valantic

Upgrade IBM Cognos Analytics Quickly and Easily!

Foreword

Dear Reader:

A new version of IBM Cognos Analytics will be available soon. After Version

11.1.7 with long-term support, IBM will release a new version in the second quarter of 2021. Surely you're already looking forward to the new functions, new visualization possibilities, and increased use of AI components. Maybe you're still using an older version of IBM Cognos Analytics and you'd like to upgrade to Version 11.1.7? Whatever you decide: **An upgrade of IBM Cognos Analytics will happen soon.**

Upgrades are a good thing. Each new version offers concrete added value. But when big upgrades are due, it's important to implement them quickly and well. An upgrade can be complex and especially costs time, and thus money! Downtimes due to a migration and incorrect reports can be company-critical. In this case, the goal is not the journey. **The goal is to complete the upgrade as quickly as possible, transparently, in accordance with company guidelines, and as well as possible.**

For migrations and regular updates, valantic recommends automated support from Motio's software solutions.

An upgrade with Motio solutions is done in four easy steps:

• Clean-up and cleansing of the IBM Cognos Analytics content stores

• Automated testing and validation of reports

• Versioning of report changes

• One-click deployment of all changes

This white paper will demonstrate how an upgrade can be implemented quickly using automation. This way, you will save time, money, and nerves and you can devote yourself to the concrete added value of the latest IBM Cognos Analytics version more quickly.

We wish you fun reading this white paper

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Martin W. Vierrath supports and is responsible at valantic for the sales of business analytics solutions - from the data source to the front-end solution. The company's portfolio ranges from license advising and development to implementation, customer-specific adjustments, individual trainings, and first- and second-level support.

Key Facts

More than 1,000 customers around the world use Motio solutions for smooth upgrades. The software publisher IBM - valantic's strategic partner - has also been a customer of Motio since 2011 and has offered Motio's solutions in its own portfolio since the beginning of 2021 based on its outstanding experiences.

The furthest-reaching automation of an IBM Cognos Analytics upgrade results in time savings of up to 70%. This is understandable if you can have Motio clean out your content store before the upgrade, eliminating half the unused or incorrect reports, and then test the reports automatically.

The result is a completely cleaned-up content store, which guarantees the performance and validity of IBM Cognos Analytics and slims down future upgrades massively.

Companies can do this thanks to valantic's years of experience with the combined use of Motio solutions.

1000
Enthusiastic customers use Motio's solutions

Up to
70 %
Time savings when using Motio solutions

100 %
Cleaned-up, cleansed, and validated reports

Contents

Checklist: is Motio right for my company?

Before we provide practical insight into the functioning and added value of Motio solutions, first, you must ask yourself the following question: Is Motio right for me and my requirements?

To answer this question, take a look at our checklist:

☐ I have more than 100 reports in the Cognos content store.

☐ I don't know how many unused reports there are in my content store.

☐ I have many complex reports.

☐ My last migration took longer than a week.

☐ I have had bad experiences with Cognos migrations.

☐ I was frequently not able to complete my previous migration project plans.

☐ I have little overview of changes and frequently cannot detect the source of errors.

☐ Migrations are not projects for our company; instead, they have to be done "on the side."
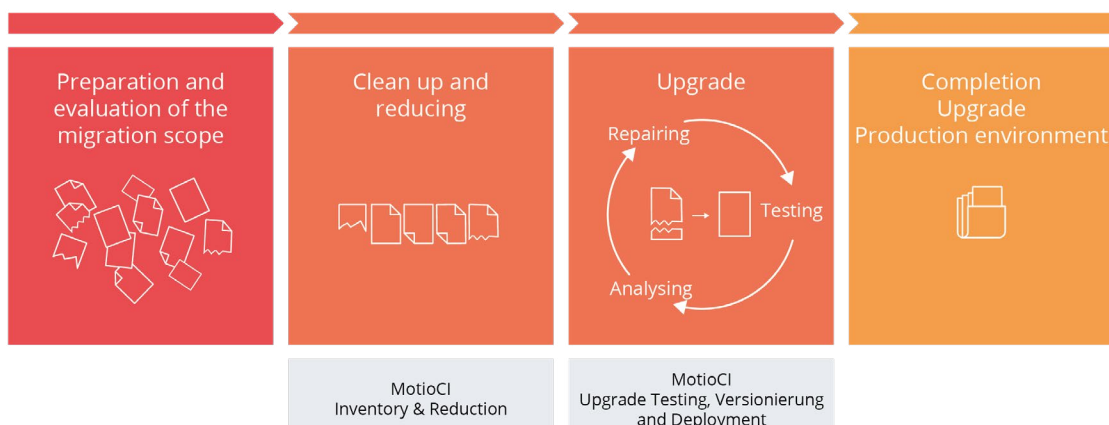
If you answered more than three of these questions with "yes," then you've found the right partner in valantic's consulting experts and you should take a closer look at the possibilities offered by the Motio solutions.

Learn in our concrete use cases how Motio can help you with your next IBM Cognos Analytics upgrade and effectively automate your processes.

Motio in practice: here's how companies are automating the next upgrade of IBM Cognos Analytics

valantic uses Motio's solutions for all migrations to new new IBM Cognos Analytics versions. In the process, we have developed a best-practice approach taking into account the following Motio solutions, which we will describe in detail below.

Preparation and evaluation of the migration scope	Clean up and reducing	Upgrade	Completion Upgrade Production environment
	MotioCI Inventory & Reduction	MotioCI Upgrade Testing, Versionierung and Deployment	

Process description of a migration project with Motio solutions

What are the four steps of a successful and efficient migration?

First, it's important to **clean up** thoroughly and remove unneeded and incorrect reports before the upgrade in order to concentrate on the relevant content. Motio helps the people in charge significantly **reduce** the scope of the initial migration.

The **testing** and **validation** of the reports to be migrated is the second fixed component of each migration. Done manually, these processes require a lot of time and can produce dubious results. By automating testing and validation, Motio eliminates stressful, error-prone, and expensive processes and prevents a possible production shutdown.

If in the course of reducing the initial migration scope reports are excluded by mistake, it is possible to make them available again through

versioning. And if enhancements to the current productive system are made during the IBM Cognos Analytics upgrade, the changes can be captured and integrated into the migration cycle later thanks to versioning.

Deployment is used to significantly reduce the time required for transferring Cognos reports between two environments.

The success of a migration can be guaranteed with the following steps:

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1

First step:
Inventory and cleansing of the
IBM Cognos Analytics content stores

With MotioCI Inventory and Reduction, Cognos content stores can be read out so that you get an extensive overview of the reports stored.

The person in charge of deploying MotioCI Inventory and Reduction has to answer the following questions:

☑ How many reports in total are there in the Cognos content store?

☑ How many reports are still valid and will run?

☑ Which reports can be deleted and thus removed from the scope of the migration?

☑ How many reports were used when for the last time?

☑ How complex are the reports (JavaScripts, HTML, SQL)?

☑ Which reports are really just copies (1:1 or very similar) of other reports?

IBM Cognos Analytics itself has no native opportunity for displaying or reducing the content of the entire content store. That's why the scope of the upgrade is unknown in most cases.

The first benefit of Motio CI Inventory and Reduction is to be able to develop an **optimal migration strategy**.

By analyzing the content store to be migrated, first the overall scope can be sized up and then it is possible to estimate how long the upgrade will probably take.

After that comes the **qualitative evaluation of the migration scope**. Here, reports that should be migrated - or not migrated

can be identified quickly. The departments responsible for the migration have the opportunity to define evaluation criteria (for example, the complexity of the reports) by themselves. Reports that should not be migrated disappear "in bulk" from the Cognos system with MotioCI Inventory and Reduction, regardless of the report folder in which they are located. The underlying **versioning** enables you to reactivate the reports at any time, even at a later point.

The focus with regard to tests and redesigns of reports is then only on the reports that migrate to the new Cognos environment.

By cleaning up the content store, you achieve two things: companies reduce the scope of the IBM Cognos Analytics content store, they can create an optimized migration plan, and save a lot of time during the upgrade. Furthermore, their content store is tidied, which stabilizes the performance of their IBM Cognos Analytics environment for the long term.

2

Second step:
Testing of the report validity between old and new IBM Cognos Analytics environment

The testing functionality is the central building block of MotioCI. It helps you conduct necessary tests of reports not manually, but with wide-ranging automation, which saves a lot of time. And this regardless of working hours (Motio can also run on the weekend).

The benefits of testing are:

- ☑ Significant reduction of the work and thus the costs in the development time of a report. The earlier the report is tested, the less work there is for the entire development process. Motio sets up the tests so that they are conducted continuously and thus errors are identified and eliminated early on, which eliminates additional work.

- ☑ Fully automated testing

- ☑ Increased report quality and user satisfaction

- ☑ Test of system components

- ☑ Many different test cases (depending on focus)

What are the benefits of this?

By creating test scenarios and saving them for later tests, you reduce the work required as much as possible. Test scenarios created once can be used for frequent upgrades or report inspection. This is something manual tests can't do.

How does this work?

Essentially, there are two possibilities for automated testing:

1. **Testing in the course of two sandboxes. The MotioCI Upgrade Tool is optimally suited for use in migration projects.**

The following graphic demonstrates how the upgrade tool works. In this example, the customer is using Cognos Version 10 and would like to migrate to Cognos 11.

The upgrade with MotioCI tests the current productive environment under "Cognos old" against a newly established IBM Cognos Analytics "Cognos new" in a sandbox. This happens outside of the existing systems.

In the old Cognos environment, the appropriate test cases and test parameters required are created and set up. Then all reports are tested automatically between Cognos old and Cognos new. All reports that Motio has tested and identified as successful therefore directly reduce the scope of the migration. This reduces the work required for

testing even after the first test run and only the reports have to be tested in which Motio has found a deviation or an error.

Motio specifies which parameters (runtime, missing data source connection, missing JavaScripts, etc.) caused the error.

After a correction of th reports, they can be tested again using the existing test cases until a fully tested "Cognos new" environment is created. This then serves as the new IBM Cognos Analytics productive environment and the old environment is retired.
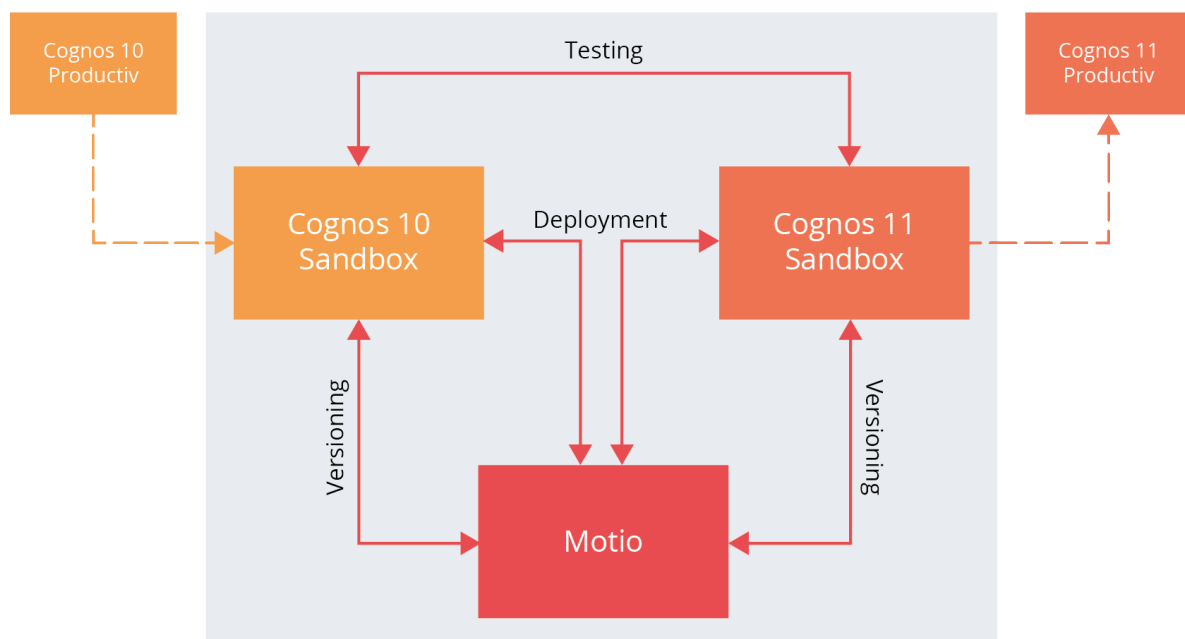
Migration von IBM Cognos Analytics Version 10 auf 11:
Testingprozess anhand zweier Sandboxes

2. Testing in productive and development environment

The same procedure can be transferred with the Motio CI Testing solution to existing environments – for example, to productive or development environments. The decisive advantage is that the enhancements can also be tested during the upgrade time. This way, companies avoid a basic "freeze" during the upgrade period. In addition, the functionality of MotioCI Testing can be used permanently and regularly to check newly developed reports for their validity in the productive system.
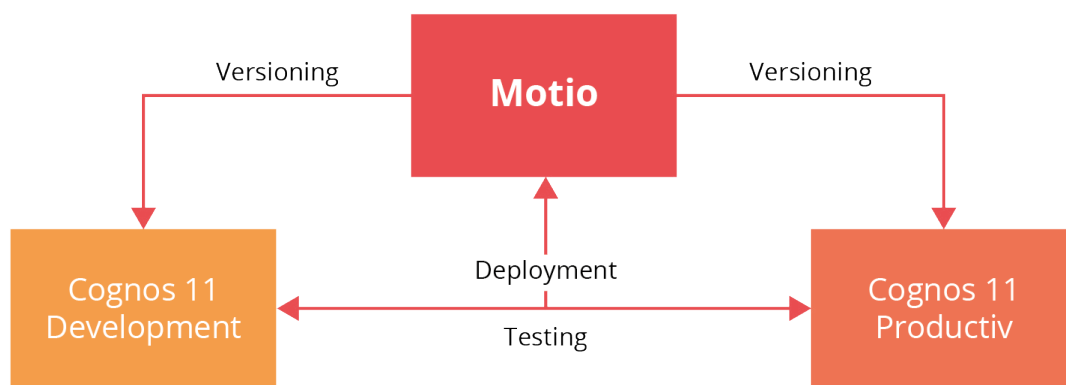
Testing process directly in the productive and development environment
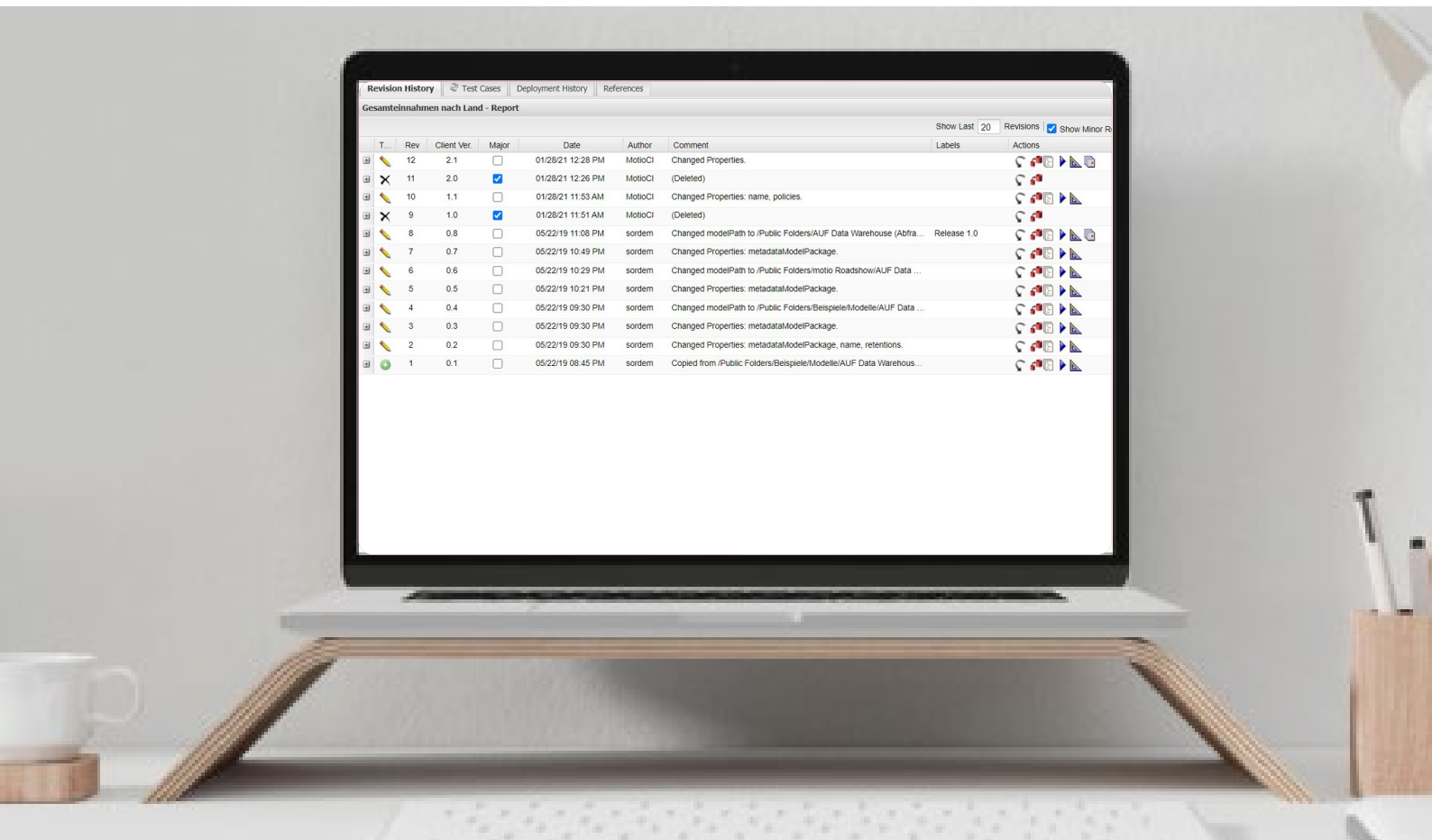
Different versions of a report

3

Third step:
Versioning of reports and report outputs in order to activate deleted reports at any time

Cognos Analytics has no system-internal version control. If a report has been deleted or a change made to a report, then only the last version is available. So what happens if the people in charge need the previous or even older report versions?

With MotioCI Versioning, companies can document each change to reports in the Cognos content store, back them up, trace them, and if necessary return to previous versions of the report.

By creating a history of each change, MotioCI Visioning makes available the following functions and benefits in IBM Cognos Analytics:

☑ Automation
- Versioning is done automatically for each change of object in the content store. Therefore, no more report copies have to be created and the content store remains lean.

☑ Transparency
- Changes to reports and objects can be traced in time, and with regard to their type and scope.
- There is a comment function. Thus, the traceability of changes becomes transparent and the people in charge can record the "who, what, and when" automatically.
- Since the back-up copies cease to exist, the content store only includes objects for use and a load due to "quick back-ups" is eliminated.

☑ Audit security
- The versioning of the various adjustments in the release states enables access to the various (automatically saved) versions at any time.

☑ Control and security
- Roll-back to previous versions or restoration of deleted objects is possible at any time.
- Two versions of an asset can now be compared in detail at any time (also for troubleshooting).
- The time required for restoring accidentally deleted content is reduced greatly. EVERY previous version of a BI asset, including deleted content, can be restored.

☑ Teamwork
- Collaborative work on objects is possible. Checking the objects in and out backs up and coordinates adjustments and changes.
- Thanks to the integrated comment function, communication among team members improves. Changes to BI assets are thus traceable for anyone with the appropriate authorizations.

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Fourth step: Deployment of reports

With the deployment feature of MotioCI, the people in charge reduce time, effort, and risks for the provision of reports.

With MotioCI Deployment, it is possible to connect several environments (for example, the two sandboxes during the upgrade) with one another and to exchange content between them purposefully. The report developer can thus assign a completed report to a release (label), which an administrator can transfer to another environment with a few clicks.

It is possible to provide several releases simultaneously, which makes continuous delivery possible in the course of a release plan. The report developer then assigns his completed report to the relevant release.

Since each deployment is audited, there is transparency about the state of the report portfolio at time X. This means that a deployment can also be rolled back (partially) if necessary. This can be advisable if reports do not work in production as they did in development.

MotioCI performs all the individual steps required for a deployment. Access to individual server (directories) - as with classic Cognos export/import provision methods - is not required, which reduces the time required for a transfer between two Cognos environments significantly.

The benefits of MotioCI Deployment are:

☑ Deployment either ad hoc, on-demand with a click or automatically according to a schedule

☑ Deployment - in contrast to classic Cognos tools - is possible per report

☑ The simplified deployment process speeds up the release cycle, which means that new developments and enhancement can be made available to end users faster

☑ Reduced admin activity and increased transparency: "What happened when"

☑ Roll-back function

Other application cases

administration of IBM Cognos Analytics

Challenge

There are a lot of challenges for upgrades and for the administration of IBM Cognos Analytics. Some of these are:

- Which reports or tasks have no owner?
- How can I delete my report output, for example as PDF, from the content store most securely and easily?
- If I would like to delete a package, how do I find the associated reports, for example in the "own folders" and react appropriately?
- Automatic report sending via e-mail: How can I insert a deputy and copy authorizations?

Solutions

MotioPI Pro offers a series of functions that help the administrator Among others, these include:

a) Managing schedules and safety plans
- Re-assigning content and schedules of deleted users

b) Performing mass processings within report definitions
- Updating calculations with errors
- Updating the footer, header or other general format parts
- Setting query elements
- Searching for all reports for a package

c) Changing the storage location of the content safely
- Maintaining runtime
- Determining reference links
- Ensuring reference drill

Added

The people in charge are spared work and thus time for IBM Cognos Analytics administration. This way, it is possible to perform goal-oriented administration of the Cognos Analytics environment in order to make changes to a larger number of reports.

With MotioPI Pro, the popular e-mail sending options are also much clearer. A purposeful deletion of output versions reduces the size of the content store considerably.

Exchange of the data source (relational database) behind IBM Cognos Analytics

Herausforderung

If data sources (SAP HANA for a Netezza, for example) behind IBM Cognos Analytics are exchanged, the following problems can crop up:

- Does the data still have the same structure?
- Are there deviations in the results due to changed data types?
- Do aggregations and calculations still produce the same results?
- How do you handle change/non-existent database functions (vendor-specific functions)?
- Does the new database provide different performance?

Solution

- MotioPI Pro and MotioCI Testing

Added

Generally, MotioCI can test the reports in a new environment or with a new data source to see whether the reports run, whether the performance is right as compared to a reference environment, and whether the results match with the same parameters (insofar as the source data is comparable).

With MotioPI Pro, you can search for errors with respect to database functions in order to get a list of the reports that have to be adjusted. Here, it is not necessary that database-specific functions create problems; implicit conversions can also create problems (such as date conversions). MotioPI Pro can help with "search and replace" and it will find the problem cases right away.

MotioPI Pro quickly exchanges changes to packages or new packages with a changed framework.

Our offerings: Motio integration with valantic

Next Steps:

1

Free Webinar on demand

Speed up your IBM Cognos Analytics upgrade in three easy, quick steps

-> Register now

2

Free consultation

Is there a new version of IBM Cognos Analytics available and you'd like to automate your upgrade? Then talk to us!

-> Contact now

3

IBM Cognos Analytics health check

Consultation for an optimal migration strategy/preparation for the migration

-> Inquire now

4

IBM Cognos Analytics upgrade packages

Which package is best suited for your IBM Cognos Analytics upgrade?

-> Inquire now

Free webinar on demand

Speed up your IBM Cognos Analytics upgrade in three quick and easy steps

The Motio expert Klaus Speierl will show you - using best practices and a use case from a current customer project - what fantastic possibilities the Motio solutions offer for the following questions:

☑ **How can I upgrade quickly and efficiently?**

☑ **How can I clean up my IBM Cognos Analytics environment quickly and easily before the upgrade?**

☑ **How can I test hundreds of reports automatically?**

In a live demo, he will show you how you can clean up your content store before the upgrade and reduce and test your reports automatically in the new Cognos environment.

Register now

IBM Cognos Analytics health check

Consultation for an optimal migration strategy/preparation for the migration

- ☑ License check

- ☑ Checking and setting up user authorizations

- ☑ Setting up migration strategy

- ☑ Advising on and demonstration of the individual Motio solutions for optimal deployment

- ☑ 3 days of consulting

Eur 3,900*

*50% of the price will be credited with booking of an upgrade package

IBM Cognos Analytics upgrade packages

Bronze upgrade package

- ☑ MotioPI Pro
- ☑ Motio Inventory
- ☑ 2 days of consulting

Silver upgrade package

- ☑ MotioPI Pr
- ☑ Motio Inventory
- ☑ MotioCI Upgrade
- ☑ 5 days of consulting

Gold upgrade package

- ☑ MotioPI Pro
- ☑ Motio Inventory
- ☑ MotioCI Upgrade
- ☑ MotioCI versioning and deployment
- ☑ 5 days of consulting

Platinum upgrade package

- ☑ MotioPI Pro
- ☑ Motio Inventory
- ☑ MotioCI testing, versioning, and deployment (for 2 content stores)
- ☑ 10 days of consulting

Request your non-binding quotation

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About valantic & Motio

valantic Business Analytics (valantic BA) is part of the valantic Group (www.valantic.com). We advise companies on the introduction and implementation of digitalization strategies and we are proven specialists in solutions for company management (business analytics, connected planning, Big Data, data warehousing, predictive analytics). For more than two decades, we have been a successful, trusted partner to our customers (including companies in the pharmaceutical, retail, and producing industries, banks, and insurance companies).

valantic is a market leader in the digital transformation and one of the top digital solutions, consulting, and software companies, with more than 1,200 developers and consultants around the world. The valantic Group is a leader in digital transformation and one of the top digital solutions, consulting, and software companies, with more than 1,000 developers and consultants around the world.

Since 2003, Motio has helped IBM Cognos Analytics customers with software solutions that adjust their BI applications, expand, and rationalize them. This Texas software provider offers an extensive product portfolio that complements and optimizes IBM Cognos Analytics.

For IBM Cognos Analytics migration projects, Motio's solutions increase efficiency and transparency and they automate numerous steps in order to make upgrades less work-intensive. Motio provides Cognos administrators with tools and automation functions that make working with Cognos more efficient.