JBoss jBPM Designer integrates with JBoss Drools Guvnor and is used to edit and create processes for IBM Cognos Producer Lifecycle and Credential Management.

Procedure

1. Go to the JBoss website (<http://www.jboss.org>).
2. Install JBoss jBPM Designer 2.4.
3. Deploy jBPM on your web server.

What to do next

Open JBoss Drools Guvnor and create a package to store the workflows and business rules for Cognos Producer Lifecycle and Credential Management.

Installing the IBM Cognos Producer Lifecycle and Credential Management software

After you have installed and configured the required software, you can install Cognos Producer Lifecycle and Credential Management.

Procedure

1. Double-click the Cognos Producer Lifecycle and Credential Management `setup.exe` file.
2. Follow the steps in the installation wizard.
The Cognos Producer Lifecycle and Credential Management WAR file is saved to your computer.

What to do next

You must deploy the Cognos Producer Lifecycle and Credential Management WAR file using Apache Tomcat.

Chapter 2. Deployment of IBM Cognos Producer Lifecycle and Credential Management with Apache Tomcat

Cognos Producer Lifecycle and Credential Management can be deployed using Apache Tomcat version 6.

In order to successfully deploy Cognos Producer Lifecycle and Credential Management using Tomcat Manager, you must already have Java 7 installed.

Installing Apache Tomcat

Apache Tomcat must be installed and running on your computer before the IBM Cognos Producer Lifecycle and Credential Management application can be deployed.

Before you begin

Java 7 must be installed and running on your computer.

Procedure

1. Go to the Apache Tomcat website (<http://tomcat.apache.org>).
2. Download and install Apache Tomcat 6.
 - If you are installing Cognos Producer Lifecycle and Credential Management on Windows, download and run the Windows Service Installer Tomcat distribution.
 - If you are not installing Cognos Producer Lifecycle and Credential Management on Windows, install Tomcat using the archive on the Apache Tomcat website.

Important: When Apache Tomcat is run as a service, there is no tray icon present while Apache Tomcat is running. An exception to this rule occurs when opting to run Apache Tomcat at the end of the installation process. Then the installer creates shortcuts for starting and configuring Apache Tomcat. The Apache Tomcat web administration application can only be used when Apache Tomcat is running.

Deploying the application using Apache Tomcat

You can use Tomcat Manager to deploy IBM Cognos Producer Lifecycle and Credential Management.

Procedure

1. Go to <http://localhost:8080>.

Apache Tomcat runs on port 8080 by default, but if you specified a different port number during the installation of Apache Tomcat, navigate to that port number instead.
2. Open Apache Tomcat Manager.
3. Deploy the PLCM.WAR file.

What to do next

After deploying the application, you must configure settings in the Cognos Producer Lifecycle and Credential Management configuration file.

Configuring access to your database

You must configure IBM Cognos Producer Lifecycle and Credential Management to point to your Microsoft SQL Server database.

Before you begin

Make sure you have created a Microsoft SQL Server database and deployed the Cognos Producer Lifecycle and Credential Management WAR file using Apache Tomcat.

Procedure

1. Navigate to the following location: C:\Program Files\Apache Software Foundation\Tomcat 6.0\webapps\PLCM\WEB-INF\classes.

Important: This is the default location. If you installed Apache Tomcat to another location, the file path is different.

2. Open the `application.conf` file.
3. Configure the `db.sql.url` value to point to your database.

Important: If you have special characters in any of the following values, you must comment out the special characters using double quotation marks ("). For example, if your password is `s3cr*t`, type `s3cr"*t` as the value.

You must modify the following values:

localhost

The host name of the computer where Microsoft SQL Server is installed.

- 1433** The default Microsoft SQL Server port. You might need to modify the port number if you are connecting to a named instance. Use Microsoft SQL Server Configuration Manager to check the port number.

databaseName

The name of the database that you created for Cognos Producer Lifecycle and Credential Management in Microsoft SQL Server.

instance

The name of your Microsoft SQL Server instance.

4. Set the `db.sql.user` value to the user who has access to the desired Microsoft SQL Server account with appropriate rights to access the database.
5. Set the `db.sql.password` value to the password of the user who has access to the desired Microsoft SQL Server account with appropriate rights to access the database.
6. Make sure the `application.context` value matches the name of the WAR file. If this value is commented out, remove the pound (#) sign.
7. Save the file.

What to do next

You must start and reload the Cognos Producer Lifecycle and Credential Management WAR file for the changes to take effect.

Configuring mail settings

For IBM Cognos Producer Lifecycle and Credential Management to automatically send emails to users, mail settings must be configured.

Before you begin

Obtain the details of your company's mail server from your system administrator.

Procedure

1. Navigate to the following location: C:\Program Files\Apache Software Foundation\Tomcat 6.0\webapps\PLCM\WEB-INF\classes.

Important: This is the default location. If you installed Apache Tomcat to another location, the file path is different.

2. Open the application.conf file.
3. Edit the following section:

```
# EMAIL configuration
clientName="XYZ Insurance"
# From email address
fromemail="plcm@ibm.com"
# This flag will determine if emails should be sent or not.
# NOTE: This flag should always be set to false if there is no valid mail
server setup enableemails=false
smtp.host="localhost"
#All below parameters are optional for Email configuration
smtp.port=25
smtp.ssl=no
smtp.tls=no
smtp.user="user"
smtp.password="secret"
```

Tip: The fromemail value is usually set to the administrator's email address. When emails are generated, they are sent from the email address indicated here.

4. Save the file.

What to do next

You must start and reload the Cognos Producer Lifecycle and Credential Management WAR file for the changes to take effect.

Configuring access to JBoss Drools Guvnor

Access to JBoss Drools Guvnor must be configured to store workflows and rule definitions used by IBM Cognos Producer Lifecycle and Credential Management.

Before you begin

You must download and install JBoss Drools Guvnor 5.5.0 and deploy the Cognos Producer Lifecycle and Credential Management WAR file on Apache Tomcat. In Guvnor, you must create a package to store the workflows and rule definitions for

Cognos Producer Lifecycle and Credential Management.

Procedure

1. Navigate to the following location: C:\Program Files\Apache Software Foundation\Tomcat 6.0\webapps\PLCM\WEB-INF\classes.

Important: This is the default location. If you installed Apache Tomcat to another location, the file path is different.

2. Open the application.conf file.
3. In the Drool configuration section, uncomment and modify the following values:

rules.packageURL

This value must point to the JBoss Drools Guvnor package binary that contains the workflows and rule definitions for Cognos Producer Lifecycle and Credential Management.

rules.user

This is the user who has access to the package that contains the workflows and rule definition for Cognos Producer Lifecycle and Credential Management.

rules.password

This is the password of the user who has access to the package that contains the workflows and rule definition for Cognos Producer Lifecycle and Credential Management.

4. Save the file.

What to do next

You must start and reload the Cognos Producer Lifecycle and Credential Management WAR file for the changes to take effect.

Reloading IBM Cognos Producer Lifecycle and Credential Management

You must reload the Cognos Producer Lifecycle and Credential Management WAR file after making changes to the application.conf file.

Procedure

1. In Tomcat Manager, next to the /PLCM application, click the **Start** link.
2. After the application starts, click the **Reload** link.
3. Navigate to <http://localhost:8080/PLCM> to access to the application.

Important: To log in for the first time, use the user name "admin" and the password "a".

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