IBM Performance 2011

Upgrading to Cognos 10

Speaker:
Date:

Breakout Session PC03
Upgrading to Cognos 10

This session provides a best practices
overview for your organization's
upgrade to Cognos 10 including tips,
guidelines, resource information and
a case study.

Agenda

- Approaches to upgrading:
  - Why the upgrade to Cognos 10 is seamless

- Supported upgrade path to Cognos 10

- The basic upgrade workflow

  "Failing to plan is planning to fail"

- Some high-level proven practices

- 4 upgrade resources available to you today

- Real-world upgrade - Boeing

- Questions

"I am impressed with how fast we were able the upgrade to Cognos 10."

John Mazerall
Data Architect, Manager, Business Intelligence and Data Solutions
Canadian Blood Services

Upgrade approaches

Upgrade all your content at once

- Move all reports to Cognos 10 quickly and efficiently:

  - 95.2% success rate based on results from Alpha

  - 94.3% success rate based on results from Beta 1

  - 99.2% success rate based on results from Beta 2

- 41 TLC Customers:

  - Onsite with resources

- 78 general customers

Upgrade in a staged approach

- Assess your applications and user requirements:

  - If some users or applications cannot upgrade to Cognos 10 while others need to leverage new capabilities from Cognos 10, upgrade as needed

  - If a new LOB has specific requirements for Cognos 10 while the rest of the organization needs to stay on Cognos 8, upgrade as needed

- Use the multi-version coexistence feature to upgrade part of your applications or users to Cognos 10
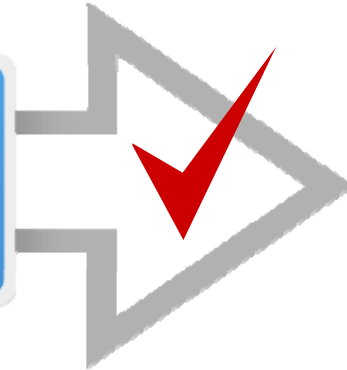
Cognos 10 upgrade supported path

Upgrade first, then leverage new features

| 8 COGNOS | Use Lifecycle Manager to validate results Cognos 8 and Cognos 10 | Accept desired results | Move business users into Cognos 10 | ✓ 10 COGNOS |

Leverage Cognos 10 New Features
(e.g. Dynamic Query, etc)

| 10 COGNOS | Use Lifecycle Manager to validate results to leverage new features | Accept desired results | Promote reports to production | ✓ 10 COGNOS |

IBM Performance 2011

The upgrade workflow

Create the Plan

Review Upgrade Resources:
- FAQ
- Doc's and Release Notes
- Conformance

Evaluate the Current System:
- Auditing
- Survey's
- System Resources

Create Detailed Upgrade Plan:
- Milestones
- Testing
- Resources

Development /Test System

Prepare the Test Environment

Upgrade Content Store

Begin Complete Application Testing
Begin Report Validation

Resolve Validation/Configuration Issues

Retest Report Content

Revise Upgrade Plan

Implement Upgrade Plan

QA/Production System

Prepare QA & Production Environments

Upgrade Content Store

Begin Complete Application Testing
Begin Report Validation

Tune QA & Production Systems
New Features

Retest Complete Application
Performance Comparison/Test

Cognos 10 Go Live
Shutdown Cognos 8.x
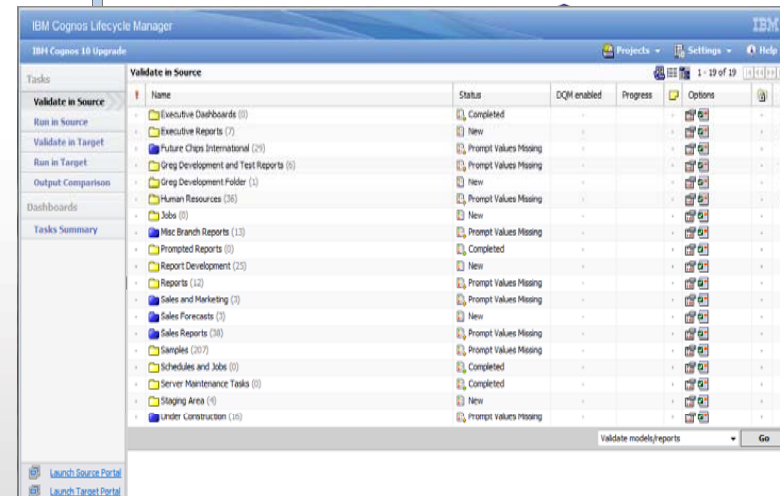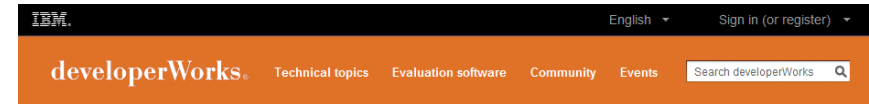
Some upgrade proven practices

- **The plan:**
  - Dedicated resources
  - Commitment
- **Content Store:**
  - Database upgrade only
  - Don't upgrade Reports at Startup
  - Content maintenance task
- **Consistency check:**
  - Before and after upgrade
- **Cognos configuration:**
  - Should be exported/imported
- **Customizations:**
  - Cognos Connection
  - System Files (system.xml)

- **Be aware of new features and functionality:**
  - i.e. Go Search
- **Release notes**
  - APAR Search
  - Fixlists
- **Report validation**
  - Lifecycle Manager
- **Upgrade website**
  - FAQ
- **New architecture**

Four upgrade resources available today

- **Proven practice site:**
  - Upgrade information
  - Upgrade techniques
- **IBM Cognos Business Intelligence 10.1.0 information center:**
  - Release notes
  - Cognos 10 docs
- **Lifecycle Manager:**
  - Content validation
- **Multi-version coexistence:**
  - Content continuity

Upgrade information

IBM Cognos Business Intelligence 10.1.0 information center

- **Proven practices site:**

  - Upgrade information

- **Release notes:**

  - FixList:
    www.ibm.com/support/docview.wss?uid=swg27019175

  - APAR – Authorized Program Analysis Report:
    www.ibm.com/support/search.wss?apar=only&tc=SS9RTN&sort=desc&word=aw&wfield=open

  - Installation and configuration information

  - Deprecation notices

- **Documentation**

- **Upgrade Site – *NEW*:**

  - Frequently Asked Questions

  - Upgrade resources

Lifecycle Manager streamlines the upgrade process

- **Lifecycle Manager validates report content between two environments**

- **Compare large numbers of reports:**
  - Different formats (PDF, HTML, XML, CSV, Microsoft® Excel 2002/2007, and Microsoft Excel 2000 Single Sheet format)
  - All supported languages

- **Establish a baseline by validating content in a single environment:**
  - Perform periodic comparisons to ensure stability
  - Verify impact on the environment after an external change or tuning operation
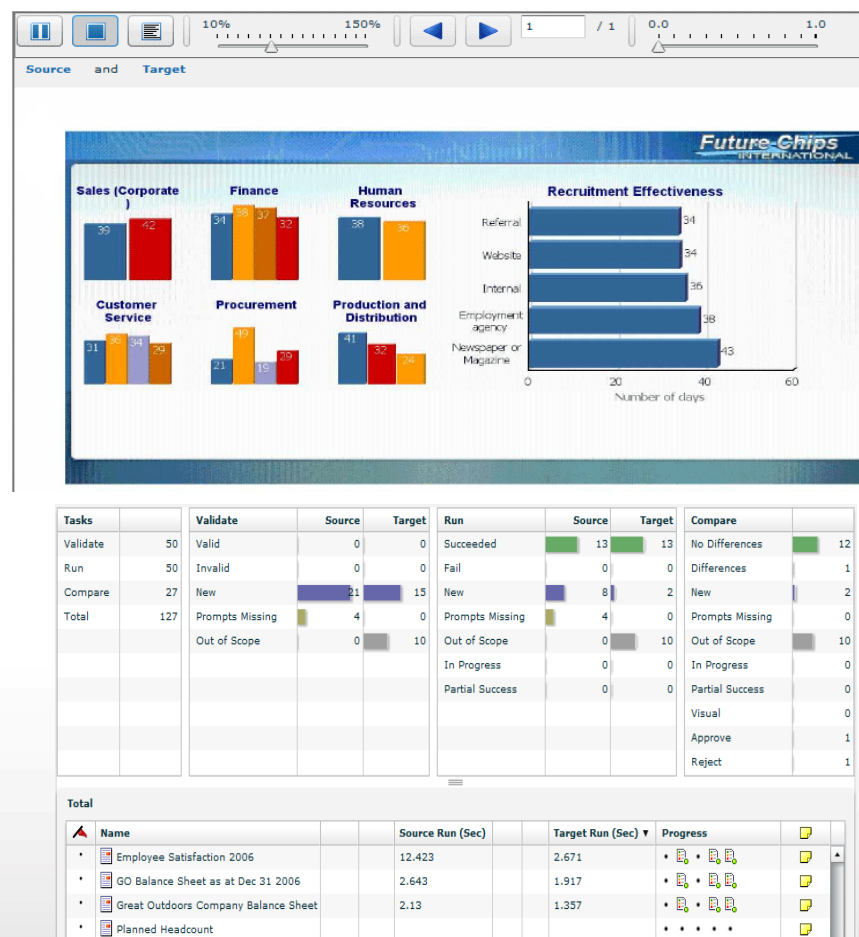
Lifecycle Manager – content validation

IBM Cognos Lifecycle Manager

Master ▾   Projects ▾   Settings ▾   Help ▾

Welcome

To begin, please create a new project or open an existing one.

Projects and Archives

A project contains data such as prompt values, validation and run results, and report outputs, related to the source and target applications being compared.

An archive is a project that cannot be modified. A new project may be created by using an archive as baseline.

Lifecycle Manager – new feature validation

IBM Performance 2011

Multi-version coexistence

- **Allows Cognos 10 to serve Cognos 8.3, 8.4 or 8.4.1 content:**
  - Single interface for users
- **First release of multi-version coexistence:**
  - Aimed at pleasing the end user
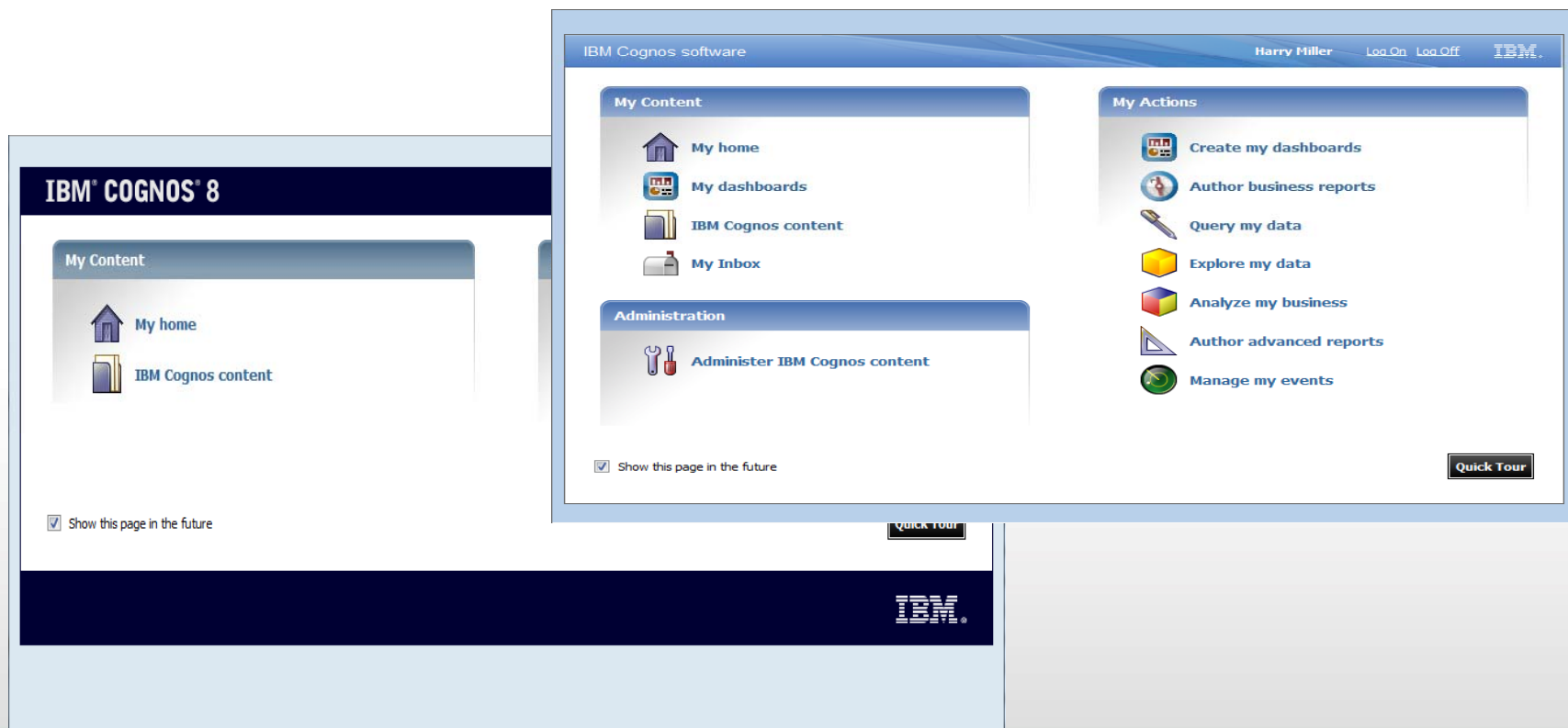
Multi-version coexistence demo

Demo
Multi-version coexistence

The Boeing upgrade

- Business challenges

- Resource

- Timelines

- BI content

- Upgrade method

Boeing
Cognos 10 upgrade plan and resources

- **Personnel:**
  - 2 Cognos
  - 3 Boeing (IT)
  - 10 Boeing (different application groups)

- **Cognos versions:**
  - Cognos 8.4.1
  - Cognos 10

- **Reports:**
  - Visual validation
  - Lifecycle Manager

- **Upgrade plan test environment:**
  - 1 week

- **Upgrade plan dev and production:**
  - 6 Days

The upgrade plan

Cognos 10 Upgrade Timeline

ID	Task Name	Duration	Start	Finish	Predecessors
10	**Development Environment**	**4 days**	**Sat 10/9/10**	**Wed 10/13/10**	
11	Dev Moratorium COB Friday	2 days	Sat 10/9/10	Mon 10/11/10	
12	Backup Dev Content Store	1 day	Sat 10/9/10	Sat 10/9/10	11SS
13	Install	1 day	Mon 10/11/10	Mon 10/11/10	
14	Validate	2 days	Tue 10/12/10	Wed 10/13/10	13
15	Go/No Go Wednesday Afternoon	0 days	Wed 10/13/10	Wed 10/13/10	14
16	**Production Environment**	**5 days**	**Mon 10/11/10**	**Fri 10/15/10**	
17	Install	3 days	Mon 10/11/10	Wed 10/13/10	
18	Prod Moratorium COB Wednesday	0 days	Wed 10/13/10	Wed 10/13/10	
19	Backup Dev Content Store	1 day	Wed 10/13/10	Wed 10/13/10	18
20	Migrate Thursday Morning	0 days	Thu 10/14/10	Thu 10/14/10	
21	Validate Thu-Fri	2 days	Thu 10/14/10	Fri 10/15/10	20

Content analysis and testing

- **Report validation:**
  - Lifecycle Manager
  - User validation

- **Report validation plan:**
  - 1 Week

Analysis of Cognos content

Type	Content Count Sept 2010
Folder	7,218
Job Definition	131
Package	2,663
PowerPlay 8 Report	3,488
PowerPlay 8 Report View	6
Query	10,115
Report	10,327
Report View	2,436
Shortcut	540
All	36,924
Same Content as Last Month	26,503

Boeing
How we did the Cognos 10.1 Upgrade

Test environment is completed

- **Content Store upgrade:**
  - Report upgrade tasks
- **Side by side installations:**
  - Same hardware
- **Moved all customizations:**
  - Well-documented by Boeing
- **Cognos configuration:**
  - Not exported, caused issues
- **Once development was completed**:
  - Approximately 10 users
  - Lifecycle Manager
- **Tuning:**
  - Released to users
  - Lifecycle Manager
- **Production**

Boeing LIVE on Cognos 10

- Boeing was LIVE with Cognos 10 on October 18th 2010 which was *before* we launched on Oct 25th 2010

- Some statistics:
  - They migrated their entire production platform:
    - moved 13 applications
    - upgrading 40,000 BI Content objects
    - and deployed to 3,500 users
    - on the busiest usage day for them – a Monday
    - in 6 days
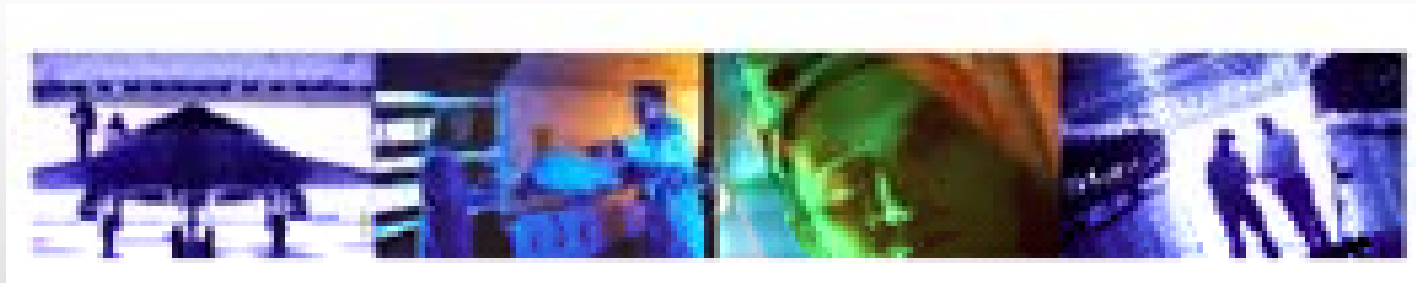
Summary

- Upgrading to Cognos 10 is much more seamless than any previous upgrade

- Customers are already having success upgrading

- There are many tools and resources to help you in the upgrade process

- Cognos 10 provides many new user capabilities once you have upgraded

Business Analytics software services

Maximize your software investment and drive better business outcomes with Business Analytics Software Services.

- Take the right training at the right time:
  ibm.com/cognos/training

- Engage a technical product expert:
  ibm.com/cognos/consulting

- Find knowledge and resources at your finger tips
  ibm.com/cognos/customer center

Join our community!

@IBMCognos and @IBMSPSS on Twitter

- On the web:
ibm.com/software/analytics/community