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## Highlights

- Initiate your IBM Cognos Planning v10 upgrade with confidence and efficiency.
  - Installation and configuration of Cognos Planning in a supported environment.
  - Assess and execute the appropriate upgrade strategy.
  - Take advantage of the new Cognos Planning capabilities as part of your upgrade.
  - Use proven practices from IBM product experts with information transfer on the upgrade process.
  - Suitable for existing Cognos Planning customers who are planning an upgrade of Cognos Planning.
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# IBM Cognos Planning v10 Upgrade Initiate Service

## Considerations

For your planning teams to fully benefit from the new functionality of Cognos Planning v10, IBM helps you to understand how this version may improve performance and stability, enhance the user experience, and extend integration with other IBM Business Analytics tools. Your questions may include:

- What alternative upgrade strategies and approaches should we consider?
- What upgrade and validation process would be most suitable to minimize risk and accelerate deployment?
- Are there new server environment considerations, such as virtualization?
- How should the roll-out plan address user acceptance, administration, and performance?
- What do users need to know to help them plan and budget faster and more accurately?
- How should we modify our publish and reporting processes to take advantage of the new capabilities?
- Are there new proven practices for installing, configuring, or administering Cognos Planning v10?

## Overview

The IBM Cognos Planning Upgrade Initiate Service combines IBM's depth of knowledge on how best to upgrade to Cognos Planning v10 with our extensive installation and configuration experience. IBM will guide you to understand the differences from your current platform and help you to develop the strategy and plans for your upgrade. The Service then accelerates your upgrade process by establishing a supported environment as a strong foundation to further explore new Cognos Planning v10 features, which will help uncover new opportunities and leverage your Cognos investment throughout your organization.



Working collaboratively with your team, IBM Services will:

- Determine an appropriate upgrade strategy based on your existing Cognos Planning environments.
- Upgrade selected Cognos Planning applications in your supported Cognos Planning v10 environment.
- Develop a high-level Application Validation Plan for selected Cognos Planning applications.
- Validate a specific dataset in your Cognos Planning v10 applications.
- Conduct a Cognos Planning v10 New Features Workshop to explore new capabilities.
- Recommend a go-forward strategy for rolling out your Cognos Planning v10 environment for production use.

The value of this Service includes:

- Accelerate the time-to-value for your upgrade initiative.
- Uncover opportunities and increase user adoption of new capabilities in Cognos Planning v10.
- Reduce risk with well-defined upgrade, validation, and roll-out plans.
- Build expertise on current installation and administration, while developing standards and proven practices.

## Activities & Deliverables

The IBM Cognos Planning v10 Upgrade Initiate Service encompasses the following activities and deliverables:

### Scoping and Kickoff

In order to establish a clear scope of activities specific to your needs, this Service begins by discussing with key business and IT stakeholders the reasons for upgrading to Cognos Planning v10. IBM captures requirements and identifies opportunities to leverage new Cognos Planning v10 features.

We will work with your key stakeholders to:

- Discuss alternative upgrade strategies:
  - A staged “new environment” approach
  - An in-place development environment upgrade (multi-environment) approach
  - An in-place single environment upgrade approach
- Discuss objectives and priorities for the engagement

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### New Features in IBM Cognos Planning v10.1 and v10.1.1:

The new features in Cognos Planning v10.1 and v10.1.1 result in greater accuracy and reduced cycle times for planning and budgeting.

Significant performance and stability improvements:

- Smaller model size results in up to 75% less data to download to Contributor web client.
- Improved administrative task performance (up to 20x faster) and enhanced workload management.
- Lower and more predictable storage volumes — up to 90% less storage required.

Additional functionality for Contributors:

- Multi e.list view at workflow page allows personalized perspective on plan elements for contributors with multiple responsibilities.
- Enhanced view of hierarchies in the web grid allows for greater speed in planning and analysis.
- Users can save e.list views and favorites so they can quickly return to where they last worked with fewer clicks.
- The ability to batch system links, allowing for accurate execution of multiple links ensuring data accuracy.

Easier and faster data transfer for reporting and uploads:

- Publish to text for fast transfer to Cognos TM1 and other OLAP tools.
- Publish to Cognos TM1, plus equivalent Contributor rights.
- Conformance with Cognos Business Intelligence 10.2.
- Direct business user access to SAP BW.

The improved performance and stability of this release should result in positive benefits for nearly all Cognos Planning clients as compared with previous releases.

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### Environment Upgrade

This work stream is focused on upgrading your Cognos Planning environment and applications. We will review your existing Cognos Planning environment and applications for readiness to be upgraded, identify risks, and assess complexity for a successful upgrade. After checking the hardware, operating system and other software in the environment for conformance with requirements of Cognos Planning v10, and securing a backup of the applications, we will upgrade the environment and associated applications. We will test services, connections, and processes in the upgrade environment to ensure they are configured and operating properly. Finally, we will provide an *Installation Document* that details the upgrade steps and software configuration.

### Application Validation

Prior to the environment upgrade, we will work with your team to create an *Application Validation Plan* for a selected set of Cognos Planning applications, specific data sets, processes, security, administration links, macros, publish definitions, and Planning reports. After the environment upgrade we will work with you to validate the applications using this document. You can leverage the *Application Validation Plan* for new applications, or more in-depth validation as you develop new applications, that you will migrate between development, test, and production environments, or data validation as you publish for reporting to Cognos TM1 or Cognos Business Intelligence—a valuable feature enhanced in Cognos Planning v10.

### New Features Workshop

With the upgraded environment and applications in place, we will conduct a Cognos Planning v10 New Features Workshop with your Cognos Planning administrators and appropriate users. This workshop will be tailored to how you use Cognos Planning, with focus on new features and capabilities that could be most beneficial. Emphasis will be placed on Cognos Planning Contributor web client, administration tasks, other features introduced since your previous release, and integration with any associated licensed Cognos components such as Cognos TM1 v10, Cognos Insight, and Cognos BI v10, in the context of your upgrade.

### Project Completion

At the completion of the Service, you will have a Cognos Planning v10 environment and upgraded applications as a starting point for exploring new features and capabilities. We will provide an *Upgrade Initiate Closure Document* with observations, findings, and recommendations to fully implement Cognos Planning v10 and take advantage of the new features. We will also provide an *Education Recommendations Document*, developed collaboratively by IBM education specialists, which will serve as a reference of available education options and programs, and a tailored training recommendation specific to your solution.

### Engage Today

The IBM Cognos Planning v10 Upgrade Initiate Service is best for existing Cognos Planning customers who are currently planning to initiate an upgrade to Cognos Planning v10. This Service is available on a Time-and-Material basis. Details are available from your IBM Business Analytics Software Services Sales representative.

If you are using IBM Cognos BI with your Cognos Planning implementations and require an upgrade of Cognos BI to the latest release, consider the [IBM Cognos BI v10 Upgrade Initiate Service](#) as a complement to this service. Your Software Services Sales representative can assist you with how these services can be combined.

If you are instead conducting a new implementation of Cognos Planning v10, rather than upgrade from an existing Cognos Planning environment, please contact your Software Services Sales representative to discuss new implementation services and Guardian Services. Other services offerings for Cognos Planning, as well as other IBM Business Analytics services, can be found at [ibm.com/software/analytics/Cognos/services](http://ibm.com/software/analytics/Cognos/services).

## About IBM Business Analytics Software Services

As an integral part of Business Analytics software division within IBM Software Group, the Business Analytics Software Services organization provides education and expert services exclusively focused on the Business Analytics product portfolio. Our depth of experience and extensive proven practices help customers maximize their software investment, mitigate risks, raise the quality of their implementations, and build valuable skills. We have provided training, guidance, advice, reviews, assessments, and assistance to thousands of clients around the world helping to ensure their business analytics implementations are optimized to take full advantage of our product capabilities.

## About IBM Business Analytics

IBM Business Analytics software delivers data-driven insights that help organizations work smarter and outperform their peers. This comprehensive portfolio includes solutions for business intelligence, predictive analytics and decision management, performance management, and risk management.

Business Analytics solutions enable companies to identify and visualize trends and patterns in areas, such as customer analytics, that can have a profound effect on business performance. They can compare scenarios, anticipate potential threats and opportunities, better plan, budget and forecast resources, balance risks against expected returns and work to meet regulatory requirements. By making analytics widely available, organizations can align tactical and strategic decision-making to achieve business goals. For further information please visit [ibm.com/business-analytics](http://ibm.com/business-analytics)

### Request a call

To request a call or to ask a question, go to [ibm.com/business-analytics/contactus](http://ibm.com/business-analytics/contactus). An IBM representative will respond to your enquiry within two business days.



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