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Client Servicing Wealth & Asset Manager Blueprint Setup Instructions

IBM Cognos BI Content

Pre-requisite technologies:
- Cognos 8.4 Business Intelligence
- SQL Server 2005 or above
- A web server configuration with a root virtual directory named cognos8

Contents:
1.   **Client Servicing 8.4.rar**

## 1. Extracting files required for setup steps

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2. Extracting files required for Setup steps

2.1. Unzipping Client Servicing 8.4.rar

2.1.1. After unzipping the "Client Servicing 8.4.rar" it will create the following directories:

Name
Data
Deployment
Documentation
Fonts
Framework Manager
Images
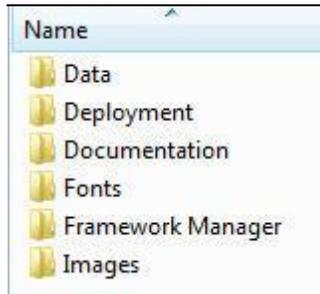
We will reference these directories, which store the applicable files

## 2. Steps for setting up Cognos 8 Business Intelligence system

2.1. Configure Security

2.1.1. Open IBM Cognos Configuration

2.1.2. Go to Security-->Authentication-->Cognos and set 'Allow anonymous access?' to "False"
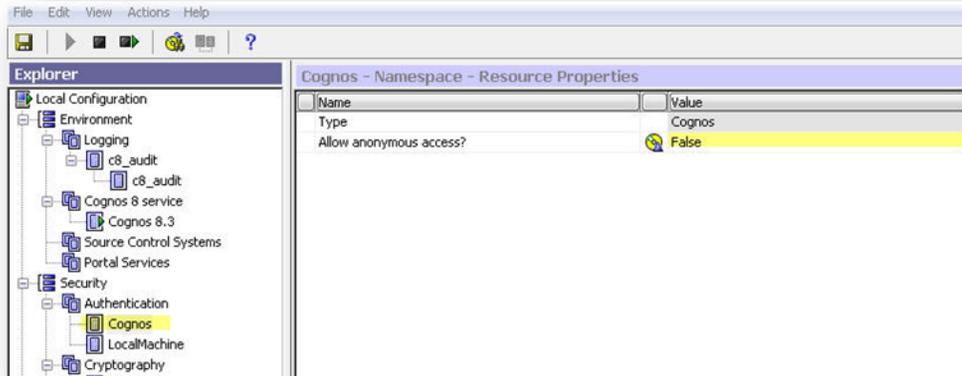
2.1.3. If you have an existing namespace, please skip to the next step; otherwise, create a new namespace. Please note: NTLM was used in this example. It is not a required resource for this blueprint module.
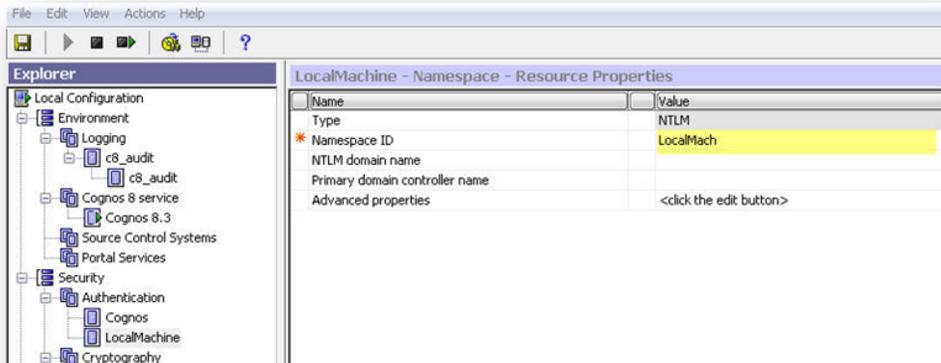

2.1.4 Save the configuration and restart the services

2.1.5 In the security source, make sure the following user account login id exists exactly as shown : **Terry Hargrove**

2.1.6 Open a browser window and go to IBM Cognos Connection. Login as a user assigned to the Directory Administrator role.

2.1.7 Click on to Launch and select "IBM Cognos Administration"
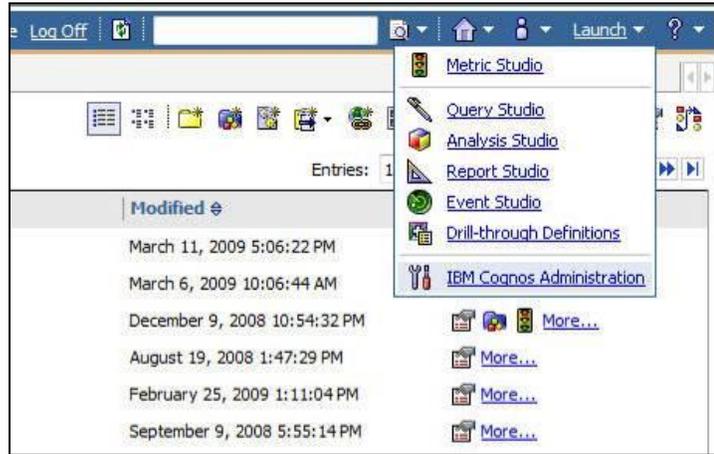
2.1.8 Navigate to Security>Users, Groups, and Roles. Ensure user "Terry Hargrove" is a member of an active group or role. (see the *IBM Cognos 8 Administration and Security Guide* for further details)
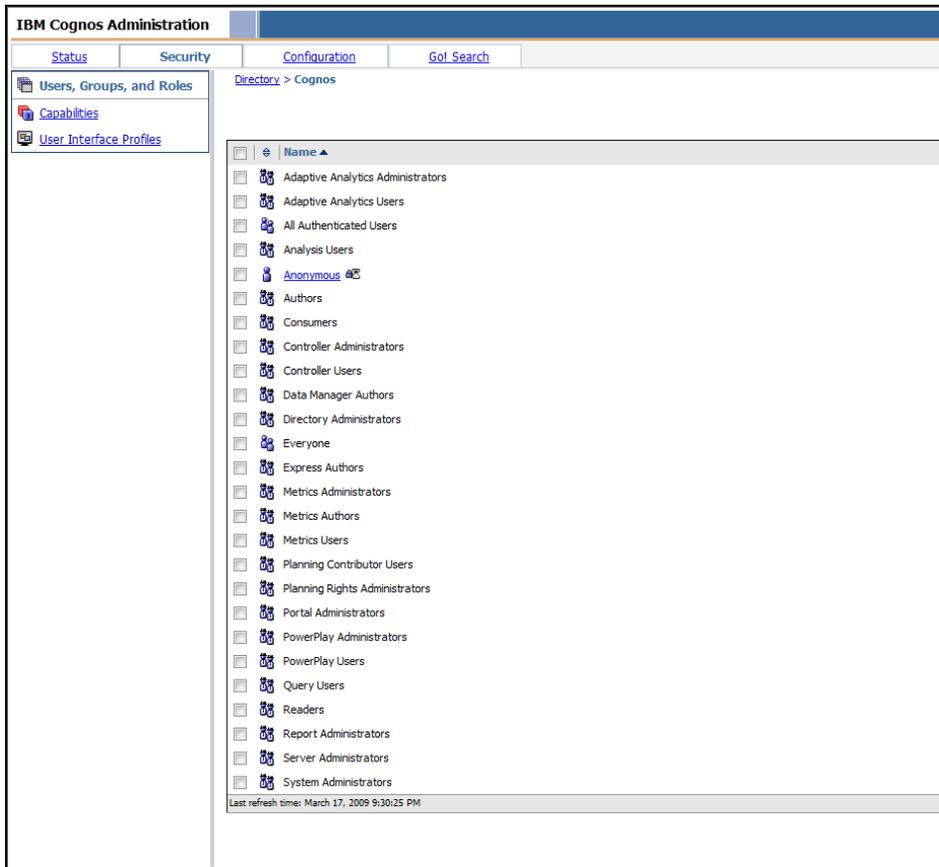
2.1.9 Minimize your browser window

2.2. Copy the necessary files into their respective directories

2.2.1. Unzip barcode_font.zip from the /**Fonts** folder and copy **barcodefont.ttf** to C:/Windows/Fonts.

2.2.2. Copy all files from **/Images** to < *cognos 8.4 install folder* >/webcontent/samples/images

Note: For a distributed architecture, the images would need to be copied to the afore-mentioned directory on the gateway host(s). Verify with your BI Administrator before copying the files.

2.2.3. Copy files from **/Data** directory into a designated SQL Server data directory.

Note: It is not a requirement to move the database files to a common data source directory, but it is recommended.

2.3. Attach the reporting database files and create data source connection

For MS SQL Server 2005:
Launch SQL Server Management Studio
Expand the Database Server
Right click onto Databases and select Attach
Browse to the location where the Reporting Database is stored and select

Refer to SQL Server Help files for help on attaching databases.

2.3.1.1. Restore your browser window, click on the Configuration tab and select 'Data Source Connections'

2.3.1.2. Click the Data Sources tab then click the New Data Source Icon
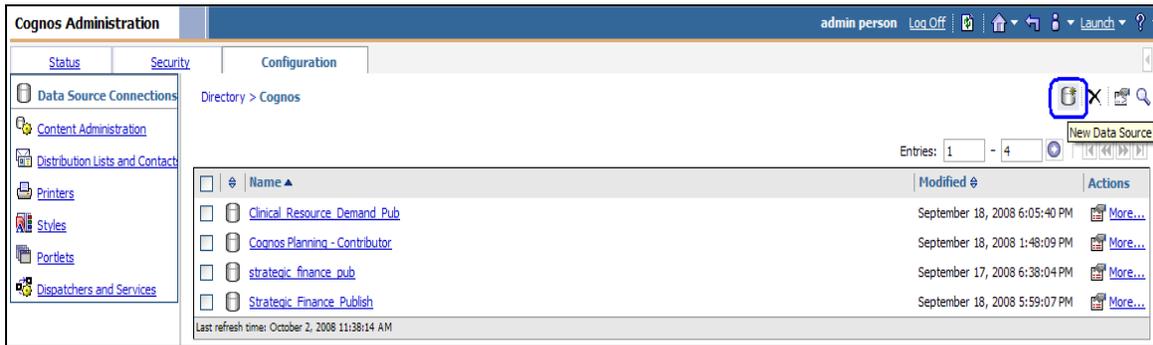
2.3.1.3. Name the Data Source exactly as: "WAMDB" then click Next >
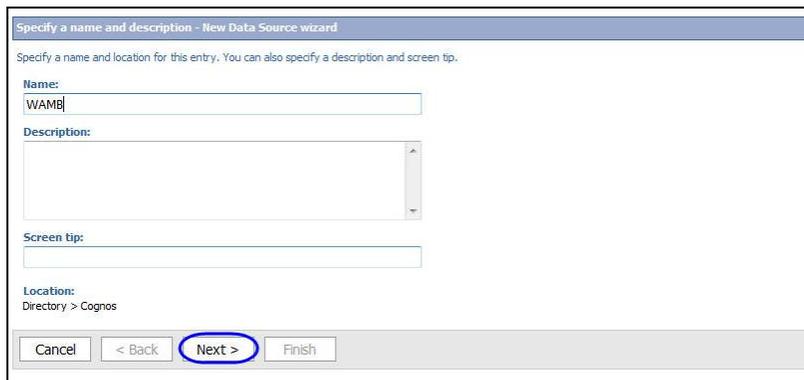
2.3.1.4. Specify the database type of the connection created during the publish container connection then click Next >
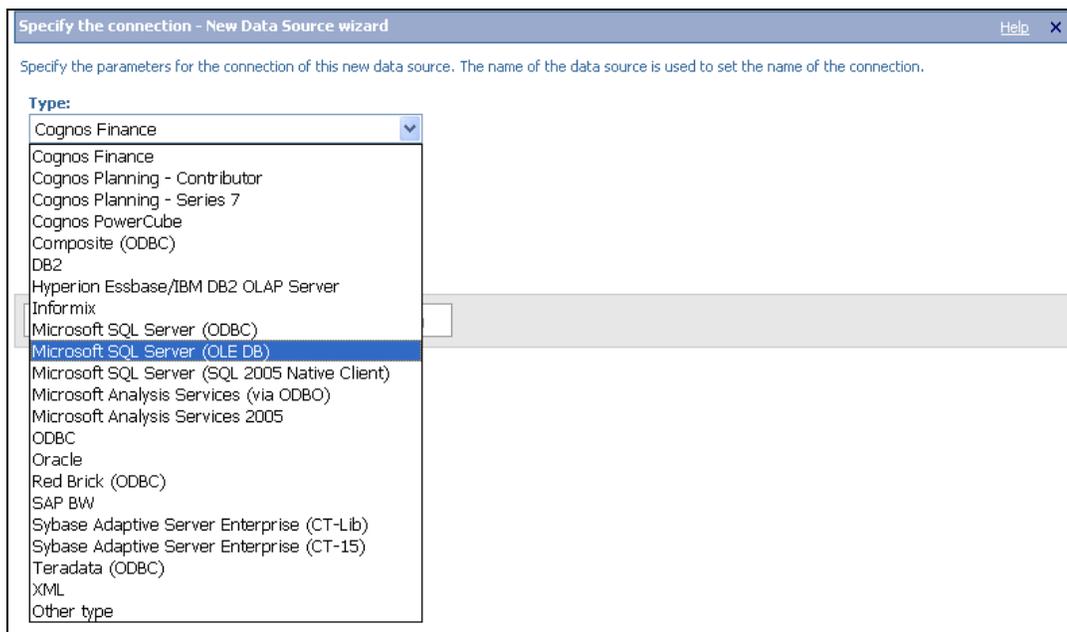
2.3.1.5. Fill out the options for the connection then click Test the connection…
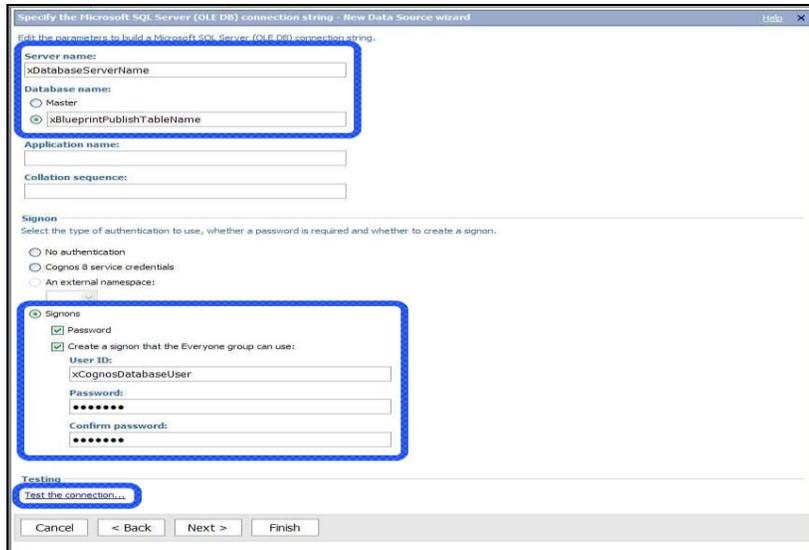
Database Name: WAMDB
Type in the credentials (if required) to access the database

2.3.1.6. Click Test to verify the connection is setup correctly
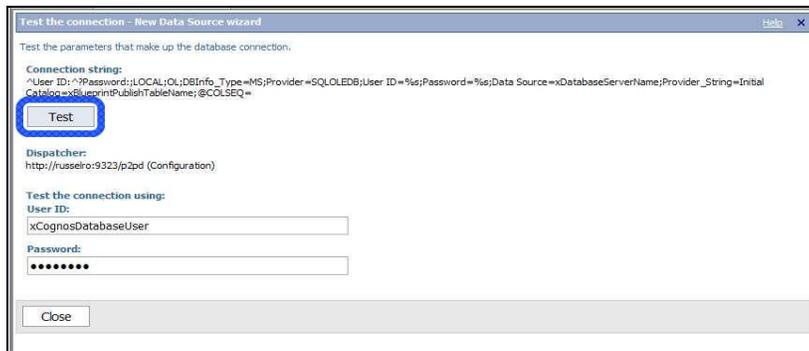
2.3.1.7. If the test Status indicates 'Succeeded,' click 'Close' to proceed
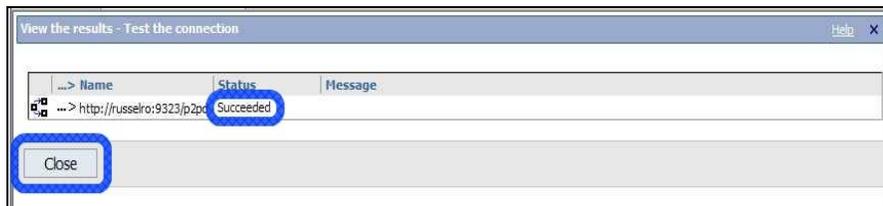
2.3.1.8. Click Close
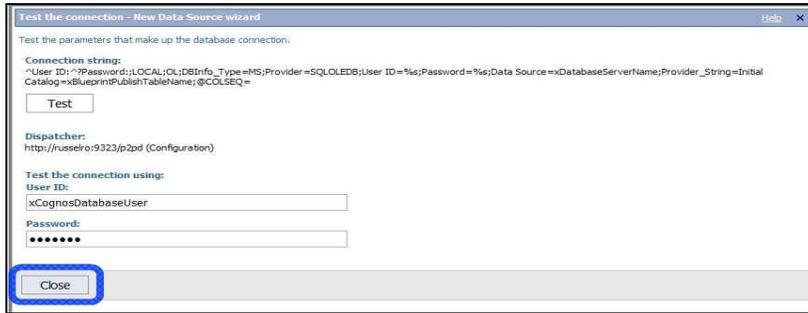
2.3.1.9. Click Finish to add the new data source
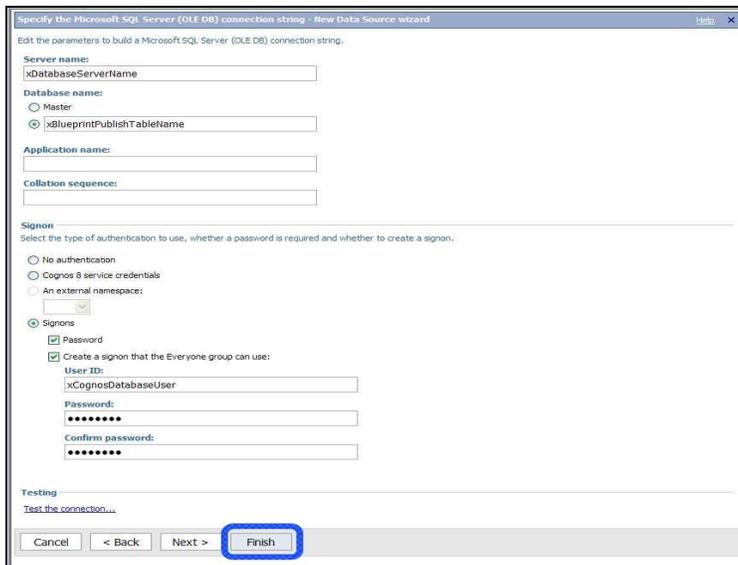
## 2.4. Run the import wizard to deploy the BI Content

### 2.4.1. From the screen in the previous step, select Content Administration
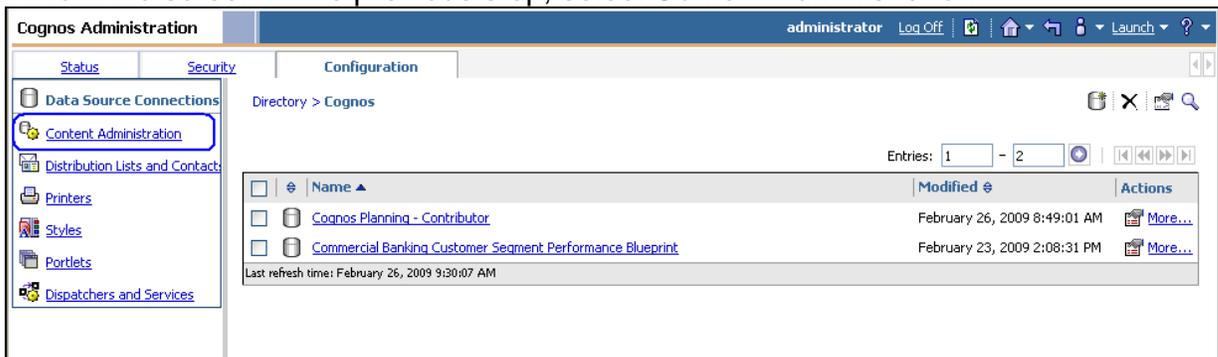
2.4.2. Click the New Import icon 📦
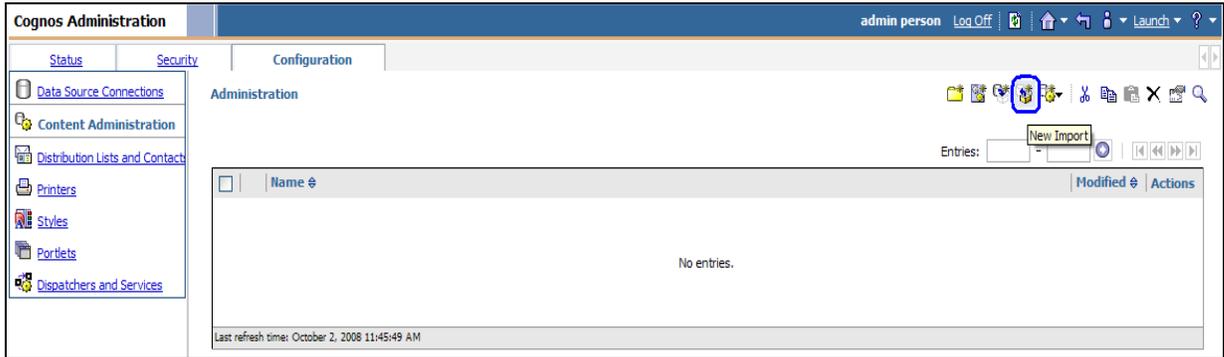
2.4.3. Select the import package named "Client Servicing - Wealth Asset Manager 8.4" then click Next >
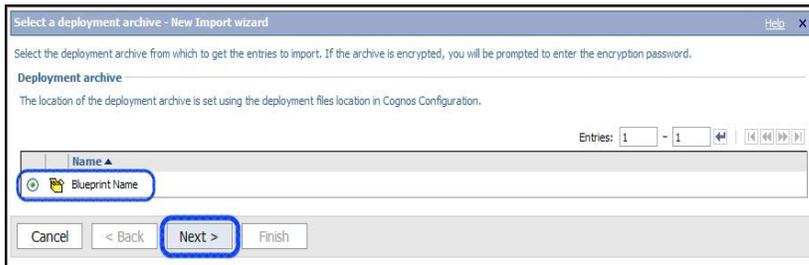
2.4.4. Verify the Name is "Client Servicing - Wealth Asset Manager 8.4" then click Next >

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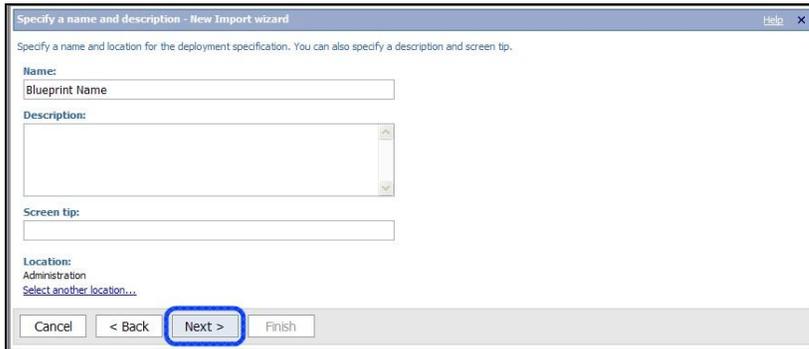
2.4.5. Specify the options and <u>DO NOT</u> check 'Disable after import' then click Next >
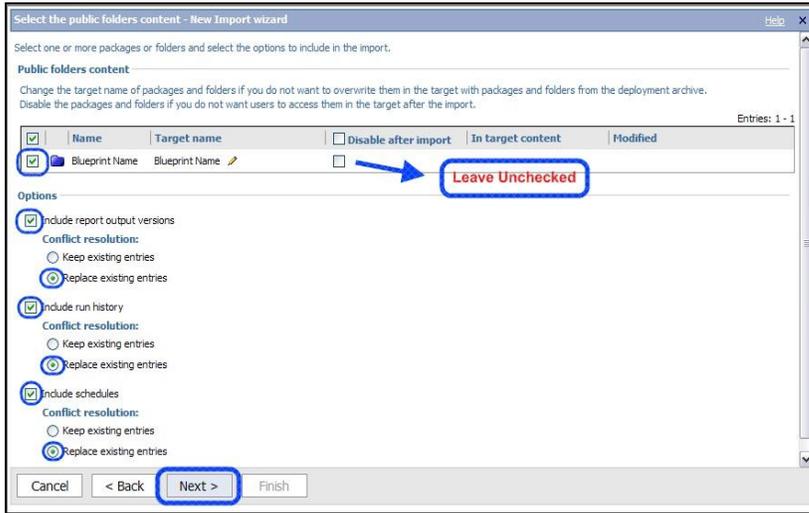
2.4.6. Specify the general options, select 'The user performing the import' and
'New entries only' then click Next >
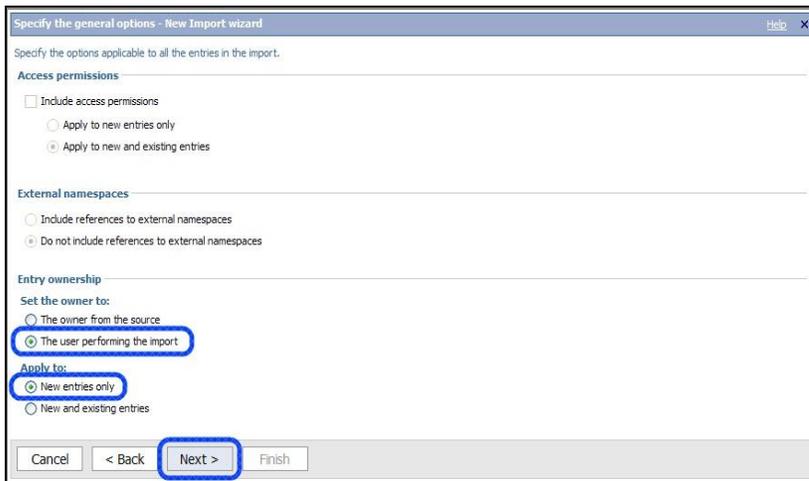
2.4.7. Review the summary options selected then click Next >
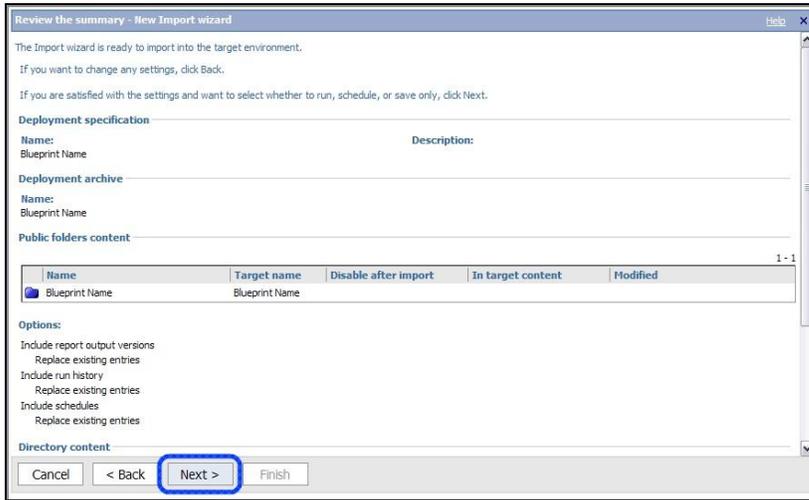
2.4.8. Choose 'Save and run once' then click Finish
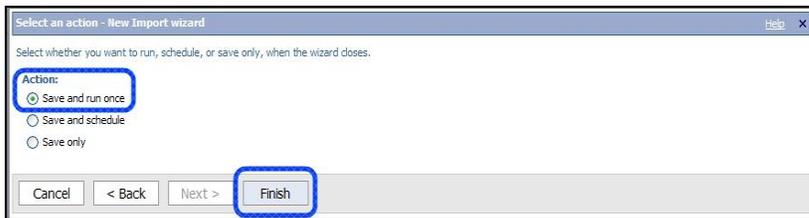
2.4.9. Specify the time to run the import select 'Now' and 'Keep the existing report specifications versions' then click Run
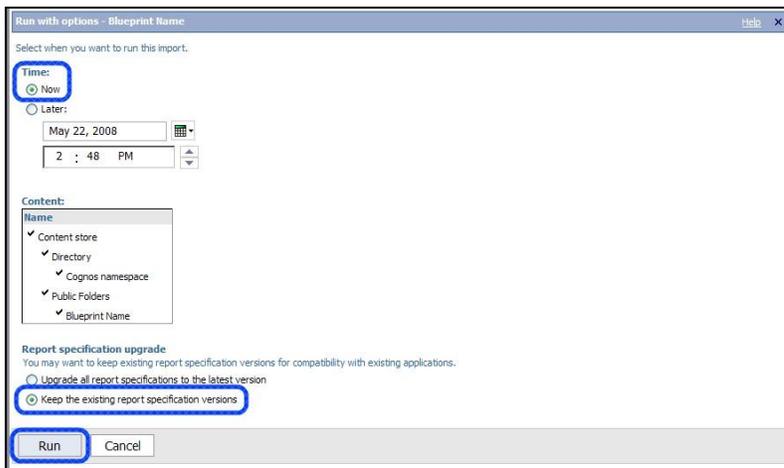
2.4.10. Check 'View the details of this import after closing this dialog' then click OK

2.4.11. Initial view of the import deployment record will be blank press the 'Refresh' hyperlink
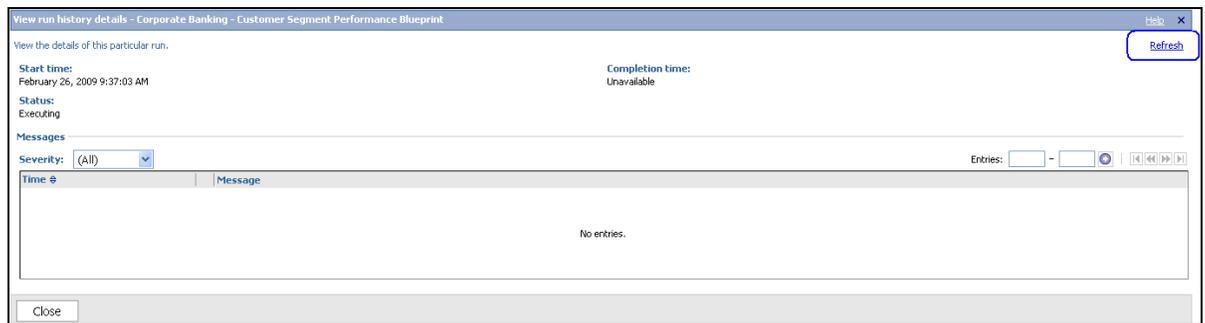
2.4.12. If the deployment import has not finished click on 'Refresh' again until it shows a completion time then click Close
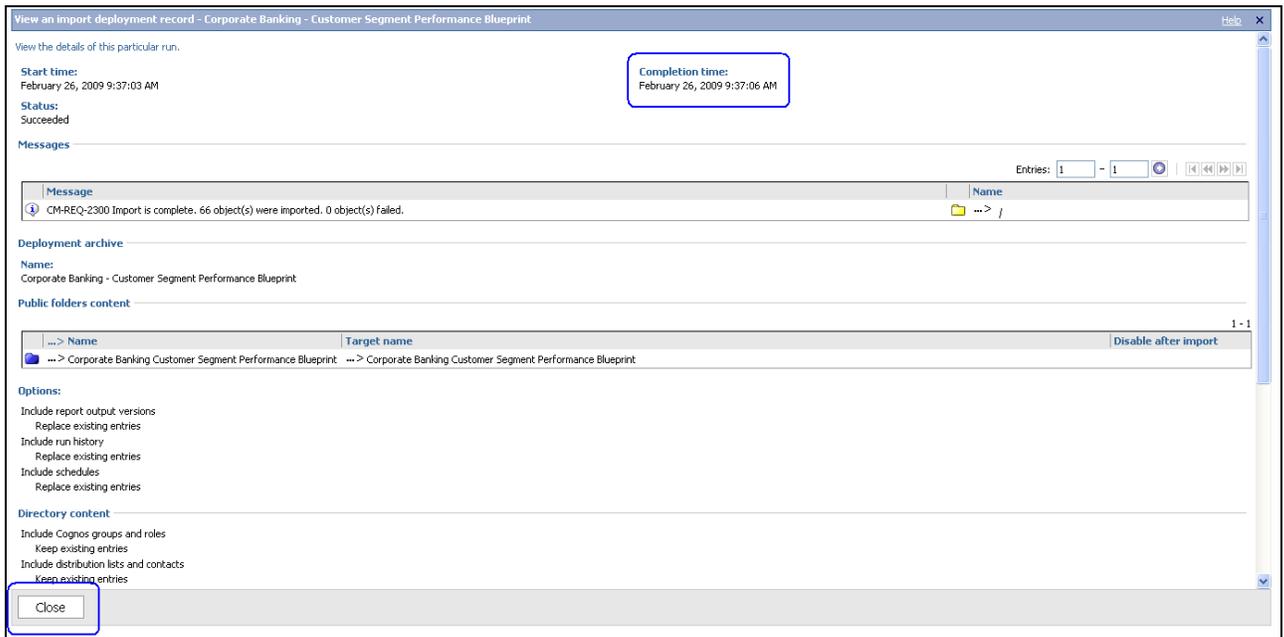
2.4.13 Log off IBM Cognos Connection

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2.5. Test the Blueprint report(s)

2.5.1. Log in to IBM Cognos Connection using the credentials for Terry Hargrove (see 2.1.5)
2.5.2. Navigate to Public Folders and click the 'Wealth Asset Manager' folder then click the "Wealth & Asset Manager Dashboard" link

Note: In the Customized layouts folder, there are multiple iterations of the Wealth & Asset manager dashboard. These are for demonstration purposes, as they are adjusted to meet varying screen resolutions and internet connectivity availability.

2.5.2.1   Wealth & Asset Manager Dashboard - static – For screen resolutions greater than 1024x768 and computers with no active internet connection

2.5.2.2   Wealth & Asset Manager Dashboard 1024x768 – For screen resolutions of 1024x768 and computers with active internet connections

2.5.2.3   Wealth & Asset Manager Dashboard - static – For screen resolutions of 1024x768 and computers with no active internet connection

2.5.3. If installed correctly the dashboard will display as follows