



CAPITAL PLANNING BLUEPRINT  
 PERFORMANCE BLUEPRINT SETUP DOCUMENT  
 A WEB-BASED PERFORMANCE MANAGEMENT SOLUTION

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## 1. Blueprint Overview

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

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 insight into different Metrics and KPIs in order to better understand how they have been performing.



## 2. Making Content Files available for each application

### 2.1. Unzipping the "Capital\_Planning\_Blueprint\_Content"

After unzipping the file "Capital\_Planning\_Blueprint\_Content", it will create the following directories:

Name	Size	Type	Date Modified
Deployment File - Reports		File Folder	11/16/2009 9:08 AM
Documentation		File Folder	11/16/2009 9:10 AM
Framework Manager Model		File Folder	11/16/2009 9:47 AM
Graphics, Files, etc		File Folder	11/16/2009 9:08 AM
TM1 Application		File Folder	11/16/2009 9:08 AM
readme.txt	1 KB	Text Document	11/16/2009 9:09 AM

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

### 2.2. Copying the necessary files into their respective directories

Copy the Capital\_Planning\_Blueprint\_BI\_Deployment.zip file from 'Deployment File – Reports' 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.

Copy the content of TM1 Application to the folder hosting the TM1 Applications:  
<Your\_TM1\_Applications\_folder>



### 3. IBM Cognos TM1 Content

The purpose of the TM1 data model is to act as a generic model for driver based Expense planning as well as a data source for the Business Intelligence Analytics. For proven practices for specific planning processes please refer to the blueprints designed to support industry sector blueprints.

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. Extract the IBM Cognos TM1 Content

Go to folder <Your\_TM1\_Applications\_folder> to unzip the file "Capital\_Planning\_Blueprint\_TM1\_Content.zip".

Once the files are extracted the following structure will be available:



#### 3.2. Configure a new IBM Cognos TM1 Server instance

The following steps provide a quick guideline on how to create 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:

Tm1s.cfg  
Tm1s.lic

Additionally, a shortcut to execute tm1s.exe using the Blueprint content as the working directory is needed.

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
.....
```

This file should be copied to the following folder:

<Your\_TM1\_Applications\_folder>\CapitalProjectPlanning\_V2\Objects"  
In order to create a new IBM Cognos TM1 Server instance.

### 3.2.1. Modify the Tm1s.cfg server configuration file

Within the folder

<Your\_TM1\_Applications\_folder>\CapitalProjectPlanning\_V2\Objects"  
The file "tm1s.cfg" is provided.

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=capital project planning_v2
DataBaseDirectory=<Your_TM1_Applications_folder>\CapitalProjectPlanning_V2\Objects
AdminHost=localhost
PortNumber=80003
ClientMessagePortNumber=12346
Language=ENG
SaveTime=
DownTime=
ProgressMessage=True
AuditLogOn=F
AuditLogMaxFileSize=100 MB
AuditLogUpdateInterval=60
DefaultMeasuresDimension=T
```

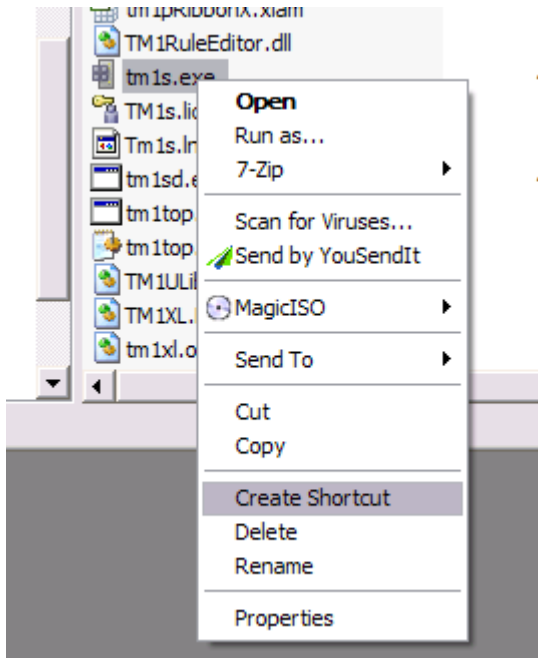
The parameters highlighted in orange would need to be reviewed and modified in accordance with your company environment. If there is certainty that the TCP ports set in the previous parameters are not being used, they can be left unchanged.



However the "AdminHost" should be changed to the IBM Cognos TM1 Admin Sever host in your environment.

### 3.2.2. Modify/Create the shortcut to Server

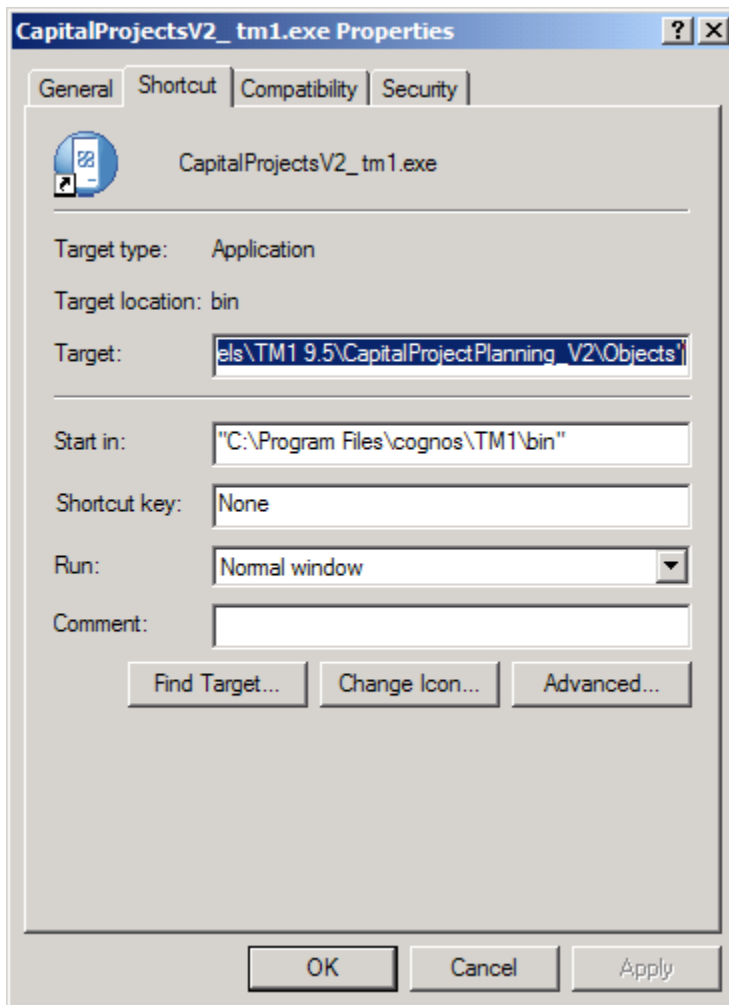
Navigate to "<YourIBMCognosTM1\_DirectoryInstall>/bin" folder; create a shortcut to tm1s.exe.





Copy the shortcut created to <Your\_TM1\_Applications\_folder>

- Rename the shortcut to "CapitalProjectPlanning\_V2"
- Edit the Shortcut Properties



The "Target" property of the shortcut needs to be changed to read:

<YourIBMCognosTM1InstallFolder>\bin\tm1s.exe -z "<Your\_TM1\_Applications\_folder>\CapitalProjectPlanning\_V2\Objects"

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

- Click OK to save the changes.

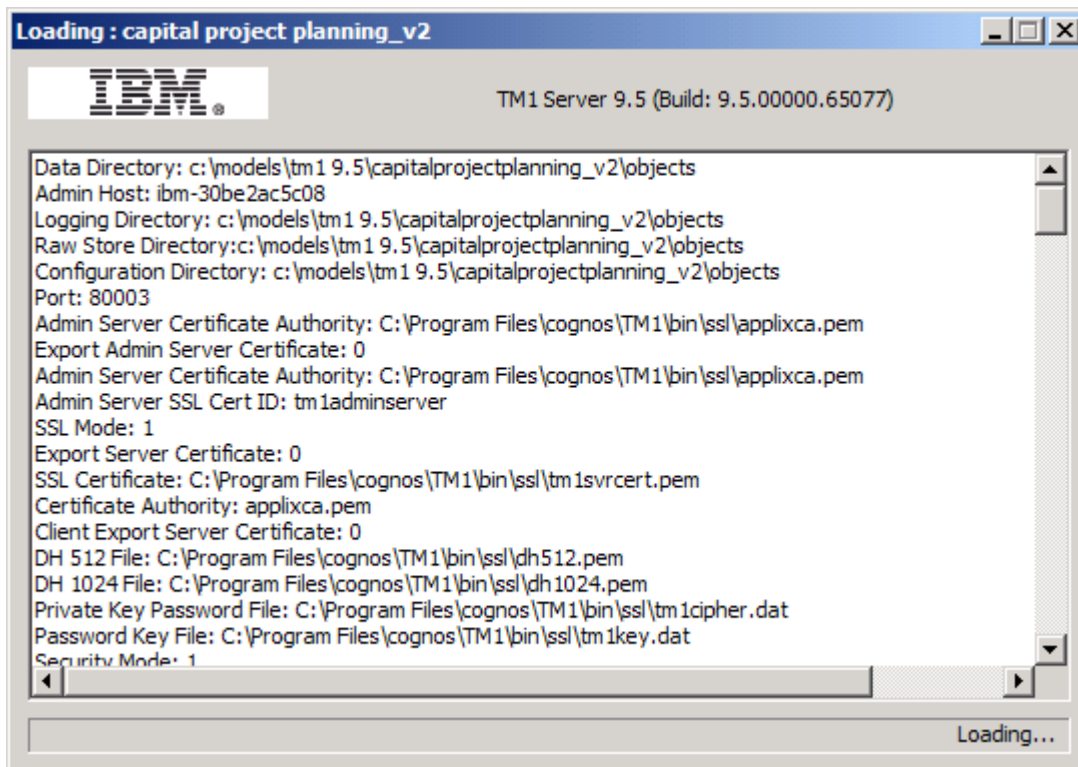




### 3.3. Testing the new IBM Cognos TM1 Server instance

Double click the shortcut “CapitalProjectPlanning\_V2” located in the folder:  
<Your\_TM1\_Applications\_folder>

After all the cubes have loaded the last lines in the dialog will display:



Once the newly created IBM Cognos TM1 Server instance is up and running, Architect and/or IBM Cognos TM1 Contributor can be used to navigate through the content.



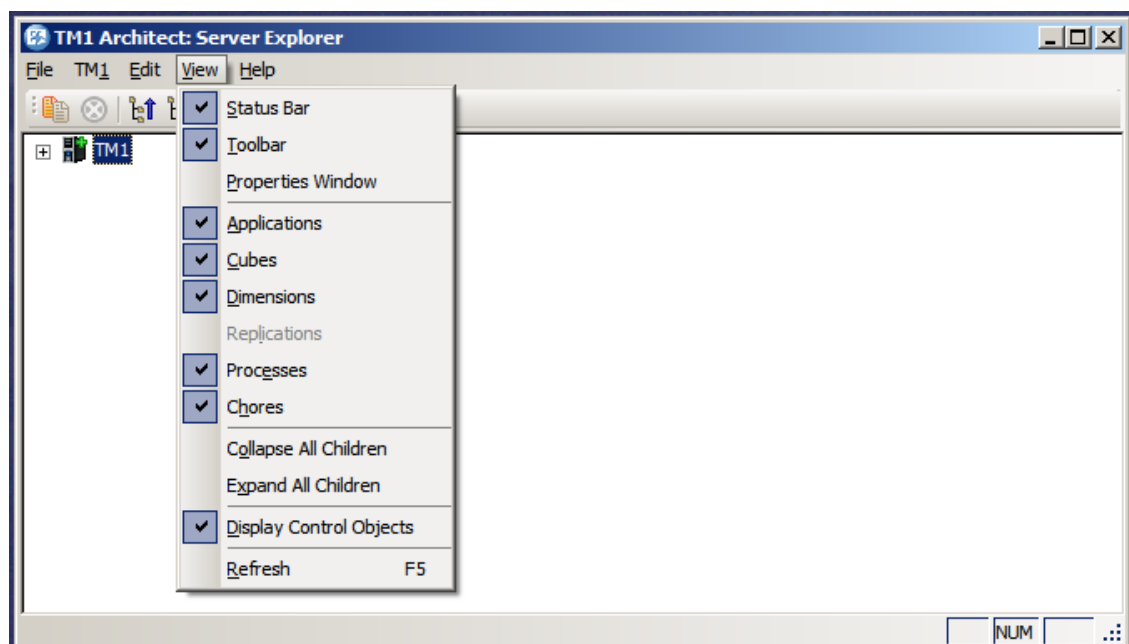


### 3.4. Setting up the Contributor Application

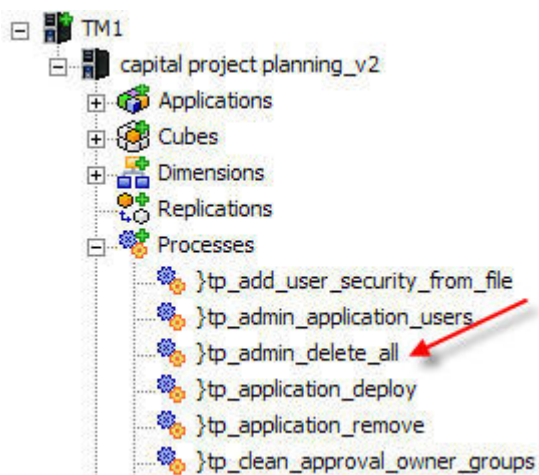
#### 3.4.1. Open TM1 Architect

3.4.2. Double click the **capital project planning\_v2** application and **Login** as User: **admin** (no password)

3.4.3. Click on the Menu Item – **View** and validate **Display Control Objects** is **checked**

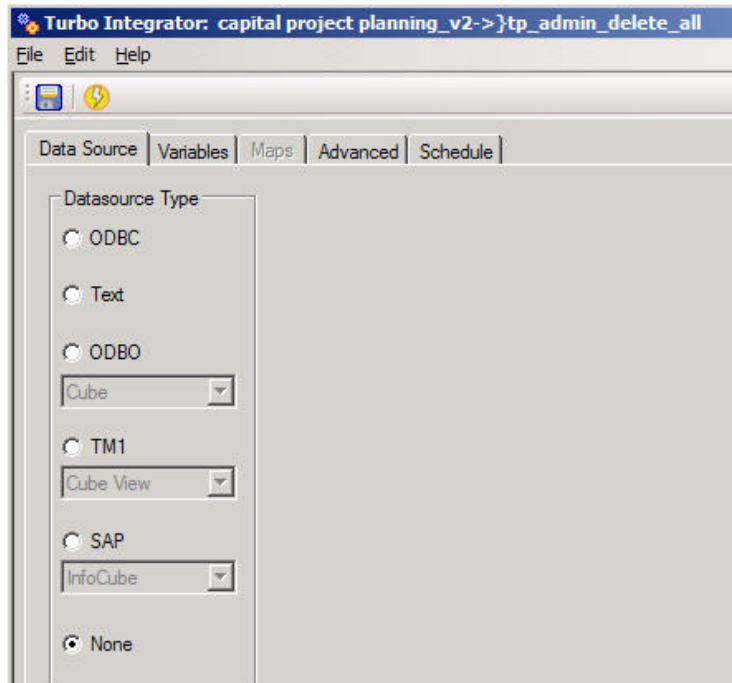


3.4.4. Expand Processes node and double click }tp\_admin\_delete\_all



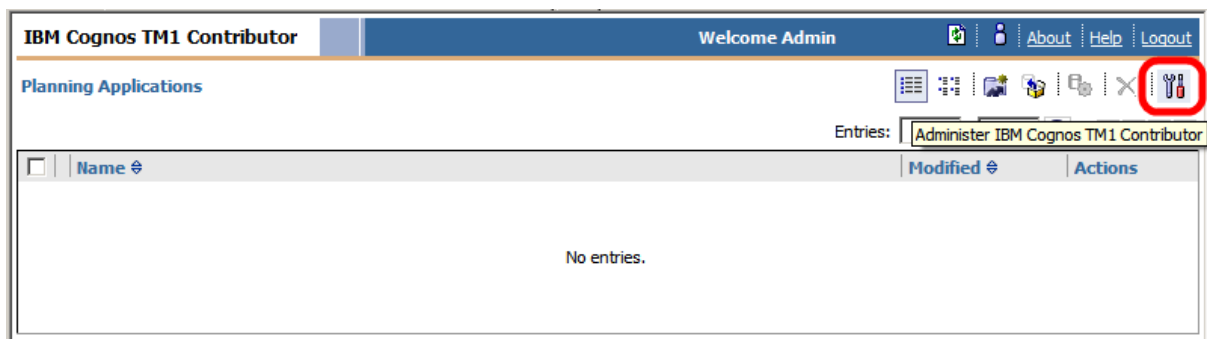


3.4.5. Click run



3.4.6. Launch your TM1 Contributor environment, for example, [http://<yourTM1\\_Server>/pmprsvc/](http://<yourTM1_Server>/pmprsvc/) and login as Admin

3.4.7. Click Administer IBM Cognos TM1 Contributor



3.4.8. Click **Add...** under the Server Names: section

3.4.9. Enter <your **TM1 Admin Host**> and click the **Refresh** icon



3.4.10. For the Server Name: select **capital project planning\_v2** and **OK**

**Add Server**

**Admin Host:**  
Your\_TM1\_Server\_Name

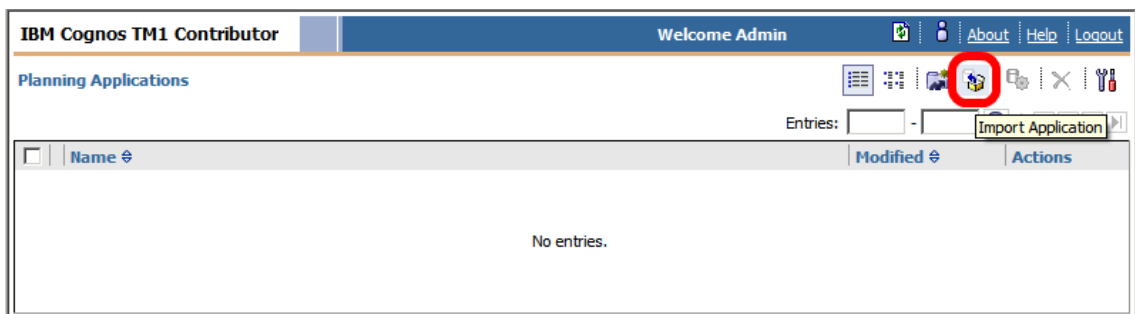
**Server Name:**  
blueprint\_name

OK Cancel

3.4.11. Click **OK**

3.4.12. Click **OK**

3.4.13. Click the **Import Application** icon



3.4.14. Choose **<yourTM1ServerName>:capital project planning\_V2** for the TM1 Server

3.4.15. Browse to **<Your\_TM1\_Application\_folder>\Capital Project Planning\_v2** and select the **"Capital Project Planning\_V2.zip"**



### 3.4.16. Uncheck Import application security and Click Import

**Application Import**

Specify your import file and import settings.

**TM1 Server:**  
 IBM-30BE2AC5C08.home:capital project planning\_v2

**Application file:**  
 C:\Models\TM1 9.5\CapitalProjectPlanning\_V2\TM1 Application\Capital Project Planr [Browse...](#)

☐ Import application security  
☒ Import application properties


[Import](#) [Cancel](#)

### 3.4.17. Click the **Activate Application** icon

**IBM Cognos TM1 Contributor** Welcome Admin [About](#) [Help](#) [Logout](#)

**Planning Applications**

Entries: 1 - 1

Name	Modified	Actions
<a href="#">Blueprint Name</a>	December 21, 2009 1:12:30 PM PST	

[Activate Application - Blueprint Name](#)

### 3.4.18. Click the **Capital Project Planning** link to test, if installed correctly it should resemble the following

**IBM Cognos TM1 Contributor** Welcome Admin [About](#) [Help](#) [Logout](#) **IBM**

You are a reviewer or contributor for:

Name	State	Ownership	Reviewer	Last Data Commit
<a href="#">US Controller</a>	Not Started	None	None	Never committed
<a href="#">US FP&amp;A</a>	Not Started	None	None	Never committed
<a href="#">US Treasury</a>	Not Started	None	None	Never committed
<a href="#">UK FP&amp;A</a>	Not Started	None	None	Never committed
<a href="#">UK Controller</a>	Work In Progress	Admin	None	December 22, 2009 10:13:57 AM PST
<a href="#">Australia FP&amp;A</a>	Not Started	None	None	Never committed
<a href="#">Australia Controller</a>	Not Started	None	None	Never committed
<a href="#">France Controller</a>	Not Started	None	None	Never committed
<a href="#">France FP&amp;A</a>	Not Started	None	None	Never committed

User Instructions



#### 4. IBM Cognos 8 BI Content

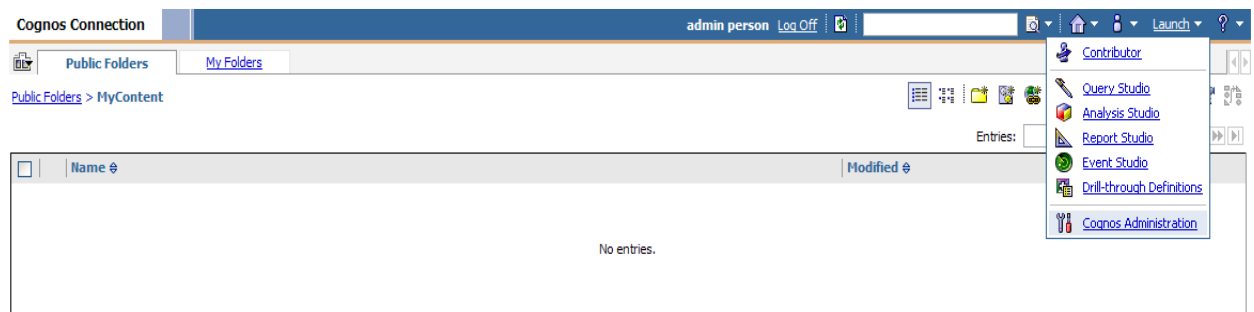
The following steps are required to configure the objects needed for the IBM Cognos BI content to work properly.

##### 4.1. Create 'Capital Planning Blueprint' data source

First, we will look into creating the connection to the 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: "Capital Planning Blueprint", then click Next >





Select the 'TM1' 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 source is used to set the name of the connection.

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...](#)

**Administration Host:**

localhost

**Server Name:**

capital project planning\_v2

**Signon**

Select the type of authentication to use, whether a password is required and whether to create a signon.

☐ No authentication

☐ An external namespace:

NTLM (Active) ▼

☒ Signons

☐ Password

☒ Create a signon that the Everyone group can use:

**User ID:**

admin

**Password:**

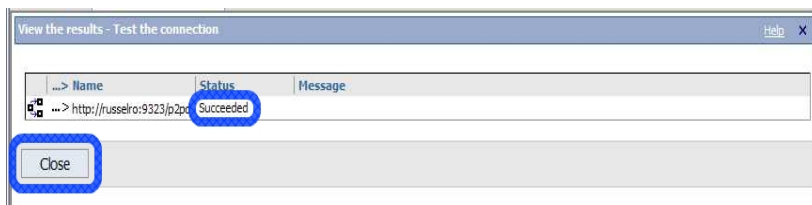
**Confirm password:**



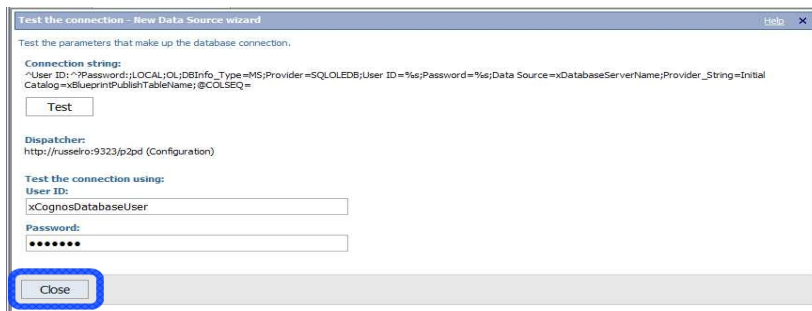
Click Test to verify the connection is setup correctly



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



Click Close







Select the import package named 'Capital\_Planning\_Blueprint\_BI\_Deployment'; then click Next >

A screenshot of the 'Select a deployment archive - New Import wizard' dialog. It has a title bar with 'Help' and 'X' buttons. The main text says: 'Select the deployment archive from which to get the entries to import. If the archive is encrypted, you will be prompted to enter the encryption password.' Below this is a 'Deployment archive' section with a text box containing 'Blueprint Name'. Above the text box is a label 'Name ▲'. To the right of the text box is a list of entries: 'Entries: 1 ~ 1'. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a red circle.

Verify the Name is 'Capital\_Planning\_Blueprint\_BI\_Deployment' then click Next >

A screenshot of the 'Specify a name and description - New Import wizard' dialog. It has a title bar with 'Help' and 'X' buttons. The main text says: 'Specify a name and location for the deployment specification. You can also specify a description and screen tip.' Below this are four text boxes: 'Name:', 'Description:', 'Screen tip:', and 'Location:'. The 'Name' box contains 'Blueprint Name'. The 'Location' box contains 'Administration'. Below the 'Location' box is a link 'Select another location...'. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a red circle.

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

A screenshot of the 'Select the public folders content - New Import wizard' dialog. It has a title bar with 'Help' and 'X' buttons. The main text says: 'Select one or more packages or folders and select the options to include in the import.' Below this is a 'Public folders content' section with a table. The table has columns: 'Name', 'Target name', 'Disable after import', 'In target content', and 'Modified'. The first row is 'Blueprint Name', 'Blueprint Name', and 'Disable after import' is unchecked. A red arrow points to the 'Disable after import' checkbox with the text 'Leave Unchecked'. Below the table is an 'Options' section with three checked options: 'Include report output versions', 'Include run history', and 'Include schedules'. Each option has a 'Conflict resolution' section with radio buttons for 'Keep existing entries' and 'Replace existing entries'. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a red circle.



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 has a title bar with 'Help' and 'X' buttons. The main text says 'Specify the options applicable to all the entries in the import.' There are three sections: 'Access permissions' with radio buttons for 'Include access permissions' (unchecked), 'Apply to new entries only' (unchecked), and 'Apply to new and existing entries' (checked); 'External namespaces' with radio buttons for 'Include references to external namespaces' (unchecked) and 'Do not include references to external namespaces' (checked); and 'Entry ownership' with 'Set the owner to:' radio buttons for 'The owner from the source' (unchecked), 'The user performing the import' (checked and circled), and 'Apply to:' radio buttons for 'New entries only' (checked and circled) and 'New and existing entries' (unchecked). At the bottom are 'Cancel', '< Back', 'Next >' (circled), and 'Finish' buttons.

Review the summary options selected then click Next >

A screenshot of the 'Review the summary - New Import wizard' dialog box. It has a title bar with 'Help' and 'X' buttons. The main text says '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.' There are three sections: 'Deployment specification' with 'Name: Blueprint Name' and 'Description:'; 'Deployment archive' with 'Name: Blueprint Name'; and 'Public folders content' with a table showing 'Blueprint Name' in the 'Name' column and 'Blueprint Name' in the 'Target name' column. Below the table are 'Options:' (Include report output versions, Replace existing entries, Include run history, Replace existing entries, Include schedules, Replace existing entries) and 'Directory content'. At the bottom are 'Cancel', '< Back', 'Next >' (circled), and 'Finish' buttons.

Choose 'Save and run once' then click Finish

A screenshot of the 'Select an action - New Import wizard' dialog box. It has a title bar with 'Help' and 'X' buttons. The main text says 'Select whether you want to run, schedule, or save only, when the wizard closes.' There is one section: 'Action:' with radio buttons for 'Save and run once' (checked and circled), 'Save and schedule' (unchecked), and 'Save only' (unchecked). At the bottom are 'Cancel', '< Back', 'Next >', and 'Finish' (circled) buttons.



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

A screenshot of the 'Run with options' dialog box. The 'Time' section has 'Now' selected. The 'Contents' list includes 'Content store', 'Directory', 'Cognos namespace', 'Public Folders', and 'Blueprint Name'. The 'Report specification upgrade' section has 'Keep the existing report specification versions' selected. The 'Run' button is highlighted with a red box.

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

A screenshot of the 'Cognos 8' dialog box. It shows the selected options: 'Time: now' and 'Report specification upgrade: Keep the existing report specification versions'. The checkbox 'View the details of this import after closing this dialog' is checked. The 'OK' button is highlighted with a red box.

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

A screenshot of the 'View run history details - Strategic Finance Blueprint' window. The 'Refresh' button is highlighted with a red box. The 'Start time' is 'October 2, 2008 11:48:59 AM' and the 'Completion time' is 'Unavailable'. The 'Status' is 'Executing'. The 'Messages' section shows 'No entries.' and a 'Close' button is at the bottom.



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 | Home | Launch ?

**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** Help X

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 [Navigation icons]

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

#### 4.3. Testing IBM Cognos Dashboards Content

After the Import is performed a new folder will show up a new folder 'Capital\_Planning\_Blueprint' in the IBM Cognos Connection portal. The content of this folder will display as:



**Innovation Center** for Performance Management  
Your connection to best practices and industry leaders

Information Management Cognos software

IBM Cognos Connection tm1adm Log Off

Public Folders My Folders

Public Folders > Capital Planning Blueprint

Name	Modified	Actions
Dashboard Pages	December 9, 2009 8:52:33 AM	More...
Packages	November 12, 2009 8:55:50 AM	More...
Reports	December 9, 2009 11:29:00 PM	More...
Capital Planning Blueprint	December 10, 2009 10:27:35 AM	More...

To test the content is coming up correctly; launch the 'Capital Planning Blueprint' Page at the bottom of the list. The following screen should come up:

Cognos Viewer - Capital Planning Blueprint tm1adm Log Off Launch

Welcome Capital Project Planning Dashboard Project Manager Dashboard

**Capital Planning Blueprint**  
IBM Cognos Innovation Center for Performance Management

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1.0

BUILT ON IBM JAVA

Then, testing can be performed on each of the dashboard pages to obtain the dashboards displaying IBM Cognos TM1 data.