Highlights

- Initiate your IBM Cognos BI v10 upgrade with confidence

- Installation and configuration of an IBM Cognos BI v10 Upgrade Environment

- Assess and execute the appropriate upgrade strategy

- Explore new IBM Cognos BI v10 capabilities in the context of your upgrade

- Proven practices from IBM product experts with knowledge transfer on the upgrade process

- Suitable for existing IBM Cognos BI v8 customers who are planning an upgrade to IBM Cognos BI v10

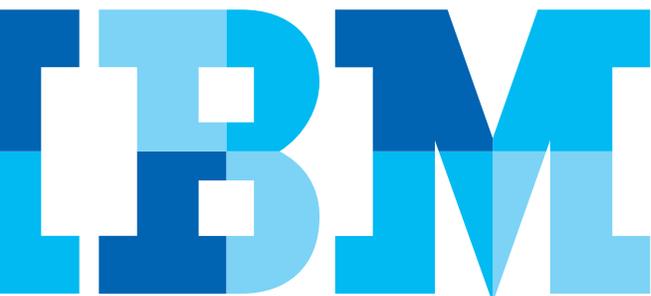# IBM Cognos BI v10 Upgrade Initiate Package

Considerations

To fully benefit from the new architecture and functionality of IBM Cognos BI v10, the upgrade process requires a thorough understanding of the differences between the two platforms and consideration of the strategy and plans for your upgrade. Questions that often arise include:

- What alternative upgrade strategies and approaches should be considered?
- Which applications could best take advantage of new IBM Cognos BI v10 features and functionality?
- What is the best means to compare and validate IBM Cognos BI v8 and IBM Cognos BI v10 content?
- How can IBM Cognos Lifecycle Manager provide for a smoother upgrade path?
- What are the latest proven practice standards for installing and configuring IBM Cognos BI v10?

Overview

The IBM Cognos BI v10 Upgrade Initiate Package combines our depth of knowledge on how best to upgrade to IBM Cognos BI v10 with our extensive installation and configuration experience. This Package accelerates your upgrade process by establishing a proven Upgrade Environment as a strong foundation to further explore new IBM Cognos BI v10 features, which will help uncover new opportunities and leverage your IBM Cognos investment throughout your organization.

The Package includes:

- Establishing an IBM Cognos BI v10 Upgrade Environment
- Determining your most suitable upgrade strategy
- Upgrading your existing IBM Cognos BI v8 content
- Validating a selected set of your IBM Cognos BI v10 content
- Exploring new IBM Cognos BI v10 functionality and opportunities
- Recommending a go forward strategy for maximizing your IBM Cognos BI v10 investment

Activities & Deliverables

The IBM Cognos BI v10 Upgrade Initiate Package encompasses the following activities and deliverables:

Scoping & Kickoff

In order to establish a clear scope of activities specific to your needs, this Package begins by discussing with key business and IT stakeholders the compelling reasons for upgrading to IBM Cognos BI v10, capturing and documenting those implementations that have high visibility, value, and complexity, and identifying where the opportunities exist to leverage new Cognos BI v10 features after the upgrade environment is established.

We will work with your key stakeholders to:

- Discuss alternative upgrade strategies:
    a) an all-at-once "Content Store upgrade" approach
    b) a selected application "Deployment upgrade" approach
- Discuss objectives and priorities for the engagement

With a clear understanding of your upgrade alternatives, a formal kick-off meeting with appropriate sponsors, management and IT staff, together with the IBM team, will review the objectives and priorities, the proposed project plan, our mutual roles and responsibilities, any key assumptions or constraints, and the expected deliverables. This will set the delivery expectations and allow for the scheduling and staffing of the remaining tasks and activities.

There will then be two primary work streams that are aligned to prepare and execute the upgrade – the **Application Upgrade Work Stream** focusing on upgrading your IBM Cognos BI content and the **Establish Upgrade Environment Work Stream** to install, configure, tune and test your Upgrade Environment.

Application Upgrade Work Stream

With a confirmed scope and requirements in hand, this work stream will review your existing IBM Cognos BI content, identify risks, and assess complexity for a successful upgrade. Working with your team, we will select a suitable IBM Cognos BI application, model, and content for subsequent validation and then refine and update your Upgrade Plan.

We will then execute the upgrade according to your selected strategy (Content Store upgrade or Deployment upgrade) and validate the selected application, reports, and IBM Cognos Framework Manager models using IBM Cognos Lifecycle Manager and compare the content between the two versions, addressing any concerns. We will document the validation outcomes as part of the *Upgrade Initiate Closure Document*.

Finally, we will conduct an IBM Cognos BI v10 Features Overview Session during which we will review appropriate features and capabilities such as IBM Cognos Business Insight, IBM Cognos Business Insight Advanced and IBM Cognos Active Reports in the context of your upgrade. This will provide valuable input for your *Education Recommendation Document*.

Establish Upgrade Environment Work Stream

IBM Cognos technical experts will install and configure the IBM Cognos BI v10 Upgrade Environment including IBM Cognos Lifecycle Manager. This will include pre-installation conformance checks, a system health and readiness assessment, a series of configurations (including auditing, basic authentication, notifications, and basic tuning) and post installation environment and function tests. You are provided with a comprehensive *IBM Cognos BI v10 Installation Document* so your staff benefits from the insights and knowledge transfer on proven practices employed for the environment.

Project Completion

At the completion of the Package, you will have an installed and configured IBM Cognos BI v10 Upgrade Environment with selected BI upgraded content as a starting point for exploring new features and capabilities. Deliverables include:

- An *IBM Cognos BI v10 Installation Document* capturing and detailing the Upgrade Environment as configured by IBM.
- The *Upgrade Initiate Closure Document* providing observations and findings from the upgrade and validation process together with recommendations and a Go-Forward Plan to serve as a reference to realize the potential of IBM Cognos BI v10.
- An *Education Recommendation Document*, developed collaboratively by IBM education specialists, which will serve as a reference of available education options and programs, including a tailored training recommendation specific to your education needs.

Engage Today

The IBM Cognos BI v10 Upgrade Initiate Package is best for existing IBM Cognos BI v8 customers who are currently planning to initiate an upgrade to IBM Cognos BI v10. This Package is available either as a Fixed-Fee service or as a Time-and-Material service. For the Fixed-Fee service, some limitations apply. Details are available from your IBM Business Analytics Lab Services Sales representative.

If you wish instead to first start using IBM Cognos BI v10 with a new implementation, rather than upgrade from an existing IBM Cognos BI v8 environment, please use the *IBM Cognos BI v10 Quick Start Package* located on IBM.com.

About IBM Business Analytics Lab Services

The Business Analytics Lab Services organization provides expert services and education exclusively focused on the Business Analytics product portfolios. Our depth of experience and extensive proven practices service offerings help customers maximize their software investment, mitigate risks, raise the quality of their implementations, and build valuable skills. We have provided education, advice, guidance, and assistance to thousands of clients around the world ensuring their business analytics implementations are optimized to take full advantage of our product capabilities.

Contact us

For more information about how IBM Cognos Lab Services can assist you, complete the Services Request form www.ibm.com/cognos/contactus on our website.

An IBM Cognos representative will respond to your inquiry within two business days.

About IBM Cognos BI and Performance Management

IBM Cognos business intelligence (BI) and performance management solutions deliver world-leading enterprise planning, consolidation and BI software, support and services to help companies plan, understand and manage financial and operational performance. IBM Cognos solutions bring together technology, analytical applications, proven practices, and a broad network of partners to give customers an open, adaptive and complete performance solution. Over 23,000 customers in more than 135 countries around the world choose IBM Cognos solutions.

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