



IBM Performance 2011

Upgrading to Cognos 10

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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



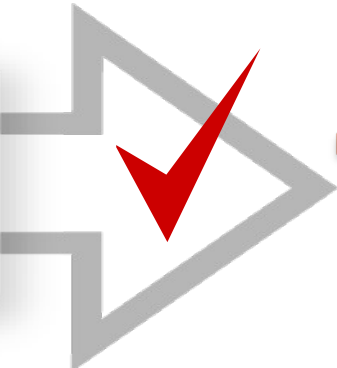
Upgrade first, then leverage new features



Use Lifecycle Manager to validate results Cognos 8 and Cognos 10

Accept desired results

Move business users into Cognos 10



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



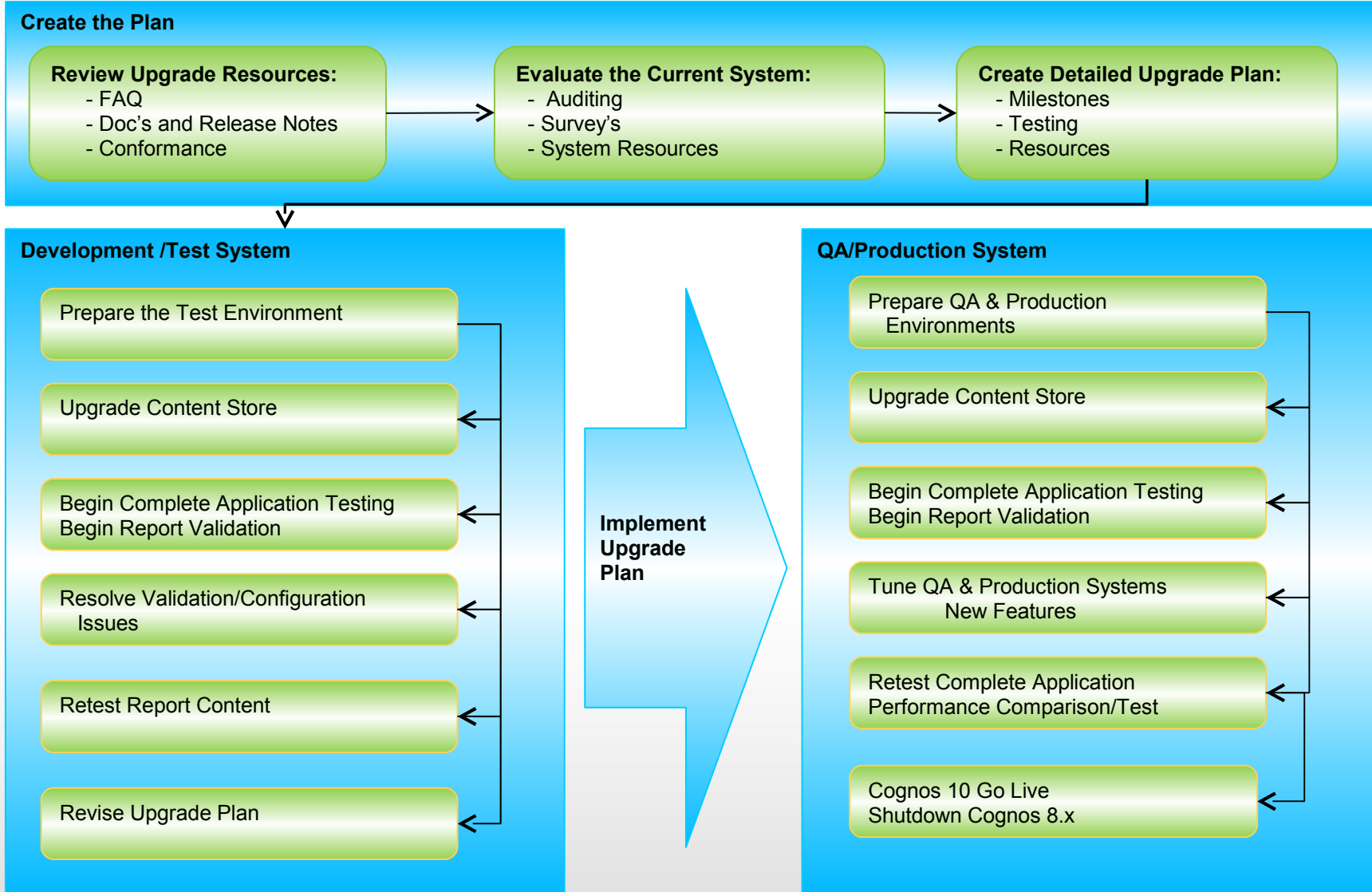
Use Lifecycle Manager to validate results to leverage new features

Accept desired results

Promote reports to production



The upgrade workflow



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:**

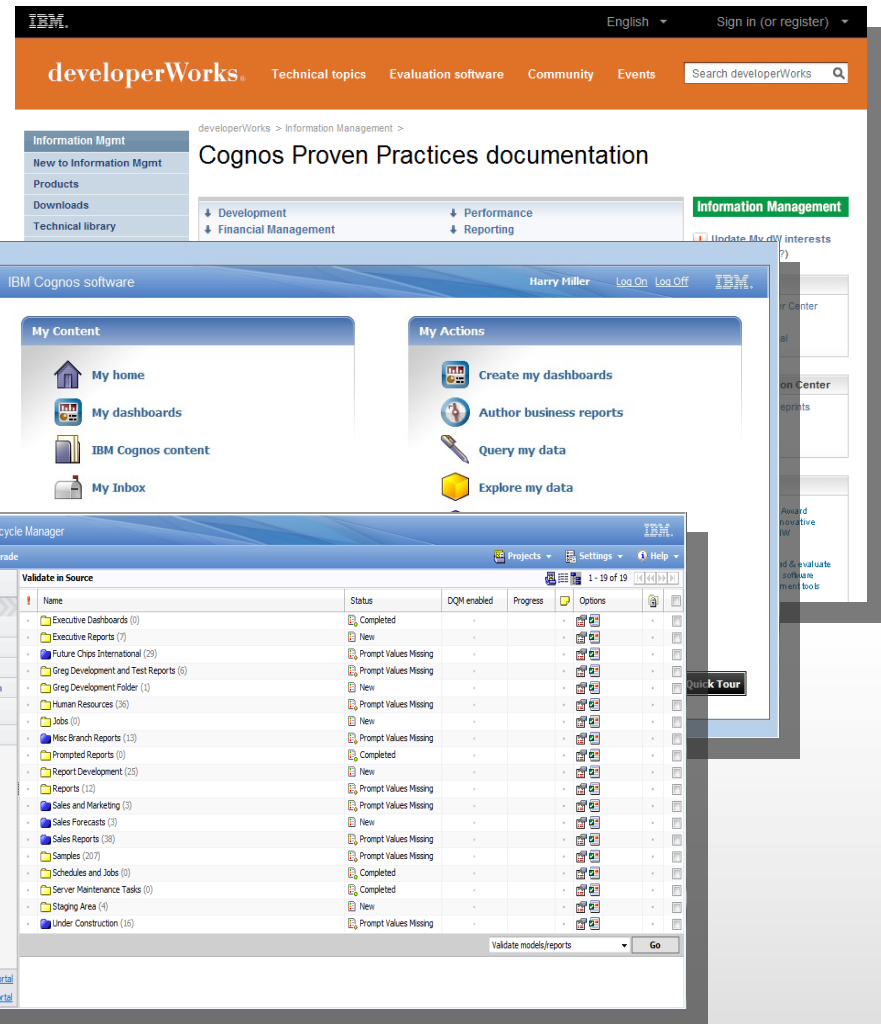
- Release notes
- Cognos 10 docs

- **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

The screenshot shows the IBM developerWorks website. The main heading is "Cognos Proven Practices documentation". Below this, there are several sections:

- Information Mgmt** (left sidebar): Includes links for New to Information Mgmt, Products, Downloads, Technical library, Community & forums, and Events.
- Related links** (left sidebar): Includes links for How to buy, Services, Training, and Support.
- Information Management** (right sidebar): Includes a link to "Update My dW interests (Log in | What's this?)" and a list of links: Cognos Customer Center, Cognos BI&FPM, and IBM Support Portal.
- Cognos Innovation Center** (right sidebar): Includes links for Performance Blueprints, Live Events, and Webinars.
- Special offers** (right sidebar): Includes a "Partner Award" for "Most innovative use of dW" and a "Download & evaluate Rational software development tool".

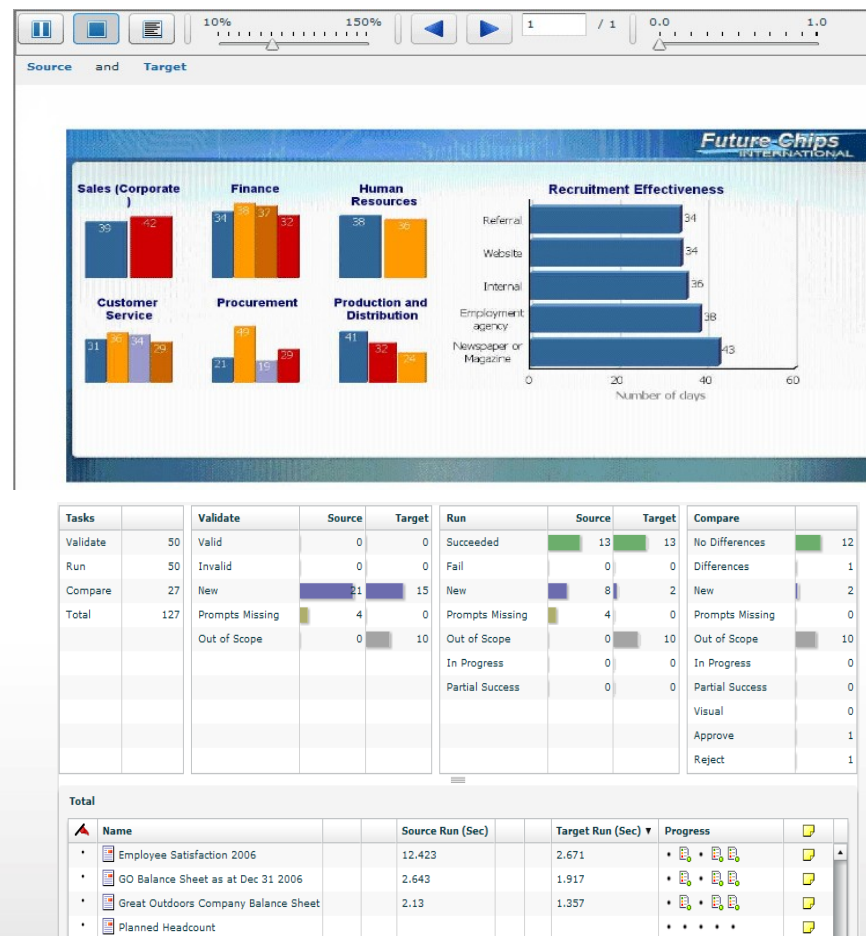
The main content area features a table of categories with arrows pointing down, including Development, Performance, Financial Management, Reporting, IBM Cognos Analytic Applications, Security, Infrastructure, Upgrade and Migration, and Modeling. Below this is an "RSS" section with a paragraph about Cognos Proven Practices and a "Find out what the top 10 Cognos BI and top 10 Cognos FPM Proven Practices were last month" section. There is also a "Development" section with links for all Development articles, How To, and Utilities.



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

A screenshot of the IBM Cognos Lifecycle Manager web application. The interface features a blue header bar with the text "IBM Cognos Lifecycle Manager" on the left and the "IBM." logo on the right. Below the header is a navigation menu with "Master", "Projects", "Settings", and "Help" options, each accompanied by a small icon. The main content area is white and contains a "Welcome" section with the text "To begin, please create a [new project](#) or [open](#) an existing one." Below this is a large, empty white space with a cursor. At the bottom of the main area is a section titled "Projects and Archives" with a brief description: "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." The entire interface is set against a light blue background.

Lifecycle Manager – new feature validation



IBM Cognos Lifecycle Manager

SAP - Dynamic Query Test

Tasks

- Validate in Source
- Run in Source
- Validate in Target
- Run in Target
- Output Comparison

Dashboards

- Tasks Summary

Validate in Source

Name	Status	DQM enabled	Progress	Options

Configure

Basic Security Advanced Preferences

Project

Project name: SAP - Dynamic Query Test

Import Content

Project: [dropdown]
Instance: [dropdown]

Application

Source		Target	
Name:	C10	C10 - DQM	
Gateway URI:	http://TP-MASSONW7/ibmcognos/cgi-bin/cognos.	http://TP-MASSONW7/ibmcognos/cgi-bin/cognos.	
Dispatcher URI:	http://TP-MASSONW7:9400/p2pd/servlet/dispatch	http://TP-MASSONW7:9400/p2pd/servlet/dispatch	
Version:	10.1	10.1	
Max connections:	4	4	

General information

Search path: /content/package[@name='SAPBW']

Save Cancel

Launch Source Portal
Launch Target Portal

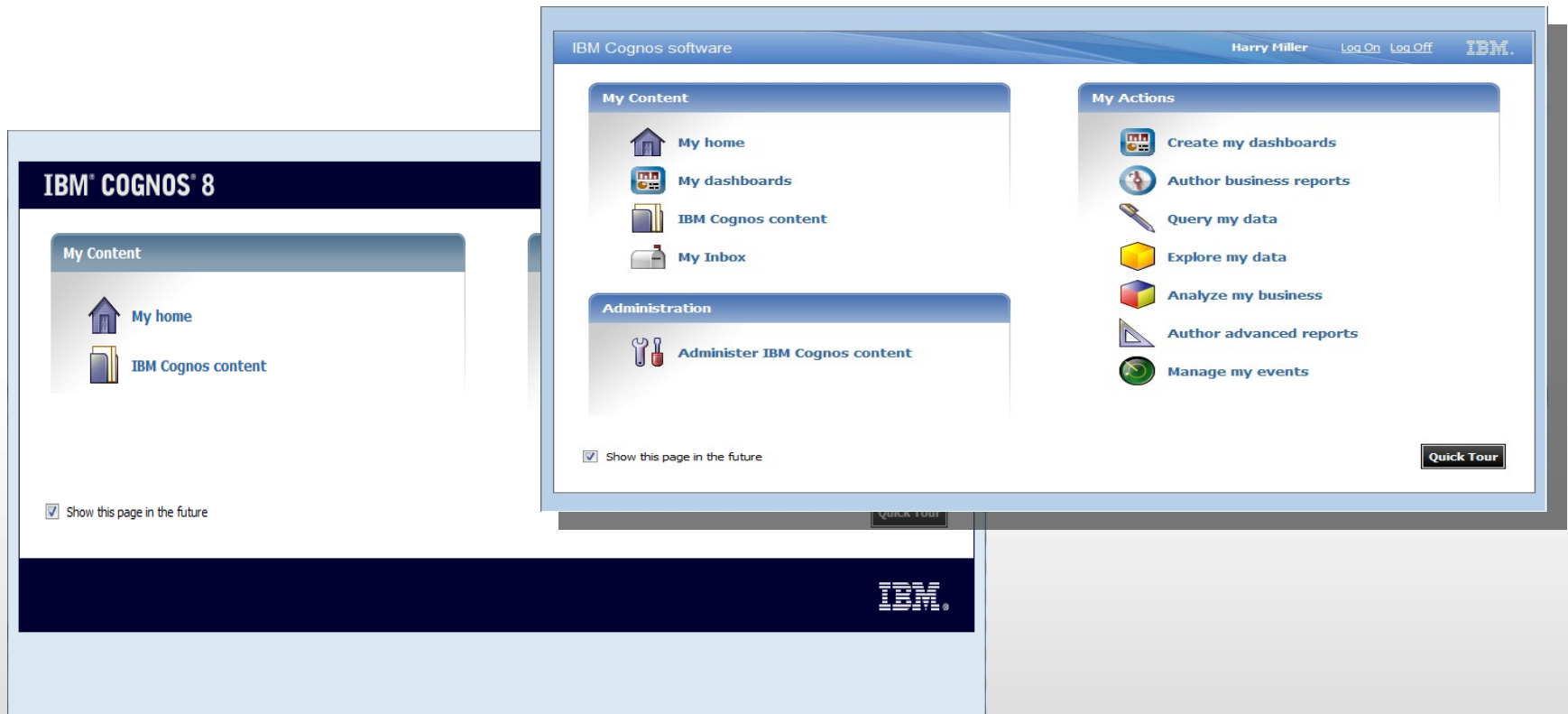
Finished walking source content manager.
Walking target content manager ...
'Continental Product Breakdown' has been enabled.
'SAPBW' contains 4 report(s).
Counting total number of reports per package.



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



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



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

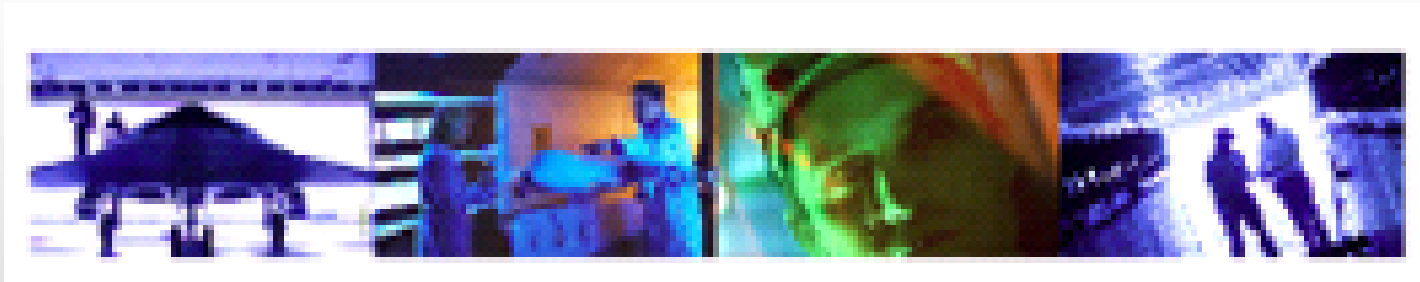
- **Content Store upgrade:**
 - Report upgrade tasks
- **Side by side installations:**
 - Same hardware
- **Moved all customizations:**
 - Well-documented by Boeing
- **Cognos configuration:**
 - Not exported, caused issues
- **Once development was completed:**
 - Approximately 10 users
 - Lifecycle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



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