

# Best Practice in IBM Cognos BI Upgrade Process



## Cognos Open Mic Team



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# Agenda

**Cognos 8**  **Cognos 10**

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

## 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

## Upgrade Approaches

### Upgrade all your Content Store at once

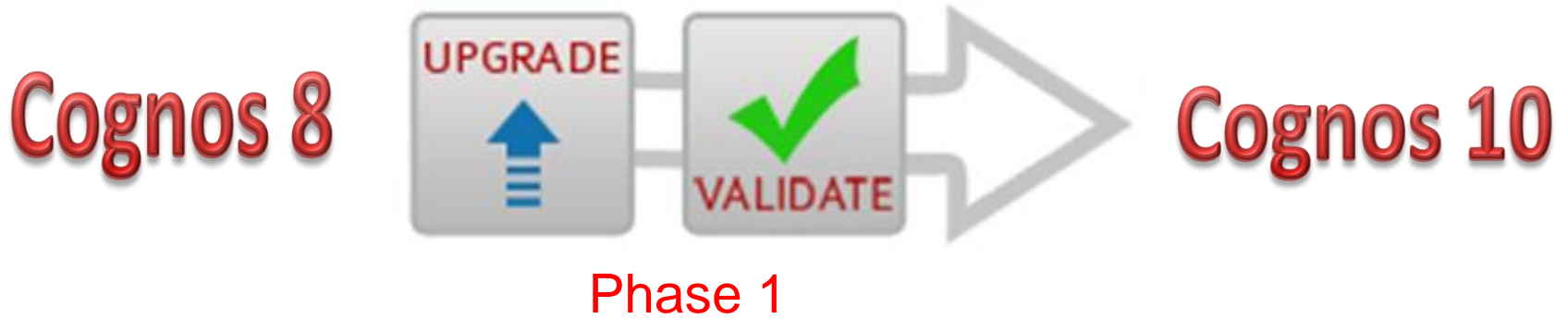
- Move all of your content quickly .
  - Take Backup by DB backup and deployment export
  - Create new Content Store for Cognos 10. Import deployment export.
  - Use IBM Cognos Lifecycle Manager to compare and validate reports between two versions.

### Upgrade in Staged Approach

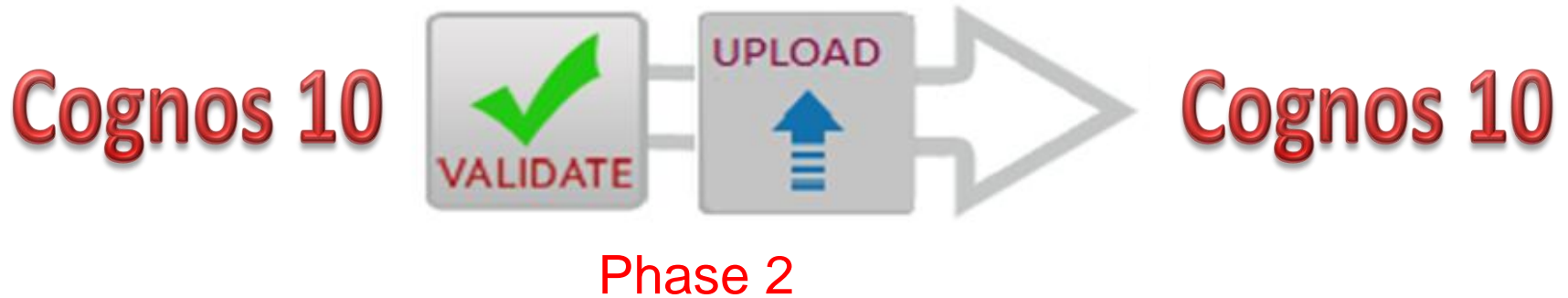
- Upgrade in stages by using *IBM Cognos Multi-Version Coexistence*
- Enables you to access both versions of the software through the IBM Cognos 10 portal
- Useful when you have scarce resources

## The Supported Upgrade Path

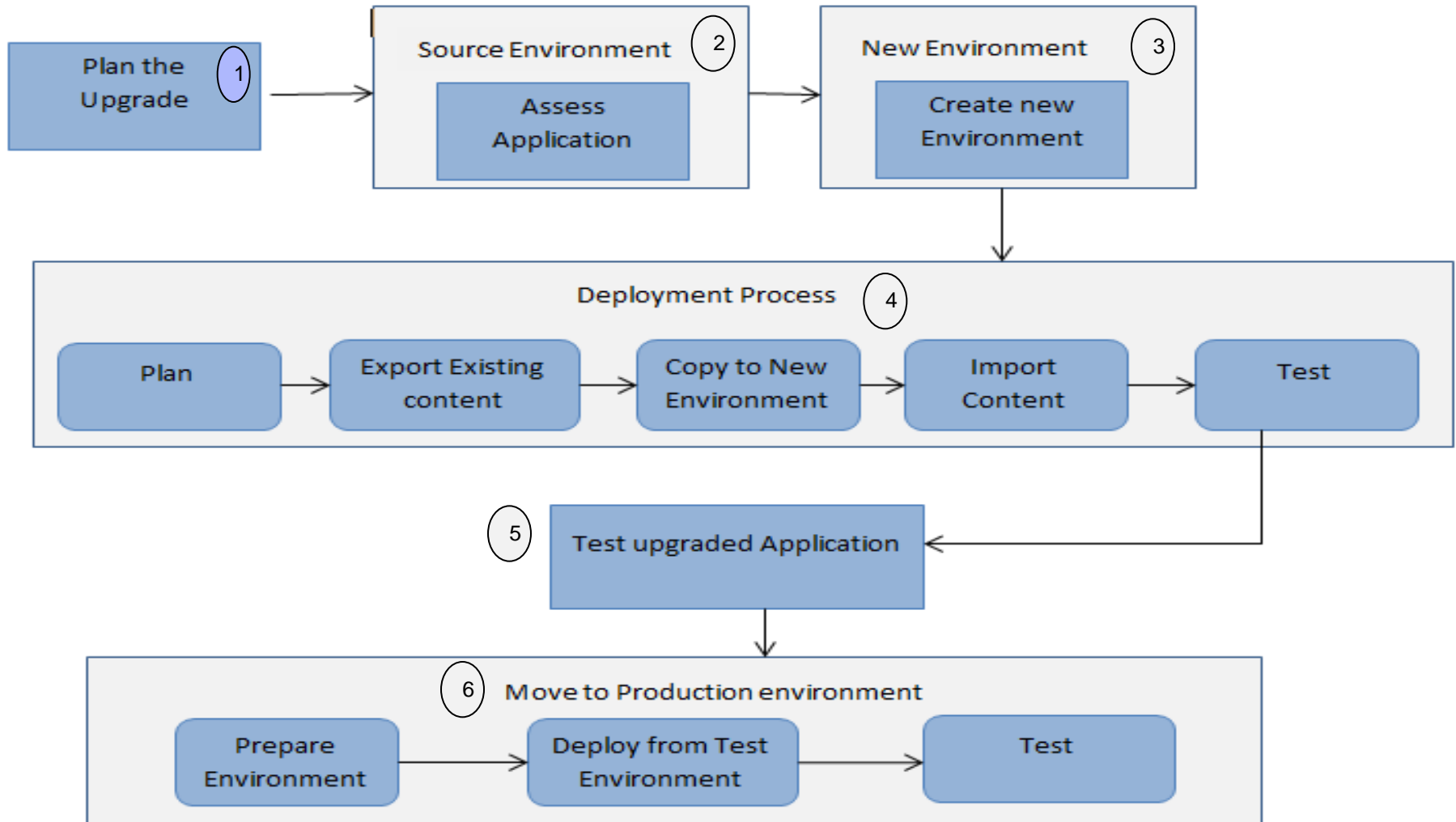
- Upgrade first, then leverage New Features



Leverage Cognos 10 New Features



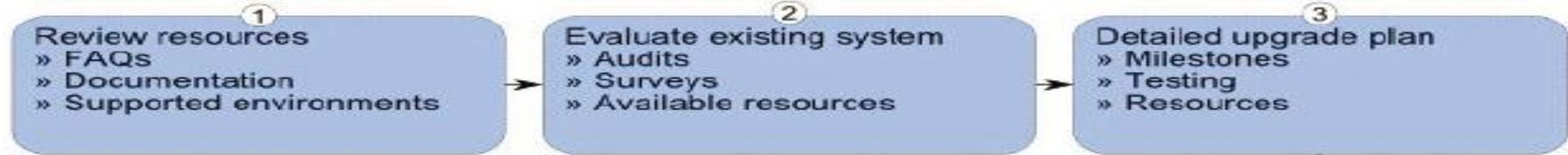
# Upgrade Process Workflow





# The Upgrade Workflow

## A) Create an upgrade plan



## B) Create a test or development system



## C) Create a QA or production system



Apply lessons learned as you create a QA or production system

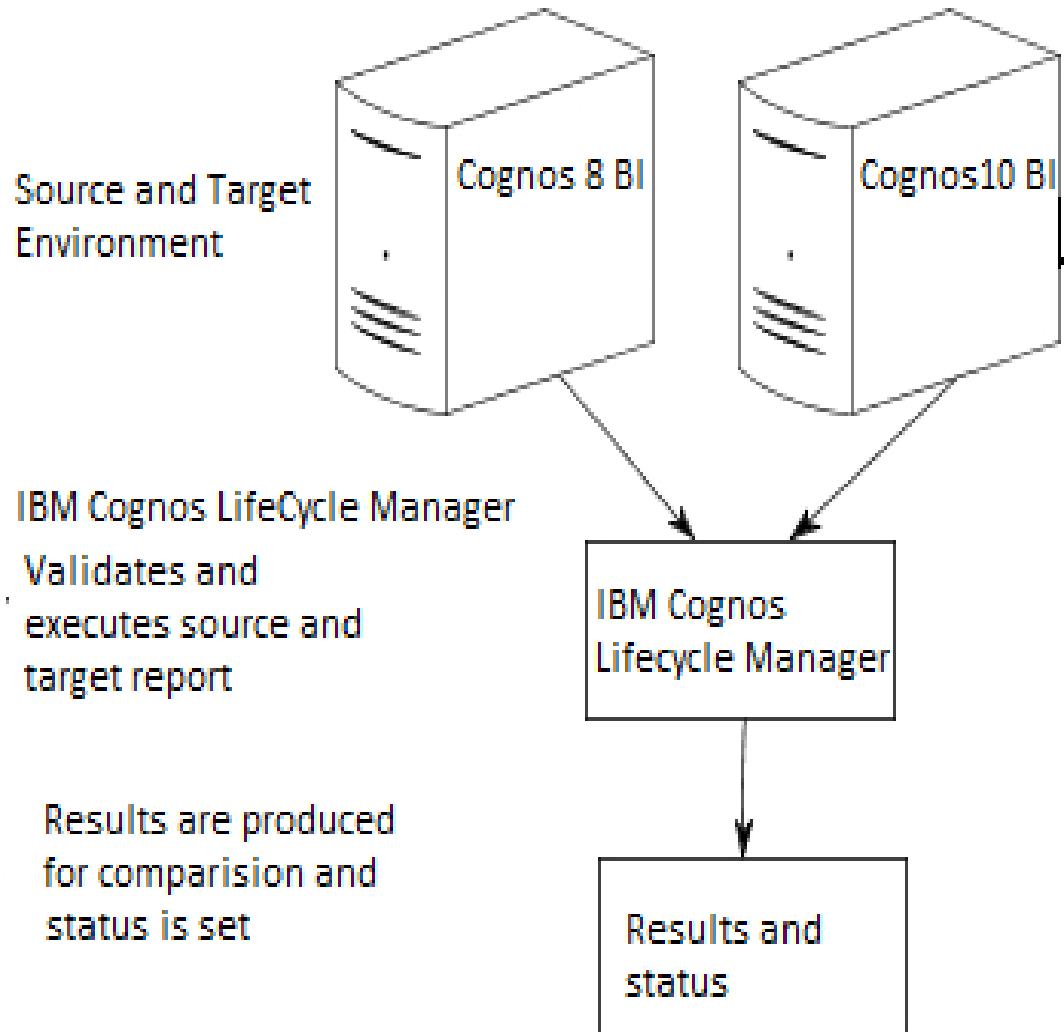


## Overview Of Lifecycle Manager

- 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

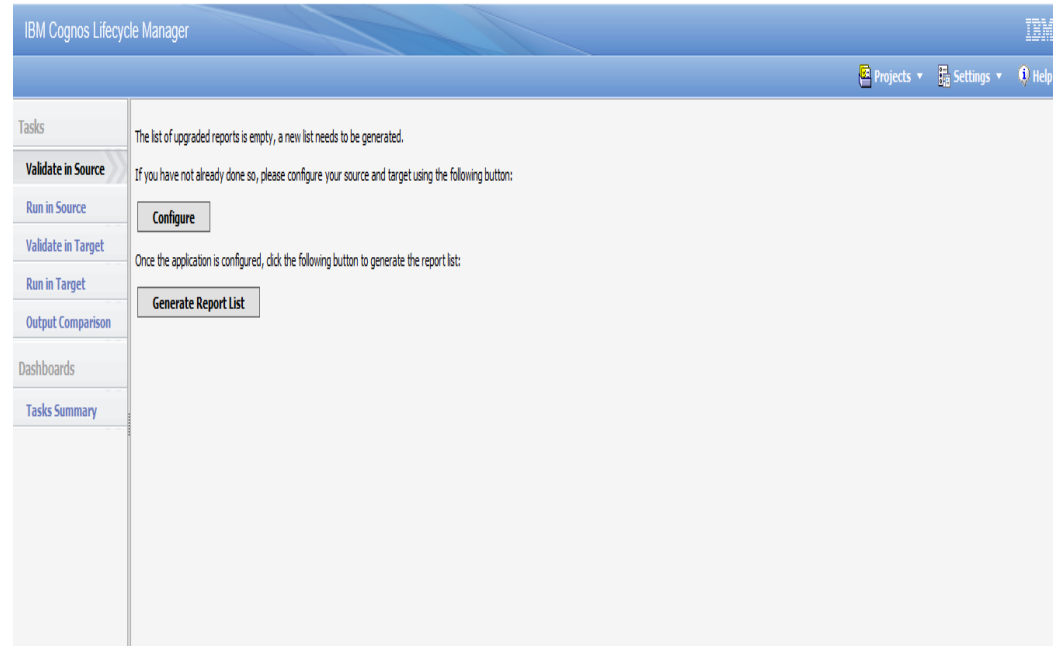
## How Lifecycle Manager Works

- 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



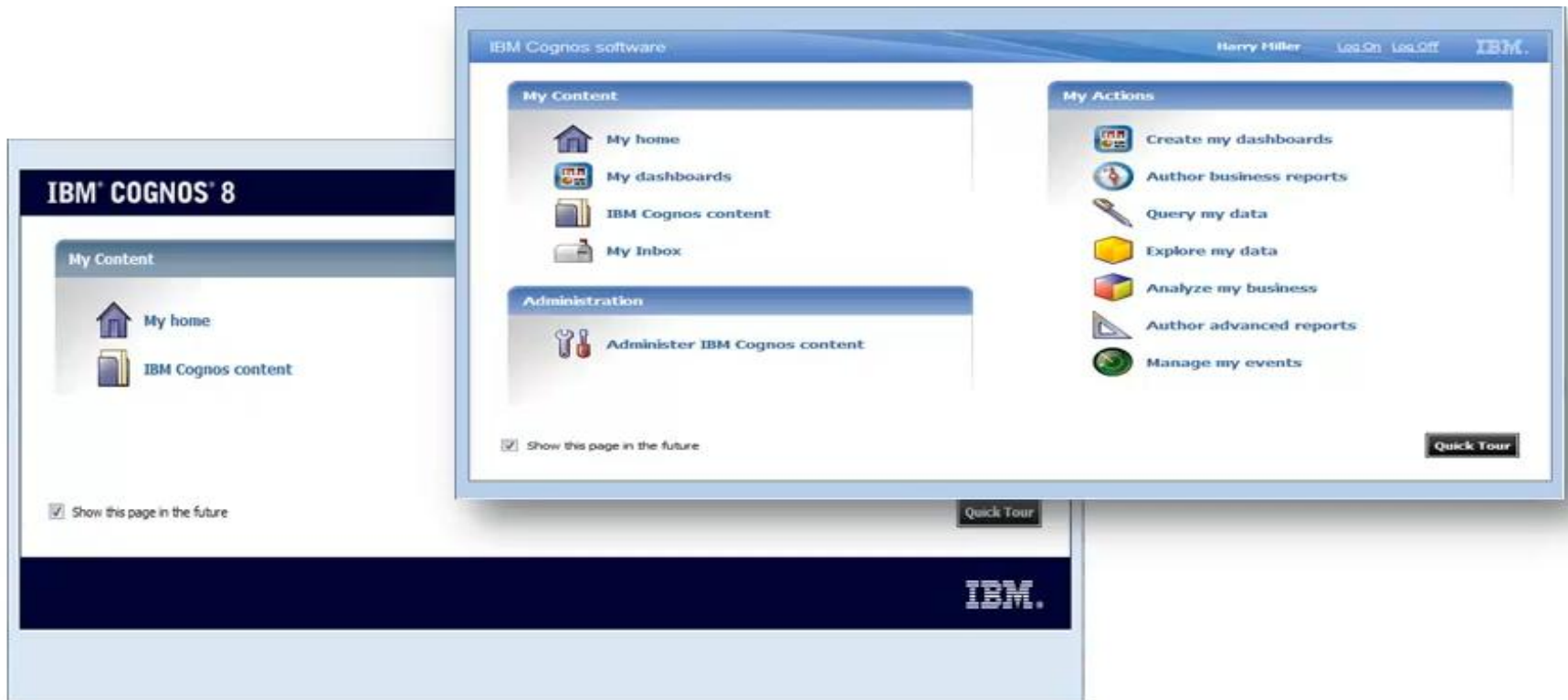
## How Lifecycle Manager Works

- 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



## 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.



## Multi-version coexistence

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

The screenshot shows the IBM Cognos Connection web interface. The browser address bar displays the URL: `cognos10/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/cc.xts&m_folder=id8C6013F1F4A43738A4423BAD131BCE6&refresh=`. The interface includes a navigation bar with "Public Folders" and "My Folders" tabs. Below the navigation bar, there is a table of folders. A red circle highlights the "c@content" folder icon, and a red arrow points from this icon to a red text label: "Link to content from a remote system".

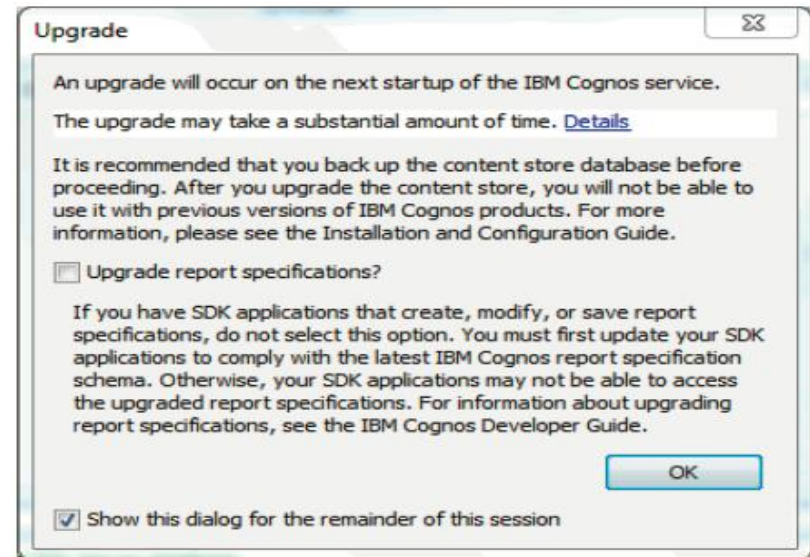
Name	Modified	Actions
Samples	June 25, 2010 12:15:34 AM	More...
c@content	November 20, 2012 8:51:31 PM	More...
cognos8content	November 25, 2012 3:38:45 PM	More...

## 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

## 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.





## 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

The image displays two screenshots related to IBM Cognos resources. The top screenshot is a browser view of the IBM developerWorks website. The page title is "Cognos Proven Practices documentation". The navigation menu includes "Technical topics", "Evaluation software", "Community", and "Events". A sidebar on the left lists categories like "Information Mgmt", "Products", "Downloads", "Technical library", "Community & forums", and "Events". The main content area features a grid of links for "Development", "Financial Management", "IBM Cognos Analytic Applications", "Infrastructure", "Modeling", "Performance", "Reporting", "Security", and "Upgrade and Migration". A "Cognos Proven Practices" section highlights that the information is "tried, tested, and proven". The bottom screenshot shows the "IBM Cognos Lifecycle Manager" application interface. It has a blue header with the title "IBM Cognos Lifecycle Manager" and a menu with "Master", "Projects", "Settings", and "Help". The main content area is titled "Welcome" and contains instructions: "To begin, please create a [new project](#) or [open](#) an existing one." Below this, there is a section titled "Projects and Archives" with explanatory text: "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."

## 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>

# Q & A Session

Thank You