

Motio Solutions for Upgrades

Presented By:
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N. America Partner Manager



Today's Agenda

- Our methodology for smoothly upgrading IBM Cognos using Motio technology.
- The Approach: Five Steps that Make the Difference
- Videos
- Q & A

Motio

Create an Efficient Way to Manage IBM Cognos

As your Cognos implementation grows and accumulates data (users, schedules, folders, etc.) it becomes increasingly difficult to manage. This is because the management tasks themselves are maintained by hand and consume a great deal of your time. You can end up spending more time on the processes rather than the end goal. Couldn't you be using your time better?

We think so! MotioPI is a **FREE** tool for Cognos, which offers many utilities designed to save you the time required for managing many Cognos tasks!

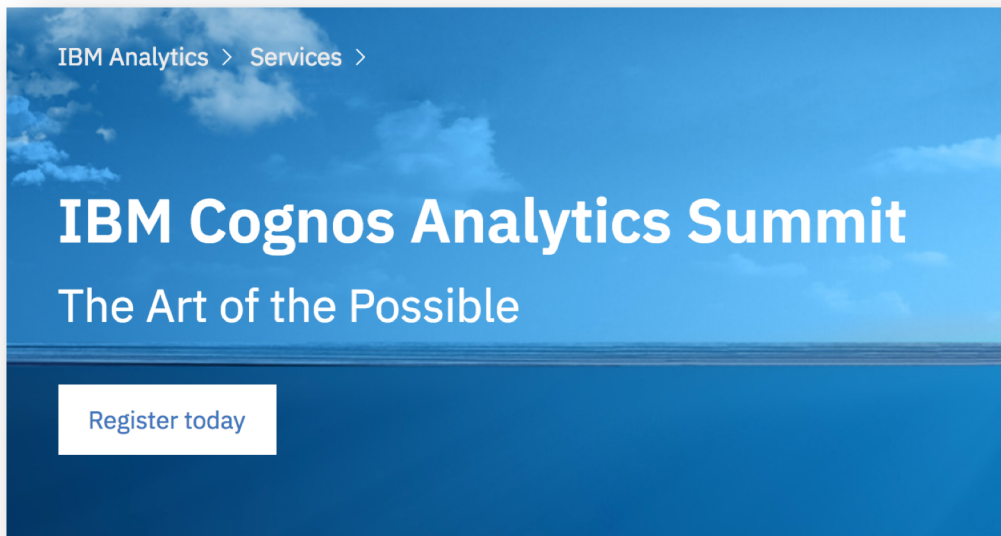
MotioPITM
FREEWARE *for IBM Cognos®*

IBM and Motio

- IBM has a unique relationship with Motio:
 - Motio is an **IBM Business Partner**.
 - **IBM is a Motio customer**. After market research IBM selected MotioCI for their internal Version Control and Deployment.
 - **IBM is a reference for MotioCI**. The office of the CIO of IBM presented the use of MotioCI in Las Vegas “How IBM Uses Business Analytics for Its Own Competitive Advantage”.
 - **IBM lab services uses MotioCI to upgrade customers**. During the program “Bring the Base forward” IBM supports many customers during *the upgrade to C11 using MotioCI*, including one of Germany's largest Bank.

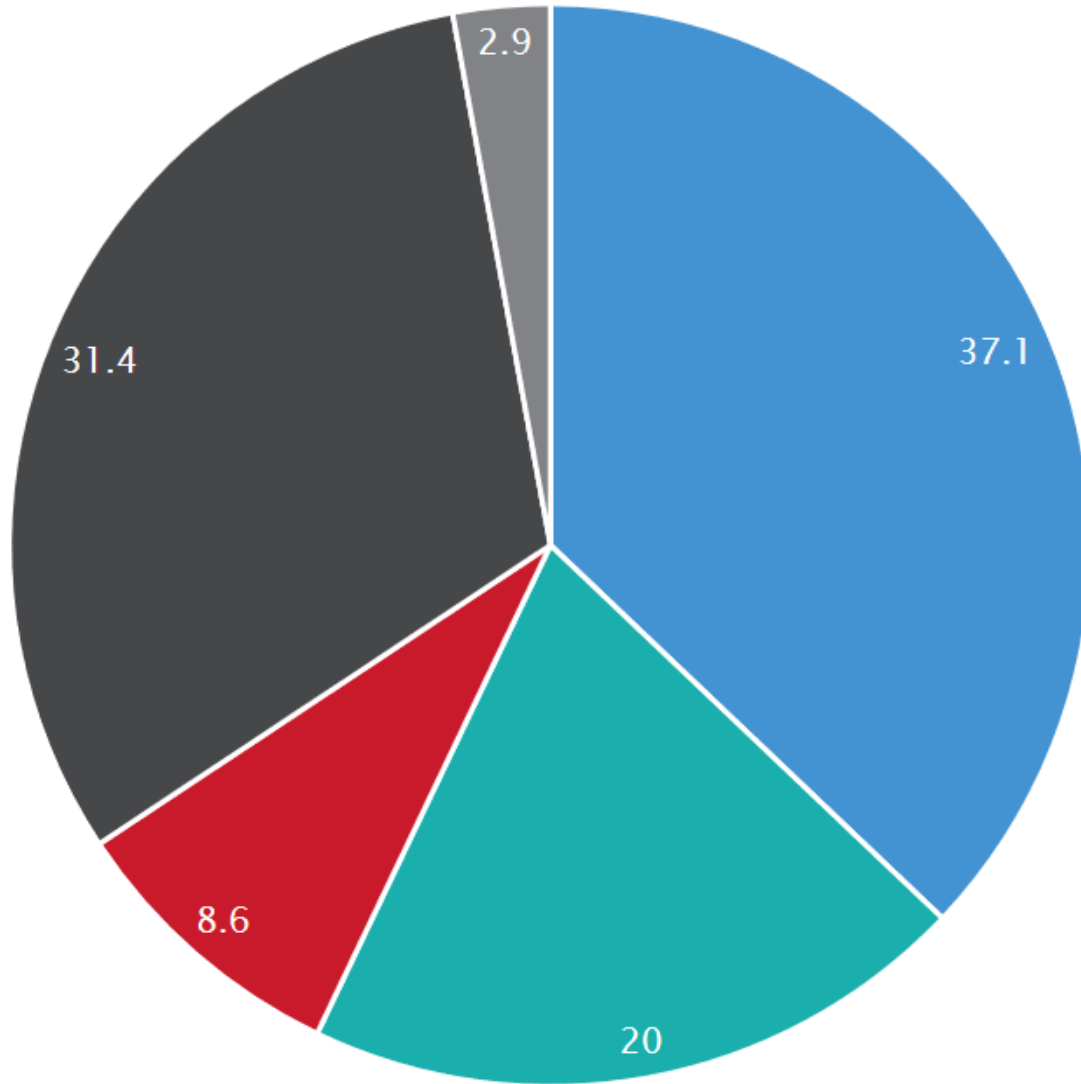
A unique relationship- IBM

- IBM is has a unique relationship with Motio
 - **IBM and Motio are on a joint world tour** visiting thousands of customers and presenting how to upgrade to C11



Our partners and customers benefit from our close relation with IBM and our development office in Ottawa, Canada.

Poll results of 100 customers



What do you see as the biggest challenge of your Cognos upgrade?

- Managing the migration
- Resolving errors post testing
- Determining ROI associated with the upgrade
- Automating the testing and validation
- Organizing and prioritizing the content

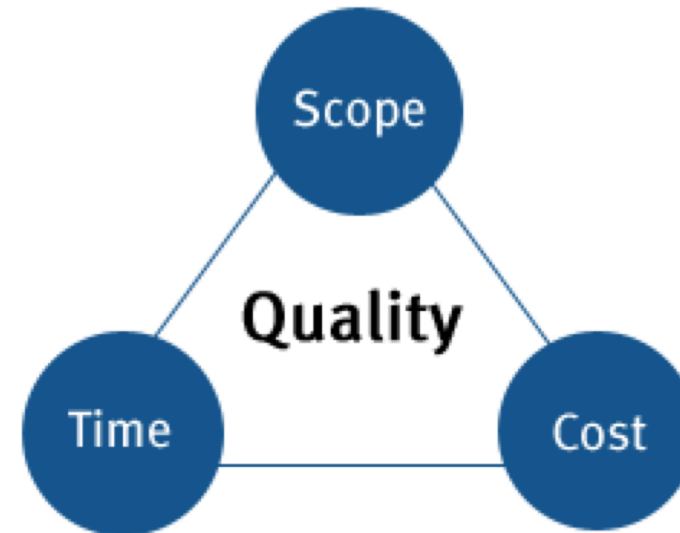
Challenges while Upgrading IBM Cognos

- Determining the ROI associated with an upgrade
- How to organize and prioritize the content to expedite testing
 - The largest cost and time associated with an upgrade is testing and validation of Cognos content (reports, cubes, FM models)
- How to automate the testing and validation process
- Resolving errors with content that come up during the testing
- Managing the BI migration: How to plan activities, check progress and monitor the quality

Benefits of Upgrading Smarter

- More control in the upgrade process
 - Focus and scope
 - Insight into work load
 - Control over progress
 - Monitoring and instant problem notification
 - Create a reliable safety net
- Cost reduction
 - Achieving efficiency by automation
 - Reduce manual errors
 - Improve communication
- Shorten the lead time
 - Shorten project time needed
 - Lower production down time on the “go live” day

Project Management Triangle



The secret sauce

- What you need is, a IBM Cognos sandbox environment
 - Well performing – multiple reports will run in parallel
 - Monitored – the sandbox environment needs to be reliable
- We need a reliable environment so we focus on the project and not worry about supporting technology
- You can use the following Motio product set:
 - Motio ReportCard
 - MotioPI Pro
 - MotioCI
- Use a structured approach
 - Assess first to understand the project
 - Scope to focus on relevant aspects
 - Manage to assure you always stay in control

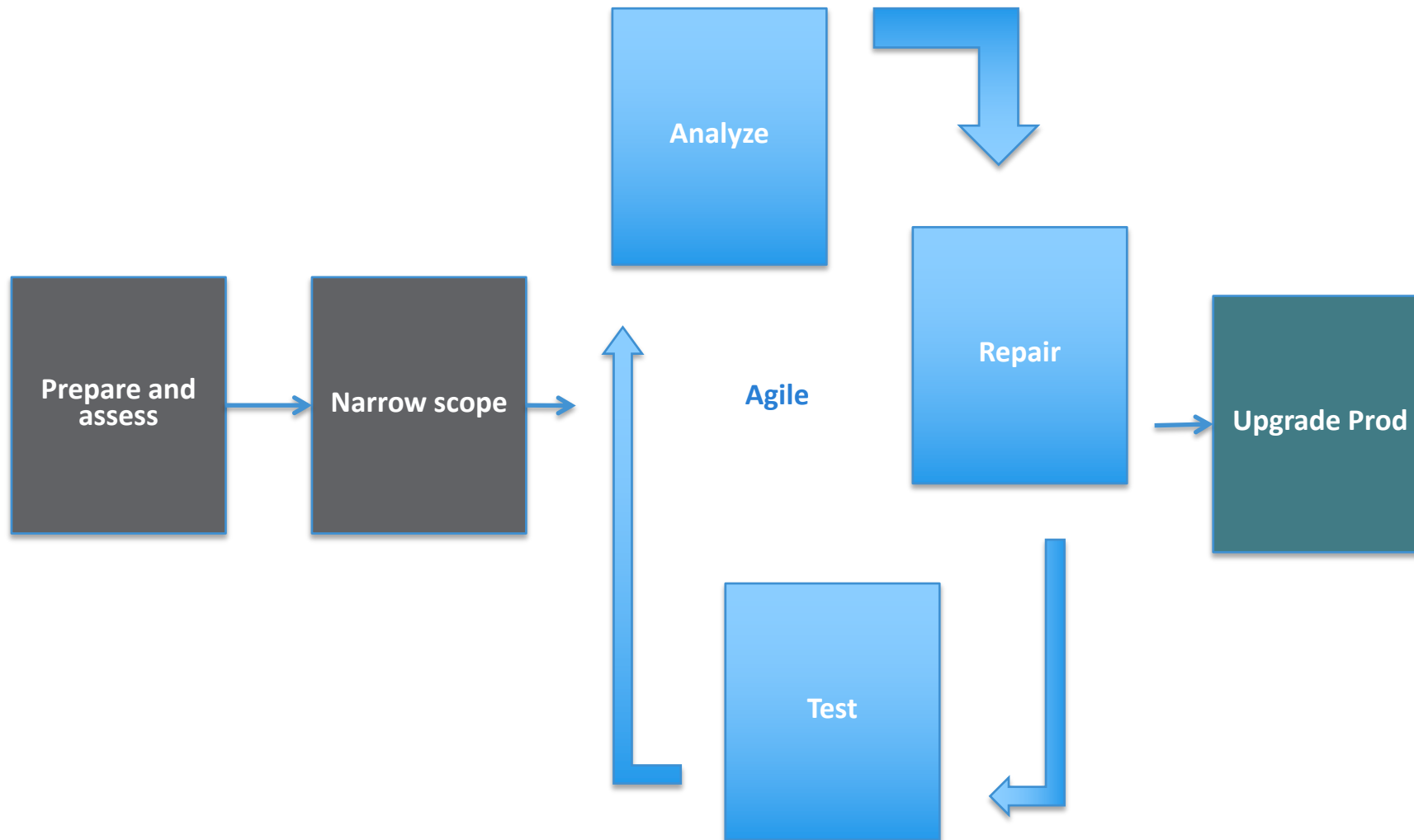


Upgrade in Five Steps

- Prepare and assess the environment
- Narrow the scope
- Analyze impact
- Repair what is broken
- Upgrade production and go live

Let's assume we upgrade
from 10.2.2 to 11.x.x
for 5000 reports

The Five steps are Part of a Bigger Picture



Step 1: Prepare and Assess (I)

Prepare the upgrade

- Prepare the infrastructure needed for the IBM Cognos sandbox
- Prepare the infrastructure for MotioCI
- Install MotioCI



Assess the current production environment

- How many reports do we have?
- How many reports are valid and will run?
- How many reports have not been recently used?
- How many reports are just copies of each other?

Based on the assessment, decide on scoping and
“cleaning”



Step 1: Prepare and Assess (II)

How can you assess?



ReportCard will analyze the XML specs and return a list of duplicate reports, inactive reports and other inefficiencies



MotioPI Pro will help you to validate all reports and find out the number of reports that do not validate and query the audit database to find unused objects



The outcome is the basis for discussing the scope of the project. Out of scope could lead to deletion of objects or they can be ignored during the upgrade

Cleaning up

Why:

Average environment^(*) has:

- 3705 accounts
- 92 data sources
- 323 packages
- 10,755 reports
- 235,771 objects

How:

Find reports that

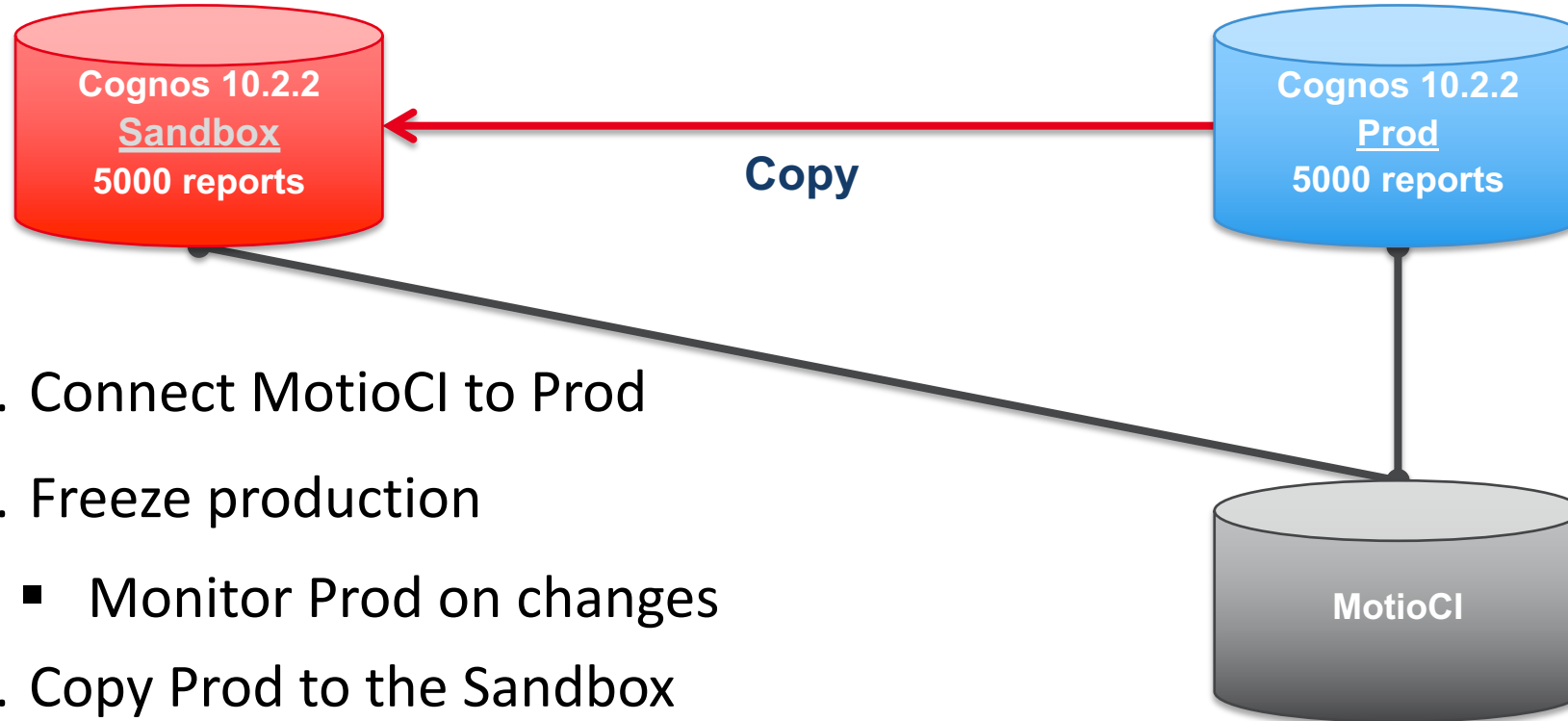
- Are not used in
 - 2 years
 - 1 year
 - 6 months
- Contain in the name
 - _Old
 - _V1, V2, V3
 - _Archive

And delete!

- But errors will be made, so customers need a safety net

(*) Motio researched over 200 content stores

Step 2: Narrow the Scope (I)



1. Connect MotioCI to Prod
2. Freeze production
 - Monitor Prod on changes
3. Copy Prod to the Sandbox
4. Turn off all schedules using PI Pro
5. Connect MotioCI to Sandbox
 - Narrow the scope in Sandbox

Step 2: Narrow the Scope (II) – Setting Up MotioCI

- To manage the upgrade, group all reports
 - Group by business, Cognos folder, package, or any other logical grouping mechanism
- Set up a project in MotioCI per group with 100-300 reports
 - If the initial group contained more reports we just split it up
- Set up test cases:
 - Value stability
 - Formatting stability
 - Performance stability
- For every object out of scope, set the label “out of scope” and disable the test case



Step 3: Analyze the Impact

1. Start with a fully prepared sandbox

2. Run base line in MotioCI

3. Upgrade sandbox to 11.x.x

4a. Check value stability

4b. Check formatting stability

4c. Check performance stability

5. Evaluate the outcome and estimate work load



Step 3: Analyze the Impact – Estimation of work

MotioCI will flag when there is a problem and a test case has failed. In order from *no worries* to a *huge problem*, we see the following issues:

1. Formatting stability failed because of change in HTML tag. However there is no problem, the output looks fine
→ **Update baseline – label as “Reset baseline”**
2. Formatting stability failed, there is a change and we accept this change, it could be even better
→ **Update baseline – label as “Accepted change”**
3. Formatting stability failed and layout changed. Fix report layout
→ **Repair the report – label as “Repaired”**
4. SQL, data changed or performance changed. Fix report and maybe fix model / package
→ **Repair – label report and package as “Repaired”**



“I have 3 people on my team to repair, based on the test results and quick assessment, average time spend is calculated on one hour. I expect to be ready within 2 weeks”

Motio delivers Cognos Intelligence and Innovation

Year	Order method type	Revenue	
2010	Fax	28,639,472.14	
	Telephone	178,793,580.36	192,733,095.43
	Mail	22,766,850.51	24,817,338.95
	E-mail	95,402,796.21	102,525,738.24
	Web	473,771,464.65	493,448,022.23
	Sales visit	101,072,721.10	109,513,556.90
	Special	13,905,918.75	14,973,478.43
2010 - Summary		914,352,803.72	968,475,137.52
2011	Fax	19,896,187.76	21,048,525.42
	Telephone	107,160,284.09	114,892,133.41
	Mail	16,013,779.49	17,146,516.93
	E-mail	44,318,886.43	47,046,709.69
	Web	881,315,747.68	921,519,876.87
	Sales visit	79,721,524.37	85,016,765.89
	Special	10,769,180.34	11,506,938.31
2011 - Summary		1,159,195,590.16	1,218,177,466.52

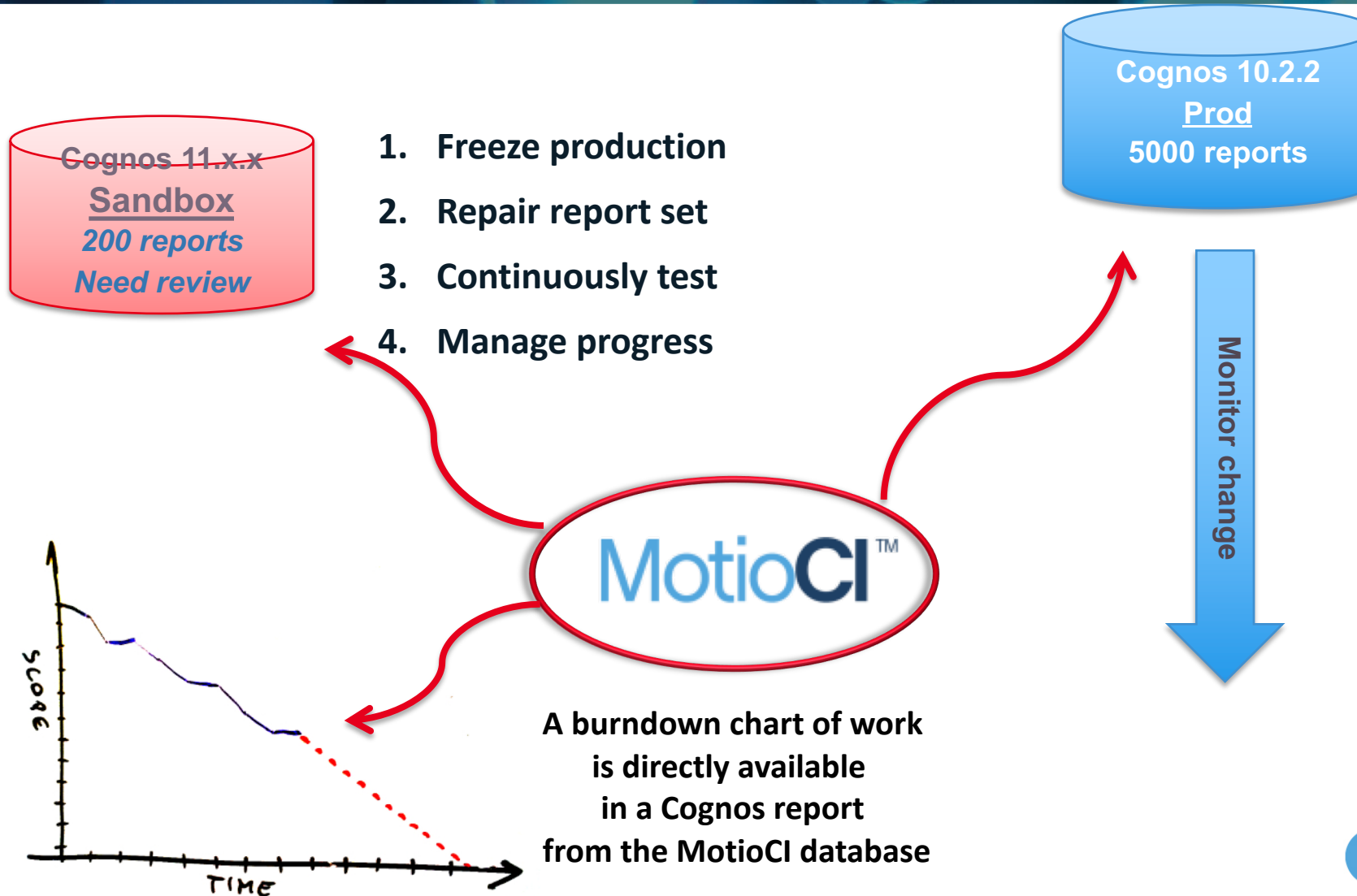
Approx 5 % of problems are related to sorting issues on one or third column

Motio technology can detect and report errors in an automatized fashion to save 50% on testing

Approx 3% of the reports have data issues

10:42 AM	
Cognos Usage - I	
Actual PDF Output	
Text Dif	
Package Usage	
to Dec 31, 2017	
	successful runs (total)
(query)	4,226
	1,604
	261
(analysis)	171
	138
py	3
	2
XXX	1
	0
	6406
	185
	6
	1
	25
	36
	0
	0
	86
	519
	35,594
	6,585
	2,777
	1,938
	636
	2,176
	32
	1
	49
	8.04
	3.72
	10.40
	11.27
	3.90
	55.80
	15.86
	0.65
	0.58
	4,226 200 35,594 8.04
	Audit 1,604 185 6,585 3.72
	GO Sales (query) 261 6 2,777 10.40
	GO Data Warehouse (analysis) 171 1 1,938 11.27
	MotioCI Reports 138 25 636 3.90
	MotioCI Reports - copy 3 36 2,176 55.80
	GO Sales (analysis) 2 0 32 15.86
	GO Sales (query)-XXXXX 1 0 1 0.65
	0 86 49 0.58
	Overall - Total 6406 519
	Output Size
	506 KB
	254 KB

Step 4: Repair



Step 5: Upgrade Production Environment

- The Saturday “go live” moment
- Before the actual go live date, baseline Production
- Start upgrading production following the standard IBM procedure
- Promote all labeled changes to the new environment
- Run all test cases in Prod against the baseline
 - Execute sanity check on the most important repaired items
 - Running test cases, this may take some time, so prioritize carefully
 - Evaluate and decide on “go live”

Congratulations!



But 2 Months Later...another CA release is out!



IBM Rapid Release can be handled as a **task** not a **protracted project**:

- Most of the work has already been done. The test cases are there.
- Just upgrade and kick off the test cases.

Reuse this investment so upgrades will be a simple task.

Now your upgrade Approach in Five Steps

- ~~Prepare and assess the environment~~
- ~~Narrow the scope~~
- ~~Analyze impact~~
- ~~Repair what is broken~~
- ~~Upgrade production and go live~~

Rapid release - task:

- *Install Cognos update*
- *Run test case*
- *Verify*
- *Update window Prod*

Summary

Main benefits of the “*IBM Bring the Base Forward*” - approach:

MotioCI provides:

- The freedom to delete
- A full test of all content
- An efficient and fast method
- A reusable and repeatable approach

Demo

Let's now take a look, because like they say,
“seeing is believing.”

MotioCI

upgrade-demo.dallas.motio.com/secure/actions/versioncontrol/versionControlAction/view.do?crnInstanceId=1#

Apps Zoho CRM Highrise Motio HubSpot Constant Contact Google Translate Google+ Sirlin.Net - Playing to IBM PartnerWorld - G

Other bookmarks

Logged in to Production, Sandbox as edwin
Log out
Help

MotioCI™

Navigation

Show Hidden

Auto-Refresh

Search

MotioCI

Production

Sandbox

Assertion Studio

Clipboard

Deployment History

Type	Time	Instance	Source Label	Target Label	User	Description
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Page 1 of 1

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MotioCI

upgrade-demo.dallas.motio.com/secure/actions/versioncontrol/versionControlAction/view.do?crnInstanceId=1

AppsZoho CRMHighriseMotioHubSpotConstant ContactGoogle TranslateGoogle+Sirlin.Net - Playing toIBM PartnerWorld - G

Logged in to Production, Sandbox C11.04 as edwin

Log outHelp

Navigation

Show HiddenAuto-Refresh

Search

MotioCI

- Production
- Sandbox C11.04
- Assertion Studio

Clipboard

Project StatusActive and Scheduled TasksMotioCI SettingsReport LocksUnversioned InstancesPromotion GroupsLicensing/SecurityCleanup Options

Total Projects: 8Failed Projects: 5As of 5:07 PMUpdate Now

Instance	Project	Status	
Instance: Production			
Production	Admin	2 Test Cases failed. 2 Test Cases have warnings. 1 Test Cases are stale. 91 Test Cases have run successfully.	
Production	Go Data Warehouse	5 Test Cases failed. 2 Test Cases have warnings. 5 Test Cases are stale. 34 Test Cases have run successfully.	
Production	MotioCI Report	3 Test Cases failed. 14 Test Cases have run successfully.	
Production	Validation	2 Test Cases failed. 4 Test Cases have run successfully.	
Instance: Sandbox C11.04			
Sandbox C11.04	Admin	109 Test Cases have no results.	
Sandbox C11.04	Upgrade HR reports	7 Test Cases are stale.	

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MotioCI™

Navigation

Project Status

Timeline

Cognos Instance Settings

Property Sets

Report Output Settings

Broadcast Messages

Total Projects: 4 Failed Projects: 2

As of 2:52 PM Update Now

Instance	Project	Status	
Instance: Sandbox C11.04			
Sandbox C11.04	Admin	108 Test Cases have no results.	
Sandbox C11.04	Upgrade HR reports	1 Test Cases failed. 6 Test Cases have run successfully.	
Sandbox C11.04	Upgrade Queries	2 Test Cases have warnings.	
Sandbox C11.04	Upgrade Sales reports	1 Test Cases failed. 9 Test Cases have run successfully.	

Clipboard

FirefoxFileEditViewHistoryBookmarksToolsWindowHelp

MotioCI

upgrade-demo.dallas.motio.com/secure/actions/versioncontrol/versionControlAction/view.do?crnInstanceId=1#

Search

Most VisitedCognos 10.2.1a Ga...MotioCI Login (Lo...NewsPopularCognos 10.2.1b G...Cognos 10.2.2 Gat...Online HTML Editor

MotioCI™

Logged in to Production 11.04, Sandbox 11.04 as moore
Log out
8
Help

Navigation

Show HiddenAuto-Refresh

Search

MotioCI

- Production 11.04
- Sandbox 11.04
- Assertion Studio

Deployment History

Type	Time	Instance	Source Label	Target Label	User	Description
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Clipboard

Page 1 of 1

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