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IBM Cognos Metric Studio: Design Scorecards (V10.1/10.2)

Information

Length: 3.0 Days
Ref: B5157G-X
Delivery method: Classroom
Price: EUR

Overview

IBM Cognos Metric Studio: Design Scorecards (V10.1/10.2) is a three-day, instructor-led course in which students will learn how to plan, create, set up, and maintain scorecard applications using IBM Cognos Metric Studio. Students will load data from supported data sources using IBM Cognos Metric Designer, and learn alternative data loading methods such as flat files and SQL scripts. Students will also learn how to secure objects within the scorecard application, as well as the application itself.

Please Note: Screen captures and labs in this course are taken from the V10.1 of the product. However, the concepts, procedures, and tasks are all applicable to a V10.2 environment and are suitable for V10.2 user education.

Public

This course is intended for Developers.

Prerequisites

You should have:

- Knowledge of Performance Management (PM) concepts
- Knowledge of scorecarding methodologies **and** applications
- Knowledge of your business requirements
- Experience using the Windows operating system
- Experience using a Web browser
- Basic knowledge of IBM Cognos **BI** and IBM Cognos Connection
- Basic knowledge of RDBMS (e.g. SQL Server)

Objective

Please refer to Course Overview.

Topics

Overview of IBM Cognos BI

Overview of IBM Cognos BI

- Discuss IBM Cognos Business Intelligence (BI) and Financial Performance Management (FPM)
- Describe IBM Cognos BI components
- Describe IBM Cognos architecture at a high level
- Define IBM Cognos groups and roles
- Explain how to extend IBM Cognos BI

Overview of IBM Cognos BI Metric Studio

- Identify scorecarding methodologies
- Explain how to identify and map requirements
- Explain the Metric Studio architecture and potential data sources
- Describe how to enhance the Metric Studio application
- Identify how security is implemented in Metric Studio

Define the Application Environment

- Create a Metric Studio application
- Define a data source connection to the metric store
- Define the scorecard structure by creating scorecards, metric types, qualifiers, and metrics
- Identify ways in which metric status is calculated
- Examine application administration tasks and scheduling

Overview of Loading and Calculating Data

- Examine the data loading architecture
- Identify potential data sources
- Examine data management processes
- Identify how data is staged prior to being loaded into the metric store
- Examine scores and trends

Load Data using IBM Cognos BI Metric Designer

- Examine Metric Designer
- Configure Metric Designer to create extracts
- Create objects extracts
- Create metrics extracts from different source types
- Publish extracts and load data into the metric store
- Import metrics/scorecards from Metric Designer

Load Data using Alternative Methods

- Load data from flat files

- Load data from a relational database
- Describe how to load data from IBM Cognos Planning

Manually Create Metrics and Calculate Data

- Describe the types of calculated metrics
- Create a derived metric
- Create a derived index metric type
- Create a formula-based calculated metric

Refine the Scorecard Application

- Organize metrics by strategy
- Track long-term goals using projects
- View performance graphically using diagrams
- Use Metric Studio data in a IBM Cognos BI report
- Use Metric Studio default analysis reports
- Add Metric Studio content to the portal

Set Application- and Object-Level Security

- Identify authentication and authorization
- Identify groups and roles
- Use pre-defined IBM Cognos BI roles
- Secure Metric Studio application and objects

Modify Default Environment Properties

- Modify default business calendar settings
- Modify default display settings
- Set status indicator properties
- Modify the appearance of metric names
- Manage custom units of measurement

End-to-end Workshop

- Create roles
- Add members and define access permissions
- Set capabilities
- Create folders
- Define access to entries
- Create an export
- Create an import

Sample Metric Map

Monitor Performance with Metrics

- View relevant data
- Sort and filter metrics by performance
- Group metrics by strategic objectives
- Record corrective actions against metrics
- Track initiatives
- Modify data values for a metric
- Monitor important metrics