Sterling Business Intelligence

Installation Guide

Version 9.1

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Note

Before using this information and the product it supports, read the information in “Notices” on page 67.

This edition applies to version 9.2 of IBM Sterling Business Intelligence and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. Overview of IBM Sterling Business Intelligence

IBM® Sterling Business Intelligence is an analytical solution that can be used by users of this application to aggregate the data that is available across supply chain products of IBM and generate performance reports relevant to their business.

This document contains instructions for installing the various components of the Sterling Business Intelligence application. It also describes the components of the Sterling Business Intelligence application, and provides information about how to set these up in a typical implementation.

Intended Audience

This document provides installation and administration information for individuals who are responsible for installing and maintaining the Sterling Business Intelligence application.

This document assumes that the users of Sterling Business Intelligence have working knowledge about installing the IBM Cognos® Business Intelligence suite of products as well as the IBM Sterling Selling and Fulfillment Foundation. Therefore, it is recommended that you read the related IBM Cognos documentation before attempting to install the Sterling Business Intelligence application.

Conventions

The following conventions may be used in this manual:

Convention
    Meaning

<AC_INSTALL_DIR>

User-supplied location where IBM Sterling Business Intelligence Content is installed. This directory exists on the server where IBM Cognos Adaptive Warehouse is installed.

<INSTALL_DIR>

User-supplied location of the Sterling Selling and Fulfillment Foundation, Release 9.2 installation directory.

<BI_COGNOS_HOME>

User-supplied location of the IBM Sterling Business Intelligence Content is installed. This directory exists on the server where IBM Cognos Business Intelligence is installed.

<c_installation>

User-supplied location of the Cognos Business Intelligence installation directory.

<c_path>

Location of the Cognos Business Intelligence installation directory. For example, <c_path> will contain the value c10 for 32 bit installation and c10_64 for 64 bit installation.

<IM_INSTALL_DIR>
Location where the IBM Installation Manager is installed.

Chapter 2. Planning the Installation

Installing Sterling Business Intelligence is broken up into distinct stages. You begin with planning the installation and environment to install Sterling Business Intelligence application, Cognos Business Intelligence server and Cognos Analytic Applications. At this point, you install the software. After installing, you must perform deployment tasks for the components you have installed.

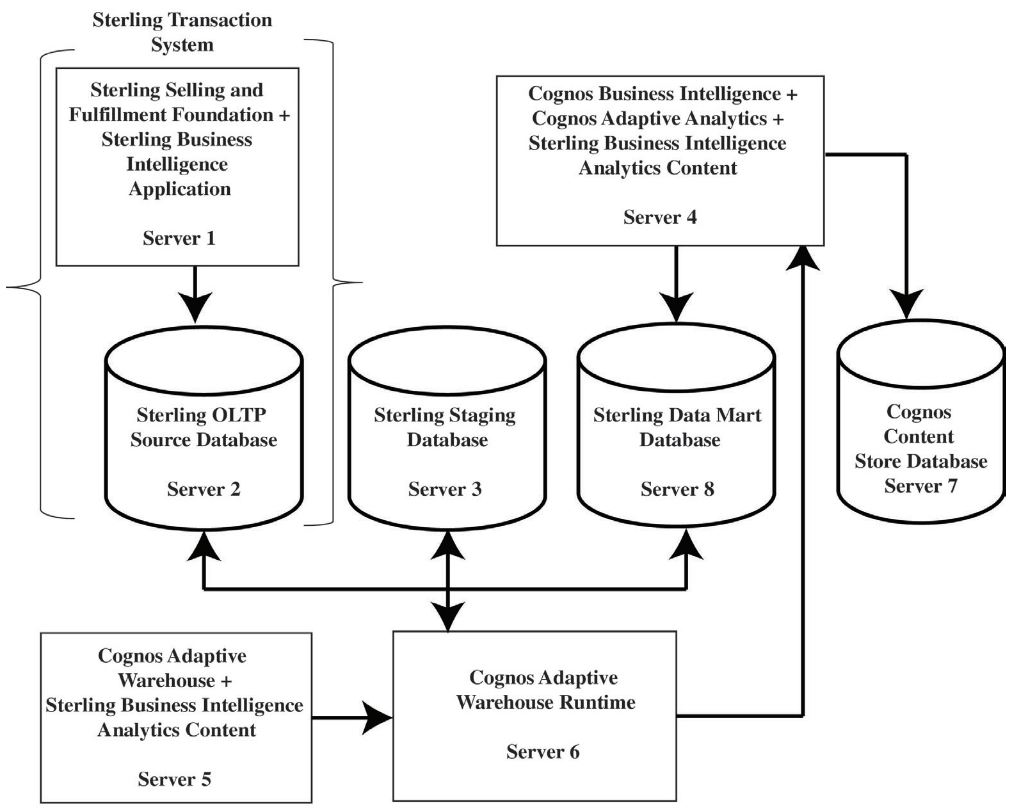
The following workflow outlines the tasks you must complete for each of these components.

Table 1. Installation Workflow

Task	Information	Description
Review the Sterling Business Intelligence ecosystem.	Chapter 3, “Understanding the IBM Sterling Business Intelligence Ecosystem,” on page 5	Understand the different components that have to be installed for Sterling Business Intelligence. Also, review the system requirements.
Install Sterling Business Intelligence application	Chapter 4, “Installing the IBM Sterling Business Intelligence Application,” on page 9	Complete all the prerequisites that are required before you install Sterling Business Intelligence application.
Install Cognos Business Intelligence server	Chapter 6, “Installing IBM Cognos Business Intelligence Server,” on page 27	
Install Cognos Adaptive Analytics	Chapter 9, “Installing the IBM Cognos Adaptive Analytics,” on page 33	
Install Cognos Adaptive Warehouse	Chapter 7, “Installing the IBM Cognos Adaptive Warehouse,” on page 29	
Install Cognos Adaptive Warehouse Runtime	Chapter 8, “Installing the IBM Cognos Adaptive Warehouse Runtime,” on page 31	
Install IBM Sterling Business Intelligence Content	Chapter 10, “Installing the IBM Sterling Business Intelligence Content,” on page 35	
Deploy Sterling Business Intelligence	Chapter 11, “Deploy IBM Sterling Business Intelligence,” on page 41	
Administer Security	“Set Up the IBM Sterling Business Intelligence Authentication Mechanism” on page 51	
Verify Sterling Business Intelligence Installation	Chapter 13, “Verify the IBM Sterling Business Intelligence Installation,” on page 57 Chapter 14, “Verify the IBM Sterling Business Intelligence Report,” on page 59	

Chapter 3. Understanding the IBM Sterling Business Intelligence Ecosystem

The best option of installing the Sterling Business Intelligence components depends on your individual requirements, resources, and preferences. It is recommended that you install each of the Sterling Business Intelligence components on different servers as described in the following diagram:



IBM Sterling Business Intelligence Application

The Sterling Business Intelligence application is installed on Sterling Selling and Fulfillment Foundation. The Sterling Business Intelligence application is installed on server 1. The application consists of a Web User Interface (UI) and related APIs' that help you select the reports criteria and generate reports. The application also installs framework components related to efficient change data capture, and other configuration data essential for the application to work.

Sterling Source Database

The Sterling Source Database hosts the online transaction processing (OLTP) database server, which is installed on server 2. This is used as a source data server. The technical stack requirements for this system are the same as that required for a database server in Sterling Selling and Fulfillment Foundation.

Sterling Staging Database

The Sterling Staging Database is the source for the data mart, and is installed on server 3. The staging environment consists of a database in which the incremental transaction data that is extracted, transformed, and loaded (ETL) from the source is stored.

Sterling Data Mart Database

The Sterling Data Mart Database is the environment in which the data mart is hosted. This is installed on server 8. The data in this database is dimensionally modeled data that is analytics-friendly.

IBM Cognos Business Intelligence Server

The Sterling Business Intelligence uses the report generation capability of Cognos Business Intelligence to create and manage ad hoc reports and scheduled reports. It is installed on server 4. It includes IBM Cognos Query Studio and IBM Cognos Report Studio. Cognos Query Studio is a Web-based tool that enables you to create ad hoc reports by selecting items from a package file. Cognos Report Studio is a Web-based tool used to build sophisticated, multiple-page, multiple-query reports.

IBM Cognos Analytic Applications

The Cognos Analytic Applications includes the following components:

- **Cognos Adaptive Warehouse**

  Cognos Adaptive Warehouse is a data modeling environment used to design and populate a target data warehouse. It provides an interface that facilitates the extraction, transformation, and loading of application-specific data from the source database into the target data warehouse. It helps you construct a source model that describes the rules for querying the source database. This component is installed on server 5.
- **Cognos Adaptive Warehouse Runtime**

  This component is used by the Cognos Adaptive Warehouse user interface and scripts. The Cognos Adaptive Warehouse Runtime helps to run the extract, transform, and load (ETL) scripts in different environments.

  If you install Cognos Adaptive Warehouse on Microsoft Windows, then you can install Cognos Adaptive Warehouse Runtime on the same server 5. Optionally, you can install Cognos Adaptive Warehouse Runtime on a Windows computer server 6, that is separate from Cognos Adaptive Warehouse.
- **IBM Cognos Adaptive Analytics**

  This is an information modeling tool for generating and deploying analytic reports and operational reports to the Sterling Business Intelligence portal. After publishing the data model in Cognos Adaptive Warehouse, you can use Cognos Adaptive Analytics to create and publish analytic reports. This component is installed on server 4, along with Cognos Business Intelligence.

IBM Sterling Business Intelligence Content

The IBM Sterling Business Intelligence Content consists of analytics content files for your system. The IBM Sterling Business Intelligence Content contains the following data:

- Dashboard reports and files required for communication between the Cognos Business Intelligence server and Sterling Business Intelligence .
- Metadata files that serve as the data mart model as well as the report specification.

System Requirements

For more information about system requirements, go to the IBM Support Portal at http://www-947.ibm.com/support/entry/portal/Planning.

Chapter 4. Installing the IBM Sterling Business Intelligence Application

The Sterling Business Intelligence application should be installed on server 1, as described in the topic Chapter 3, “Understanding the IBM Sterling Business Intelligence Ecosystem,” on page 5.

Note: You will be directed to perform either a single schema installation or a multi-schema installation based on the configuration of Sterling Selling and Fulfillment Foundation, Release 9.2.

Ensure that there is at least 1 GB of free disk space is available for installation.

Installing IBM Sterling Business Intelligence Application using IBM Installation Manager GUI for Single Schema on Windows

Before you begin

Running the IBM Installation Manager in both GUI mode and command line mode is not supported. Therefore, if the command line mode of the IBM Installation Manager is open, ensure that you close it.

Ensure that you have performed the following tasks before you proceed with your Sterling Business Intelligence installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, Release 9.2 in single schema mode on Windows. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the data warehouse database, refer to the following link :http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db.

About this task

You will find instructions to install Sterling Business Intelligence using the IBM Installation Manager GUI on Windows.

Procedure

1. Execute the following command to start the IBM Installation Manager : `<IM_INSTALL_DIR>\eclipse\launcher.exe` The Start page of the Installation Manager is displayed.
2. Add the Sterling Business Intelligence application installer repository location in the IBM Installation Manager as follows:

a. In Installation Manager, click **File > Preferences... > Repositories**. The Preferences page opens and displays the available repositories, repository locations, and the connection status for the repositories.
b. Click **Add Repository.**
c. Enter the repository location or click **Browse**. When browsing, navigate to the repository location and select the `repository.config`, file for the installer.
d. Click **OK**. The new repository location is added to the list. If the repository is not connected, a red box is displayed in the **Connection** column. Debug your connectivity issues.
e. Click **OK** to close the Preferences page.

3. Click **Install** in the IBM Installation Manager home page.
4. Select the IBM Sterling Business Intelligence check box. Click **Next**.
5. Click **Use the existing package group**. Click **Next**.
6. In the Features page, ensure that IBM Sterling Business Intelligence check box is selected. Click **Next**.
7. The **Datamart Database Information** page is displayed, with the database vendor name. In the **Datamart Database Information** page, enter the information for the fields described in the table below. The supported databases are Oracle and DB2. Ensure that the schema is created with the UTF-8 character set enabled. For more details about enabling the UTF-8 character set, refer to the documentation related to the database vendor.

Field **Description**

Database user name

Name of the database user.

Database password

Password of the database user to access the database.

Confirm database password

Re-enter the password.

Database catalog name

Name of the database catalog. If the database is DB2, enter the DB2 catalog name and if it is Oracle, enter SID.

Database schema name

Name of the database schema.

Database host name

IP address or host name of the location in which the database is installed.

Database port

Port number of the database.

JDBC driver file

Click **Add Jars** to browse to the JDBC driver file for Oracle or DB2. Repeat to add the license file for DB2 (required).

To test the connection to the database, click **Validate Connection**. If a message saying the connection failed is displayed, verify the information entered in all fields and click **Validate Connection**.

8. Click **Next**.
9. In the **Staging Database Information** page, enter the information related to the database as described in the table below. The supported databases are Oracle and DB2.

   Ensure that the schema is created with the UTF-8 character set enabled. For more details about enabling the UTF-8 character set, refer to the documentation related to the database vendor.

   Field **Description**

   Database user name
   Name of the database user.

   Database password
   Password of the database user to access the database.

   Confirm database password
   Re-enter the password.

   Database catalog name
   Name of the database catalog. If the database is DB2, enter the DB2 catalog name and if it is Oracle, enter SID.

   Database schema name
   Name of the database schema.

   Database host name
   IP address or host name of the location in which the database is installed.

   Database port
   Port number of the database.

   JDBC driver file
   Click **Add Jars** to browse to the JDBC driver file for Oracle or DB2. Repeat to add the license file for DB2 (required).

   To test the connection to the database, click **Validate Connection**. If a message saying the connection failed is displayed, verify the information entered in all fields and click **Validate Connection**.
10. Click **Next**.
11. In the Summary page, the **Packages** are displayed. Click **Install**. A progress indicator displays the percentage of the installation completed.
12. On successful completion, the Install Packages window is displayed with the package details.
13. (Optional) Click **View log file** to open the installation log file for the current session in a new window. You must close the Installation Log window to continue.

    Note: If the installation was not successful, click on the **View log file** to view the failure reason.
14. Click **Finish** to complete the installation.

Installing IBM Sterling Business Intelligence Application using IBM Installation Manager Command Line for Single Schema on Windows

Before you begin

You cannot run the IBM Installation Manager in both GUI and command line mode. Hence, ensure that you have closed the GUI of the IBM Installation Manager.

Ensure that you have performed the following tasks before you proceed with your Application installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, 9.2 in Windows environment. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the data warehouse database, refer to the following link:http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db

About this task

You can also install the Sterling Business Intelligence using the IBM Installation Manager command line (**imcl**) installation command. The **imcl** command provides a text-based (non-GUI) interface.

Procedure

1. Execute the **imcl** command as follows:
   - **<IM_INSTALL_DIR>\eclipse\tools\imcl -consoleMode**

   Here,

   <IM_INSTALL_DIR>
   Indicates the directory where the IBM Installation Manager is installed.
2. Add the Sterling Business Intelligence installer repository location in the IBM Installation Manager as follows:
   a. Type P to select Preferences and press Enter.
   b. Type 1 to select Repositories and press Enter.
   c. Type D to select Add Repository and press Enter.
   d. Enter the repository location to point to the `repository.config` file and press Enter. A message will be displayed with the connection status of the repository.
   e. Type A to apply the changes and return to Preferences and press Enter.
   f. Type R to return to the main menu and press Enter.
3. Install the Sterling Business Intelligence as follows:
   a. Type 1 to install and press Enter.
   b. Type the number associated with the IBM Sterling Business Intelligence package and press Enter.

c. Type 1 to choose version 9.2.0 and press Enter.
d. Type N and press Enter.
e. Type M to change the location where Sterling Selling and Fulfillment Foundation is installed, using the IBM Installation Manager.
f. Enter the location where Sterling Selling and Fulfillment Foundation is installed and press Enter.
g. Type N and press Enter.
h. Type N and press Enter.
i. The data mart vendor information is displayed. Enter the Database user Name for the data mart and press Enter.
j. Enter the user password for the data mart and press Enter.
k. Enter the Database catalog Name for the data mart and press Enter. If the database is DB2, enter the DB2 catalog name and if it is Oracle, enter SID.
l. Enter the Database Schema Name for the data mart and press Enter.
m. Enter the Database host Name for the data mart and press Enter.
n. Enter the Database port Number for the data mart and press Enter.
o. Enter the Database driver jars for the data mart and press Enter. The supported databases are Oracle and DB2. Enter the location of the JDBC driver file for Oracle or DB2. Repeat to add the license file for DB2 (required).
p. Type A to Add jar.
q. Type D when you have finished adding the jar.
r. The staging vendor information is displayed. Enter the Database user Name for the staging and press Enter.
s. Enter the Database password for the staging and press Enter.
t. Enter the Database catalog Name for the staging and press Enter.
u. Enter the Database Schema Name for the staging and press Enter.
v. Enter the Database host Name for the staging and press Enter.
w. Enter the Database port Number for the staging and press Enter.
x. Enter the Database driver jars for the staging and press Enter. The supported databases are Oracle and DB2.
y. Type A to Add jar. Enter the location of the JDBC driver file for Oracle or DB2. Repeat to add the license file for DB2 (required).
z. Type D when you have finished adding the jar.
aa. Type Y to validate the connection to the database.
ab. If the database validation is successful. Type I to install and press Enter. A progress indicator shows the percentage of installation completed.
ac. After the installation is complete, the installation status is displayed.

Installing IBM Sterling Business Intelligence Application using IBM Installation Manager GUI for Single Schema on Unix or Linux

Before you begin

Running the IBM Installation Manager in both GUI mode and command line mode is not supported. Therefore, if the command line mode of the IBM Installation Manager is open, ensure that you close it.

Ensure that you have performed the following tasks before you proceed with your installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, Release 9.2 in single schema mode on Windows. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the data warehouse database, refer to the following link:http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db.
4. Ensure that you set the display to your remote server using the following command:

   `export DISPLAY=<server_ip_address>:0.0`

   For example, **`export DISPLAY=10.11.12.1:0.0`**

About this task

You will find instructions to install Sterling Business Intelligence using the IBM Installation Manager GUI on Unix or Linux.

Procedure

1. Execute the following command to start the IBM Installation Manager : **`<IM_INSTALL_DIR>/eclipse/launcher`** The Start page of the Installation Manager is displayed.
2. Add the Sterling Business Intelligence application installer repository location in the IBM Installation Manager as follows:
   a. In Installation Manager, click **File > Preferences... > Repositories**. The Preferences page opens and displays the available repositories, repository locations, and the connection status for the repositories.
   b. Click **Add Repository.**
   c. Enter the repository location or click **Browse**. When browsing, navigate to the repository location and select the `repository.config`, file for the installer.
   d. Click **OK**. The new repository location is added to the list. If the repository is not connected, a red box is displayed in the **Connection** column. Debug your connectivity issues.
   e. Click **OK** to close the Preferences page.
3. Click **Install** in the IBM Installation Manager home page.
4. Select the IBM Sterling Business Intelligence check box. Click **Next**.
5. Click **Use the existing package group**. Click **Next**.
6. In the Features page, ensure that IBM Sterling Business Intelligence check box is selected. Click **Next**.
7. The **Datamart Database Information** page is displayed, with the database vendor name. In the **Datamart Database Information** page, enter the information for the fields described in the table below. The supported databases are Oracle and DB2.

Ensure that the schema is created with the UTF-8 character set enabled. For more details about enabling the UTF-8 character set, refer to the documentation related to the database vendor.

Field **Description**

Database user name

Name of the database user.

Database password

Password of the database user to access the database.

Confirm database password

Re-enter the password.

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Name of the database catalog. If the database is DB2, enter the DB2 catalog name and if it is Oracle, enter SID .

Database schema name

Name of the database schema.

Database host name

IP address or host name of the location in which the database is installed.

Database port

Port number of the database.

JDBC driver file

Click **Add Jars** to browse to the JDBC driver file for Oracle or DB2. Repeat to add the license file for DB2 (required).

To test the connection to the database, click **Validate Connection**. If a message saying `the connection failed` is displayed, verify the information entered in all fields and click **Validate Connection**.

8. Click **Next**.
9. In the **Staging Database Information** page, enter the information related to the database as described in the table below. The supported databases are Oracle and DB2.

   Ensure that the schema is created with the UTF-8 character set enabled. For more details about enabling the UTF-8 character set, refer to the documentation related to the database vendor.

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To test the connection to the database, click **Validate Connection**. If a message saying `the connection failed` is displayed, verify the information entered in all fields and click **Validate Connection**.

10. Click **Next**.
11. In the Summary page, the **Packages** are displayed. Click **Install**. A progress indicator displays the percentage of the installation completed.
12. On successful completion, the Install Packages window is displayed with the package details.
13. (Optional) Click **View log file** to open the installation log file for the current session in a new window. You must close the Installation Log window to continue.

    Note: If the installation was not successful, click on the **View log file** to view the failure reason in the log file.
14. Click **Finish** to complete the installation.

Installing IBM Sterling Business Intelligence Application using IBM Installation Manager Command Line for Single Schema on Unix or Linux

Before you begin

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Ensure that you have performed the following tasks before you proceed with your Application installation:

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2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, 9.2 in Unix or Linux environment. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the

data warehouse database, refer to the following link:http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db

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1. Execute the **imcl** command as follows:
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   Here,

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2. Add the Sterling Business Intelligence installer repository location in the IBM Installation Manager as follows:
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   b. Type 1 to select Repositories and press Enter.
   c. Type D to select Add Repository and press Enter.
   d. Enter the repository location to point to the `repository.config` file and press Enter. A message will be displayed with the connection status of the repository.
   e. Type A to apply the changes and return to Preferences and press Enter.
   f. Type R to return to the main menu and press Enter.
3. Install the Sterling Business Intelligence as follows:
   a. Type 1 to install and press Enter.
   b. Type the number associated with the IBM Sterling Business Intelligence package and press Enter.
   c. Type 1 to choose version 9.2.0 and press Enter.
   d. Type N and press Enter.
   e. Type M to change the location where Sterling Selling and Fulfillment Foundation is installed, using the IBM Installation Manager.
   f. Enter the location where Sterling Selling and Fulfillment Foundation is installed and press Enter.
   g. Type N and press Enter.
   h. Type N and press Enter.
   i. The data mart vendor information is displayed. Enter the Database user Name for the data mart and press Enter.
   j. Enter the Database password for the data mart and press Enter.
   k. Enter the Database catalog Name for the data mart and press Enter. If the database is DB2, enter the DB2 catalog name and if it is Oracle, enter SID.
   l. Enter the Database Schema Name for the data mart and press Enter.
   m. Enter the Database host Name for the data mart and press Enter.
   n. Enter the Database port Number for the data mart and press Enter.

o. Enter the Database driver jars for the data mart and press Enter. The supported databases are Oracle and DB2. Enter the location of the JDBC driver file for Oracle or DB2. Repeat to add the license file for DB2 (required).
p. Type A to Add jar.
q. Type D when you have finished adding the jar.
r. The staging vendor information is displayed. Enter the Database user Name for the staging and press Enter.
s. Enter the user password for the staging and press Enter.
t. Enter the Database catalog Name for the staging and press Enter. If the database is DB2, enter the DB2 catalog name and if it is Oracle, enter SID.
u. Enter the Database Schema Name for the staging and press Enter.
v. Enter the Database host Name for the staging and press Enter.
w. Enter the Database port Number for the staging and press Enter.
x. Enter the Database driver jars for the staging and press Enter. The supported databases are Oracle and DB2. Enter the location of the JDBC driver file for Oracle or DB2. Repeat to add the license file for DB2 (required).
y. Type A to Add jar.
z. Type D when you have finished adding the jar.
aa. Type Y to validate the connection to the database.
ab. Type I to install and press Enter. A progress indicator shows the percentage of installation completed.
ac. After the installation is complete, the installation status is displayed.

Installing IBM Sterling Business Intelligence using IBM Installation Manager GUI for Multi Schema on Windows

Before you begin

Running the IBM Installation Manager in both GUI mode and command line mode is not supported. Therefore, if the command line mode of the IBM Installation Manager is open, ensure that you close it.

Ensure that you have performed the following tasks before you proceed with your Sterling Business Intelligence installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, Release 9.2 in multi schema mode on Windows. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the data warehouse database, refer to the following link:http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db

About this task

You will find instructions to install Sterling Business Intelligence using the IBM Installation Manager GUI on Windows.

Procedure

1. Start the IBM Installation Manager. The Start page of the Installation Manager is displayed.
2. Add the Sterling Business Intelligence installer repository location in the IBM Installation Manager as follows:
   a. In Installation Manager, click **File > Preferences... > Repositories**. The Repositories page opens and displays the available repositories, repository locations, and the connection status for the repositories.
   b. Click **Add Repository.**
   c. Enter the repository location or click **Browse**. When browsing, navigate to the repository location and select the `repository.config`, file for the installer.
   d. Click **OK**. The new repository location is added to the list. If the repository is not connected, a red box is displayed in the **Connection** column.
   e. Click **OK** to close the Preference page.
3. Click **Install** .
4. Select the IBM Sterling Business Intelligence. Click **Next**.
5. Click **Use the existing package group**. Click **Next**.
6. In the Features page, ensure that IBM Sterling Business Intelligence check box is selected. Click **Next**.
7. In the Summary page, the **Packages** are displayed. Click **Install**. A progress indicator displays the percentage of the installation completed.
8. (Optional) Click **View log file** to open the installation log file for the current session in a new window. You must close the Installation Log window to continue.
9. Click **Finish** to complete the installation.

Installing IBM Sterling Business Intelligence using IBM Installation Manager Command Line for Multi Schema on Windows

Before you begin

You cannot run the IBM Installation Manager in both GUI and command line mode. Hence, ensure that you have closed the GUI of the IBM Installation Manager.

Ensure that you have performed the following tasks before you proceed with your Application installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, 9.2 in Windows environment. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the data warehouse database, refer to the following link:http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db

About this task

You can also install the Sterling Business Intelligence using the IBM Installation Manager command line (**imcl**) installation command. The **imcl** command provides a text-based (non-GUI) interface.

Procedure

1. Execute the **imcl** command as follows:
   - **<IM_INSTALL_DIR>\eclipse\tools\imcl -consoleMode**

   Here,

   <IM_INSTALL_DIR>
      Indicates the directory where the IBM Installation Manager is installed.
2. Add the Sterling Business Intelligence installer repository location in the IBM Installation Manager as follows:
   a. Type P to select Preferences and press Enter.
   b. Type 1 to select Repositories and press Enter.
   c. Type D to select Add Repository and press Enter.
   d. Enter the repository location to point to the `repository.config` file and press Enter. A message will be displayed with the connection status of the repository.
   e. Type A to apply the changes and return to Preferences and press Enter.
   f. Type R to return to the main menu and press Enter.
3. Install the Sterling Business Intelligence as follows:
   a. Type 1 to install and press Enter.
   b. Type the number associated with the IBM Sterling Business Intelligence package and press Enter.
   c. Type 1 to choose version 9.2.0 and press Enter.
   d. Type N and press Enter.
   e. Type M to change the location where Sterling Selling and Fulfillment Foundation is installed, using the IBM Installation Manager.
   f. Enter the location where Sterling Selling and Fulfillment Foundation is installed and press Enter.
   g. Type N and press Enter.
   h. Type I to install and press Enter. A progress indicator shows the percentage of installation completed.
   i. After the installation is complete, the installation status is displayed.

Installing IBM Sterling Business Intelligence using IBM Installation Manager GUI for Multi Schema on Unix or Linux

Before you begin

Running the IBM Installation Manager in both GUI mode and command line mode is not supported. Therefore, if the command line mode of the IBM Installation Manager is open, ensure that you close it.

Ensure that you have performed the following tasks before you proceed with your Sterling Business Intelligence installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, Release 9.2 in multi schema mode on Unix or Linux. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the data warehouse database, refer to the following link:http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db

About this task

You will find instructions to install Sterling Business Intelligence using the IBM Installation Manager GUI on Unix or Linux.

Procedure

1. Start the IBM Installation Manager. The Start page of the Installation Manager is displayed.
2. Add the Sterling Business Intelligence installer repository location in the IBM Installation Manager as follows:
   a. In Installation Manager, click **File > Preferences... > Repositories**. The Repositories page opens and displays the available repositories, repository locations, and the connection status for the repositories.
   b. Click **Add Repository.**
   c. Enter the repository location or click **Browse**. When browsing, navigate to the repository location and select the `repository.config`, file for the installer.
   d. Click **OK**. The new repository location is added to the list. If the repository is not connected, a red box is displayed in the **Connection** column.
   e. Click **OK** to close the Preference page.
3. Click **Install** .
4. Select the IBM Sterling Business Intelligence. Click **Next**.
5. Click **Use the existing package group**. Click **Next**.
6. In the Features page, ensure that IBM Sterling Business Intelligence check box is selected. Click **Next**.
7. In the Summary page, the **Packages** are displayed. Click **Install**. A progress indicator displays the percentage of the installation completed.

8. (Optional) Click **View log file** to open the installation log file for the current session in a new window. You must close the Installation Log window to continue.
9. Click **Finish** to complete the installation.

Installing IBM Sterling Business Intelligence using IBM Installation Manager Command Line for Multi Schema on Unix or Linux

Before you begin

You cannot run the IBM Installation Manager in both GUI and command line mode. Hence, ensure that you have closed the GUI of the IBM Installation Manager.

Ensure that you have performed the following tasks before you proceed with your Application installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you have installed Sterling Selling and Fulfillment Foundation, 9.2 in Unix or Linux environment. For more information about installing Sterling Selling and Fulfillment Foundation, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
3. Ensure that the database schema is created and configured for both the staging and the data mart. For more information about configuration settings for the data warehouse database, refer to the following link:http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db

About this task

You can also install the Sterling Business Intelligence using the IBM Installation Manager command line (`imcl`) installation command. The `imcl` command provides a text-based (non-GUI) interface.

Procedure

1. Execute the `imcl` command as follows:
   - **`<IM_INSTALL_DIR>/eclipse/tools/imcl -consoleMode`**

   Here,

   `<IM_INSTALL_DIR>`
      Indicates the directory where the IBM Installation Manager is installed.
2. Add the Sterling Business Intelligence installer repository location in the IBM Installation Manager as follows:
   a. Type P to select Preferences and press Enter.
   b. Type 1 to select Repositories and press Enter.
   c. Type D to select Add Repository and press Enter.
   d. Enter the repository location to point to the `repository.config` file and press Enter. A message will be displayed with the connection status of the repository.
   e. Type A to apply the changes and return to Preferences and press Enter.

f. Type R to return to the main menu and press Enter.

3. Install the Sterling Business Intelligence application as follows:
   a. Type 1 to install and press Enter.
   b. Type the number associated with the IBM Sterling Business Intelligence package and press Enter.
   c. Type 1 to choose version 9.2.0 and press Enter.
   d. Type N and press Enter.
   e. Type M to change the location where Sterling Selling and Fulfillment Foundation is installed, using the IBM Installation Manager.
   f. Enter the location where Sterling Selling and Fulfillment Foundation is installed and press Enter.
   g. Type N and press Enter.
   h. Type I to install and press Enter. A progress indicator shows the percentage of installation completed.
   i. After the installation is complete, the installation status is displayed.

Chapter 5. Upgrading IBM Sterling Business Intelligence

Before you begin

1. Ensure that you have installed Sterling Selling and Fulfillment Foundation with the `Enable Upgrade` option selected. For more information, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide* .

Procedure

1. Install the Sterling Business Intelligence application. For installing Sterling Business Intelligence application, refer to the topic Chapter 4, "Installing the IBM Sterling Business Intelligence Application," on page 9. For completing the upgrade, refer to the upgrade instructions in the *Sterling Business Intelligence: Upgrade Guide*.
2. To upgrade the Cognos Business Intelligence server and Cognos Adaptive Analytics, refer to the upgrade instructions in the *Sterling Business Intelligence: Upgrade Guide*.

Chapter 6. Installing IBM Cognos Business Intelligence Server

The Cognos Business Intelligence server is installed on server 4.

For more information about the different installation options, refer to the following link : http://publib.boulder.ibm.com/infocenter/cbi/v10r1m1/topic/com.ibm.swg.ba.cognos.inst_cr_winux.10.1.1.doc/c_distributionoptionsforcognosseries8.html#DistributionOptionsforCognosSeries8.

For more information about planning the installation, refer to the following link : http://publib.boulder.ibm.com/infocenter/cbi/v10r1m1/topic/com.ibm.swg.ba.cognos.inst_cr_winux.10.1.1.doc/c_settinguptheenvironment.html#SettingUptheEnvironment.

Installing IBM Cognos Business Intelligence Server on One Computer

You can install all Cognos Business Intelligence components on one computer, or distribute them across a network.

For more information on installing Cognos Business Intelligence server on one computer, refer to the following link: http://publib.boulder.ibm.com/infocenter/cbi/v10r1m1/topic/com.ibm.swg.ba.cognos.inst_cr_winux.10.1.1.doc/c_installingandconfiguring8componentsononecomputer.html#InstallingandConfiguring8Componen

Note: Perform the following steps after you install the Cognos Business Intelligence server,

- Launch the Cognos Business Intelligence server user interface. In the Configuration window, set the **memory in MB** to 1536.
- Modify the maximum memory configuration as follows:
  - For Windows

    In the <c_installation>\bin\startup.bat file, set CATALINA_OPTS=-Xmx1536m.
  - For Unix

    In the <c_installation>/bin/startup.sh file, set MEM=1536.

Installing IBM Cognos Business Intelligence Server on Different Computers

You can install all Cognos Business Intelligence components on one computer, or distribute them across a network.

For more information on installing Cognos Business Intelligence server on different computers, refer to the following link: http://publib.boulder.ibm.com/infocenter/cbi/v10r1m1/topic/com.ibm.swg.ba.cognos.inst_cr_winux.10.1.1.doc/c_installingcognos8servercomponentsinadistributedenvironment.html#InstallingCognos8ServerCo

Note: Perform the following steps after you install the Cognos Business Intelligence server,

- Launch the Cognos Business Intelligence server user interface. In the Configuration window, set the **memory in MB** to 1536.
- Modify the maximum memory configuration as follows:

- For Windows

  In the `<c_installation>\bin\startup.bat` file, set `CATALINA_OPTS=-Xmx1536m`.
- For Unix

  In the `<c_installation>/bin/startup.sh` file, set `MEM=1536`.

Chapter 7. Installing the IBM Cognos Adaptive Warehouse

The Cognos Adaptive Warehouse component can be installed only on Microsoft Windows.

The component is installed on server 5, as described in the topic Chapter 3, “Understanding the IBM Sterling Business Intelligence Ecosystem,” on page 5.

For more information about the different installation options, refer to the following link :http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/c_distributionoptionsforanalyticapps.html#DistributionOptionsforAnalyticApps.

For more information about planning your installation, refer to the following link : http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_settinguptheenvironment_aapps.html

Installing the IBM Cognos Adaptive Warehouse on Windows

Before you begin

Ensure that you have performed the following tasks before you proceed with your installation:

1. Ensure that you have installed and configured Cognos Business Intelligence server. For more information about installing and configuring Cognos Business Intelligence server, refer to Chapter 6, “Installing IBM Cognos Business Intelligence Server,” on page 27

Procedure

For completing the installation and configuration of the Cognos Adaptive Warehouse, refer to the following link http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/c_installaaf.html#InstallAAF

Chapter 8. Installing the IBM Cognos Adaptive Warehouse Runtime

The Cognos Adaptive Warehouse Runtime is used to execute the extract, transform, and load (ETL) scripts that have been generated from the Cognos Adaptive Warehouse.

The Cognos Adaptive Warehouse Runtime is installed on server 6, as described in the Chapter 3, "Understanding the IBM Sterling Business Intelligence Ecosystem," on page 5 topic.

For more information about the different installation options, refer to the following link :http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/c_distributionoptionsforanalyticapps.html#DistributionOptionsforAnalyticApps.

For more information about planning your installation, refer to the following link : http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_settinguptheenvironment_aapps.html

Installing the IBM Cognos Adaptive Warehouse Runtime on Windows

Before you begin

Ensure that you have performed the following tasks before you proceed with your installation:

1. Ensure that you have installed and configured Cognos Business Intelligence server. For more information about installing and configuring Cognos Business Intelligence server, refer to Chapter 6, "Installing IBM Cognos Business Intelligence Server," on page 27.

Procedure

For completing the installation and configuration of the Cognos Adaptive Warehouse Runtime, refer to the following link : http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_apps_installingibmcognosadaptivewarehouseruntimeonwindows.html

Installing the IBM Cognos Adaptive Warehouse Runtime on Linux or UNIX

Before you begin

Ensure that you have performed the following tasks before you proceed with your installation:

1. Ensure that you have installed and configured Cognos Business Intelligence server. For more information about installing and configuring Cognos Business Intelligence server, refer to Chapter 6, "Installing IBM Cognos Business Intelligence Server," on page 27.

Procedure

For more information about installation and configuring the Cognos Adaptive Warehouse Runtime, refer to the following link: http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_inst_aw_unix.html#inst_aw_UNIX.

Chapter 9. Installing the IBM Cognos Adaptive Analytics

The Cognos Adaptive Analytics must be installed on the same server on which Cognos Business Intelligence server is installed. The Cognos Adaptive Analytics is installed on server 4, as described in the Chapter 3, “Understanding the IBM Sterling Business Intelligence Ecosystem,” on page 5 topic.

For more information about the different installation options, refer to the following link :http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/c_distributionoptionsforanalyticapps.html#DistributionOptionsforAnalyticApps.

For more information about planning your installation, refer to the following link : http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_settinguptheenvironment_aapps.html

Installing IBM Cognos Adaptive Analytics on Windows

For more information on installing Cognos Adaptive Analytics on Windows, refer to the following link: http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_inst_aa_win.html#inst_aa_Win.

Installing IBM Cognos Adaptive Analytics on Unix or Linux

For more information on installing Cognos Adaptive Analytics on Unix or Linux, refer to the following link: http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_inst_aa_unix.html#inst_aa_UNIX.

Chapter 10. Installing the IBM Sterling Business Intelligence Content

IBM Sterling Business Intelligence Content can be installed on all platforms.

IBM Installation Manager installs IBM Sterling Business Intelligence Content in an empty folder. You must ensure that the IBM Sterling Business Intelligence Content is copied from this folder to the following locations:

- The server on which Cognos Business Intelligence server is installed. This folder is referred to as <BI_COGNOS_HOME>.
- The server on which Cognos Adaptive Warehouse is installed. This folder is referred to as <AC_INSTALL_DIR>.

Note: Ensure that there is at least 50 MB of free disk space available for installation.

Installing IBM Sterling Business Intelligence Content using IBM Installation Manager on Windows

Before you begin

Running the IBM Installation Manager in both GUI mode and command line mode is not supported. Therefore, if the command line mode of the IBM Installation Manager is open, ensure that you close it.

Ensure that you have performed the following tasks before you proceed with your installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

About this task

You will find instructions to install content using the IBM Installation Manager GUI on Windows.

Procedure

1. Execute the following command to start the IBM Installation Manager : **`<IM_INSTALL_DIR>\eclipse\launcher.exe`**. The Start page of the Installation Manager is displayed.
2. Add the repository location in the IBM Installation Manager as follows:
   a. In IBM Installation Manager, click **File > Preferences... > Repositories**. The Preferences page opens and displays the available repositories, repository locations, and the connection status for the repositories.
   b. Click **Add Repository.**
   c. Enter the repository location or click **Browse**. When browsing, navigate to the repository location and select the `repository.config` file.
   d. Click **OK**. The new repository location is added to the list. If the repository is not connected, a red box is displayed in the **Connection** column.

   e. Click **OK** to close the Preferences page.
3. Click **Install** in the IBM Installation Manager home page.
4. Select **IBM Sterling Business Intelligence Content** check box. Click **Next**.
5. Review and accept the license agreement. Click **Next**.
6. Click **Create a new package group** . Click **Browse** and navigate to the directory in which you want to install the Content. The directory must be empty. Click **Next**.
7. Click **Next**.
8. In the Summary page, the **Packages** are displayed. Click **Install**. A progress indicator displays the percentage of the installation completed.
9. On successful completion, the Install Packages window is displayed with the package details.
10. (Optional) Click **View log file** to open the installation log file for the current session in a new window. You must close the Installation Log window to continue.

    Note: If the installation was not successful, click on the **View log file** to view the failure reason.
11. Click **Finish** to complete the installation.

Installing IBM Sterling Business Intelligence Content using IBM Installation Manager Command Line on Windows

Before you begin

You cannot run the IBM Installation Manager in both GUI and command line mode. Hence, ensure that you have closed the GUI of the IBM Installation Manager.

Ensure that you have performed the following tasks before you proceed with your installation:

- Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

About this task

You can also install the IBM Sterling Business Intelligence Content using the IBM Installation Manager command line (**imcl**) installation command. The **imcl** command provides a text-based (non-GUI) interface.

Procedure

1. Execute the **imcl** command as follows:
   - **<IM_INSTALL_DIR>\eclipse\tools\imcl -consoleMode**

   Here,

   <IM_INSTALL_DIR>
      Indicates the directory where the IBM Installation Manager is installed.
2. Add the IBM Sterling Business Intelligence Content repository location in the IBM Installation Manager as follows:
   a. Type P to select Preferences and press Enter.
   b. Type 1 to select Repositories and press Enter.

c. Type D to select Add Repository and press Enter.
d. Enter the location of the repository location and press Enter.
e. Type A to apply the changes and return to Preferences and press Enter.
f. Type R to return to the main menu and press Enter.

3. Install the IBM Sterling Business Intelligence Content as follows:
   a. Type 1 to install and press Enter.
   b. Type the number associated with the IBM Sterling Business Intelligence Content package and press Enter.
   c. Type 1 to choose version 9.2.0 and press Enter.
   d. Type N and press Enter.
   e. Read each license agreement by typing the option number (1 or 2). After reading, type R to return to the prompt. When ready to accept the license agreements, type A and press Enter.
   f. Type N and press Enter.
   g. Type M to change the install location for IBM Sterling Business Intelligence Content, using the IBM Installation Manager.
   h. Enter the location of an empty folder where IBM Sterling Business Intelligence Content will be installed, press Enter.
   i. Type N and press Enter.
   j. Type I to install and press Enter. A progress indicator shows the percentage of installation completed.
   k. After the installation is complete, the installation status is displayed.

Installing IBM Sterling Business Intelligence Content using IBM Installation Manager on Unix or Linux

Before you begin

Running the IBM Installation Manager in both GUI mode and command line mode is not supported. Therefore, if the command line mode of the IBM Installation Manager is open, ensure that you close it.

Ensure that you have performed the following tasks before you proceed with your installation:

1. Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.
2. Ensure that you set the display to your remote server using the following command:

   export DISPLAY=<server_ip_address>:0.0

   For example, **export DISPLAY=10.11.12.1:0.0**

About this task

You will find instructions to install IBM Sterling Business Intelligence Content using the IBM Installation Manager GUI on Unix or Linux.

Procedure

1. Execute the following command to start the IBM Installation Manager : **<IM_INSTALL_DIR>\eclipse\launcher**. The Start page of the Installation Manager is displayed.
2. Add the repository location in the IBM Installation Manager as follows:
   a. In IBM Installation Manager, click **File > Preferences... > Repositories**. The Preferences page opens and displays the available repositories, repository locations, and the connection status for the repositories.
   b. Click **Add Repository.**
   c. Enter the repository location or click **Browse**. When browsing, navigate to the repository location and select the `repository.config` file.
   d. Click **OK**. The new repository location is added to the list. If the repository is not connected, a red box is displayed in the **Connection** column. Debug your connectivity issues.
   e. Click **OK** to close the Preferences page.
3. Click **Install** .
4. Select the **IBM Sterling Business Intelligence Content**. Click **Next**.
5. Review and accept the license agreement. Click **Next**.
6. Click **Create a new package group** . Click **Browse** and navigate to the directory in which you want to install the IBM Sterling Business Intelligence Content. The directory must be empty. Click **Next**.
7. Click **Next**.
8. In the Summary page, the **Packages** are displayed. Click **Install**. A progress indicator displays the percentage of the installation completed.
9. On successful completion, the Install Packages window is displayed with the package details.
10. (Optional) Click **View log file** to open the installation log file for the current session in a new window. You must close the Installation Log window to continue.

    Note: If the installation was not successful, click on the **View log file** to view the failure reason.
11. Click **Finish** to complete the installation.

Installing IBM Sterling Business Intelligence Content using IBM Installation Manager Command Line on Unix or Linux

Before you begin

You cannot run the IBM Installation Manager in both GUI and command line mode. Hence, ensure that you have closed the GUI of the IBM Installation Manager.

Ensure that you have performed the following tasks before you proceed with your installation:

- Install the IBM Installation Manager. For more information about installing the IBM Installation Manager, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

About this task

You can also install the IBM Sterling Business Intelligence Content using the IBM Installation Manager command line (**imcl**) installation command. The **imcl** command provides a text-based (non-GUI) interface.

Procedure

1. Execute the **imcl** command as follows:
   - **<IM_INSTALL_DIR>/eclipse/tools/imcl -consoleMode**

   Here,

   <IM_INSTALL_DIR>
      Indicates the directory where the IBM Installation Manager is installed.
2. Add the IBM Sterling Business Intelligence Content repository location in the IBM Installation Manager as follows:
   a. Type P to select Preferences and press Enter.
   b. Type 1 to select Repositories and press Enter.
   c. Type D to select Add Repository and press Enter.
   d. Enter the location of the repository location and press Enter.
   e. Type A to apply the changes and return to Preferences and press Enter.
   f. Type R to return to the main menu and press Enter.
3. Install the IBM Sterling Business Intelligence Content as follows:
   a. Type 1 to install and press Enter.
   b. Type the number associated with the IBM Sterling Business Intelligence Content package and press Enter.
   c. Type 1 to choose version 9.2.0 and press Enter.
   d. Type N and press Enter.
   e. Read each license agreement by typing the option number (1 or 2). After reading, type R to return to the prompt. When ready to accept the license agreements, type A and press Enter.
   f. Type N and press Enter.
   g. Type M to change the install location for IBM Sterling Business Intelligence Content, using the IBM Installation Manager.
   h. Enter the location of an empty folder where IBM Sterling Business Intelligence Content will be installed, press Enter.
   i. Type N and press Enter.
   j. Type I to install and press Enter. A progress indicator shows the percentage of installation completed.
   k. After the installation is complete, the installation status is displayed.

Chapter 11. Deploy IBM Sterling Business Intelligence

About this task

To deploy Sterling Business Intelligence, perform the following steps:

Procedure

1. "Deploy the IBM Sterling Business Intelligence Application on Windows"
2. "Configure the IBM Cognos Business Intelligence Server" on page 43
3. "Setup for Accessing the IBM Cognos Business Intelligence Server from the IBM Sterling Business Intelligence Application" on page 44
4. "Set Up Environment for IBM Cognos Analytic Applications" on page 45.
5. "Configure the IBM Cognos Adaptive Warehouse" on page 45
6. "Deploy Analytics Content" on page 45
7. "Deploy the Dashboard Reports to IBM Cognos Content Store" on page 49

Deploy the IBM Sterling Business Intelligence Application on Windows

About this task

Perform the following steps in the Sterling Transaction System (server 1) in which the Sterling Business Intelligence Application is installed.

Procedure

1. To create an application EAR file, run the following command from the `<INSTALL_DIR>/bin` directory:
   - For Windows:

     ```
     buildear.cmd -Dappserver=jboss -Dwarfiles=smcfs,sma,sbc,sbi
     -Dearfile=smcfs.ear create-ear
     ```

   Note:
   - Here, the value of **`Dappserver`** depends upon the application server. For JBoss, pass `jboss` in this parameter. For BEA WebLogic, pass `weblogic` and for IBM WebSphere®, pass `websphere`
   - You can add the following option to the **`buildear`** command if you do not want to use Web services: **`Dnowebservice=true`**.

   Running this command includes the `sbi.war` file into the `smcfs.ear` file.
2. You can build documentation EAR along with the application EAR. The doc ear does not contain end-user documentation, such as the context-sensitive help files. It contains only development-related documentation, including API Javadocs, ERDs, and XSDs that should not be deployed to a production server. It is recommended that you create documentation EAR only when you are working in development environment.

   To build the documentation EAR, `smcfsdocs.ear` along with the application EAR, before running the buildear command, add the BUILD_DOC_EAR property and set the value to "true" in the `<INSTALL_DIR>/properties/sandbox.cfg` file and run the setupfiles script.

Note: By default, the documentation EAR is not built and deployed with the application EAR.

Note: The -Dnodocear parameter takes precedence over the BUILD_DOC_EAR property. For example, if the BUILD_DOC_EAR property is set to "true" but the -Dnodocear parameter is used with the create-ear script, the documentation EAR does not build.

For more information about deploying the WAR and EAR files, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

Deploy the IBM Sterling Business Intelligence Application on Unix or Linux

About this task

Perform the following steps in the Sterling Transaction System (server 1) in which the Sterling Business Intelligence Application is installed.

Procedure

1. To create an application EAR file, run the following command from the <INSTALL_DIR>/bin directory:
   - For Linux or UNIX:
     ```
     ./buildear.sh -Dappserver=jboss -Dwarfiles=smcfs,sma,sbc,sbi
     -Dearfile=smcfs.ear create-ear
     ```

   Note:
   - Here, the value of **`Dappserver`** depends upon the application server. For JBoss, pass `jboss` in this parameter. For BEA WebLogic, pass `weblogic` and for IBM WebSphere, pass `websphere`
   - You can add the following option to the **`buildear`** command if you do not want to use Web services: **`Dnowebservice=true`**.

   Running this command includes the `sbi.war` file into the `smcfs.ear` file.
2. You can build documentation EAR along with the application EAR. The doc ear does not contain end-user documentation, such as the context-sensitive help files. It contains only development-related documentation, including API Javadocs, ERDs, and XSDs that should not be deployed to a production server. It is recommended that you create documentation EAR only when you are working in development environment.

   To build the documentation EAR, `smcfsdocs.ear` along with the application EAR, before running the buildear command, add the BUILD_DOC_EAR property and set the value to "true" in the <INSTALL_DIR>/properties/sandbox.cfg file and run the setupfiles script.

   Note: By default, the documentation EAR is not built and deployed with the application EAR.

   Note: The -Dnodocear parameter takes precedence over the BUILD_DOC_EAR property. For example, if the BUILD_DOC_EAR property is set to "true" but the -Dnodocear parameter is used with the create-ear script, the documentation EAR does not build.

   For more information about deploying the WAR and EAR files, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

Configure the IBM Cognos Business Intelligence Server

You should apply Sterling Business Intelligence specific styles to the Cognos Business Intelligence reports, and add the `system.xml` definition to enable the relevant toolbar actions for the reports.

About this task

To apply Sterling Business Intelligence specific styles to reports, perform the following tasks:

Note: It is recommended that you take a back up of the existing `reportstudio_en.xml` and `GlobalReportStyles.css` files.

Procedure

1. The `GlobalReportStyles.css` file is found in multiple locations. You must copy the contents of the `<BI_COGNOS_HOME>\rs-export\Style_Sheet\SBIReportStyles.css` at the beginning of the `GlobalReportStyles.css` file in the following locations:
   - `<c_installation>\<c_path>\reportstyles`
   - `<c_installation>\<c_path>\bin`
   - `<c_installation>\<c_path>\webcontent\reportstyles`
   - `<c_installation>\<c_path>\webcontent\schemas`

   Note: If you do not copy the contents of the `SBIReportStyles.css` at the beginning of the `GlobalReportStyles.css` file, then the reports and fonts will not be displayed properly in Mozilla Firefox.
2. Edit the `reportstudio_en.xml` file under `<c_installation>\<c_path>\msgsdk` and `<c_installation>\<c_path>\webcontent\pat\res` to add the content of `<BI_COGNOS_HOME>\rs-xport\Style_Sheet\SBI_reportstudio_en_sample.xml` at the end, just before the `</section>` tag. You must add only the content between the comment tags `<!-- SBI STARTS --> & <!-- SBI ENDS -->`
3. Add the `blue-top.png` image file taken from `<BI_COGNOS_HOME>\rs-export\Style_Sheet`, and copy the `blue-top.png` file into `<c_installation>\<c_path>\webcontent\samples\images`. Ensure that the `<c_installation>\<c_path>\webcontent\samples\images` directory has been created and the appropriate permissions granted to users read from this directory.
4. Add the following lines to `system.xml` under `<c_installation>\<c_path>\templates\ps\portal\` and `<c_installation>\<c_path>\templates\ps\`. If you have not defined the **`ui_hide`** parameter in `system.xml`, add the instructions provided here. If you have already defined the **`ui_hide`** parameter, add only those line items that are not defined.

```
<param name="ui_hide"><RV_HEADER/>
<RV_TOOLBAR_BUTTONS_DOWNLOAD/>
<RV_TOOLBAR_BUTTONS_SAVE/>
<RV_TOOLBAR_BUTTONS_SAVEAS/>
<RV_TOOLBAR_BUTTONS_SEND/>
<RV_TOOLBAR_BUTTONS_RUN/>
<RV_TOOLBAR_BUTTONS_XLS/>
<RV_TOOLBAR_BUTTONS_XLS_CSV/>
<RV_TOOLBAR_BUTTONS_XML/>
<RV_TOOLBAR_BUTTONS_XLS_SPREADSHEETML/>
<RV_TOOLBAR_BUTTONS_XLS_XLWA/>
<RV_TOOLBAR_BUTTONS_XLS_XLS/>
<RV_TOOLBAR_BUTTONS_XLS_SINGLEXLS/>
<RV_TOOLBAR_BUTTONS_DRILLDOWN/>
```

```
<RV_TOOLBAR_BUTTONS_DRILLUP/>
<RV_TOOLBAR_BUTTONS_GOTO/>
<RV_TOOLBAR_BUTTONS_ADD_THIS_REPORT/>
<RV_TOOLBAR_BUTTONS_ADD_TO_MY_BOOKMARKS/>
<RV_TOOLBAR_BUTTONS_ADD_TO_MY_FOLDERS/>
<RV_TOOLBAR_BUTTONS_KEEP_THIS_VERSION/>
</param>
```

5. Perform the following steps to mask the **As at Date** box in Cognos Adaptive Analytics:
   a. Take a backup of the file <c_installation>\<c_path>\data\AA\templates\ATTemplate_custom.xml.
   b. Copy <BI_COGNOS_HOME>\rs-export\Style_Sheet\sbiaatemplate_custom.xml file to <c_installation>\<c_path>\data\AA\templates\.
   c. Rename <c_installation>\<c_path>\data\AA\templates\sbiaatemplate_custom.xml to <c_installation>\<c_path>\data\AA\templates\ATTemplate_custom.xml.
   d. Copy the following text to the Settings section of Cognos Adaptive Analytics configuration file <c_installation>\<c_path>\configuration\aaConfig.xml : <EditATTemplate>on</EditATTemplate>.
   e. Open Cognos Adaptive Analytics. Click the **Project Actions** icon, and select **Reload Analytic Type Template**.
   f. Deploy the Cognos Adaptive Analytics deployment archive. For more information, refer to the topic “Deploy the IBM Cognos Adaptive Analytics Content to IBM Cognos Content Store” on page 49.
6. Copy the <BI_COGNOS_HOME>\rs-export\Style_Sheet\SCLogo_Horiz_2C_WEB.png image to the <c_installation>\<c_path>\webcontent\skins\business\branding\ directory.

Setup for Accessing the IBM Cognos Business Intelligence Server from the IBM Sterling Business Intelligence Application

About this task

To launch Cognos Business Intelligence Server from Sterling Business Intelligence, you must configure the analytics.reportnet.url property in the <INSTALL_DIR>/properties/customer_overrides.properties file.

The Cognos Business Intelligence Server URL format is:

```
http://<machinename>:<port_number>/ibmcognos/cgi-bin/cognos.cgi
```

<machinename>
: Indicates the machine name or the IP address of the Cognos Business Intelligence Server installation machine. Also, if you have changed the reference URL for Cognos Business Intelligence using the IBM Cognos Configurator, replace cognos with the correct path.

<port_number>
: Indicates the port number.

For additional information about modifying properties and the customer_overrides.properties file, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide* and *Sterling Selling and Fulfillment Foundation: Properties Guide*.

You must also configure the `analytics.namespace` property in the <INSTALL_DIR>/properties/customer_overrides.properties file. This property indicates the namespace that is to be configured to authenticate users in Cognos Business Intelligence.

Set Up Environment for IBM Cognos Analytic Applications

To set up the environment for the Cognos Analytic Applications, perform the following steps:

1. Set up the Content Store (on server 7).
2. Set up database connectivity for the Content Store (from server 4).
3. Configure the Web server (involves setting up virtual directories on server 4).
4. Ensure that all the environment variables are set before launching the Cognos Adaptive Warehouse Runtime and creating datasources.
5. Set up data sources (from Cognos Connection on server 4). Ensure that you create the following data sources in the Cognos Business Intelligence server:
   - Sterling Staging Data Source: This data source is mapped to the staging.
   - Sterling Data Source: This data source is mapped to the Sterling Data Mart Database.

Note: In a distributed installation, you must ensure that the Connect String provided in the data source connection is the same in all the database clients.

For more information about setting up the environment for the Cognos Analytic Applications, refer to the following link http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/index.jsp?topic=%2Fcom.ibm.swg.ba.cognos.inst_apps.10.1.0.doc%2Fc_installationofibmcognosanalyticapplicationsapplicationcontent.html.

For more information about data source connections, refer to the Cognos Adaptive Warehouse User Guide in the following link, http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_aw_cnfg_sttgs_dw_db.html#aw_cnfg_sttgs_dw_db.

Configure the IBM Cognos Adaptive Warehouse

You must configure the Cognos Adaptive Warehouse to make it work in your IBM Cognos environment.

Launch the Cognos Adaptive Warehouse configurator. Ensure that the cryptographic settings are completed. If you have a distributed installation, it is recommended that you set the value of the **`Store Symmetric Key`** field to **`False`** locally. For more information about changing the cryptographic settings and configuring the Cognos Adaptive Warehouse, refer to the following link http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.inst_apps.10.1.0.doc/t_inst_configureaafsingle.html#inst_ConfigureAAFsingle. This guide contains separate instructions for single-computer installation and distributed installation. Follow the appropriate configuration instructions.

Deploy Analytics Content

Deploying the Analytics Content includes the following steps:

Procedure

1. "Set Up the IBM Cognos Adaptive Warehouse Content"
2. "Deploy the IBM Cognos Adaptive Warehouse Content to IBM Cognos Content Store" on page 47
3. "Set Up the IBM Cognos Adaptive Analytics Content" on page 48
4. "Deploy the IBM Cognos Adaptive Analytics Content to IBM Cognos Content Store" on page 49

Set Up the IBM Cognos Adaptive Warehouse Content

Setting up the Cognos Adaptive Warehouse content includes setting up content for the warehouse schema.

About this task

To set up the Cognos Adaptive Warehouse content for the Data Mart warehouse schema, perform the following steps:

Procedure

1. Launch the Cognos Adaptive Warehouse application from the Cognos Adaptive Warehouse server (installed on server 5, as described in the topic Chapter 3, "Understanding the IBM Sterling Business Intelligence Ecosystem," on page 5.
2. Create a new project in Cognos Adaptive Warehouse. To create a new project in Cognos Adaptive Warehouse, you must first create a data source connection that refers to the data mart. It is recommended that the data source connection be named `Sterling Data Source` and it refers to the data mart. For more information about creating a project in Cognos Adaptive Warehouse, refer to the http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_wk_wth_prj_aw.html#wk_wth_prj_aw.
3. From the **Actions** menu of the Cognos Adaptive Warehouse application, select **Import from Content Library**.
4. Click **Browse**, and select the library index file that you want to import from. This file is available in the directory in which the Cognos Adaptive Warehouse content is installed, and has a `.pwi` extension, for example, `<AC_INSTALL_DIR>/aw-export/sterling data source export/sterling data source export.pwi`
5. Click **Open**.
6. Click **Next**.
7. In the Conflict Resolution screen, select the conflict resolution that you want to apply. By default, **`Full Upgrade`** is selected. For more details about conflict resolution strategy, refer to the following link http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/c_conflict_resolution.html#Conflict_Resolution.
8. Click **Next**
9. Click **Next**.

   The details of the objects that you are importing are displayed.
10. Click **Finish** to run the import.
11. In the Data Source Mapping dialog box, select the IBM Cognos Content Manager Data Sources corresponding to Sterling Staging Data Source.

Note: The Sterling Staging data source should point to the Sterling Staging Database schema, (installed on server 3, as described in the topic Chapter 3, "Understanding the IBM Sterling Business Intelligence Ecosystem," on page 5.

12. Click **OK**.

    A pop-up window is displayed with warning messages. You can ignore the warning messages pertaining to Common Code Union Source, SO Actual Confirmed Union, Category Union, and Orphan Data.
13. Click **OK**.

    The Validation Results screen is displayed.
14. Click **Close**.
15. Click **OK**.
16. From the **Actions** menu, select **`Synchronize Target Metadata`**.
17. From the **File** menu, select **Save** to save the project.

    For more information about working with projects in Cognos Adaptive Warehouse, refer to http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aw.10.1.0.doc/t_managing_your_project.html#Managing_Your_Project.

Deploy the IBM Cognos Adaptive Warehouse Content to IBM Cognos Content Store

About this task

Deploying the Cognos Adaptive Warehouse content includes deploying content for the Data Mart warehouse schema.

To deploy the Cognos Adaptive Warehouse content for the Data Mart warehouse schema to the Cognos Content Store, perform the following steps:

Procedure

1. Open the `Sterling Data Source` project.
2. Click the **Target** button to navigate to the target model.
3. Click **Packages**.

   The following packages are displayed:
   - `Sterling Data Source`
   - `Sterling Data Source Source`
   - `IBM Adhoc Package`
4. Select the `Sterling Data Source` package.
5. From the **Actions** menu, navigate to **Package > Publish Packages**.

   The Publish Wizard-Select Location Type screen is displayed.
6. In the Publish Wizard-Select Location Type screen, make a choice about whether to publish the package to Cognos Content Store or to a network location.
   - To enable model versioning when publishing to the Cognos Content Store, select the **Enable model versioning** checkbox and enter the number of model versions pertaining to the packages that are to be retained.

     Note: To delete all but the most recently published version of the model on the server, select the Delete all previous model versions check box.
   - To validate your warehouse model prior to publishing, clear the Verify the package before publishing check box.

Note: It is recommended that you retain the default selection in order to ensure that the package is complete, and does not contain any errors.

7. Click **Next**.

   The Add Security screen is displayed.

8. Click **Next**.

   The Publish Wizard-Options screen is displayed.

9. Click **Publish**.

10. Click **Finish**.

    A warning message is displayed in the Verify Model screen, indicating that the package contains orphan dimensions. You can ignore the message.

    To publish the `Sterling Data Source Source` package, select the `Sterling Data Source Source` package and repeat steps 5 to 9.

    To publish the `IBM Adhoc Package` package, select the `IBM Adhoc Package` package and repeat steps 5 to 9.

11. Click **Close**.

Set Up the IBM Cognos Adaptive Analytics Content

Before you begin

Ensure that Calendar dataflow is loaded before importing content to Cognos Adaptive Analytics.

About this task

You must import business content from a content library into a project to take advantage of the content included in Cognos Adaptive Analytics. The content library contains information packages, metric types, hierarchies, operational report specifications, and global data pertaining to the Cognos Adaptive Analytics application.

To set up the Cognos Adaptive Analytics content, perform the following steps:

Procedure

1. Launch the Cognos Adaptive Analytics application.
2. Create a new project by selecting a data source connection that references the data mart Cognos Adaptive Warehouse model. It is recommended that you specify the project name as **`Sterling Analytics`**. Specify the **Data source** as **`Sterling Data Source`** and the Schema. Specify the **Package** name as **`Sterling Data Source`**. For more information about creating a new project, refer to the following link http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.ba.cognos.ug_aa.10.1.0.doc/t_creating_project.html.
3. In the **Create content** tab, click on the **Project Actions** icon, select **Import from Content Library**.
4. In the Objects to import screen, click on **Library Content file** to open the Content Library files window screen.
   a. In the Content Library files window, select `Sterling AA Export.xml` file.
   b. Click **OK**.
   c. In the Objects to import screen, select **`Information Packages`**.
   d. Click **Next.**
   e. Select **Full Upgrade**.

f. Click **Finish**.

Deploy the IBM Cognos Adaptive Analytics Content to IBM Cognos Content Store

To deploy the Cognos Adaptive Analytics content to Content Store, you must create a deployment archive in Cognos Adaptive Analytics. To create a deployment archive, perform these steps:

Procedure

1. From the **Project Actions** menu in the Cognos Adaptive Analytics application, select **Create Deployment Archive**.
2. In the **Create a deployment archive** box, enter a name for the archive.
3. Click **OK**.

Results

The deployment archive is created, and you can now publish your reports in IBM Cognos Connection.

For more information about publishing your reports in Cognos Connection, refer to the following link :http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.im.cognos.ug_cra.10.1.0.doc/ug_cra_id21985DeployingData.html#DeployingData.

Note: You cannot view data in the reports until the data is loaded into the data mart. For more information about loading data into the data mart and setting up load management, refer to the *Sterling Business Intelligence: Implementation Guide*.

Deploy the Dashboard Reports to IBM Cognos Content Store

About this task

Note: `Dashboards.zip` should be imported to content store only after importing Adaptive Analytics Deployment Archive.

To deploy the dashboards to Cognos Content Store, perform the following steps:

Procedure

1. Copy the <BI_COGNOS_HOME>/Dashboards.zip file to the <c_installation>/<c_path>/deployment folder.
2. Launch Cognos Connection
3. Import the `Dashboards.zip` file to Cognos Content Store.

   For more information about importing the deployment archive to Cognos Content Store, refer to the following link http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.im.cognos.ug_cra.10.1.0.doc/ug_cra_id21189Deployment.html#Deployment.

Chapter 12. Security Administration

Set Up the IBM Sterling Business Intelligence Authentication Mechanism

Before you begin

Prior to setting up the Sterling Business Intelligence Authentication Mechanism, perform the following tasks:

1. Copy the `<BI_COGNOS_HOME>/lib/sscap-auth.jar` file to the `<c_installation>/<c_path>/webapps/p2pd/WEB-INF/lib` folder into the machine in which Cognos Business Intelligence server has been installed.
2. Copy the `<BI_COGNOS_HOME>/analytics.properties.sample` file to the `<c_installation>/<c_path>/webapps/p2pd/WEB-INF/classes` folder.
3. Save the `<c_installation>/<c_path>/webapps/p2pd/WEB-INF/classes/analytics.properties.sample` file as `analytics.properties` in the same folder.
4. Change the value of the `sscap.app.url` property to point to the Sterling Selling and Fulfillment Foundation URL:

   If Sterling Selling and Fulfillment Foundation is configured for HTTP, then `sscap.app.url=http://hostname:port/smcfs`

   If Sterling Selling and Fulfillment Foundation is configured for HTTPS, then `sscap.app.url=https://hostname:port/smcfs`

Note: The `sscap-auth.jar` contains the `YantraAuthenticationServlet` which authenticates the user credentials being passed from Cognos Business Intelligence. The servlet resides on the Sterling Business Intelligence server and does the following:

- Authenticates the user
- Provides information about user details/user groups
- Verifies that the user is a Cognos Business Intelligence Administrator and returns user groups based on the user resource permissions

About this task

To set up the Sterling Business Intelligence Authentication Mechanism, perform the following tasks:

Procedure

1. Launch IBM Cognos Configuration.
2. Click **Security > Authentication> Cognos**.
3. Click the Value box for **Allow anonymous Access** , select **False**.
4. Right-click **Authentication**, and click **New Resource > Namespace**.
5. In the **Name** box, type **`smcfs`**.
6. In the **Type** list, click **Custom Java™ Provider**
7. In the Resource Properties panel, enter `com.yantra.authenticator.YantraAuthentication` as the Java class name.
8. From the **File** menu, click **Save**.

Setting Up Access to IBM Cognos Administration and Reporting

To help increase the security of your business systems and data with Sterling Business Intelligence, you can be selective in assigning access to the IBM Cognos administrative functions, reports, folders, and packages. Use the Sterling Business Intelligence Administrator platform resource to assign these permissions.

To set up access to IBM Cognos Administration and Reporting, perform the following tasks:

- Control access to IBM Cognos Administration
- Control access to IBM Cognos Reports, Folders, and Packages

Control Access to IBM Cognos Business Intelligence Administration

About this task

The first task in configuring user access to Cognos Business Intelligence administration is to grant permissions to the Sterling Business Intelligence Administrator resource in the `Sterling Application Platform`. You must have security groups created in the Sterling Selling and Fulfillment Foundation prior to completing this task. The Sterling Business Intelligence Administrator will automatically be granted Cognos Business Intelligence administrative capabilities.

Procedure

1. In the Sterling Selling and Fulfillment Foundation Applications Manager, select **Application > Application Platform**.
2. From the tree in the application rules side panel, select **Security > Groups**.

   The Groups screen is displayed in the work area.
3. Double click on the group to be given permissions to access the Cognos Business Intelligence screens. The Group Details screen opens.
4. In the Group Details screen, Permissions tab, Click on **Permissions** button for **Sterling Business Intelligence**. The Permissions screen opens.
5. In the Permissions screen, navigate to the entity you want to give permissions. For example, to give permissions to Profit Margin Report, select **Applications > Sterling Business Intelligence> Entities >SBIReports>Profit Margin Report**.
6. Right click and select **Check All**.
7. Click **Save**.

Editing the System Administrator Role in IBM Cognos Business Intelligence

The second task in limiting access to administration functionality is to make two changes to the System Administrator role in Cognos Business Intelligence. The two changes are described in “Adding the smcfs/SYSTEM Group” on page 53 and “Removing the Everyone Group from the System Administrator Role” on page 53. You can only complete this task after you set access to Cognos Business Intelligence administration. See “Adding the smcfs/SYSTEM Group” on page 53.

When a user launches Cognos Connection through the Console, all user groups to which that user belongs are displayed. If the user has permission to access the

Sterling Business Intelligence Administrator, the user sees all groups defined in the database and an additional group called smcfs/SYSTEM. Otherwise, the user sees only the groups to which he belongs.

In Cognos Business Intelligence, by default, all users have administrative capabilities because the Everyone group (which includes all users) is included in the System Administrator role.

Adding the smcfs/SYSTEM Group

About this task

Note: You *must* complete this task before deleting the Everyone group (see "Removing the Everyone Group from the System Administrator Role").

When you grant BI Admin rights to a user in the Sterling Selling and Fulfillment Foundation Applications Manager, a new group called SYSTEM is displayed in the user's list of groups under the smcfs namespace in Cognos Business Intelligence. Add this smcfs/SYSTEM group to the System Administrator role in Cognos Business Intelligence:

Procedure

1. Start your Web browser and enter the URL of your Cognos Business Intelligence applications (the default is http://localhost/ibmcognos).

   The Cognos Business Intelligence home page displays.
2. Click Cognos Connection.
3. Log in to the Cognos Connection portal as a System Administrator.
4. Locate smcfs in the list of roles, and click **smcfs**.
5. Locate SYSTEM in the list, and click the Set Properties icon in the Action column.
6. The Set Properties - SYSTEM screen displays. Select the **Permissions** tab.
7. Check the **Override the access permissions acquired from the parent entry** checkbox.
8. Click **Add**. The Select Entries - System screen displays.
9. Click **smcfs**.
10. In Available Entries, select the **System** checkbox and click the arrow to move it to **Selected Entries**. Click **OK**. The Set Properties - System screen displays.

Removing the Everyone Group from the System Administrator Role

About this task

After adding the smcfs/SYSTEM group to the System Adminstrator role, remove the Everyone group from the System Administrator role:

Procedure

1. Log in to the IBM Cognos Connection portal as a System Administrator.
2. Go to **Tools > Directory** and select the IBM Cognos Business Intelligence namespace.
3. Locate System Administrators in the list of roles, and click the Set Properties icon in the Action column.
4. Select the **Members** tab. Select Everyone, and click **Remove**.

Results

The result is that only users who have permission to access the Sterling Business Intelligence Administrator have administrative capabilities in IBM Cognos Business Intelligence.

Controlling Access to IBM Cognos Business Intelligence Reports, Folders, and Packages

About this task

The second part of controlling Cognos Business Intelligence access through Sterling Business Intelligence is to set specific permissions to entries in Cognos Business Intelligence.

Procedure

1. In Cognos Connection on the **Capability** screen, locate the entry for which you want to set access permissions.
2. Click the down-arrow icon next to the desired entry to display the corresponding Set Properties menu. Click **Set Properties**. The **Set Properties** screen displays.
3. In the **Set Properties** screen, select the **Permissions** tab.
4. Choose whether to use the permissions of the parent entry or select permissions specifically for the entry:
   - To use the permissions of the parent entry, clear the Override the access permissions acquired from the parent entry option. If you are prompted to use the parent permissions, click **OK** in the prompt dialog. Click **OK** on the Set Properties screen.
   - To set access permissions for the entry, select the **Override the access permissions acquired from the parent entry** option. Proceed to step 5.
5. To remove an entry from the list, select it and click **Remove**.
6. To specify a new entry for which you want to grant or deny access, click **Add**.
7. The Select Entries screen displays. Click **smcfs**.
8. In Available Entries, select the **SYSTEM** checkbox and click the arrow to move it to Selected Entries.
9. Select entries using one of the following methods:
   - To choose from the listed entries, click the appropriate namespace, and select the users, groups, or roles.
   - To enter new names, click **Type** and type the names of the groups, roles, or users into the Entries field. Separate multiple entries with a semicolon (;).

     For example: `smcfs/SYSTEM;Cognos/Everyone`
10. Click the right-arrow to move entries to the **Selected entries** box and click **OK** when done. You return to the **Permissions** tab on the previous screen (Set Properties).
11. Click **add**. You return to the Select entries screen.
12. Select **smcfs** and then click the arrow to move smcfs to **Selected Entries**. Click **OK**. You return to the **Permissions** tab, with smcfs added to the Name column.
13. To specify permissions for a user, group, or role, select the appropriate checkbox in the Name column and then select permissions checkboxes in the

Grant or Deny columns. The icon next to each user, group, or role in the Permissions column represents the type of access granted or denied. Repeat this step for each user, group, and role.

14. If you want to replace the existing permissions of the child entries with the permissions you set for this entry, in the Option section, select the **Delete the access permissions of all child entries** check box. This option appears only with the entries that are containers.
15. Click **OK**.

    Note: The above steps should be followed for changing Permissions at the Reports Level and for other IBM Cognos Components and Packages.

Chapter 13. Verify the IBM Sterling Business Intelligence Installation

To verify the Sterling Business Intelligence installation, you must launch the Sterling Business Intelligence application, launch the reports, and perform load management.

About this task

Note: It is assumed that all the services and servers have been restarted after the execution of configuration-related tasks.

To launch Sterling Business Intelligence, perform these steps:

Procedure

1. Open a browser and type the corresponding URL in the address bar, for example, `http://<hostname>:<port>/sbi/bi/launch.jsp`
2. Click **Go**.

   The Sterling Business Intelligence Login page is displayed.
3. Enter a valid `Login ID` and `Password`.
4. Click **Sign In**.

   The Sterling Business Intelligence application home page is displayed.

   Note: The Sterling Business Intelligence application screens have been designed for 1024x768 resolution. For better viewing experience, change the display resolution accordingly.

Chapter 14. Verify the IBM Sterling Business Intelligence Report

About this task

Verify if the installation was successful by launching the Sterling Business Intelligence report.

Procedure

1. Launch the Sterling Business Intelligence application.

   The Sterling Business Intelligence application home page is displayed.
2. From the **Order** menu, select the report you want to view.

   The corresponding report is displayed.

Results

After the verification is completed, you must load data into the data mart. Prior to starting the load management activities, ensure that all servers are time synchronized using services like Network Time Protocol (NTP) to a single clock source. In case the Platform considerations do not allow for time synchronization, the IBM Cognos server should run one minute slower than the OLTP server. For more information about load management, refer to the *Sterling Business Intelligence: Implementation Guide*.

Chapter 15. Installing IBM Sterling Business Intelligence Language Pack

Before installing the Sterling Business Intelligence language pack, ensure that you have successfully installed Sterling Selling and Fulfillment Foundation, Release 9.2.

Language packs are compressed files that are compatible with the UNIX, Linux, and Windows operating systems. Ensure that you install the Sterling Selling and Fulfillment Foundation language pack, before you install the Sterling Business Intelligence language pack. For more information about installing the Sterling Selling and Fulfillment Foundation language pack, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

Install the Language Pack for IBM Sterling Business Intelligence Dashboard Literals

About this task

To install and localize the language pack for dashboard literals, perform the following tasks:

Procedure

1. Extract the `SBI-Analytics9.2_<language>_<locale>.zip` file from the language pack CD to the `<BI_COGNOS_HOME>` directory. Ensure that the `sbianalyticsbundle_<language>_<locale>.properties` file exists in `<BI_COGNOS_HOME>/resources/` directory.
2. Ensure that the environment variables `BI_RT` and `BI_COGNOS_HOME` are correctly set, For example in UNIX,

   ```
   export BI_RT = <BI_COGNOS_HOME>
   export BI_COGNOS_HOME = <BI_COGNOS_HOME>
   ```

   The `<BI_COGNOS_HOME>` directory is the root directory where the Sterling Business Intelligence content for Cognos Business Intelligence is installed.
3. Copy the following jar files to `<BI_COGNOS_HOME>/lib` folder from `<COGNOS_HOME>/<c_path>/webapps/p2pd/WEB-INF/lib` folder.
   - activation.jar
   - axis.jar
   - axisCrnpClient.jar
   - CAM_AAA.jar
   - CAM_AAA_CustomIF.jar
   - commons-discovery-0.2.jar
   - commons-logging-1.1.jar
   - dom4j-1.6.1.jar
   - jaxrpc.jar
   - saaj.jar
   - soap.jar
   - sscap-auth.jar
   - wsdl4j-1.5.1.jar

- xalan.jar
- xercesImpl.jar
- xml-apis.jar

4. Ensure that you have disabled the Cognos Business Intelligence authentication.
5. To localize the dashboard literals in the <BI_COGNOS_HOME> folder, copy execute the following command from the <BI_COGNOS_HOME>/bin folder: `ant -f sbilocalizer.xml import`

   Note:

   - If you have installed Sterling Business Intelligence Content for Cognos Business Intelligence and Sterling Business Intelligence on two different machines, you must modify the following line of the XML by replacing **`localhost`** with the IP address of the machine on which Sterling Business Intelligence content for Cognos Business Intelligence has been installed before you execute the command:

     ```
     <property name="cognosurl" value="http://localhost:<port>/p2pd/
     servlet/dispatch"/>
     ```

   The `sbilocalizer.xml` command reads all the bundles in the <BI_COGNOS_HOME>/resources folder. It then adds the literal translations for each locale into the dashboard definitions present in the <BI_COGNOS_HOME>/reports folder. The modified dashboard definitions are copied into the <BI_COGNOS_HOME>/localizedreports folder, and added into the content repository. When the dashboards are generated again, the literals are displayed according to the user's locale.
6. Ensure that you enable the Cognos Business Intelligence authentication.

Install Language Pack for IBM Cognos Adaptive Warehouse

About this task

To install the language pack to localize the Cognos Adaptive Warehouse, perform the following tasks:

Procedure

1. Extract the SBI-Analytics9.2_<language>_<locale>.zip file from the language pack CD to the <AC_INSTALL_DIR> directory.
2. Launch the Cognos Adaptive Warehouse application and click on the **Target** tab to open the Target view.
3. From **Project** menu, navigate to **Languages > Define Languages**. The Define Languages window is displayed.
4. From the Available Languages list, select each language that you want to add and click the arrow button to move it to the **Project languages** box and click **OK**.
5. From the **Project** menu, navigate to **Languages > Import Translation File**. The Import Translation File window is displayed.
6. From the Project Languages list, select the required project language and add it into **Translate into** box.
7. Select the <AC_INSTALL_DIR>\resources\sbiawbundle_<languagecode>_<localecode>.txt file that must be imported. Sterling Business Intelligence Analytics Content is installed in the<AC_INSTALL_DIR> folder.
8. Click **OK**.

9. Click **Save**.
10. In the **Target** tab, in the `Project Viewer` pane, click on Packages > Sterling Data Source.
11. In Properties window click on **Language**, Languages window is displayed.
12. In the Languages window, select the language that you want to add from the Available Languages list and click the arrow button to move it to the Project languages box. Click **OK**.
13. Click **Save**.
14. Publish the Sterling Data Source Package.
15. In the **Target** tab, in the Project Viewer pane, click on **Packages > IBM Adhoc Package**. Repeat steps 11 - 13.
16. Publish the IBM Adhoc Package.

Install Language Pack for IBM Cognos Adaptive Analytics

Before you begin

Before installing the applications language pack, ensure that you have installed the Sterling Selling and Fulfillment Foundation language pack. For more information about installing the Sterling Selling and Fulfillment Foundation language pack, refer to the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

About this task

To install the language pack to localize the Cognos Adaptive Analytics, perform the following tasks:

Procedure

1. Extract the `SBI-Analytics9.2_<language>_<locale>.zip` file from the language pack CD to the `<AC_INSTALL_DIR>` directory.
2. Copy `<AC_INSTALL_DIR>/resources/sbiaabundle_<languagecode>_<localecode>.txt` to `<c_installation>/<c_path>/data/aa/content/`.
3. Launch the Cognos Adaptive Analytics and open the project that you want to localize.
4. From **Project Actions** icon, navigate to **Select Languages > Define Languages**. The Select Languages window is displayed.
5. From the Available Languages list, select each language that you want to add and click the arrow button to move it to the **Selected Languages** box and click **OK**.
6. From the **Project Actions** icon, select **Import Translation File**. The Import translation file window is displayed. Select the `sbiaabundle_<languagecode>_<localecode>.txt` file.
7. Click **OK**. The `import completed successfully` message appears. Click **OK**.
8. From the **Project Actions** icon, select **Create a Deployment Archive**. The Create a deployment archive window is displayed.
9. In the **New archive** box, enter a name for the new archive.
10. Click **OK**. The deployment archive was created message is displayed. Click **OK**.
11. The deployment archive is created. You can now publish your reports in Cognos Connection. Deploy the deployment archive to publish the reports.

For information on deploying the deployment archive, refer to http://publib.boulder.ibm.com/infocenter/caapps/v10r1m0/topic/com.ibm.swg.im.cognos.ug_cra.10.1.0.doc/ug_cra_id21189Deployment.html#Deployment.

Install the Language Pack for IBM Sterling Business Intelligence

About this task

To install the Sterling Business Intelligence language pack, perform the following steps.

Procedure

1. Extract the `SBI9.2_<language>_<locale>.zip` file from the language pack CD to the `<INSTALL_DIR>` directory.
2. Ensure that you re-create the resource JAR file and the EAR file.

Localize IBM Sterling Business Intelligence Reports and Dashboard Data

You can localize the data in the Sterling Business Intelligence reports and dashboards using the Cognos Adaptive Warehouse application. All the data present in a dashboard that describing an entity, for example, Category Description, Region Description, Buyer Description and so on, are localized in the data warehouse database. The data warehouse database contains localized data from the YFS_LOCALIZED_STRINGS table, which is transformed and added as additional columns.

Before you begin

Note: Before you start the data localization process, the database factory default values must be localized. For more information about localization for multilingual installation, refer to the *Sterling Selling and Fulfillment Foundation: Localization Guide*.

About this task

To localize the data in the Sterling Business Intelligence reports and dashboards, perform the following tasks:

Procedure

1. Launch the Cognos Adaptive Warehouse application. By default, the application opens in the Warehouse view.
2. From the **Actions** menu, select Edit Data languages.

   The Specify Project Languages pop-up window is displayed.
3. Click **Add**.
4. Enter the New Languages and Language code.
5. Click **OK**.
6. Click **Synchronize Target Metadata**.
7. Click **Save** and perform the load management.

   For more information about performing load management, refer to the *IBM Cognos Analytic Applications Adaptive Warehouse User Guide*.

Localizing the Factory Setup Data

Besides storing your transactional data, the database also stores configuration data, such as error codes. This means that the database may need to store values in a language-specific format. If these database literals are not localized, screen literals are displayed inconsistently, with some being displayed in the localized language and others being displayed in English.

To localize the factory setup data, perform the following tasks:

1. Extract the `SBI9.2_<language>_<locale>.zip` file from the language pack CD to the `<INSTALL_DIR>` directory. `<INSTALL_DIR>` is the directory where the Sterling Selling and Fulfillment Foundation is installed. Ensure that the file `en_US_sbifcliterals2translate_<language>_<locale>.properties` is present in the `<INSTALL_DIR>/installed_data/smcfs/components/complete_installation/factorysetup/XMLS` directory.
2. Execute the following command from the `<INSTALL_DIR>/bin` folder:

   For Windows: **sci_ant.cmd -f localizedstringreconciler.xml import -Dsrc=<INSTALL_DIR>\installed_data\smcfs\components\complete_installation\factorysetup\XMLS -Dbasefilename=sbifcliterals2translate**

   For UNIX or Linux: **sci_ant.sh -f localizedstringreconciler.xml import -Dsrc=<INSTALL_DIR>/installed_data/smcfs/components/complete_installation/factorysetup/XMLS -Dbasefilename=sbifcliterals2translate**

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