SCOR Metrics Installation Instructions

Pre-requisites
1. Platform: Cognos 8.4 SP1 or later Business Intelligence and Metrics Studio

Installation Notes:
The instructions for the installation process have been broken into two areas. The first is Installation Tasks which will explain the steps for making the SCOR Metrics Blueprint available for viewing using sample data provided by IBM Cognos. The second, Customization and Implementation, explains how to utilize the underlying framework in order to configure and map data from an external source or source system. The Pre-installation tasks numbered 1 – 4 and Installation Tasks 1-2 are required to successfully run the Blueprint. **Cognos 8.4 SP1 or later must be installed to successfully import the Metric Studio deployment.**

Pre-installation Tasks
1. Unzip the "SCOR_METRICS_DEPLOYMENT.ZIP" and copy the SCOR_METRICS_DEPLOYMENT folder into the *c8_location*\deployment directory
2. Copy the "SCOR BI Reports Deployment.zip" into *c8_location*\deployment directory
3. Unzip the "CMM Diagrams.zip" file and copy the images into the *c8_location*\webapps\p2pd\WEB-INF\cmm\images\diagrams directory
4. Unzip the "Reporting Images.zip" and copy the images into the *c8_location*\webcontent\samples\images directory
5. The "SCOR Designer and FM Models.zip" contains both the Metric Designer and Framework Manager Models, unzip to a location of your choice
6. Place the "SCOR.xls" and "SCOR Metric Definitions.xls" into a location of your choice
7. Create the "SCOR Metrics" database on a Cognos Supported database server
   Note An IBM Cognos Support document has been copied and placed in these instructions to address DB2 database implementations on a Windows Environment

Installation Tasks
1. **Import the SCOR Metrics Metric Studio Deployment**
2. **Import the SCOR BI Reports Deployment**

Customization and Implementation
3.1. **Excel ODBC Connection Configuration for a Windows Environment**
3.2. **Create the "SCOR FM Excel Import" Cognos Connection Datasource**
3.3. **Utilizing the Framework Manager Model (ODBC specific)**
3.4. **Utilizing the Framework Manager Model (Generic)**
3.5. **Utilizing the Metric Designer Model**

DB2 Support Article for Metric Studio

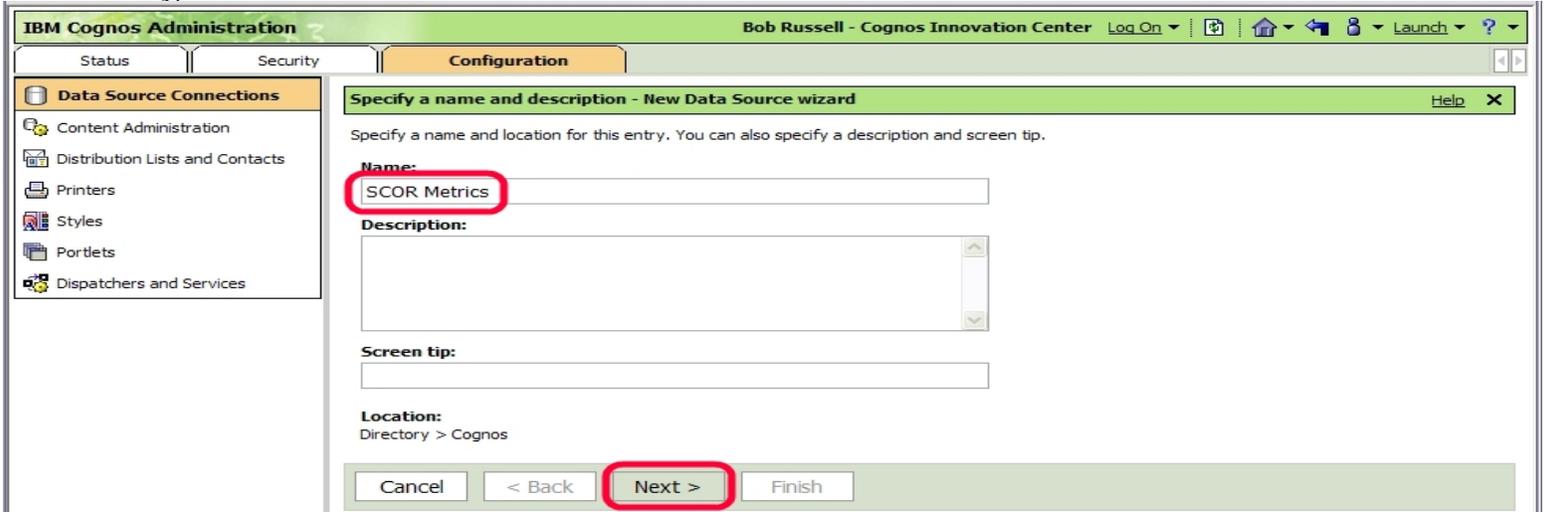# Import the SCOR Metrics Metric Studio deployment

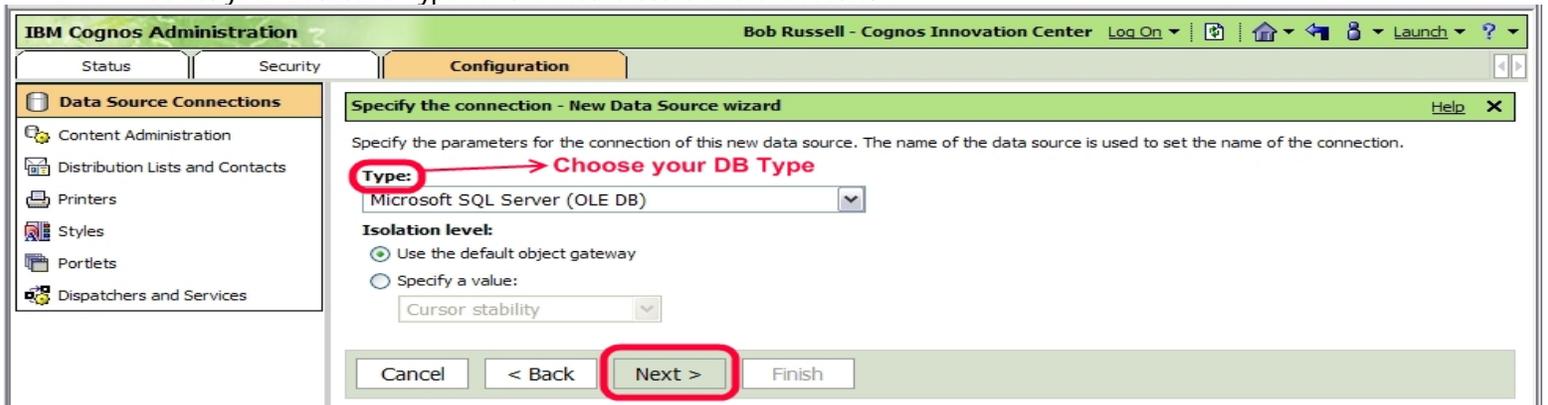**1.1.** Open Cognos Connection click **Launch ▾** and click 🔧 **IBM Cognos Administration**
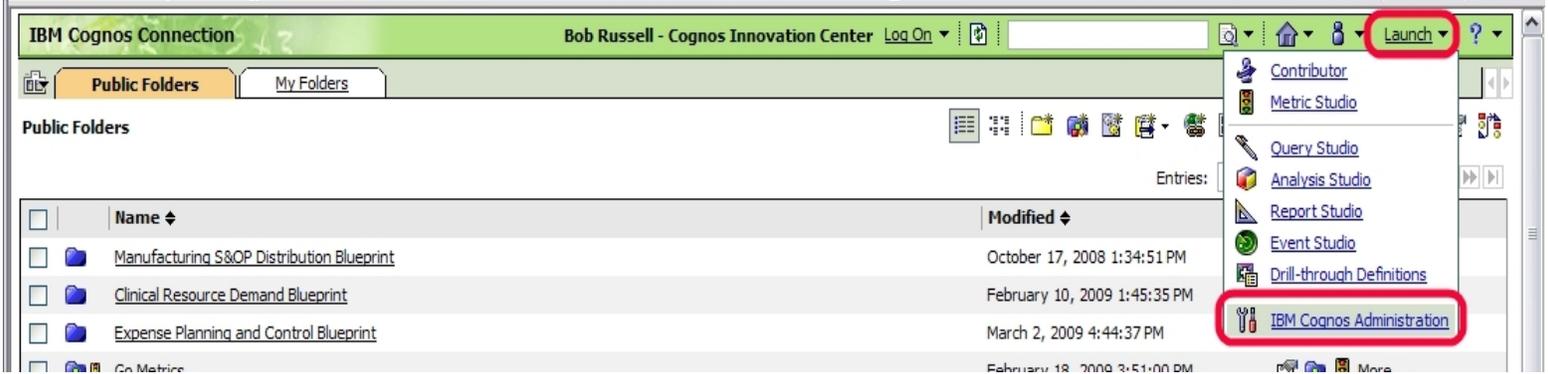
1.2. Navigate to the Configuration tab and select Data Source Connections (by default it should open to this tab), then click the 🗄 **New Data Source** icon

1.3. Type in the Name as '**SCOR Metrics'** and click **Next >**

1.4. Select your Database Type for the Metric Store and click **Next >**

1.5. **Fill in the required fields** for the SCOR Metrics Data Source Connection (below is an example for Microsoft SQL Server (OLE DB)) and click **Next >** (you may also choose to test the connection parameters for accuracy)

1.6. Select the **Checkbox** to ☑ **Create a Metric Package** and click **OK** to launch the Metric Package Wizard

1.7. Review the name that will be used for the Metric Package, it is **strongly suggested to use "SCOR Metrics" as the name**, then click **Next >**

** NOTE **

Using "SCOR Metrics" as the Metric Package name will minimize the amount of effort after importing the reporting package and then needing to change the Linked Package name for each report

1.8. Click **Next >** to setup the Metric Package parameters

1.9. Select the ⦿ **Use the default deployment location** option and click **Next >**

1.10. Select the ⦿ **Standard calendar** option and click **Next >**

1.11. Select ☑ **Years,** ☑ **Quarters (Three months)**, **and** ☑ **Months** as the levels for the business calendar and click **Next >**
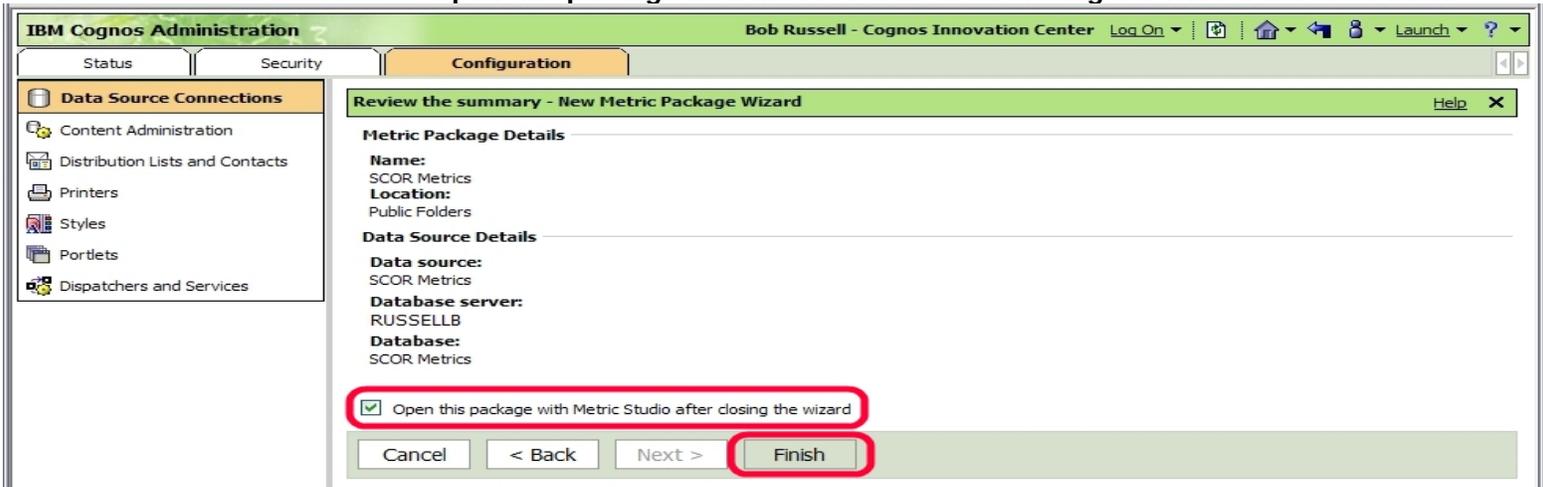

1.12. Click the calendar drop down ▦▾ and select **Jan 1, 2006 as the start date** and **add 4 years** and click **Next >**

1.13. Review the summary and click **Initialize** to start populating the calendar data
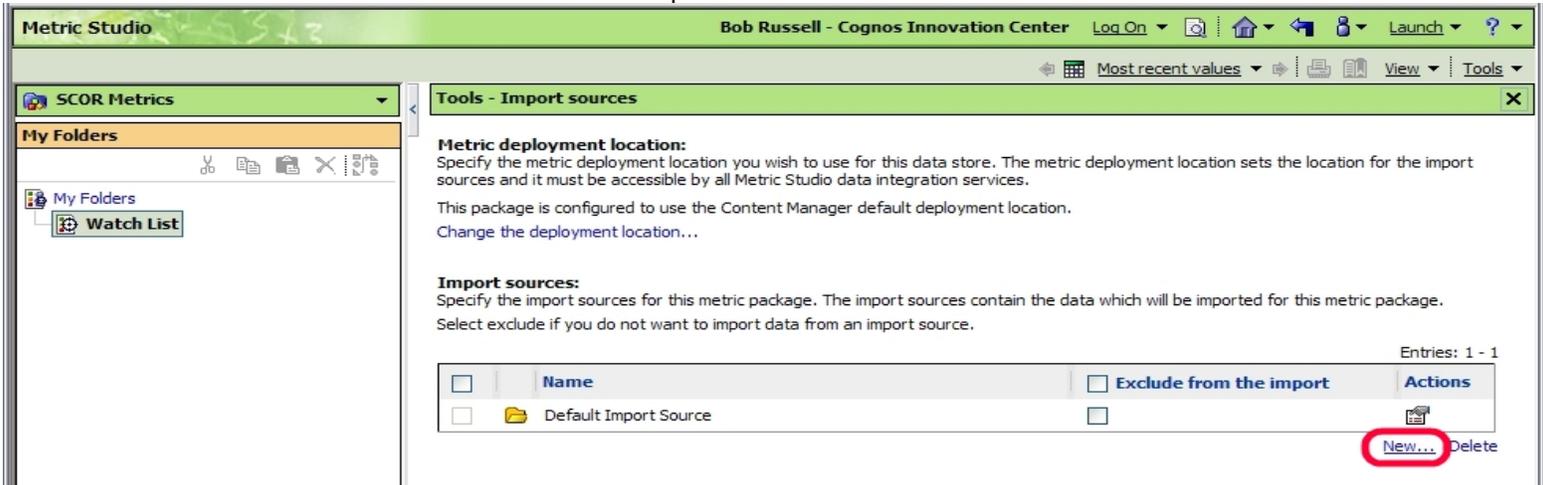
1.14. Select the checkbox ☑ **Open this package with Metric Studio after closing the wizard** and click **Finish**


**1.15.** Once Metric Studio opens, click the **Tools** ▼ menu item and select **Import Sources**

**1.16.** Click the **"New…"** link to create the new Import source

1.17. Fill out the options as shown below
  a. Type **"SCOR_METRICS_DEPLOYMENT"** as the name
  b. Choose ⦿ **Metrics import directory**
  c. Choose ⦿ **SCOR_METRICS_DEPLOYMENT** as the import location choice
  d. Select the checkbox option to ☑ **Include sub-directories**
  e. Use **"8.4.2"** as the File format
  f. Select the upper radio option for Character set encoding and choose ⦿ **Unicode (UTF-16)**
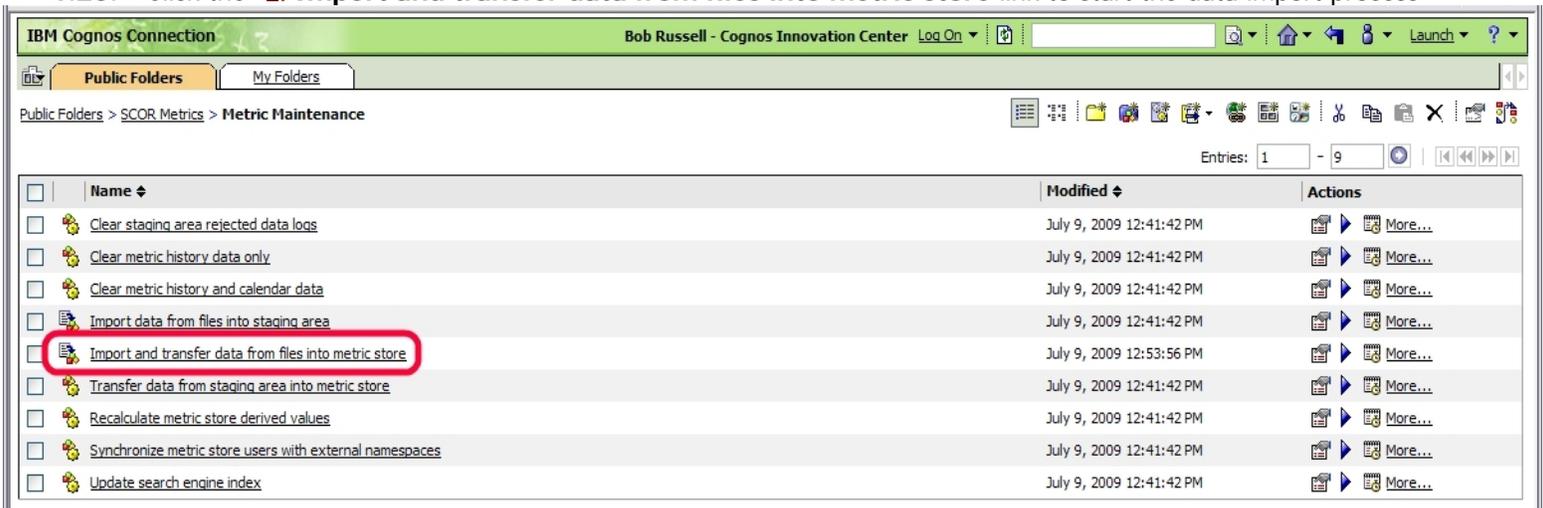 g. Click **OK**
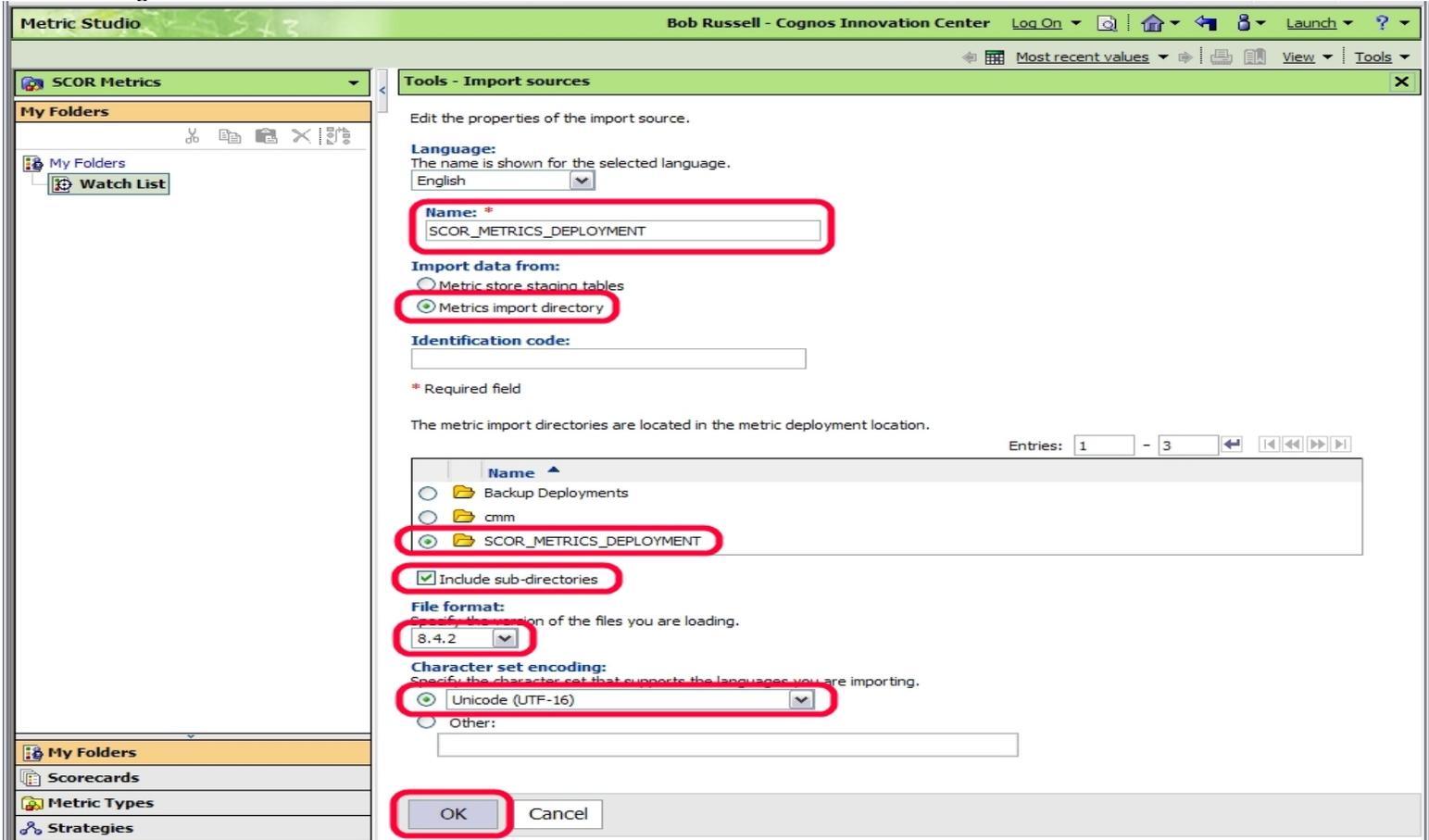
1.18. Click on the checkbox for ☑ **Exclude from the import** for **Default Import Source** and the click **OK**
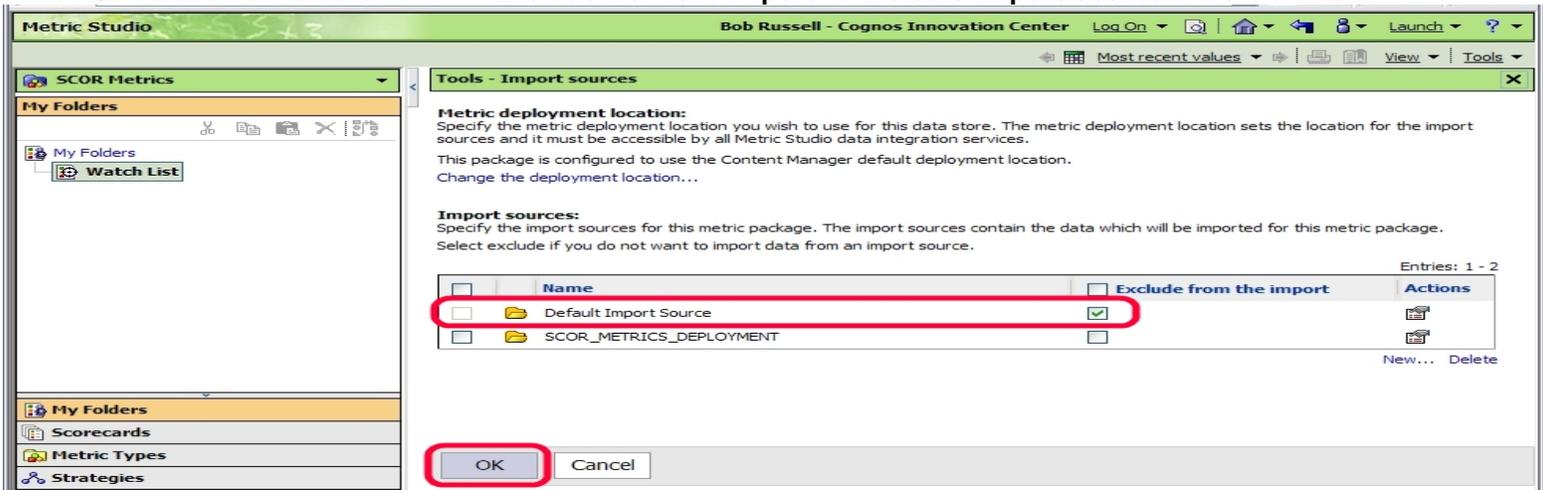
1.19. Click on the **Tools** ▾ Menu and select **Metric maintenance**
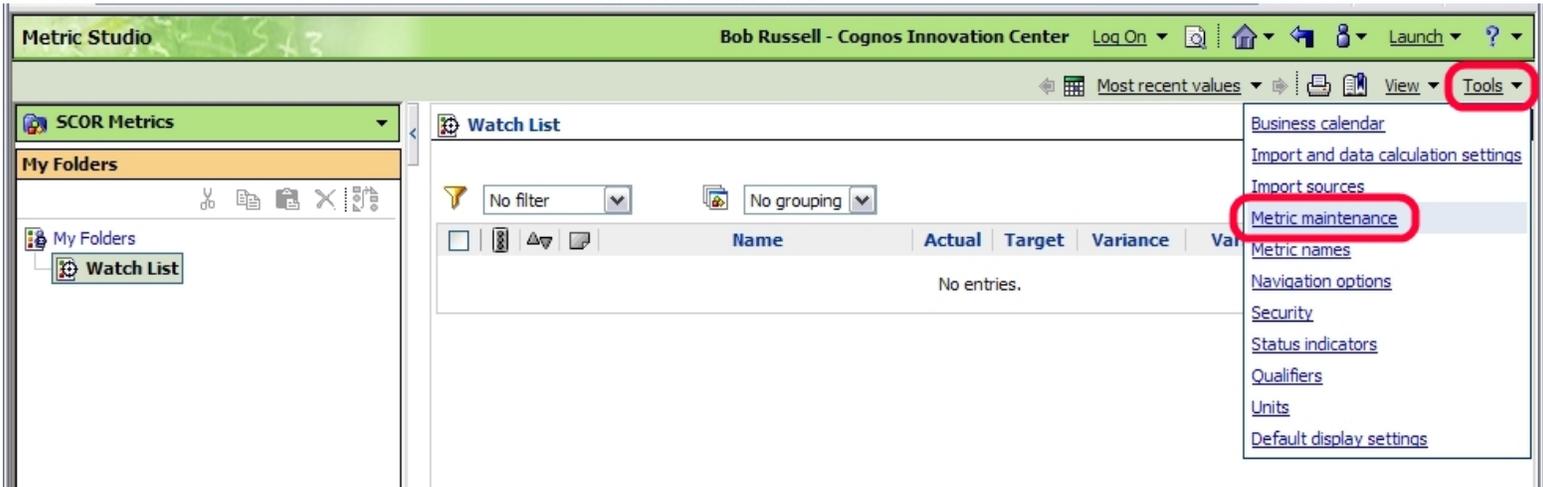
1.20. Click the 🖧 **Import and transfer data from files into metric store** link to start the data import process

1.21. After the import completes click **View the run details** link to validate that there were no errors

1.22. After verifying that there were **no errors** (as shown below) click **Close**

1.23. Click the ⬅ **Return** icon to open SCOR Metrics in Metric Studio

1.24. Select the **dropdown** menu for ▦ **Most recent values** ▾ and select an earlier date to **validate** that data for "Actuals" has been loaded

Import the SCOR BI Reports Deployment

2.1. Navigate to Public Folders expand the **Launch ▼ menu** and click 🖥 **IBM Cognos Administration**
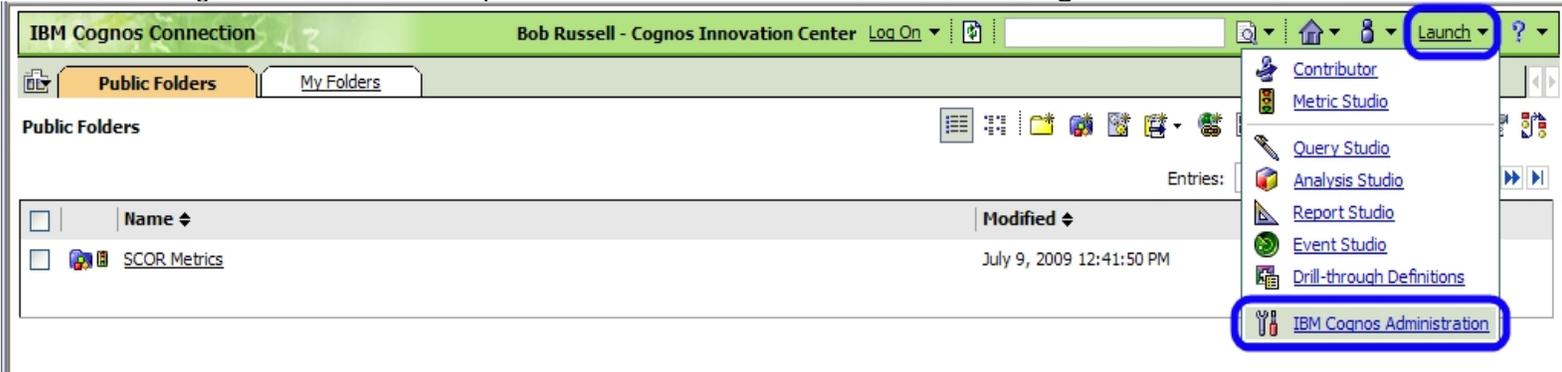
2.2. Click the 🗃 **Content Administration** Link and the 🗂 **New Import** icon to start the New Import wizard

2.3. Select the option for ⦿ 🗂 **SCOR BI Reports Deployment** and click **Next >**
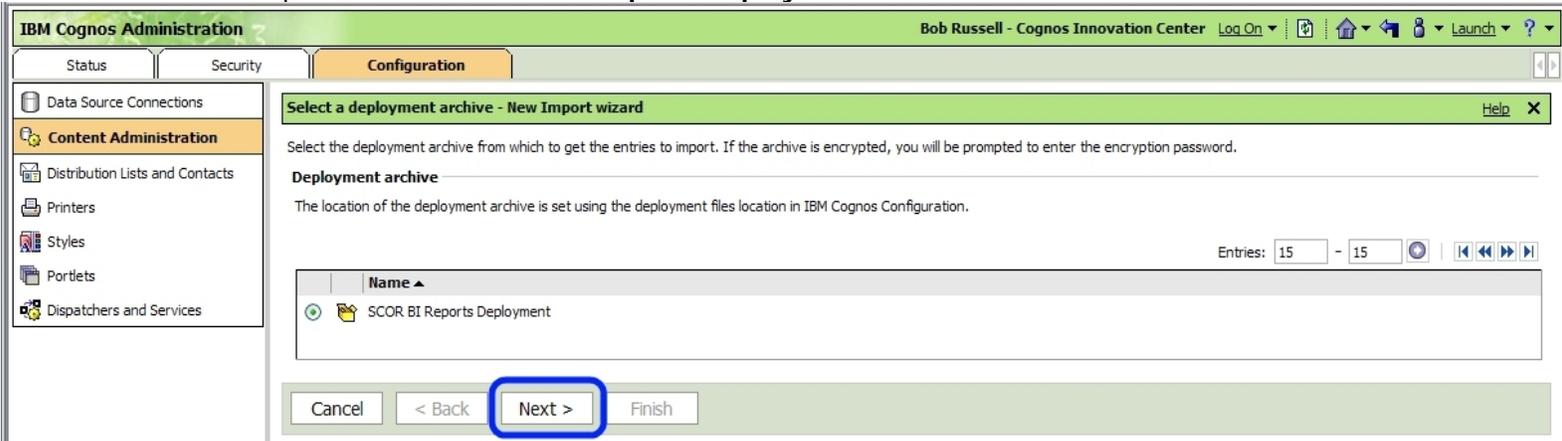
2.4. Keep the existing name and click **Next >**

2.5. Select the **checkbox** for ☑ 📁 ┈> **SCOR Reporting** and click **Next >**

2.6. Keep the defaults for a standard import and choose **Next >**

2.7. Review the summary and click **Next >**

2.8. Choose the radio option for ⦿ **Save and run once** and click **Finish**

2.9. Select the radio options for ⦿ **Now** and ⦿ **Keep the existing report specification versions** and click **Run**

2.10. Select the checkbox to ☑ **View the details of this import after closing this dialog** and click **OK**
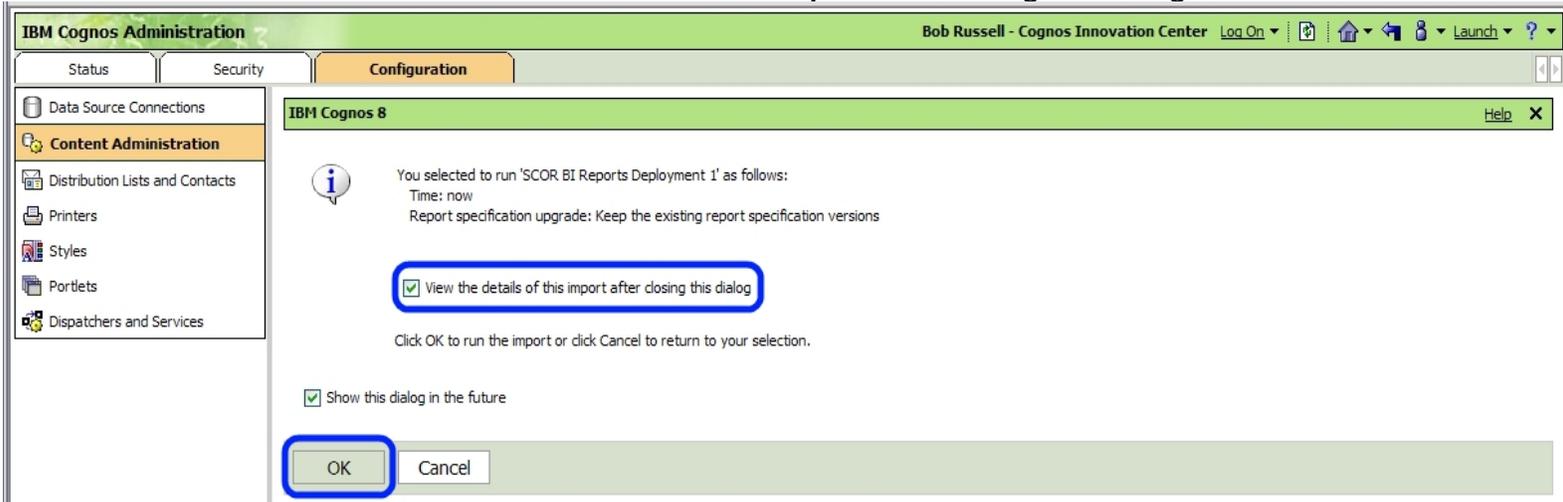
2.11. Click the **Refresh** hyperlink **until** the status returns as **Succeeded**
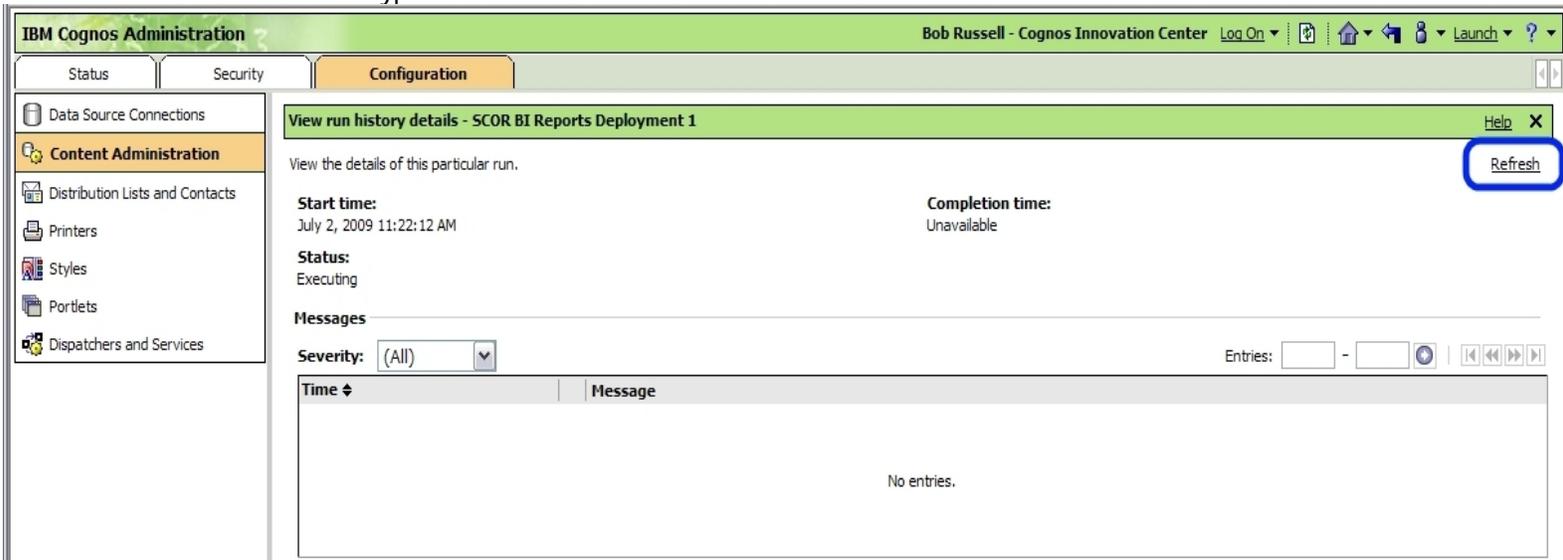
2.12. When the import successfully runs the Message should display as "… 0 object(s) failed.", then click **Close**
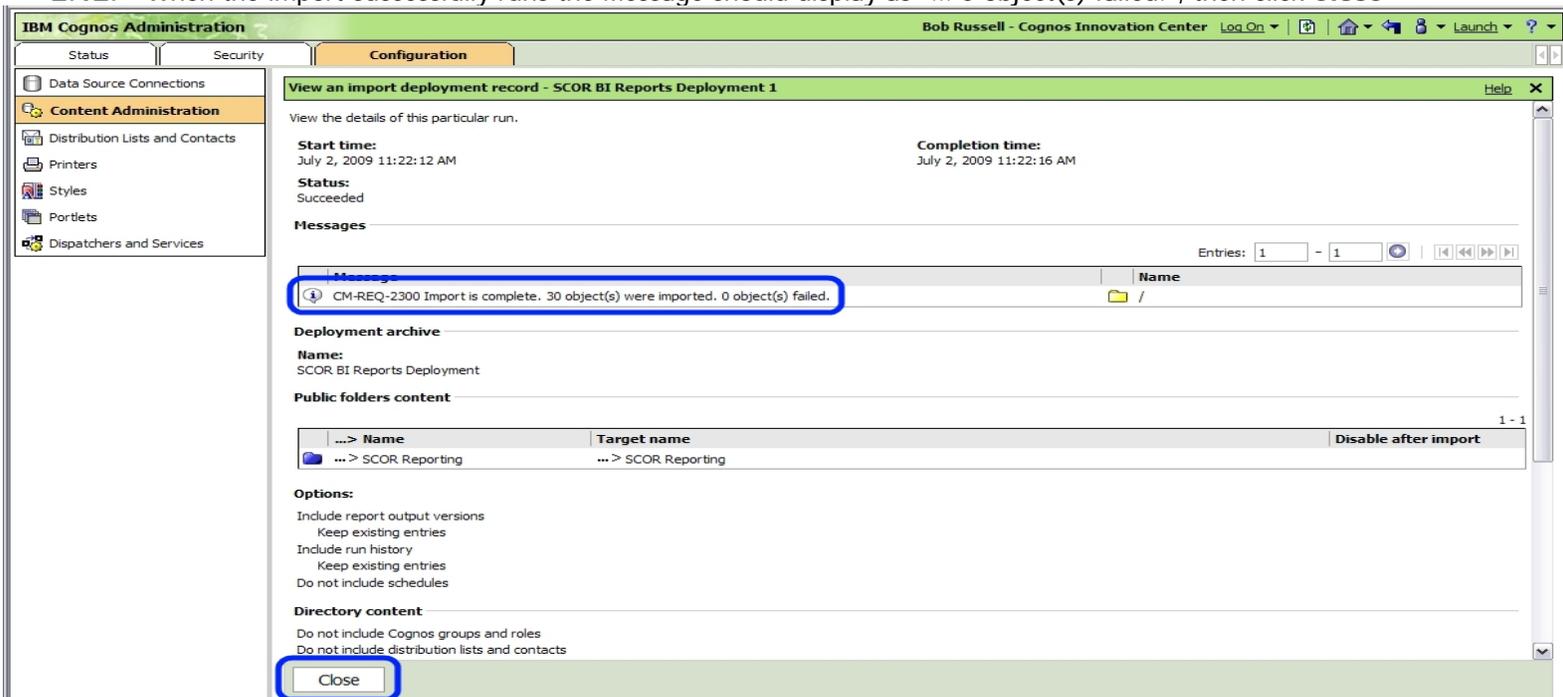
2.13. Navigate to **Public Folders** and **open** SCOR **Metrics** in Metric Studio

2.14. Navigate **Scorecards**, select SCOR expand the **Most recent values** menu and change the Time Period to **January 1, 2009** and click **OK**
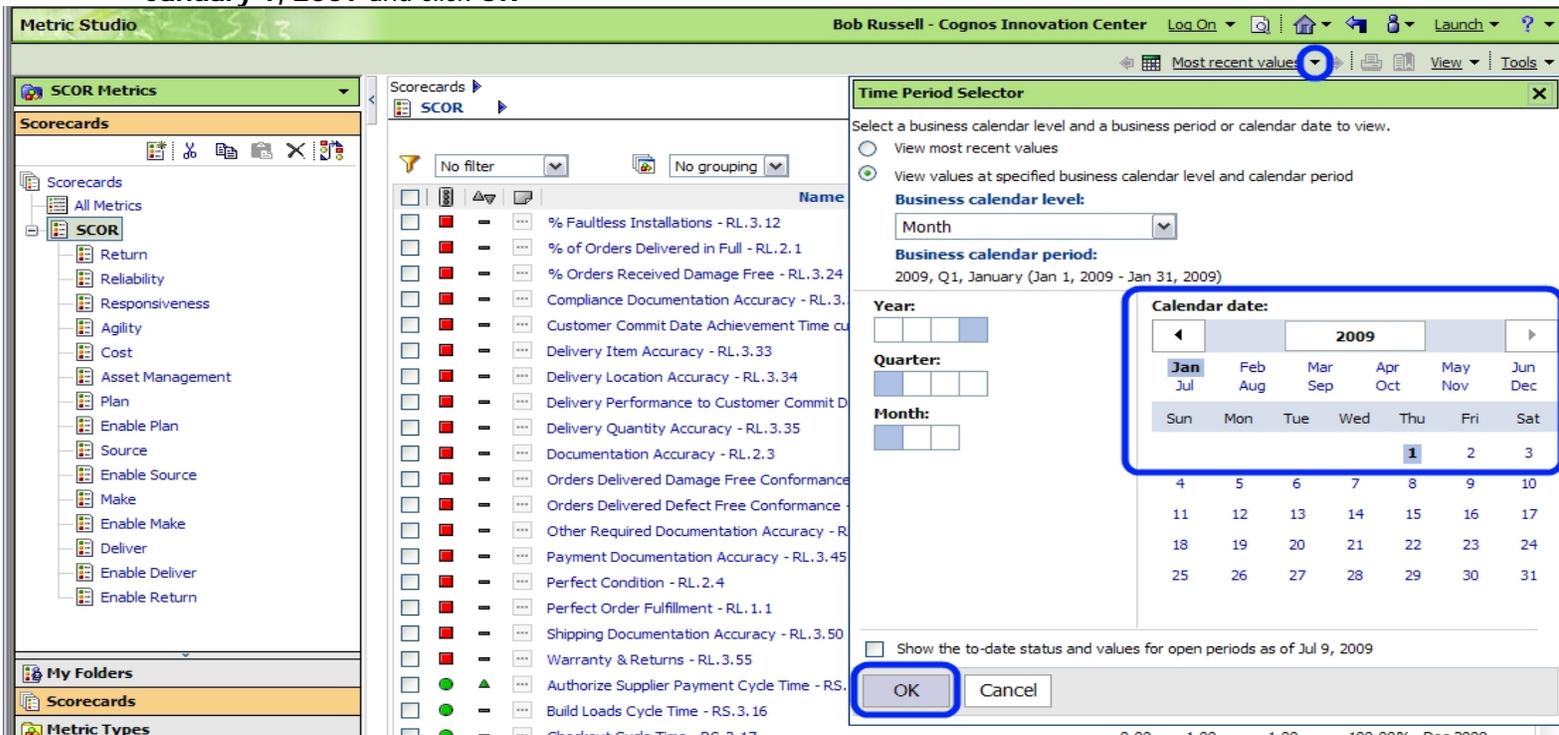
2.15. Navigate to the Diagrams tab for SCOR and click the **Prepare Bookmark** icon

2.16. **Copy** the new Bookmark by highlighting the **Browser's Address field** right click and choose Copy. We will use this in Step 2.18 and Step 2.21 to point to the SCOR Performance Attributes diagram in your Metric Studio instance
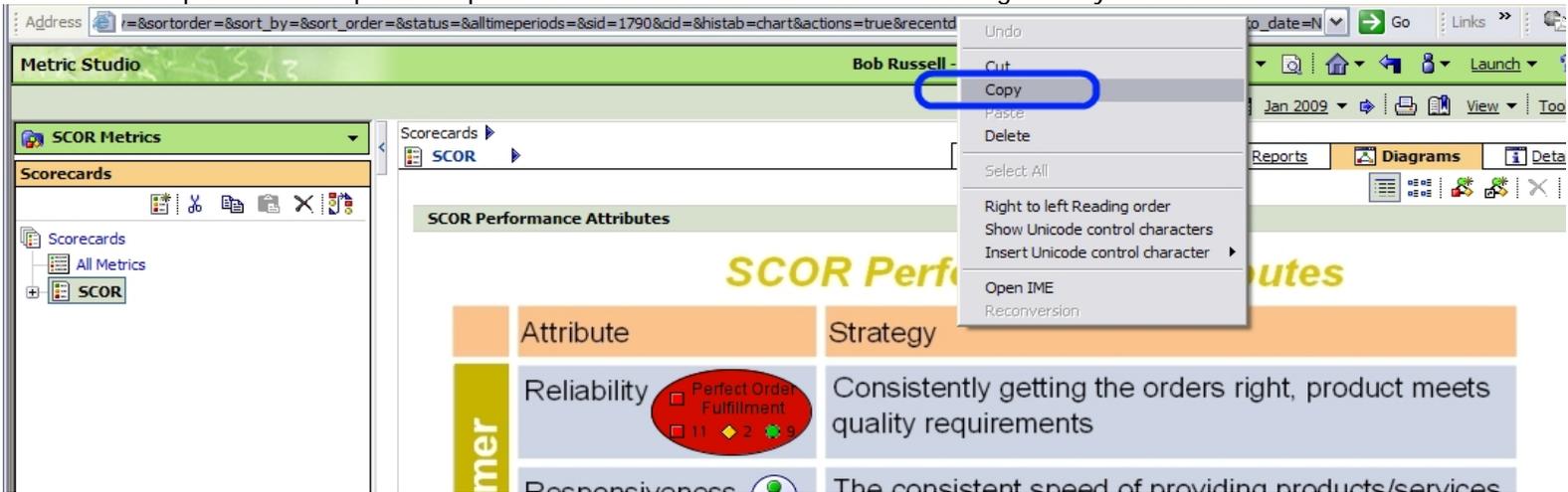
2.17. Navigate to **Public Folders > SCOR Reporting** package find the 🐢 **SCOR Metrics Attributes Launch** link and click the 🖼 **Properties** icon
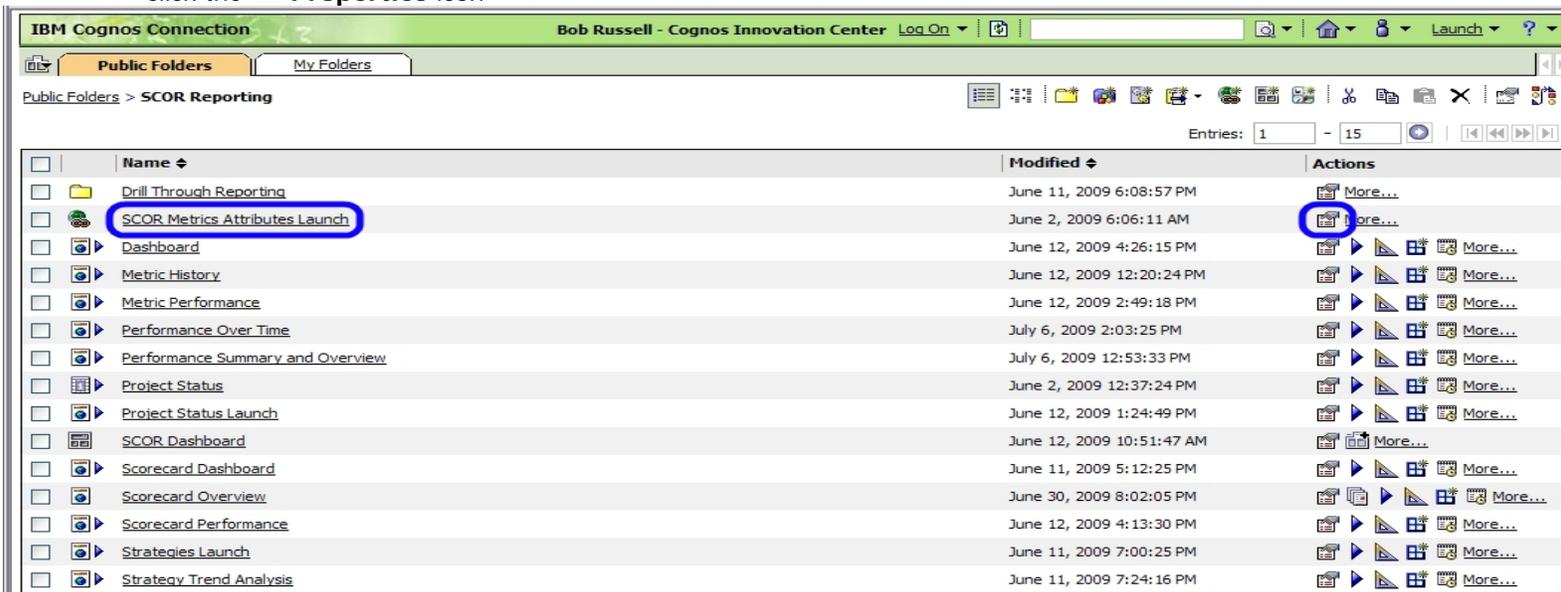
2.18. **Highlight** the entire entry for **the URL** string right click and choose **Paste** then click **OK**
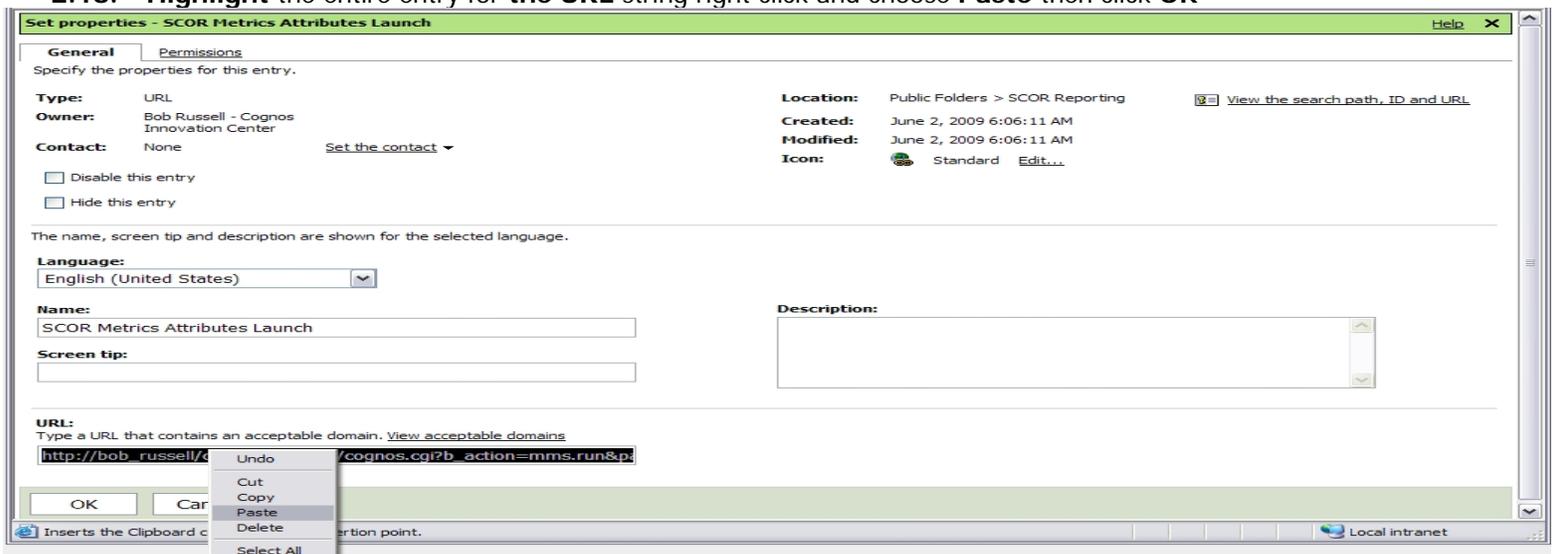
2.19. Open the 🔵 **Dashboard report** in **Report Studio** by clicking the 📐 Report Studio icon
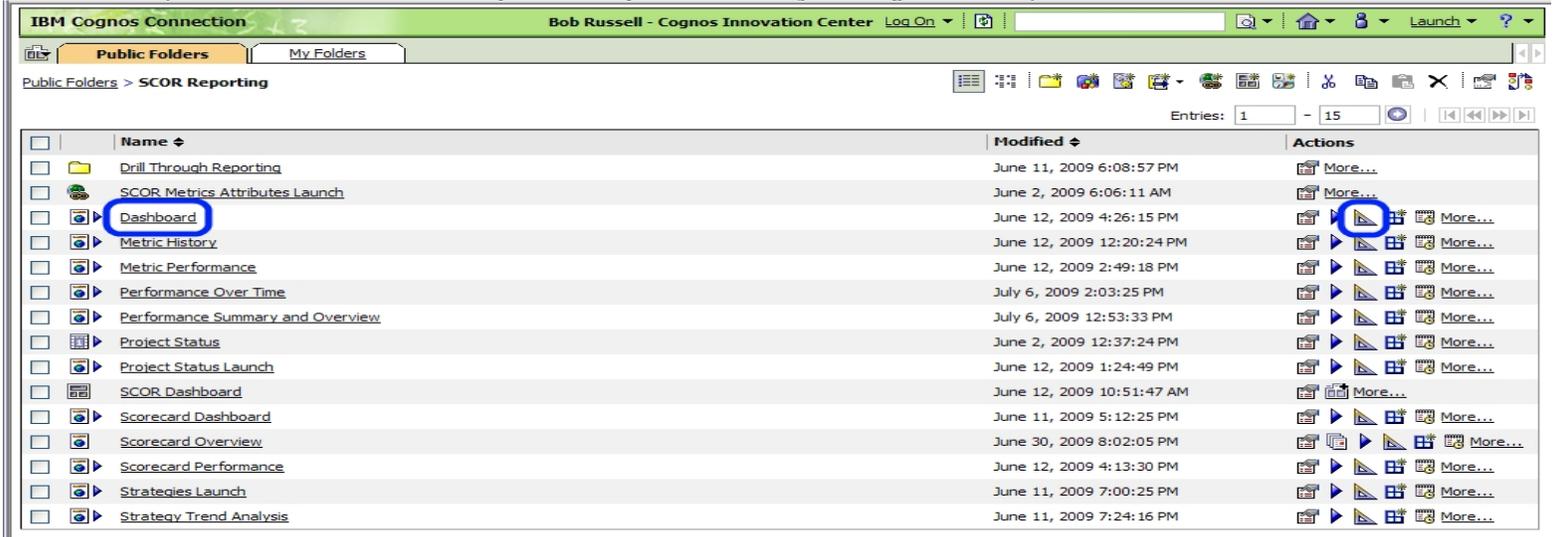
2.20. Click the **middle most HTML item** as shown below and click on the ▦ **ellipses** button in **properties HTML** to open the HTML dialog
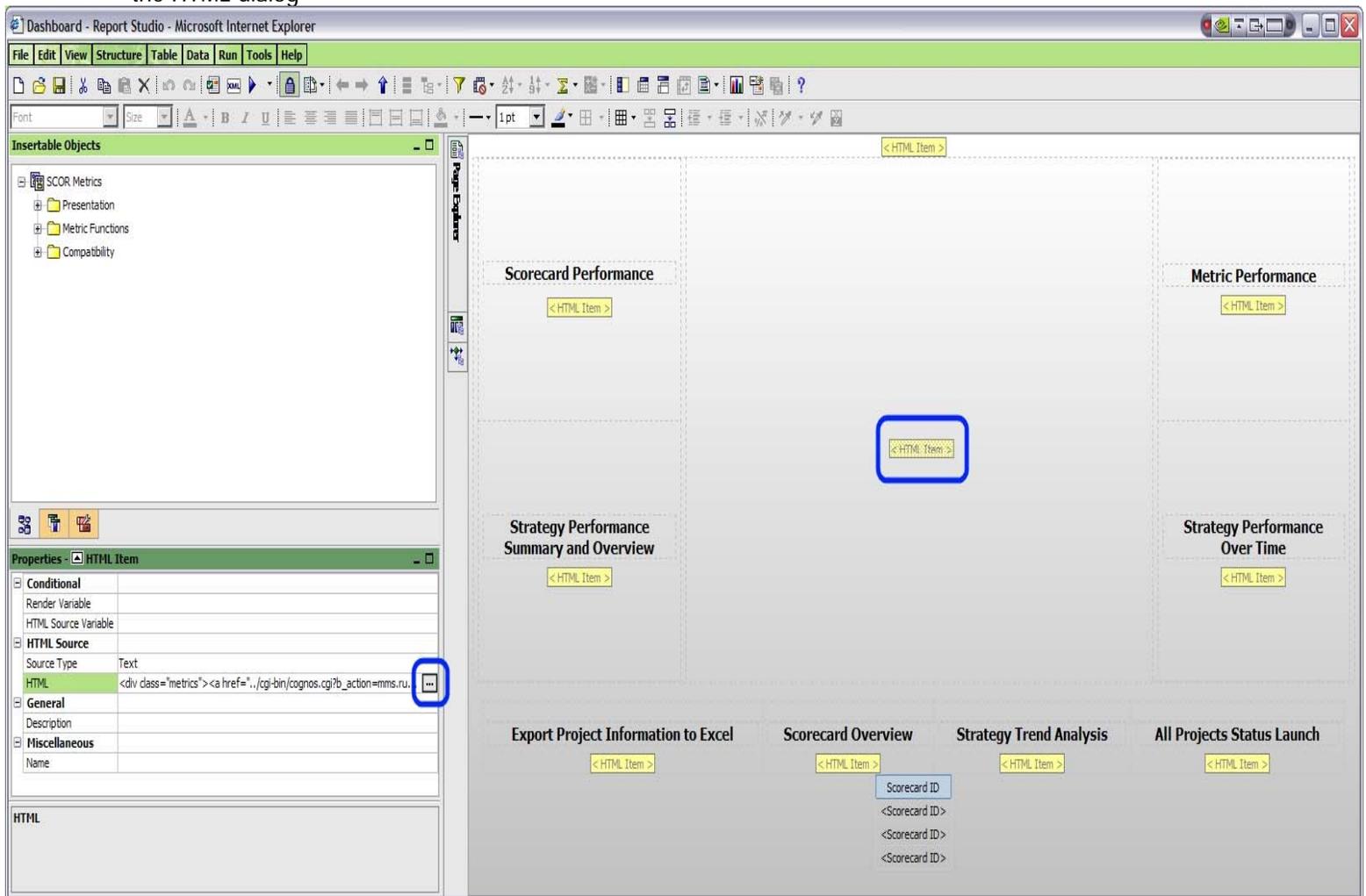
2.21. Within the following area, <mark>**<a href="**../cgi-bin/cognos.....**"**</mark>, select all text within the quotes (as highlighted in yellow) right click and choose **paste** to paste the bookmark from Step 16 click **OK**, **save** the report and close it
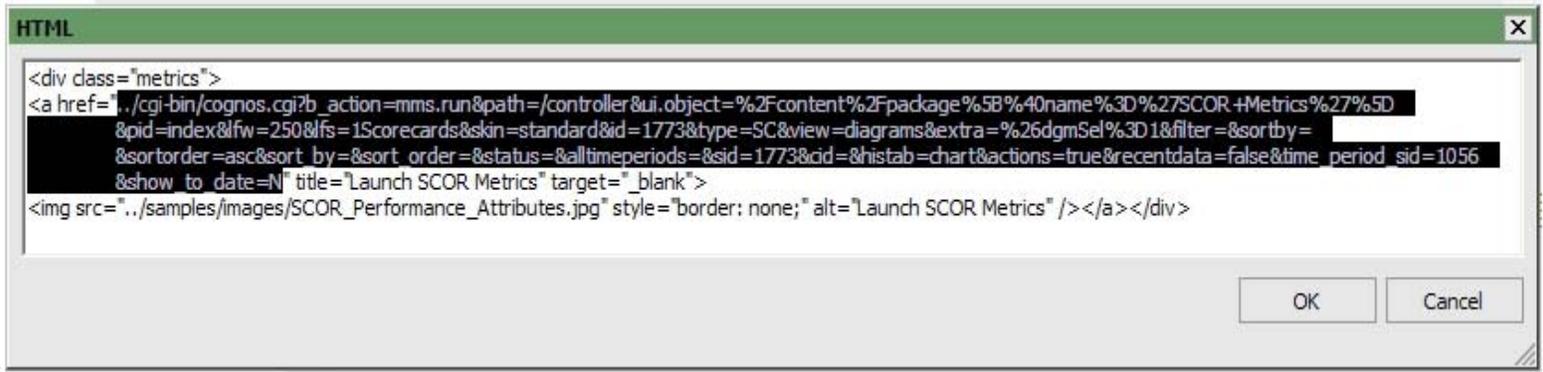
2.22. Navigate to **Public Folders > SCOR Reporting** and click the 🔲 **SCOR Dashboard** to open it
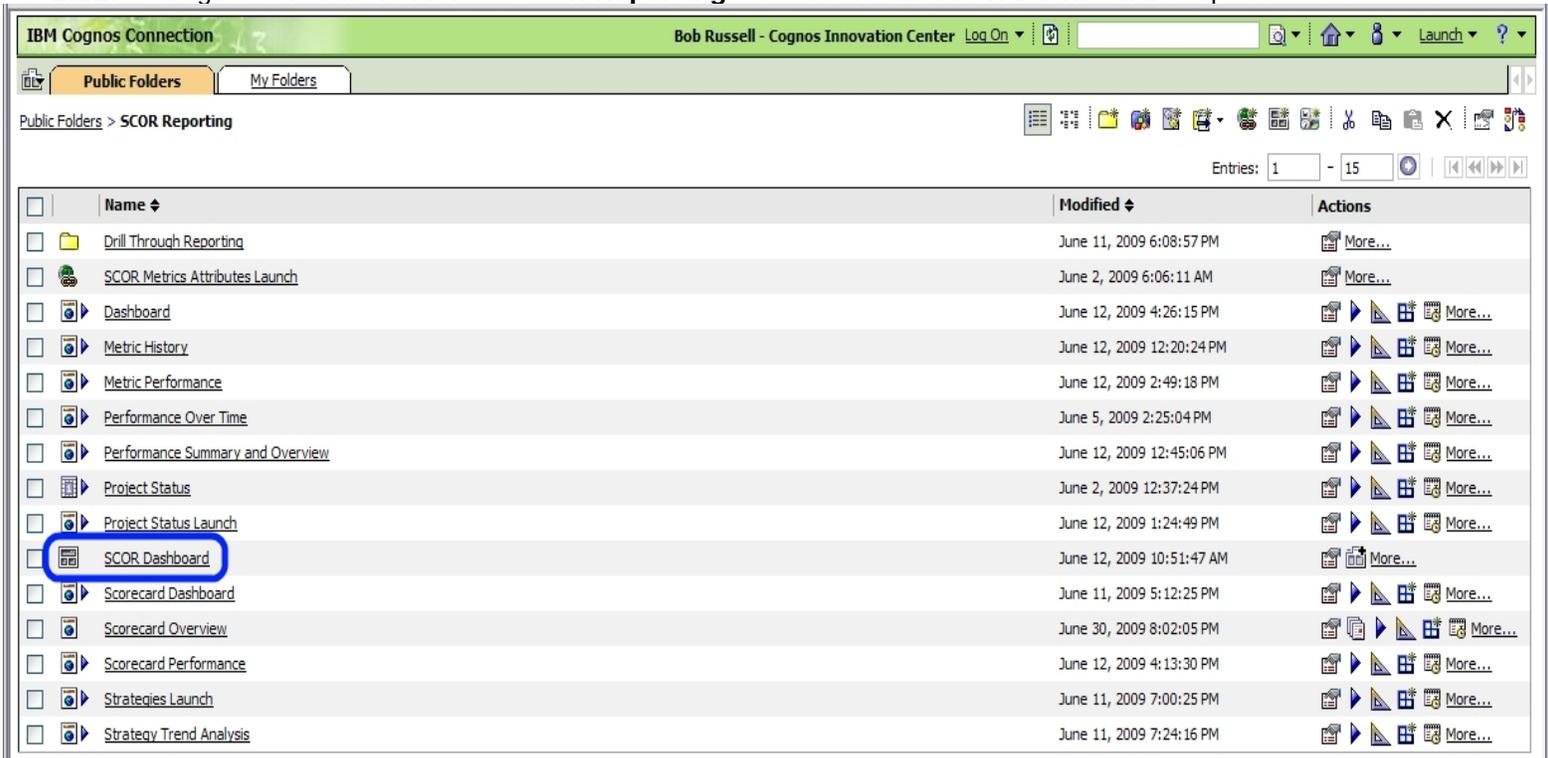
2.23. **Click on the SCOR Performance Attributes graphic** and **validate** it opens Metric Studio to the diagram filtering values for January 1, 2009

3. Customization and Implementation

Overview of the SCOR Metrics Blueprint

The SCOR Metrics Blueprint was developed using a base Framework Manager model which pulls the data from an Excel spreadsheet. The easiest way to populate new data would be to extract the data from your environment and populate the existing Excel spreadsheet (SCOR.xls). By virtue of using the existing Excel structure, the Framework Manager Model package would already be ready to prepare the Metric Designer model. If you plan to rebuild the existing Framework Model, you would publish the new model and then update the Metrics Designer model. Lastly, you will need open the SCOR Metric package and choose Tools > Maintenance > Transfer data from staging tables into metric store.

3.1. Excel ODBC Connection Configuration for a Windows Environment
3.1.1. For a Windows environment, create an ODBC Connection by clicking Start then Control Panel then Administrative Tools

3.1.2. Click the System DSN tab and click the 'Add...' button

3.1.3. Select the option for Microsoft Excel Driver (*.xls) and click the 'Finish' button

3.1.4. Enter the Data Source Name exactly as 'SCOR_ODBC'

3.1.5. Navigate to Version and choose the option for 'Excel 97-2000'

3.1.6. Click the 'Select Workbook...' button and navigate to the 'SCOR.xls' folder location and select 'SCOR.xls' as the Workbook

3.1.7. Click the 'Options>>' button and select the option to enable the Read Only property
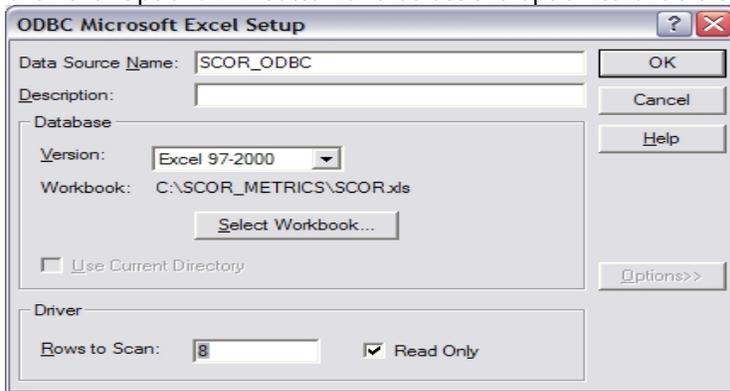
3.1.8. Click the 'OK' button

3.2. Create the "SCOR FM Excel Import" Cognos Connection Datsource
3.2.1. Launch Cognos Connection and Navigate to 🔧 IBM Cognos Administration

3.2.2. Navigate to the Configuration tab and select Data Source Connections (by default it should open to this tab), then click the 🗋 **New Data Source** icon

3.2.3. Type in the Name as '**SCOR FM Excel Import'** and click **Next >**

3.2.4. Choose the Type, if you are using the **ODBC** solution please proceed to **Step 3.2.4.1 otherwise Step 3.2.4.2**
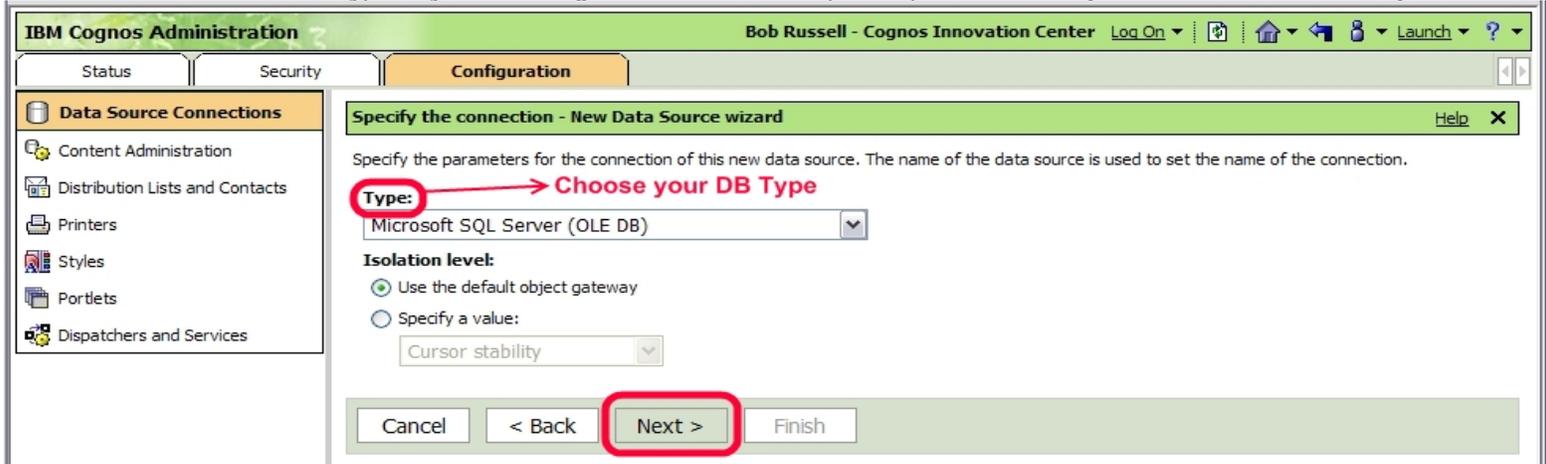
3.2.4.1. Name the ODBC data source exactly as **"SCOR_ODBC"**, select ☑ **Open asynchronously** then **Finish** and proceed to **Step 3.3**

3.2.4.2. Fill out the appropriate connection info for your source system (Supply Chain data) and Finish

3.3. Utilizing the Framework Manager Model (ODBC specific)

3.3.1. You will want to map your source data to the defined Excel Spreadsheets provided and then proceed to populate the new data

3.3.2. Launch Framework Manager and open the SCOR Excel Import.cpf file (Pre-installation Task 5)

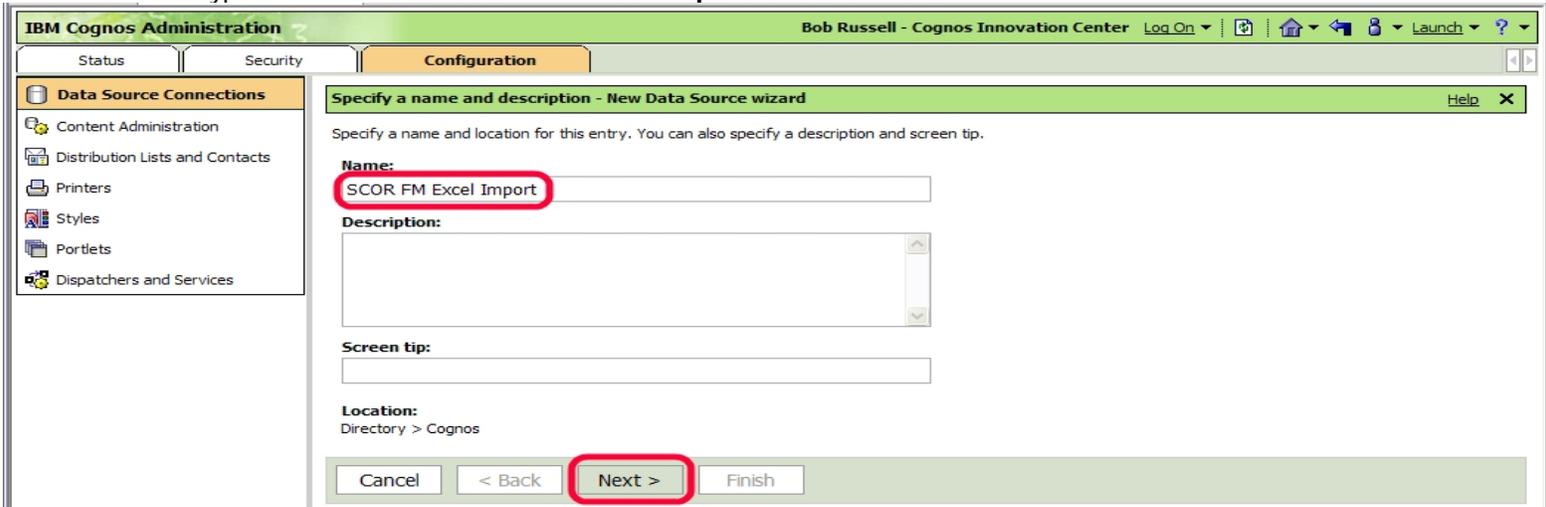**3.3.3.** Expand the SCOR Excel folder and then expand one of the subfolders (ex. Reliability)

3.3.4. Right click a query subject located in the subfolder selected in Step 3.3.3, select 'Test' and then choose the '▶ Test Sample Link' to validate the configuration is working correctly

3.3.5. Providing a valid result is returned you can proceed to Step **3.5 'Utilizing the Metric Designer Model'**

3.4. Utilizing the Framework Manager Model (Generic)

3.4.1. Launch Framework Manager and open the SCOR Excel Import.cpf file

3.4.2. Expand the SCOR Excel folder and then expand one of the subfolders (ex. Reliability)

3.4.3. Expand any query subject and copy the column names, there is also a list provided in the 'SCOR Metrics Definitions.xls' file (Column B – Framework Manager Name), the names will need to match the exact order that is specified in the original query subject

3.4.4. Right click a query subject located in the subfolder and select 'Edit Definition...'

3.4.5. You will now map your new data items and redo the labels to match the previous query subject in Step 3.4.3

3.4.6. You will need to do this process for each of the query subjects in the model
**Note that you may be able to copy and paste the query subjects and apply a filter to populate data for Actuals, Targets, Tolerance and Benchmarks depending on the data structure

3.4.7. After completing the necessary changes, you will need to republish the package so the new items can be referenced correctly by Metric Designer

3.5. Utilizing the Metric Designer Model

3.5.1. Open Cognos Connection and clear the history data and staging area

3.5.2. Launch Metric Designer and open the SCOR Metrics.cpf file (Pre-installation Task 5)

3.5.3. Expand Metric Package References then Expand SCOR Metrics

3.5.4. Right click one of the Metrics Extract (ex. Reliability) and choose "Validate"
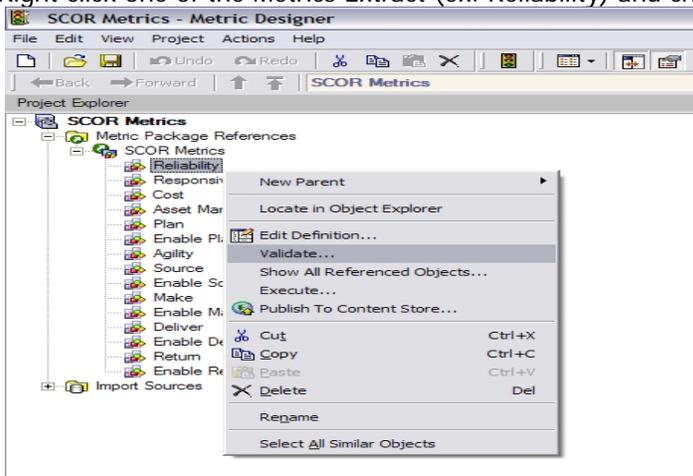
3.5.5. After successfully Validating, 'Right click' (the same Metrics Extract as in Step 3.5.3) and choose "Execute"

3.5.6. Now select the option to "Write to Metric staging area" and click OK

3.5.7. After writing the data to the staging area you need to do this for each individual Metric Extract (it would be advised to do 2 Extracts per time and then load the data from Cognos Connection and clear the logs)

3.5.8. Open Cognos Connection

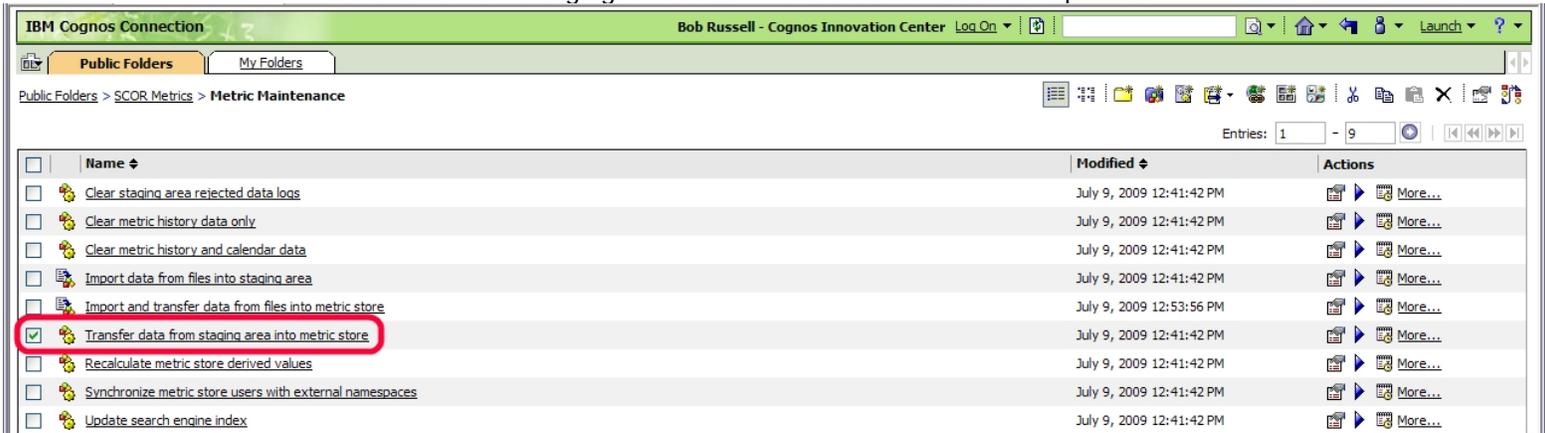**3.5.9.** Navigate to Public Folders and open SCOR Metrics in Metric Studio

3.5.10. Click Tools and click Metric maintenance

3.5.11. Click the Transfer data from staging area into metric store Link to run the process

3.5.12. Repeat the instructions above (3.5.4 +) until all Metric Staging Extracts have been loaded

DB2 Support Article for Metric Studio

Error initializing a metric store database in DB2

Problem(Abstract)
Error initializing the metric store

Symptom
CMM-APP-3254 The initialization of the metrics store failed.
DIS-ERR-3115 Task execution failed.
MDS-RUN-3200 Encountered an invalid script location or script file while executing the install step

Cause
The userid / password used to create the connection needs to be the userid / password used when creating the database. The user account must have DBADM privileges

Environment
DB2 database on Windows

Resolving the problem
Be sure that when the data source connection is created that the userid / password provided to the cmm_create_db script is used for the connection.
Steps:
1. Open a DOS window on the Metric Server Application Tier machine and navigate to the ..<install directory>\c8\configuration\schemas\cmm\db2 directory.
2. Open the DB2 command window with the command : db2cmd
3. Use the cmm_create_db script provided to create the database in the db2 instance.
Syntax: cmm_create_db <instance> <userid> <password> <db name> <disk drive> <alias>
4. Once complete, launch Cognos Connection and navigate to the Data Source tab (Tools -> Directory -> Data Source).
5. Create a DB2 connection for the new database <db name> using the <userid>/<password> combination provided during step 3.
6. Begin the initialization process/wizard and choose the data source connection created in step 5.