Best Practice in IBM Cognos BI Upgrade Process

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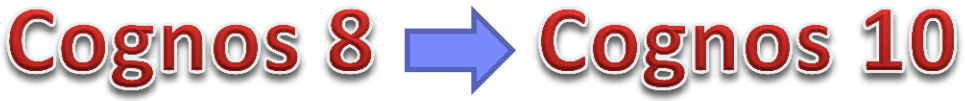
Agenda



- Upgrade Approaches
- Upgrade Workflow
- Overview of Life Cycle Manager
- Upgrade Proven Practices
- Upgrade Resource Available
- Questions?

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The Upgrade

- Reason to upgrade
  - Business and Users
    - New Features
    - New Functionality
  - Architecture/Hardware/Software upgrades
  - To Fix issues with current release
  - End of support
- Challenges with upgrading
  - Not much clarity on Upgrade procedure
  - upgrades costs
  - Time to evaluate reports

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Upgrade Approaches

Upgrade all your Content Store at once

- Move all of your content quickly .
  - Take Backup by DB backup and deployment export
  - Create new Content Store for Cognos 10. Import deployment export.
  - Use IBM Cognos Lifecycle Manager to compare and validate reports between two versions.

Upgrade in Staged Approach

  - Upgrade in stages by using *IBM Cognos Multi-Version Coexistence*
  - Enables you to access both versions of the software through the IBM Cognos 10 portal
  - Useful when you have scarce resources

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The Supported Upgrade Path

- Upgrade first, then leverage New Features

Phase 1

Leverage Cognos 10 New Features

Phase 2

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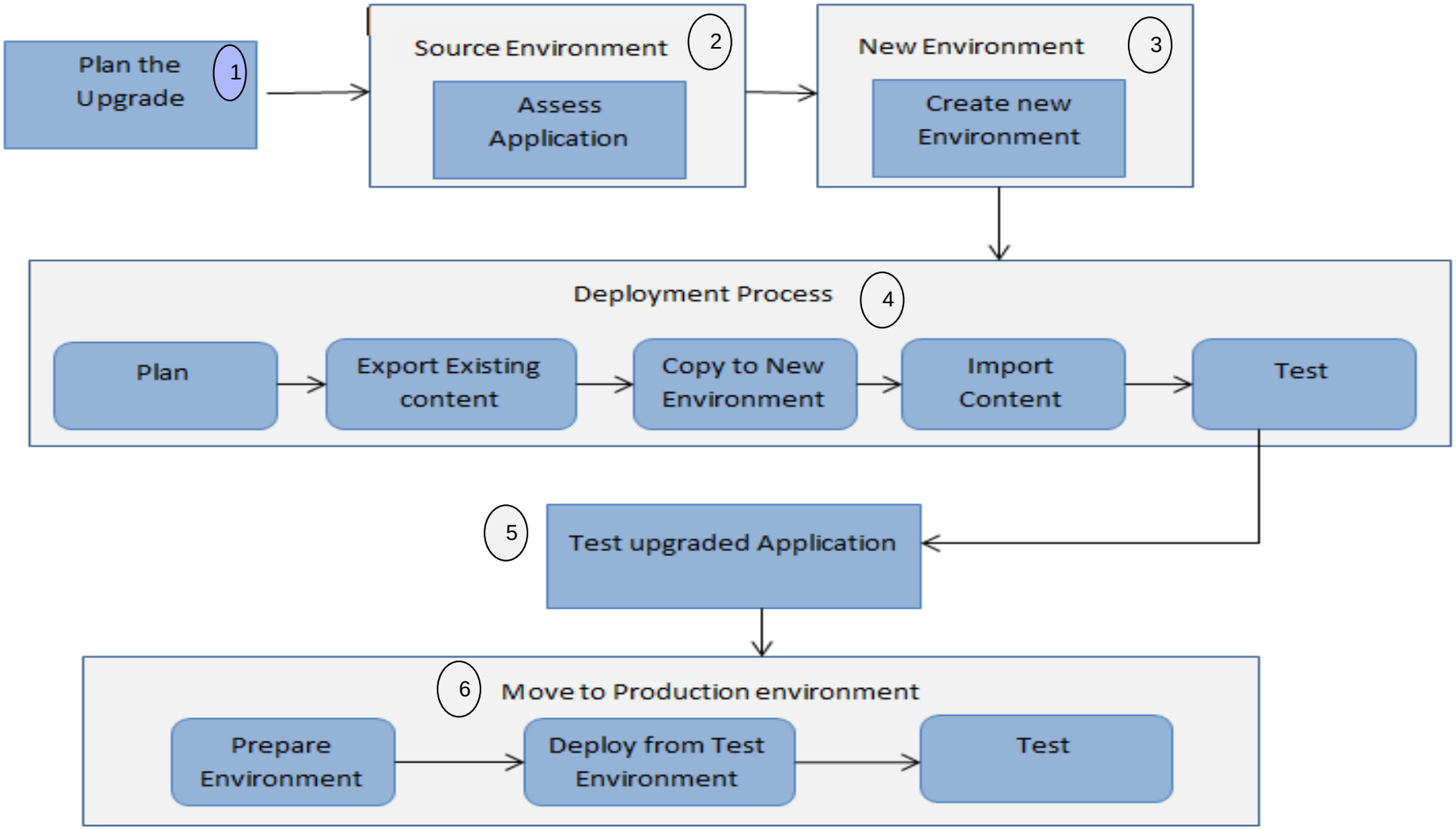
Upgrade Process Workflow



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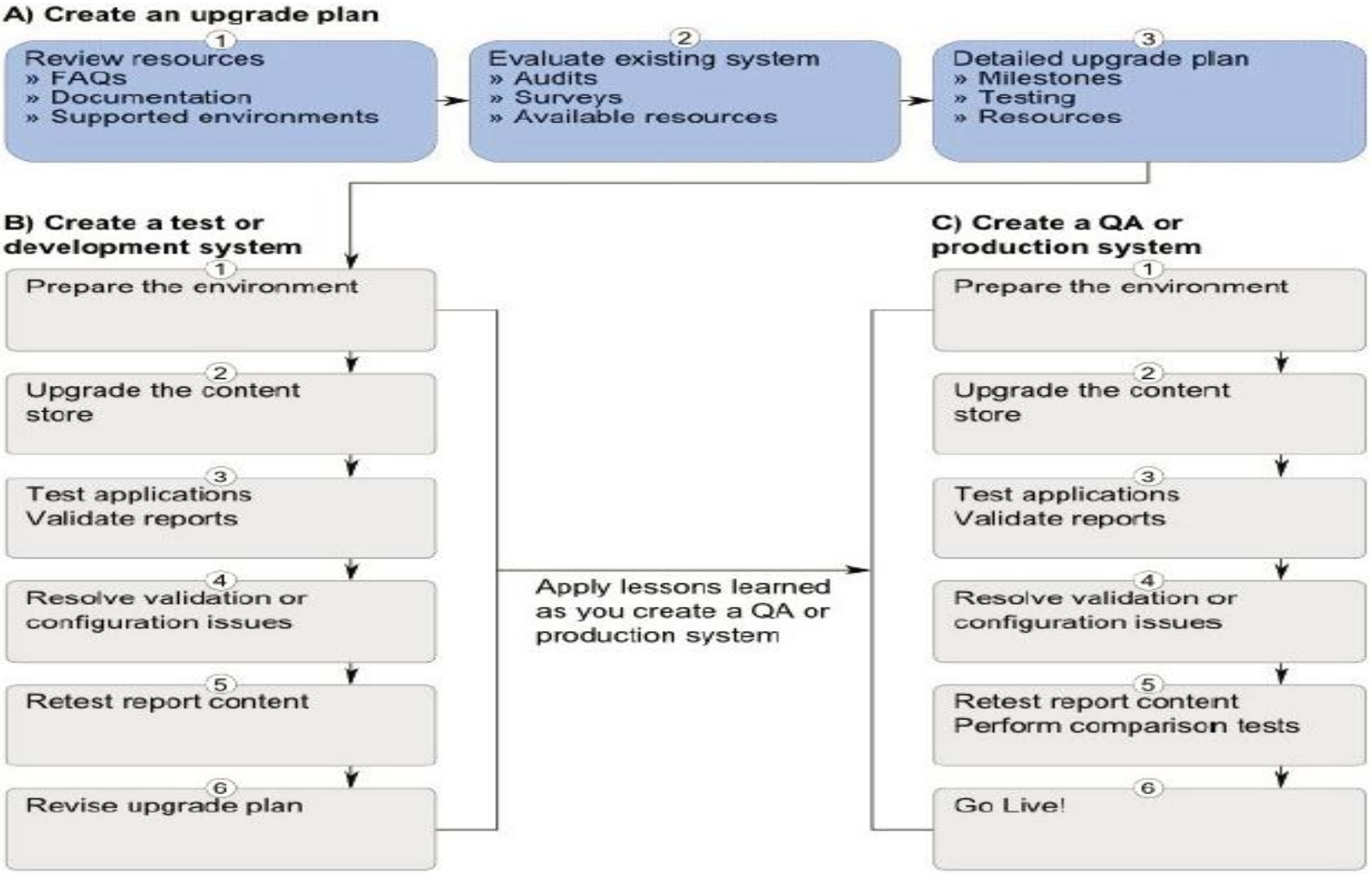
The Upgrade Workflow



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Overview Of Lifecycle Manager

- Helps you manage the validation of report content
- Validates reports by comparing their output
- Any supported output format
- Types of reports:
  - –Report Studio
  - –Query Studio
  - –Analysis Studio
- Easily configurable to many environments .
- At a given time references two environment.
- Allows you to easily benchmark and retest once issues are identified and fixed
- Reduce the time it takes to validate a large volume of reports during the upgrade process

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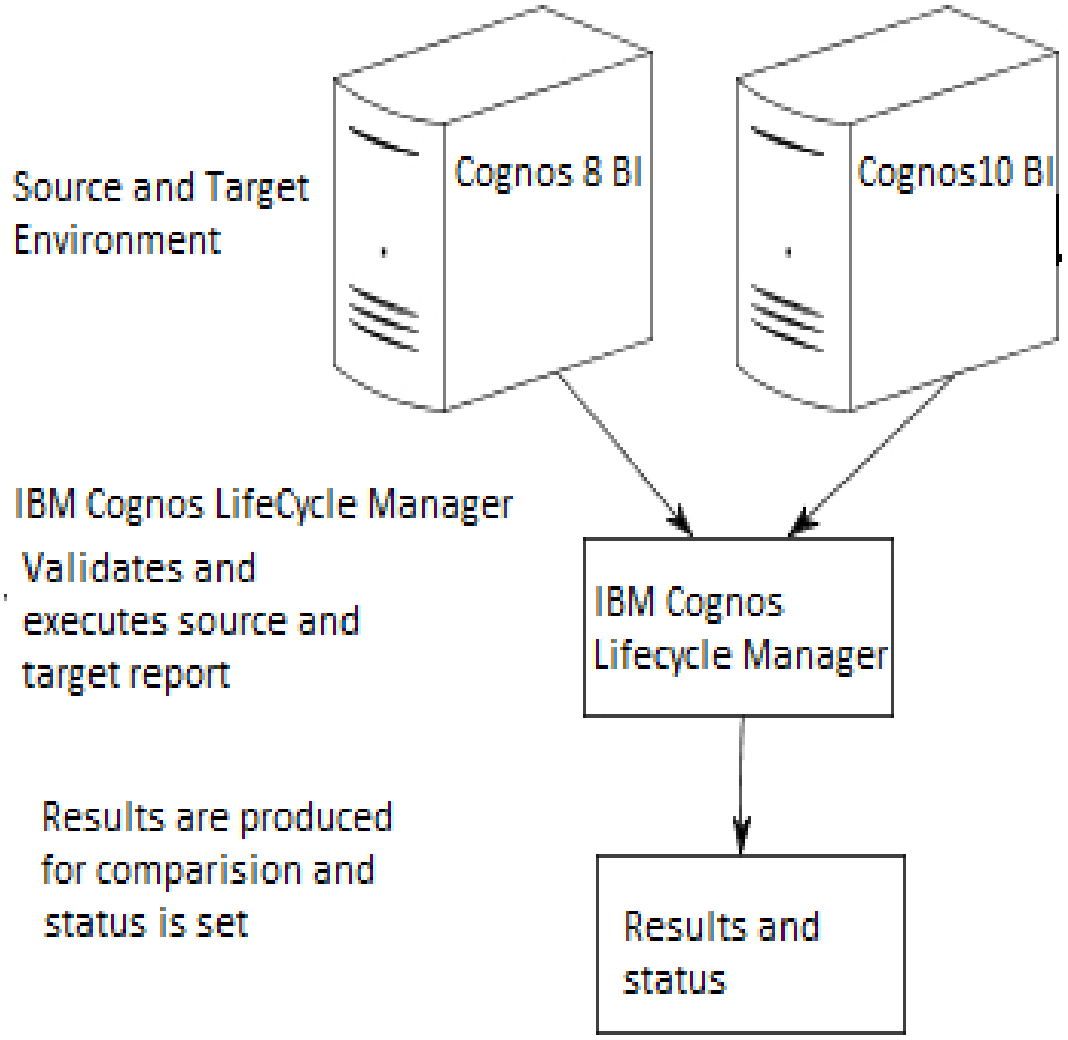
How Lifecycle Manager Works

- validates and executes reports in both environments, and then compares them
- tests report output only by comparing results from one release (the source) to another (the target)
- does not test any other aspects of the upgrade such as configuration, the studios, IBM Cognos Connection, skins, and customizations
- does not perform the actual product or report upgrade



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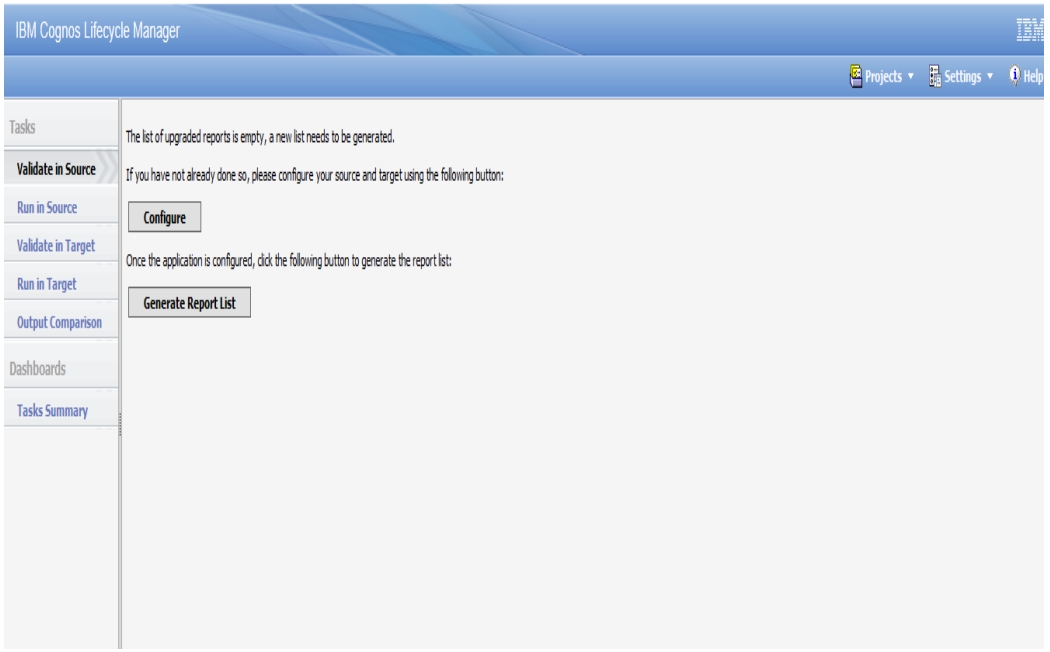
How Lifecycle Manager Works

- Create a new project
- Configure to use Source and Target Environment
- Generate the Report List
- Tasks performed by Lifecycle Manager
  - Validate the Report in Source
  - Run in Source
  - Validate in Target
  - Run in Target
  - Output Comparison



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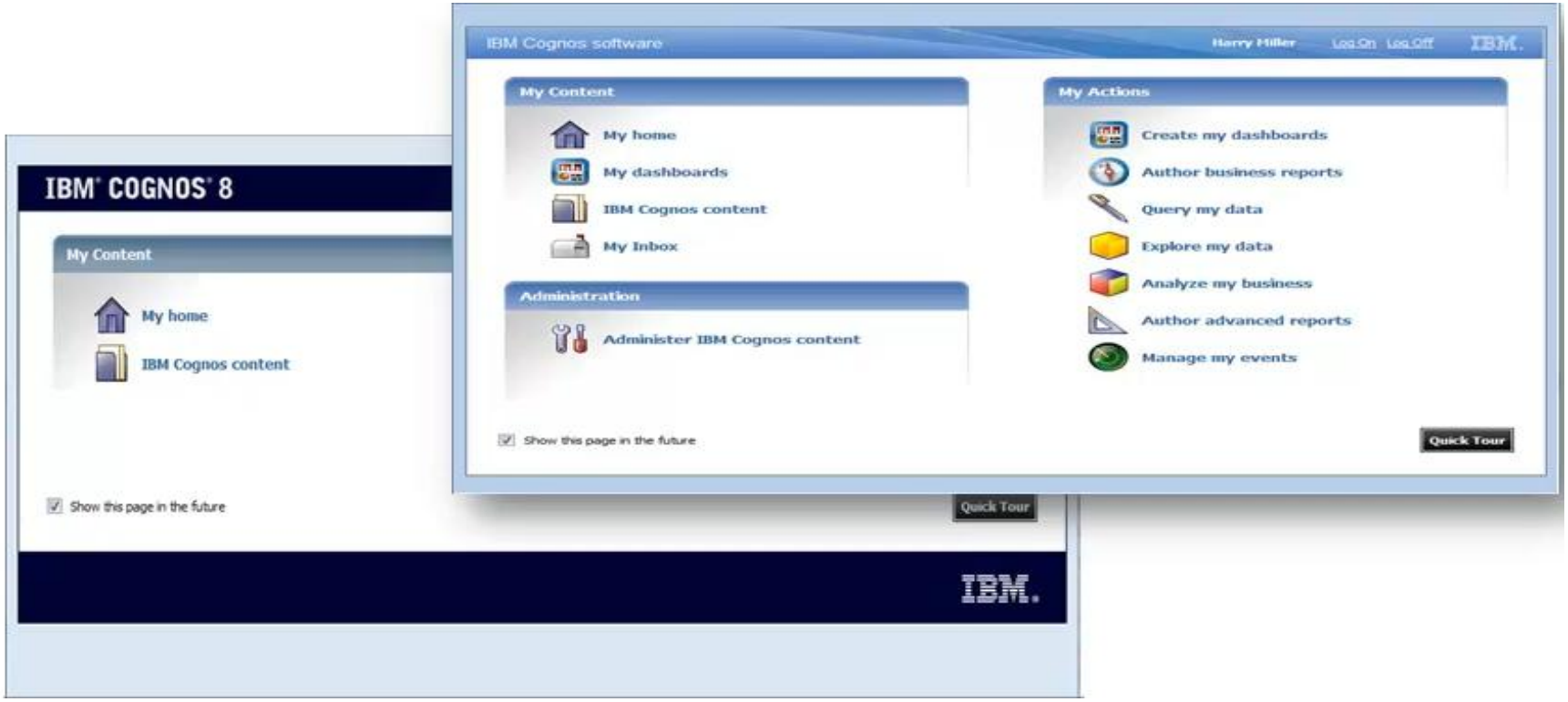
Multi-version coexistence

- Single interface for users
  - Users have access to two versions through single common portal
- Allows Cognos 10 to server Cognos 8.3, 8.4, 8.4.1 contents
- Allows Administrator to upgrade Cognos in stages.



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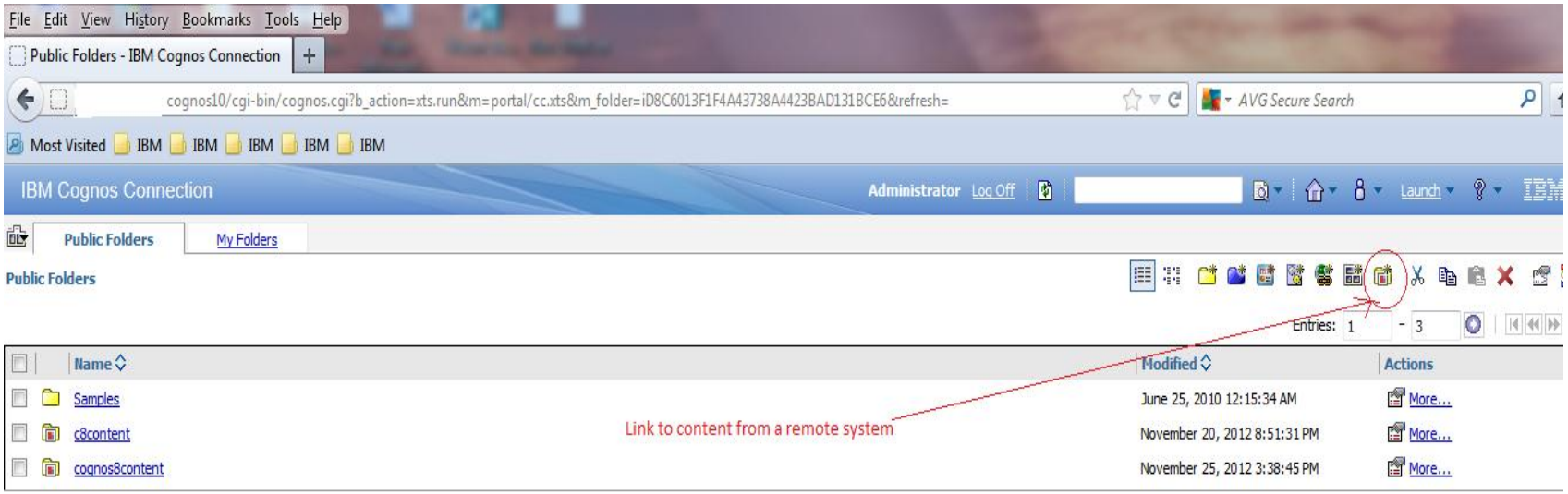
Multi-version coexistence

- Configure Cognos 10 and Cognos 8 to avail Multi-version coexsistence feature
  http://www-01.ibm.com/support/docview.wss?uid=swg21459041
- Cognos 8 is running the report and Cognos 10 is displaying it.



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Some Upgrade Proven Practice

- **The plan:**
  - Dedicated resources
  - Commitment
- **Consistency check:**
  - Before and after upgrade
  - Like “cleaning house”
- **Cognos configuration:**
  - Should be exported/imported
  - Simple typo can cause delays
- **Customizations:**
  - System Files (system.xml)
  - Create/maintain documents of modifications
- **Be aware of new features and functionality:**
  - i.e. Go Search and content indexes
- **Release notes**
  - APAR Search
  - Fixlists
- **Report validation**
  - Lifecycle Manager
- **Upgrade website**
  - FAQ’s, demos, links etc

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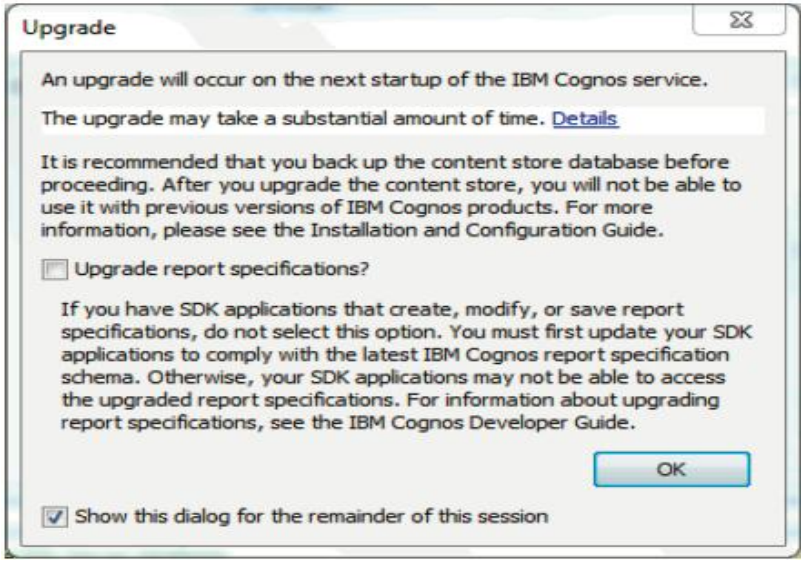
Content Store

- Database Back up, Deployment export of entire Content Store on regular basis.

- Database upgrade only
  - Backup the Cognos 8 Content Store
  - Create a new Database/schema for Cognos 10 Content Store
  - Restore the Cognos 8 Content Store into the new Cognos 10 Content Store db
  - Point Cognos 10 to use restored Content Store.

- Recommended not to upgrade Reports at Startup

- Content maintenance task
  - upgrade reports at a later time
  - Use Administration Console create
  - Report Upgrade Tasks.



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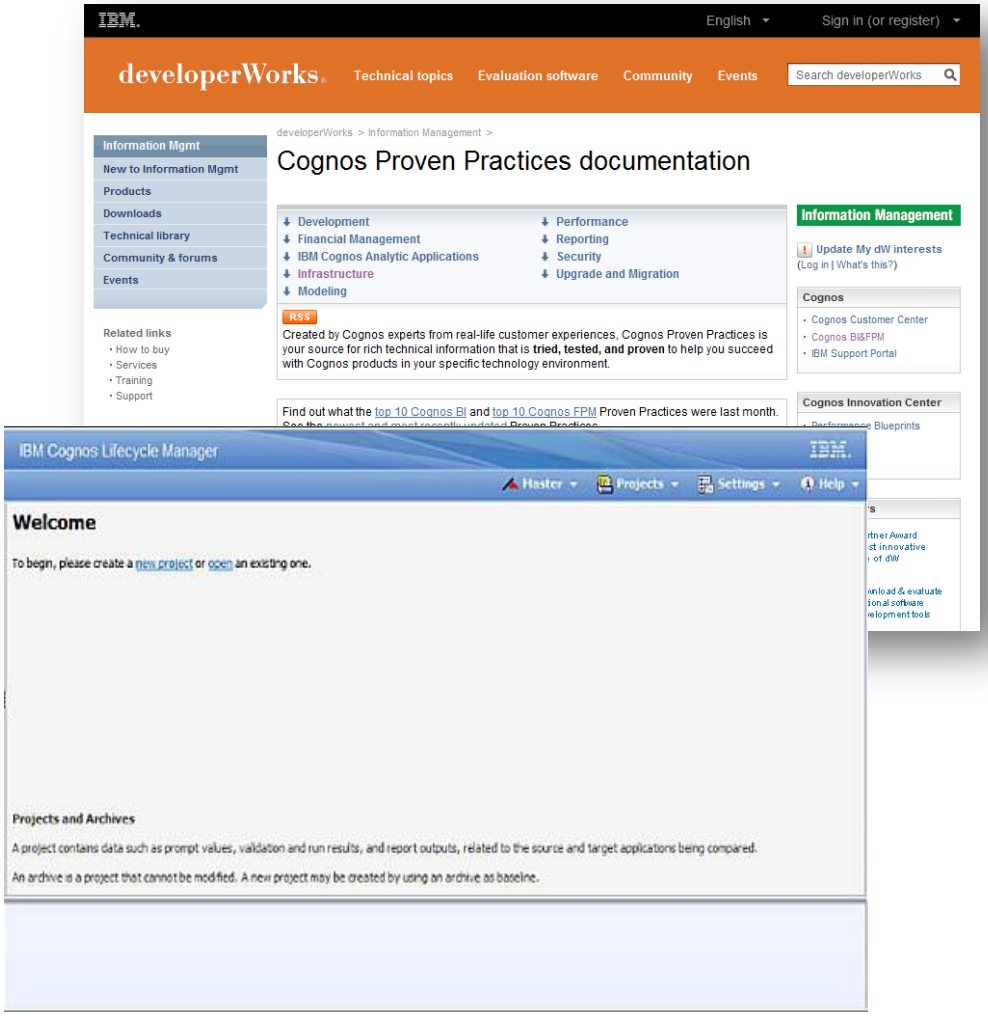
Upgrade Resources Available

- **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 (staged approach):**
  - Content continuity



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Reference Links

- Proven Practice Link - http://www.ibm.com/developerworks/analytics/practices.html
- Information Center - http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp
- Lifecycle Manager Demo - http://www.youtube.com/watch?v=G6Dd9XOjeyE
- Multiversion Coexistence Demo – http://www.youtube.com/watch?v=kD7J5fZY-n8
- Technote for Multiversion Coexistence –

  http://www-01.ibm.com/support/docview.wss?uid=swg21459041

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Q & A Session

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