



Sitecore EI 1.0 for CMS & DMS 6.5-6.6

Engagement Intelligence Datamart Installation Guide

Installation guide for administrators and developers

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Chapter 1

Introduction

This document describes the steps required to install and configure the Engagement Intelligence Datamart on Sitecore CMS. It also provides an overview of the Engagement Intelligence architecture and explains how the Datamart fits into this structure.

This document contains the following chapters:

- **Chapter 1 — Introduction**
This section includes an introduction to the document and a brief overview of the Engagement Intelligence architecture.
- **Chapter 2 — System Requirements**
This section includes hardware and software requirements and some general guidelines.
- **Chapter 3 — Datamart Installation Steps**
This section includes all the steps required to install the Engagement Intelligence Datamart.
- **Chapter 4 — Troubleshooting**
This section includes tips and tricks to solve problems during installation.

1.1 Architecture Overview

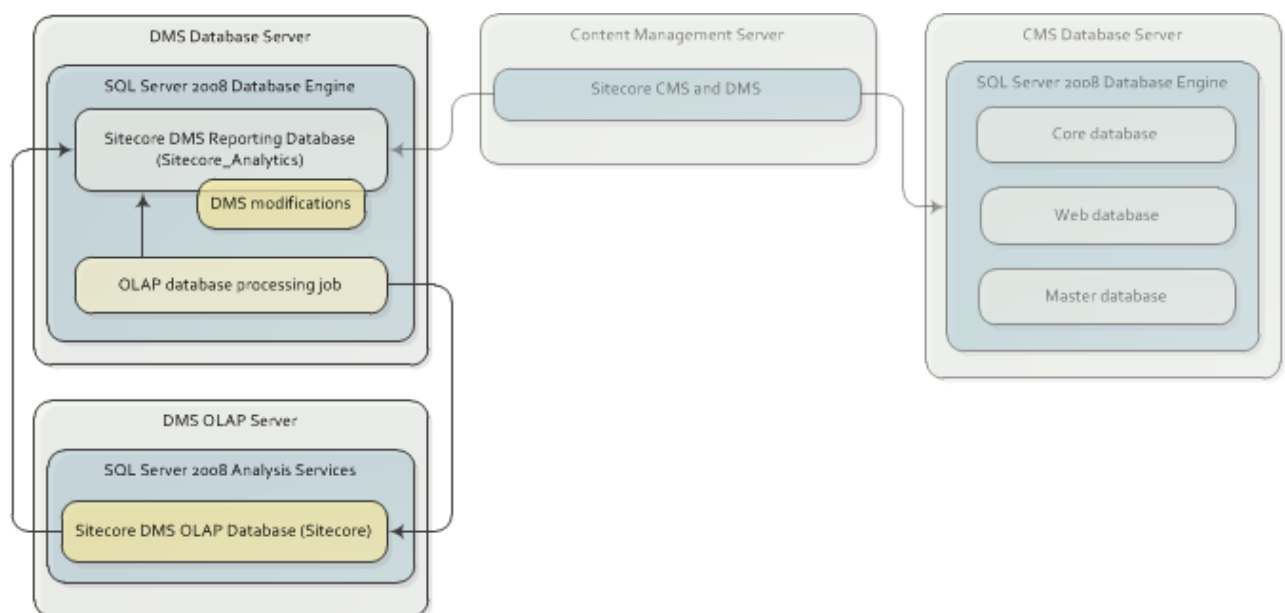
The Engagement Intelligence Datamart consists of two main components:

- Additional SQL Views in the Sitecore Analytics database.
- OLAP cube – deployed on a *Microsoft SQL Server Analysis Services (MSAS)* server.

The Datamart processes data from the Sitecore Analytics database for use with the TARGIT Analyzer. Depending on your system architecture you can create additional SQL Server Views in either the Sitecore reporting or analytics databases.

You should install the *TARGIT BI Suite (ANT Server)* on a separate server or MSAS. The ANT Server helps deliver the analytics data to a web browser or Windows front end where you can view the data in several TARGIT analyses.

Engagement Intelligence Datamart recommended configuration:



Server 1: CMS Database Server

- Microsoft SQL Server Database Engine (2008 or higher).
 - Core, Master and Web databases.

Server 2: DMS Database Server

- Microsoft SQL Server Database Engine (2008 or higher).
 - Sitecore DMS analytics or reporting database with modifications from `engagement_intelligence_schema.sql` script.
 - OLAP database processing job set up in SQL Server Agent.

Server 3: DMS OLAP Server

- Microsoft SQL Server Analysis Services (2008 or higher).
 - Sitecore DMS OLAP database.

Server 4: Content Management Server

- Sitecore CMS instance with DMS enabled.

Chapter 2

System Requirements

This section provides guidelines on the minimum hardware and software requirements that you need when you install the Engagement Intelligence Datamart with Sitecore CMS and DMS.

This chapter contains the following sections:

- Prerequisites

2.1 Prerequisites

Before you install the Engagement Intelligence Datamart, use this section to ensure that you have the correct hardware and software configuration.

Note

Check that you can log into SQL Server with a system administrator (sa) account and that you have the appropriate licenses installed for *Sitecore Engagement Intelligence* and TARGIT.

2.1.1 Hardware Requirements

The Datamart can consist of multiple servers each with their own hardware requirements. This section outlines the minimum requirements you need to install the Datamart.

- Minimum 8 GB of RAM.
- Hard disk space – Each server can have different requirements for hard disk space.
 - Analytics database – you need to allow at least 20% more disk space for the Datamart Analytics database than you would normally allocate to your Analytics database.
 - OLAP Cube database – the Datamart cube only requires about a third of the space you would normally allocate to your Analytics database.

2.1.2 Software Requirements

- Windows Server 2008.
- Microsoft SQL Server 2008 R2 Standard or Enterprise edition, including the following additional components:
 - Database Engine Services
 - Analysis Services

Note

For best results, we recommend that you use a clean installation of SQL Server 2008.

- Sitecore CMS 6.5 and DMS 2.0 or Sitecore CMS and DMS 6.6 running on Microsoft SQL Server.

For more detailed information on the exact hardware and software requirements for each of these components, refer to the relevant documentation for each product:

- Sitecore CMS and DMS – *Sitecore 6.5 – 6.6 Installation Guide* on SDN.
- SQL Server 2008 and OLAP Cube – *SQL Server 2008 documentation* on MSDN.
- TARGIT – *TARGIT documentation*.

2.1.3 DMS Data Optimization Tool

After you have installed the OLAP cube, run the DMS Data Optimization Tool to ensure the consistency and integrity of all your Analytics reporting data.

You can download the DMS Data Optimization Tool and instructions on how to use it from the Sitecore Developer Network (SDN).

Chapter 3

Datamart Installation Steps

Follow the steps in this chapter to install the Datamart with Sitecore CMS and DMS.

This chapter contains the following sections:

- The Installation Package
- SQL Server Configuration
- Creating Additional Views in the Analytics Database
- Deploying the OLAP Cube
- Configuring a Job to Process the Cube
- Testing the Cube Installation

3.1 The Installation Package

The installation package is a zip archive that includes the following content:

SQL scripts:

- `engagement_intelligence_schema.sql` – this script creates all the required database objects (additional SQL Views).
- `engagement_intelligence_job.sql` – this script creates a SQL Agent job for processing the OLAP and Analytics databases.

OLAP Cube database schema:

- `Cube.asdatabase` – schema for creating the Microsoft Analysis Service OLAP database

Extract the zip archive into a directory and verify that all files are free of errors. You will need to access these files during the installation process.

Perform all the installation steps in the same order as described in this document.

3.2 SQL Server Configuration

This section outlines some important SQL Server configuration settings to consider when installing the Engagement Intelligence Datamart. It is not possible to know every SQL Server system configuration, so for more information on a specific configuration, see the SQL Server 2008 documentation on MSDN.

3.2.1 Security Accounts

You can log in to SQL Server using Windows authentication or SQL Server authentication, depending on the configuration of your system architecture. However, we recommend that you use Windows authentication.

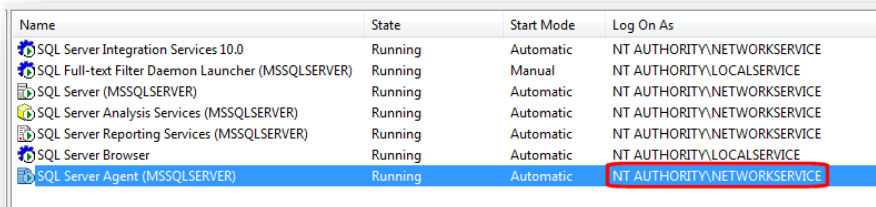
Microsoft SQL Server services should run under the following security accounts:

SQL Server Agent	NT AUTHORITY\NETWORK SERVICE
SQL Server Database Engine	NT AUTHORITY\NETWORK SERVICE
SQL Server Analysis Services	NT AUTHORITY\NETWORK SERVICE
SQL Server Browser	NT AUTHORITY\LOCAL SERVICE

Note

If your SQL Server installation uses different security account settings, you may need to adjust the steps in this guide accordingly.

You can use the *SQL Server Configuration Manager* to check these settings:



For more information on how to configure service accounts for SQL Server Services, see MSDN: http://msdn.microsoft.com/en-us/library/ms143504.aspx#Default_Accts

3.2.2 Collation Settings

Check the collation settings for SQL Server. It is a requirement that MSAS uses the same collation settings as the Analytics Database.

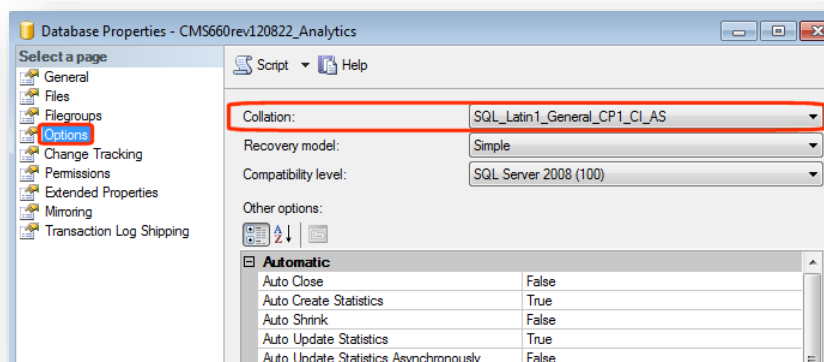
The following table shows the default collation settings:

SQL Server – Analytics database	SQL_Latin1_General_CP1_CI_AS
SQL Server - Analysis Services (MSAS)	Latin1_General_CI_AS

Checking the Collation Settings for the Analytics Database

To check the collation settings for the Analytics database:

1. Start *Microsoft SQL Server 2008 R2 Management Studio* and connect to the SQL Server instance running the Analytics database.
2. In the *Object Explorer*, locate your Analytics database, right click the Analytics database node and then click **Properties**.
3. In the **Database Properties** window, click **Options**.
4. The default collation settings appear in the **Collation** field.



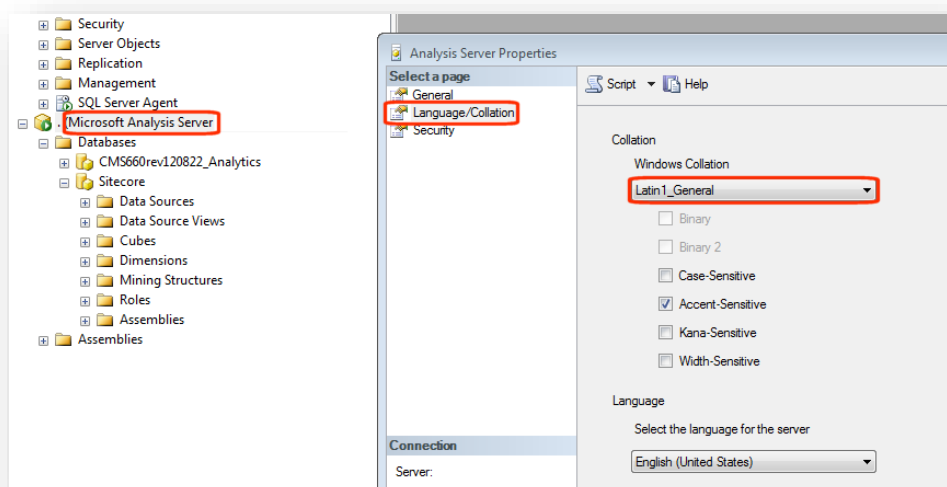
Click the drop down to see other collation settings available.

Changing the Collation Settings for SQL Server Analysis Services

If your MSAS collation settings do not match your Analytics database then you should change the collation settings for MSAS and not for the Analytics database.

To configure or to verify the default collation used by MSAS:

1. Start *Microsoft SQL Server 2008 R2 Management Studio* and connect to Analysis Services.
2. In the *Object Explorer*, right-click the root node of the Analysis Services instance and then click **Properties**.
3. In the **Analysis Server Properties** window, select Language/Collation.



4. Collation and other related settings appear on the right hand side of the window.
5. Use the drop down to change the Analysis Services collation settings to match those of the Analytics database.

The SQL Server instances in this example display the following collation settings:

SQL Server Instance	Setting
Analytics database	SQL_Latin1_General_CP1_CI_AS
Analysis Services (MSAS)	Latin_1_General

This is not an exact match but both settings are `Latin_General` which is close enough.

6. Click **OK** to save your changes.

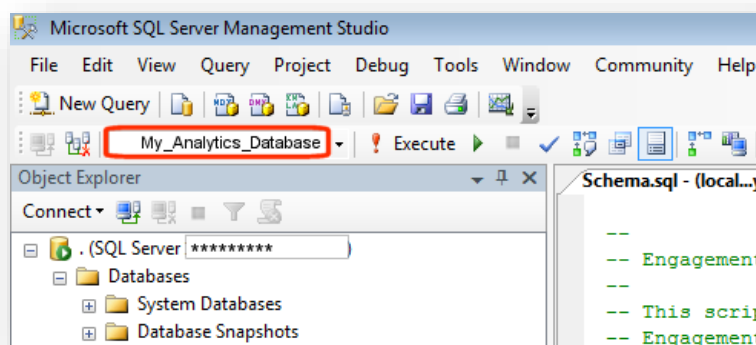
You must restart Analysis Services before your changes take effect.

3.3 Creating Additional Views in the Analytics Database

The first stage in the installation process is to create additional SQL Server views. Views are like virtual tables that the OLAP cube uses when processing the data in the Analytics or Reporting databases. You need to run the `engagement_intelligence_schema.sql` script to create the additional views.

To create the additional views:

1. Start *Microsoft SQL Server 2008 R2 Management Studio* and connect to your Analytics database.
2. Open the `engagement_intelligence_schema.sql` file by double clicking or by browsing for the file from the SQL Server main menu.
3. In the SQL Editor Toolbar, select your Analytics database as the current database.



4. Execute the script by pressing **F5** or in the SQL Editor Toolbar, click **Execute**.
5. Once the script completes successfully, the database is ready for Engagement Intelligence.

3.4 Deploying the OLAP Cube

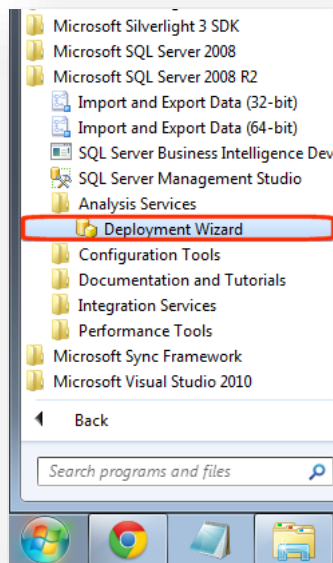
Follow the steps in this section to deploy the Analysis Services OLAP Cube database.

Deploying the OLAP Cube

Using the *Microsoft Analysis Services Deployment Wizard* run the `Cube.asdatabase` file. This creates the OLAP Cube database.

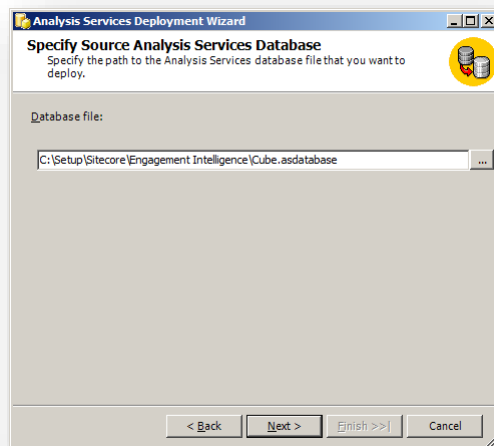
To deploy the OLAP cube database:

1. Open the *Microsoft Analysis Services Deployment Wizard* using the Windows Start menu. Click Start, All Programs, Microsoft SQL Server 2008 R2, Analysis Services and then click Deployment Wizard.



In the Deployment Wizard, on the welcome page, click **Next**.

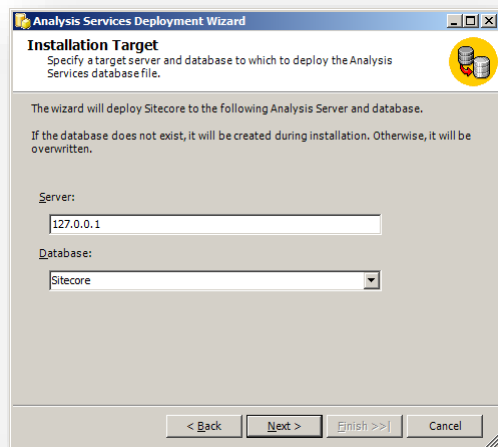
2. On the **Specify Source Analysis Services Database** page, use the browse button (...) to locate the OLAP cube database source file (`cube.asdatabase`) and then click **Next**.



- On the **Installation Target** page, complete the **Server** and **Database** fields using the following table:

Field	Description	Value
Server	Instance name or IP address of the target server.	<i>Localhost or 127.0.0.1</i>
Database	Name for the OLAP cube database.	<i>Sitecore</i>

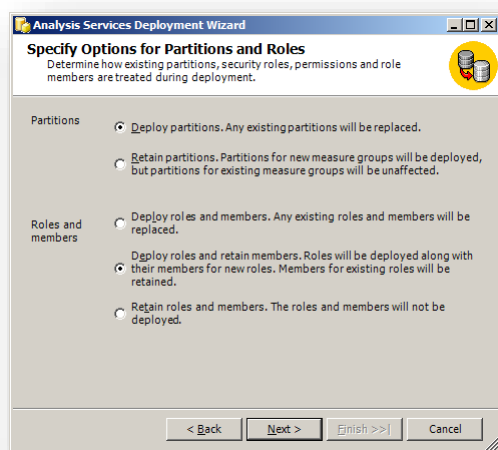
Click **Next**.



- On the **Specify Options for Partitions and Roles** page, ensure that you select the following options:

Option	Setting
Partitions	<i>Deploy partitions.</i>
Roles and members	<i>Deploy roles and retain members.</i>

Click **Next**.

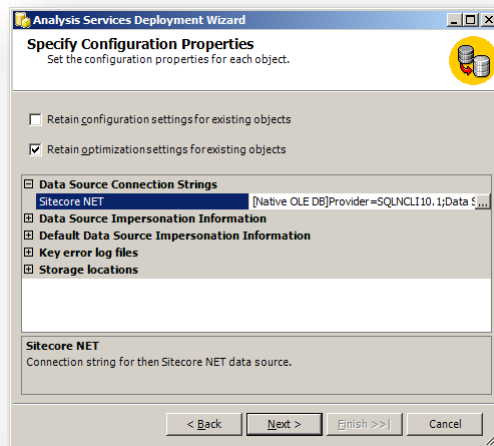


- On the **Specify Configuration Properties** page, in the **Data Source Connection Strings** group, select the *Sitecore NET* property.

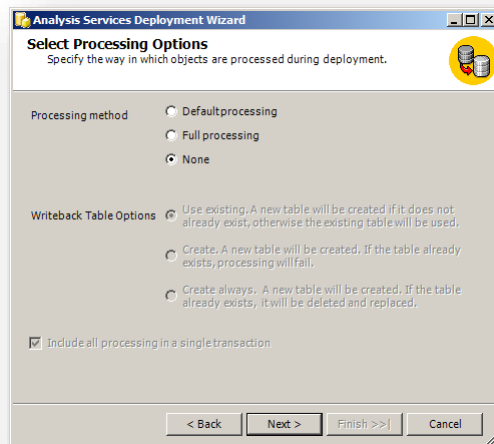
Enter a valid connection string that points to your *Analytics* database. Either enter a connection string directly or click the browse button (...) to open the **Connection Manager** window.

In the **Connection Manager** window, you can configure and test a new connection. Leave all other settings unchanged.

Click **Next**.



- On the **Select Processing Options** page, under *Processing method*, select *None* and click **Next**.



- On the **Confirm Deployment** page, verify that the server address is correct. Click **Next** to deploy the database.
- The deployment takes only a few seconds. Click **Next** and then click **Finish** to complete the installation.

3.5 Configuring a Job to Process the Cube

Follow these steps to create and configure a SQL Server Agent job that processes the OLAP cube and Analytics database. You should create the job on the SQL Server instance that is running the Analytics database.

Before you start, ensure that you configure SQL Server Agent to start automatically. To do this, open *Local Services*, select *SQL Server Agent (MSSQLSERVER)*, right click and select *Properties*. Change the *Startup type* from *Manual* to *Automatic*. You can also do this using *SQL Server Configuration Manager*.

In the SQL Server Agent, create a job for processing the data in the OLAP Cube database.

To create a SQL Server Agent job:

1. Start *Microsoft SQL Server Management Studio* and connect to the SQL Server instance running the Analytics database.
2. Open the `engagement_intelligence_job.sql` file by double clicking or by browsing for the file from the SQL Server main menu.
3. Configure the `engagement_intelligence_job.sql` script by editing the following three variables:

Setting	Description
<pre>DECLARE @sitecore_analytics_sql_database_name SYSNAME =</pre>	<p>The name of your Analytics database.</p> <p>For example: <i>My_Analytics_Database</i></p>
<pre>DECLARE @sitecore_analytics_as_instance_name SYSNAME =</pre>	<p>The name of the MSAS instance onto which you deploy the OLAP database (this should be a separate server).</p> <p>For example, <i>SVRNAME</i> or <i>SVRNAME\INSTANCENAME</i></p>
<pre>DECLARE @sitecore_analytics_as_database_name SYSNAME =</pre>	<p>The name of the MSAS OLAP database.</p> <p>For example: <i>Sitecore</i></p>

4. To run the `engagement_intelligence_job.sql` script, click **Execute** in the SQL Editor Toolbar or press **F5**.
5. In the Object Explorer, expand the SQL Server Agent node and open the **Jobs** folder. Verify that the *Sitecore DMS BI Processing* job appears. If it does not appear, refresh the **Jobs** folder.
6. Double click the job to open the **Properties** window where you can fine tune the job or change the default schedule, for example, to run every night.

3.6 Testing the Cube Installation

To test the installation, you must run the job that you created in the last section (*Configuring a Job to Process the Cube*). However, before you run the job, you need to run the Engagement Intelligence license script and check that the SQL Server Agent is running in the correct security context.

License

To run the Engagement Intelligence license script:

1. In SQL Server, open the *engagement_intelligence_license.sql* script by double clicking or by browsing for the file from the SQL Server main menu.
2. In the SQL Editor Toolbar, click *Execute*.

This license script creates database objects required by Engagement Intelligence.

Note

Your license for Sitecore Engagement Intelligence will be provided separately.

Security Context

The SQL Server Agent job should run under the NETWORK SERVICES security context (the same context as the SQL Server Database Engine). This enables the SQL Server Agent job to connect to the SQL Server Database Engine. If you do not already have a NETWORK SERVICE login, you need to create a new SQL Server user with this name.

To create a SQL Server user called NETWORK SERVICE:

1. In SQL Server (Database Engine), select **Security** then **Logins**.
2. Right click **Logins** and then click **New Login**.
3. In the **Login – New** window, **General** page, under *Windows authentication*, *Login name* click **Search**.
4. In the **Select User or Group** window, enter NETWORK SERVICE.
5. Click **OK**.

Running the Job

Note

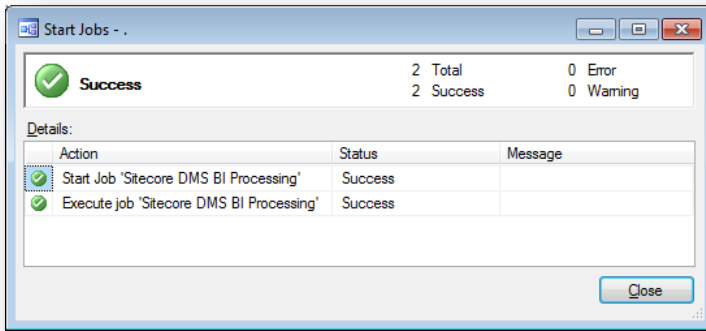
Running the SQL Server Agent job is a very resource intensive process, so execute this procedure with care.

To verify the datamart installation:

1. Start *Microsoft SQL Server Management Studio* and connect to the database server where you installed the *Sitecore DMS BI Processing* job.
2. In the *Object Explorer*, expand the *SQL Server Agent* node and then open the *Jobs* folder.
3. Right-click the *Sitecore DMS BI Processing* job and select *Start Job at Step*.
4. Select *Step 1*. and click **OK**.
5. The *Start Jobs* window appears showing that the job is executing.

It can take several hours to process the data depending on the hardware configuration of the server and the size of your Analytics database.

When the job has completed successfully, you see the following message:



Chapter 4

Troubleshooting

This chapter includes some tips and tricks to solve common problems that you may encounter during the installation process.

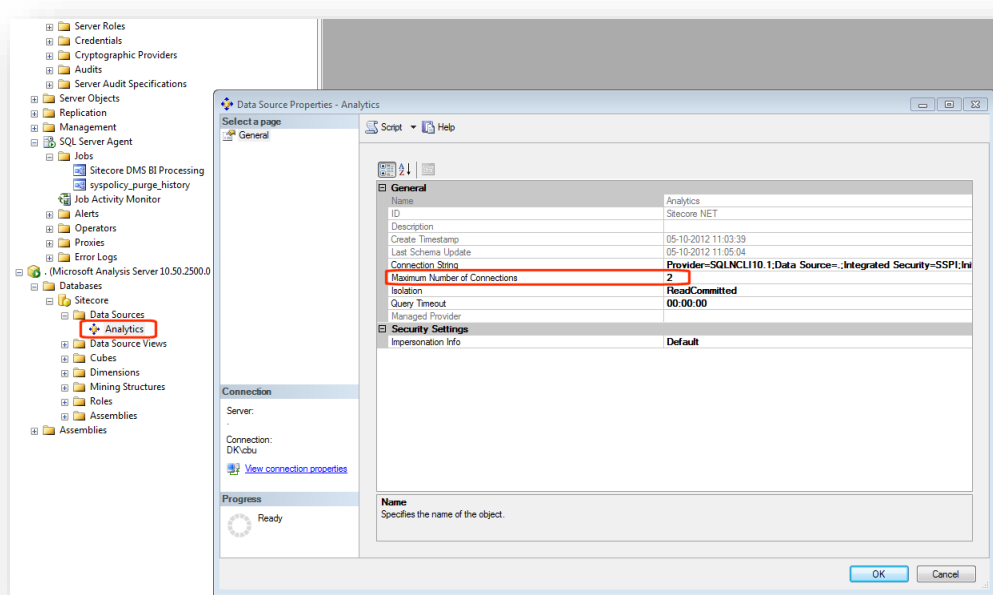
- Setting the Maximum Number of Connections

4.1 Setting the Maximum Number of Connections

If you are using a production database that is used by other processes, change the default setting in the *Maximum number of connections* setting to a lower number. This reduces the load on the server.

To change the default setting:

1. Connect to SQL Analysis Services.
2. Expand the **Data Sources** node and right click the **Analytics**.
3. Click **Properties**.
4. In the **Data Source Properties – Analytics** window, select the **General** page, and then select the *Maximum Number of Connections* setting.



5. The default SQL Server setting is *10*. Change this to *1* or *2*, then click **OK**.