



IBM Cognos Forum

Ignite knowledge, ideas, connections

Security Migration in IBM Cognos 8 BI

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Cognos.
software

Security Migration

- > Why is this important
- > Series 7 security model
- > Cognos 8 security model
- > Considerations for migration
- > Scenarios

Why is this important?

- > Security can be woven into many parts of your application**
- > Changing authentication sources will affect run-time access to your application, access to objects within your application and access to data**
- > If not planned, including security migration as part of your application migration may significantly delay your migration**

Series 7 Security Model

- > Access Manager authenticates the user to a Series 7 namespace**

- > The Series 7 namespace contains users, user classes and data source connection information**

- > Authorization determined by user class membership**
 - Including PowerCube user class views**

- > The Series 7 namespace is stored in a SunOne or Microsoft Active Directory Server and is managed with Access Manager administration interfaces**

Where is Series 7 namespace security information used in Series 7?

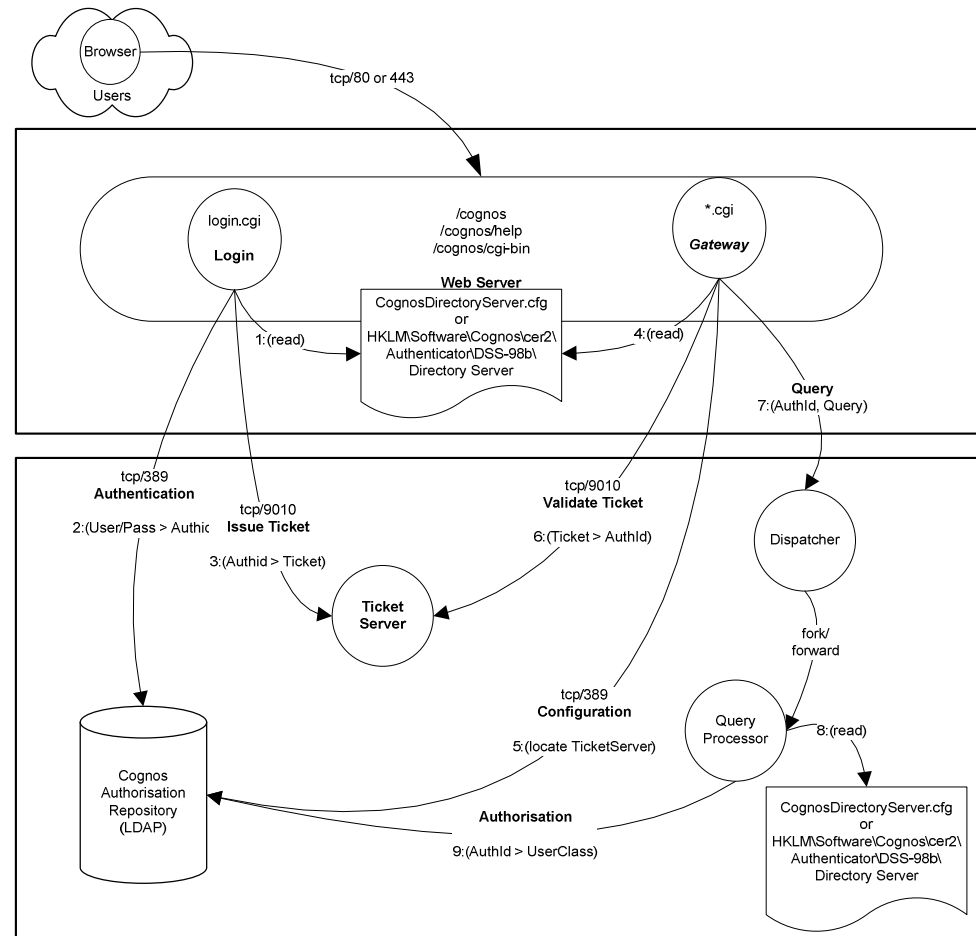
- > Application authentication**
- > Data source access**
- > Upfront**
 - ACLs on objects
 - Upfront Personal content

- > PowerCube user class views**
- > Impromptu**
 - Catalog filters
 - IWR Schedules
 - Report Bursting (based on user classes)

- > Architect models**
- > Email distributions for NoticeCast**

Series 7 Web Authentication

- > User is redirected to login.cgi for authentication
- > A 'Ticket' is issued and stored on Browser as a Session Cookie
- > All Cognos gateways validate this Cookie against TicketServer to determine identity before forwarding request to appropriate dispatcher.

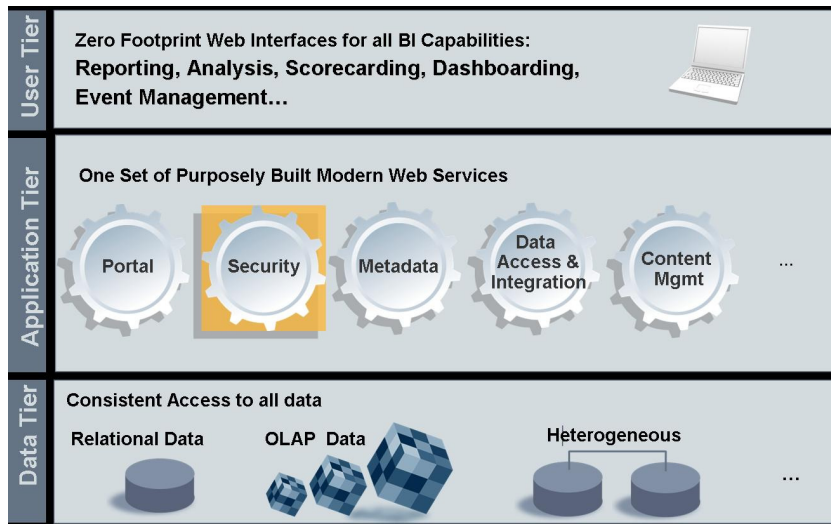


Cognos 8 Security Model



- > Leveraging of existing enterprise security model
- > Concurrent multiple authentication configuration
- > Application-specific users and groups
- > Out-of-the-box encryption with enhanced encryption enabled

Cognos 8 Security Integration Points



- > Authentication to Cognos 8
- > Application security
- > Data Source access



Interoperable and Extensible

Standards

SOAP, XML, WSDL, HTTP(S), OMG
CWM, XML/XMI, WSRP

Extend

Open, Web Services API to programming
language of choice including Java,
Microsoft .NET Framework, COM & Perl

Embed

Industry Standard Portals including IBM,
SAP, Plumtree, WRSP)

Enterprise Search, BPM, Office, 3rd party
Applications

Security

Any combination of LDAP, NTLM, Active
Directory, Netegrity, SAP, Cognos 7, custom

Cognos 8 Authentication

- > Leverage existing enterprise security model
 - Integrate with 3rd party security providers
- > Authenticate users to multiple disparate authentication namespaces
- > Provide single sign-on
 - Allow concurrent multiple authentication configuration
- > Authentication mechanism is dependent on namespace configuration
- > Cognos 8 does not manage users or user properties

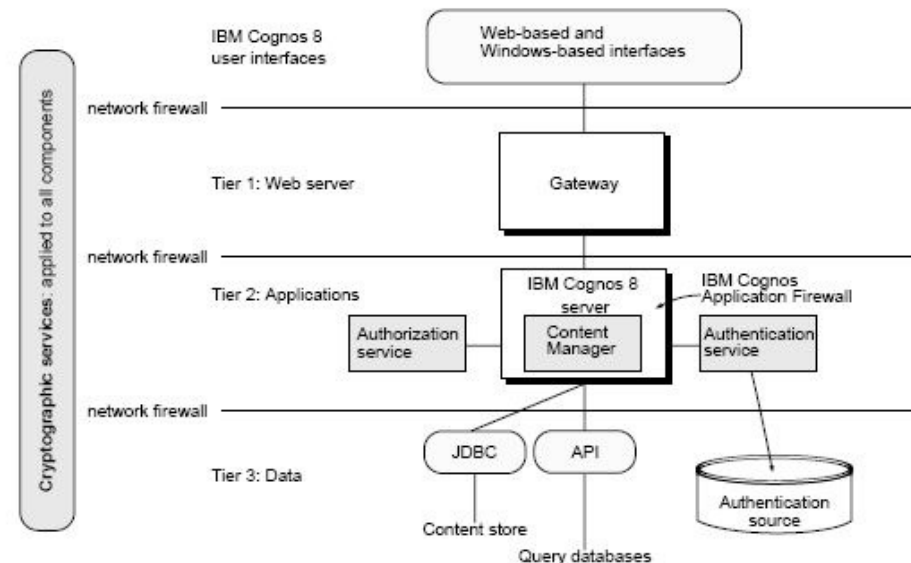
Any combination of:

- LDAP
- NTLM
- Active Directory
- Netegrity
- SAP
- Cognos security
- Custom.....



Cognos 8 Authentication Rundown

- > Cognos 8 Request
 - Is a cookie available?
- > Anonymous Access
- > Gateway forwards a request to Dispatcher
- > Dispatcher forwards request to CM Service
- > The CM Service reaches out to Authentication Source
- > A Visa is granted on authentication
- > Create User Profile in Content Manager



Cognos 8 Application Security



> Permissions

- Secured by users, groups and/or roles
- Permissions on all objects include:
 - Read, Write, Execute, Set Policy, Traverse

> Capabilities

- The Capabilities tool controls access to
 - secured functions such as Administration and the Cognos Query Studio
 - secured features such as User Defined SQL and Bursting

Any combination of authentication namespace users, groups and roles or Cognos namespace groups and roles can be used

Cognos 8 - Cognos Namespace

- > **Optional**
- > **Primary function is to abstract the authentication source's users groups and roles**
- > **Recommended for applications that deploy to environments where the development authentication source is different from the test / production authentication source**

Cognos 8 - Series 7 Namespace

- > The Series7 Authentication Provider uses the Series7 “AuthID” for the Cognos 8 CAMID
- > The Series7 AuthID is unique for every user
- > Always use the Access Manager “LAE Export” to deploy Series 7 authentication between environments
- > Deleting and re-adding a user will generate a new AuthID
- > Changing User Attributes and moving Users within the structure will not impact the AuthID

Considerations for Migration

- > Authentication
- > Authorization
- > Access
- > Data security



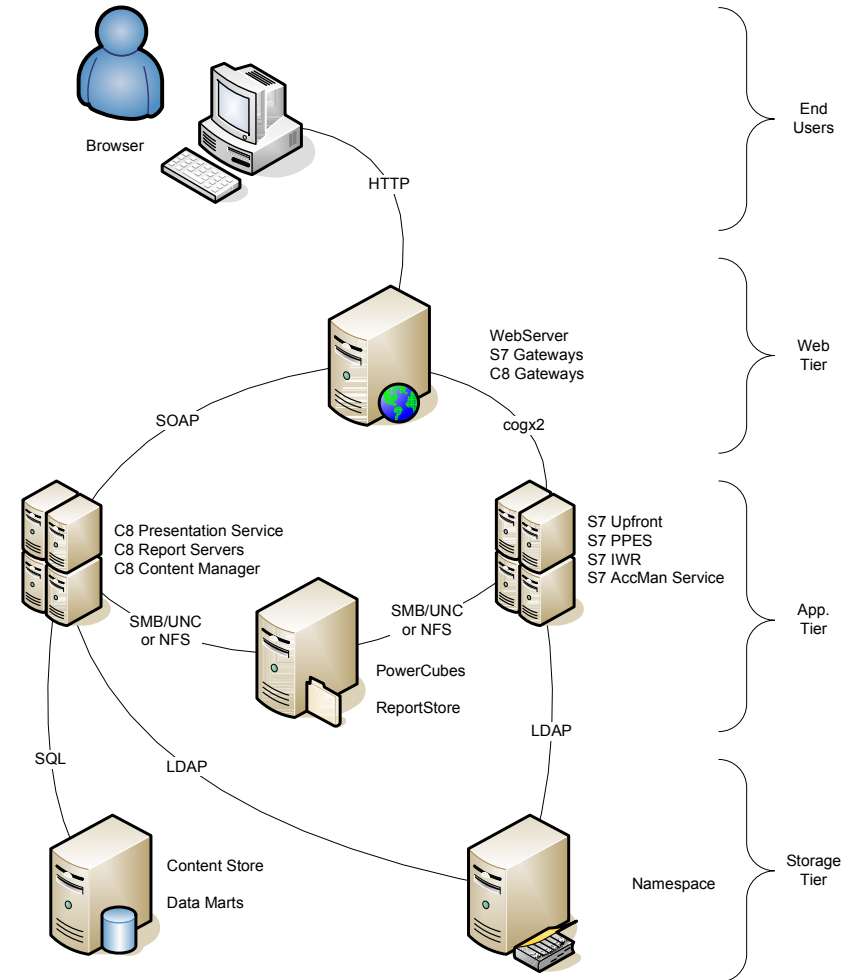
Authentication

> Determining who you are

- Login with credentials
- Guest accounts
- System login with a single sign-on mechanism

> Authentication source choices:

- Unsecured
- Continue to use Series 7 Namespace
- Want or require to move to a corporate authentication source



Authorization

- > Determining what you can see and access**
- > Applying permissions and capabilities to objects in Cognos 8**
 - Users, groups and/or roles from authentication source
 - Groups, roles from Cognos namespace
- > Do you want to preserve same application security after migration?**

Data Source Access

- > Managing the migration of datasources signon data
- > Setting up single signon to datasources

Signon

Select whether or not authentication is needed, and if so, the namespace to use.

No authentication

An external namespace:

Series7testcase (Inactive) ▾

Select whether a cube password is needed.

Cube password

Create a signon that the Everyone group can use:

Password:

Confirm password:

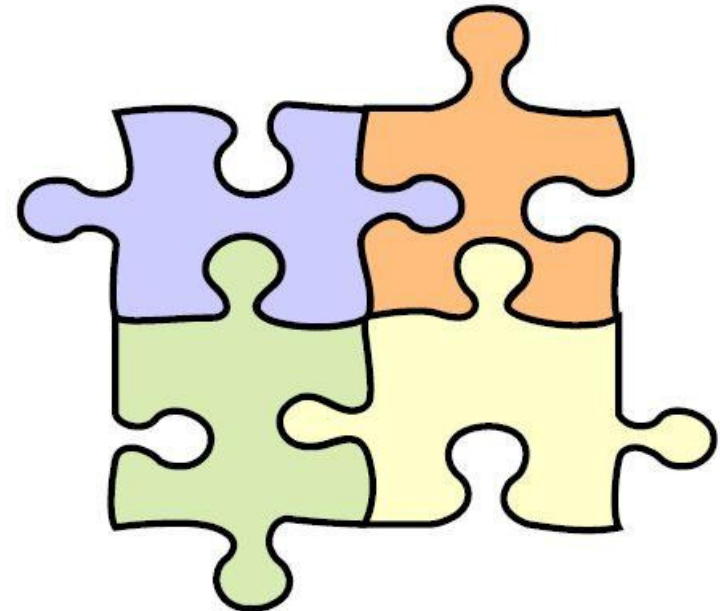
Data Security

> PowerCube specific:

- User class views based on Series 7 namespace security
- If you require changing your authentication source from the Series 7 namespace, you must:
 - Move from Transformer 7 to Transformer 8.3 or higher
 - Map your cube view security from the Series 7 namespace user classes to the users, groups and/or roles from your new authentication namespace

Scenarios

- > Scenario 1: Retaining Series 7 namespace authentication
- > Scenario 2: Changing namespace providers



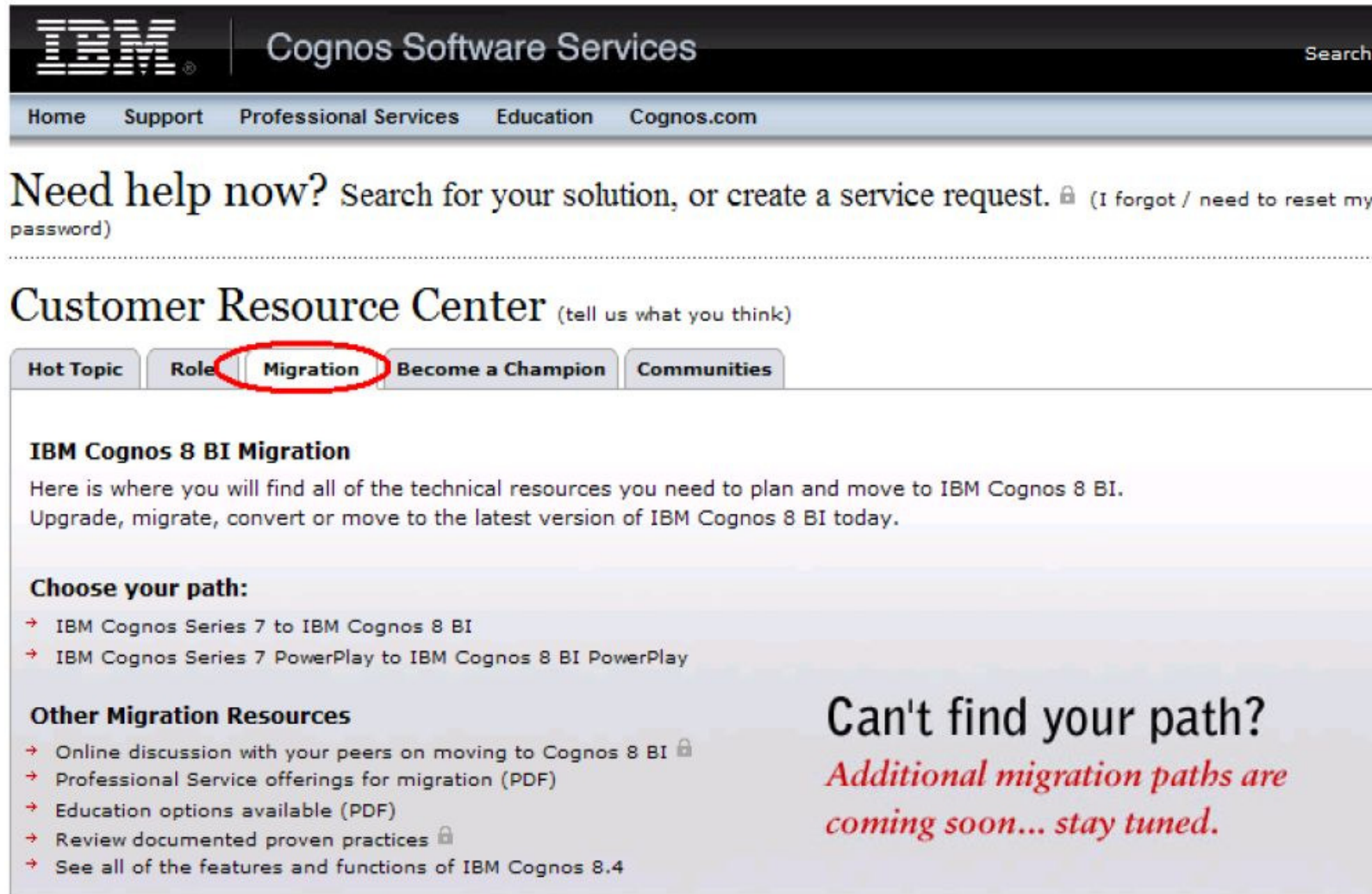
Scenario 1: Retaining Series 7 namespace authentication

- > Most straightforward migration**
- > Migration tools will migrate security from Series 7 server applications as part of the migration to Cognos 8**
- > Cube security does not change therefore the move to Transformer 8 is not mandatory**
- > PowerPlay Studio migration requires a Series 7 Namespace**
 - Upfront Newsboxes / Newsboxes require a Series 7 namespace**
- > Interoperability requires a Series 7 namespace**

Scenario 2: Changing Namespace Providers

- > Most complex scenario
- > Need to map users and user classes from the Series 7 namespace to the new authentication namespace
- > Identify all parts of the Series 7 application that use Series 7 namespace users and user classes
- > Determine mapping for cube security if applicable
 - Must move to Transformer 8
 - Update the model with new security
 - Revisit any cube update automation

For more information, go to the Customer Support Resource Center



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IBM Cognos 8 BI Migration

Here is where you will find all of the technical resources you need to plan and move to IBM Cognos 8 BI. Upgrade, migrate, convert or move to the latest version of IBM Cognos 8 BI today.

Choose your path:

- [IBM Cognos Series 7 to IBM Cognos 8 BI](#)
- [IBM Cognos Series 7 PowerPlay to IBM Cognos 8 BI PowerPlay](#)

Other Migration Resources

- [Online discussion with your peers on moving to Cognos 8 BI](#) [\(lock\)](#)
- [Professional Service offerings for migration \(PDF\)](#)
- [Education options available \(PDF\)](#)
- [Review documented proven practices](#) [\(lock\)](#)
- [See all of the features and functions of IBM Cognos 8.4](#)

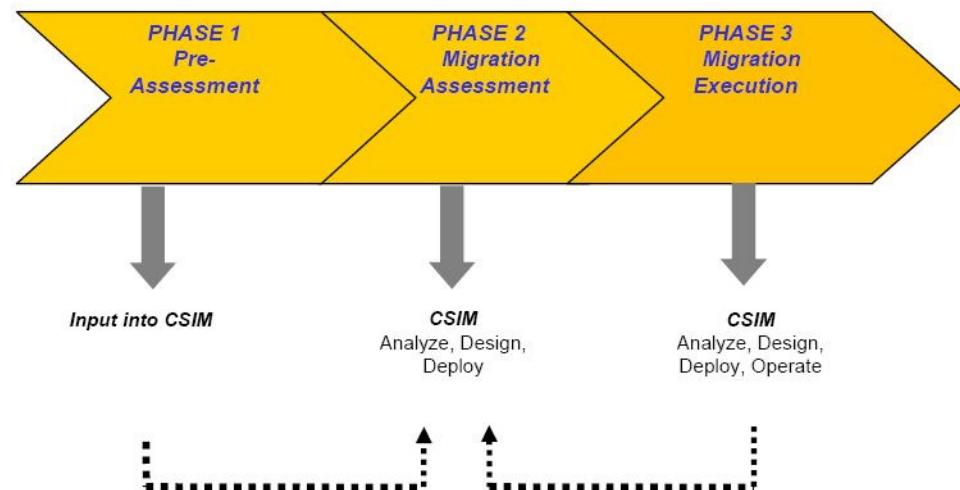
Can't find your path?
Additional migration paths are coming soon... stay tuned.

IBM Cognos 8 BI PowerPlay Migration Workshop

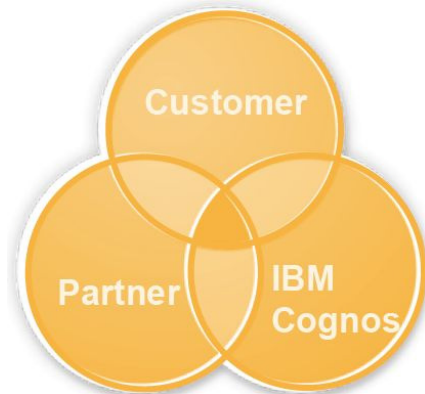
> Leveraging lessons learned from numerous migration projects, this 1-day workshop will teach attendees how to plan, estimate and successfully migrate IBM Cognos Series 7 Powerplay applications to IBM Cognos 8 PowerPlay.

> You will:

- perform a pre-assessment
- learn about different migration approaches and when to use them
- understand how to test and refine your project to meet customer expectations

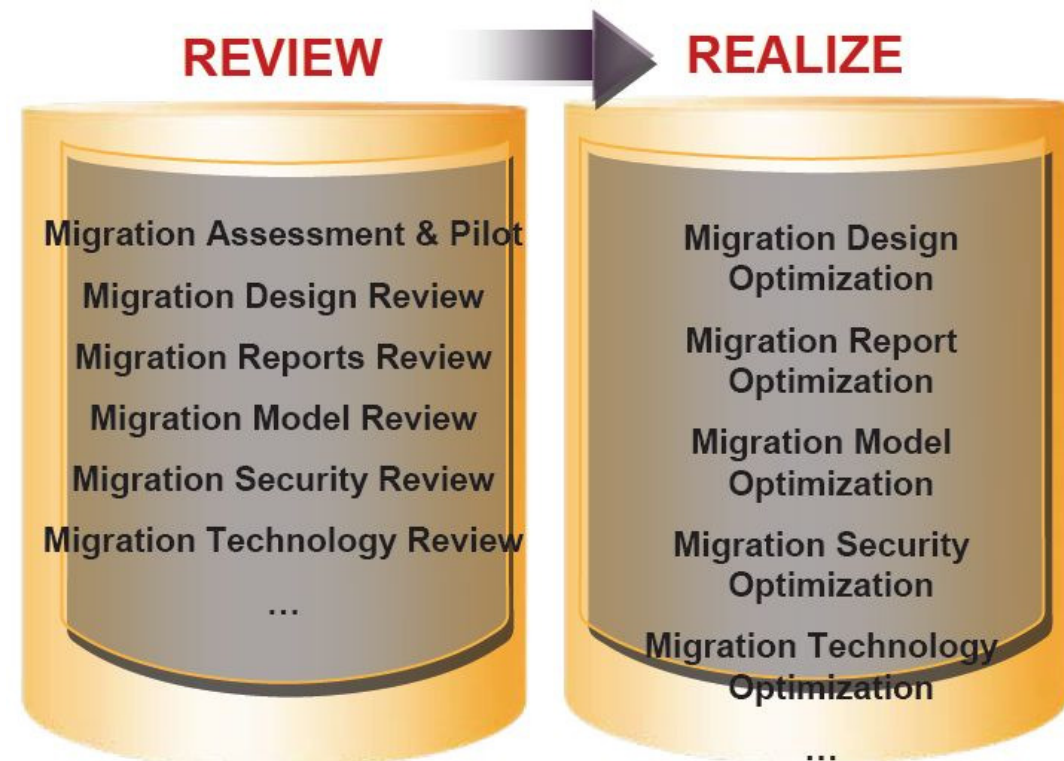


Guardian Services for Migrations

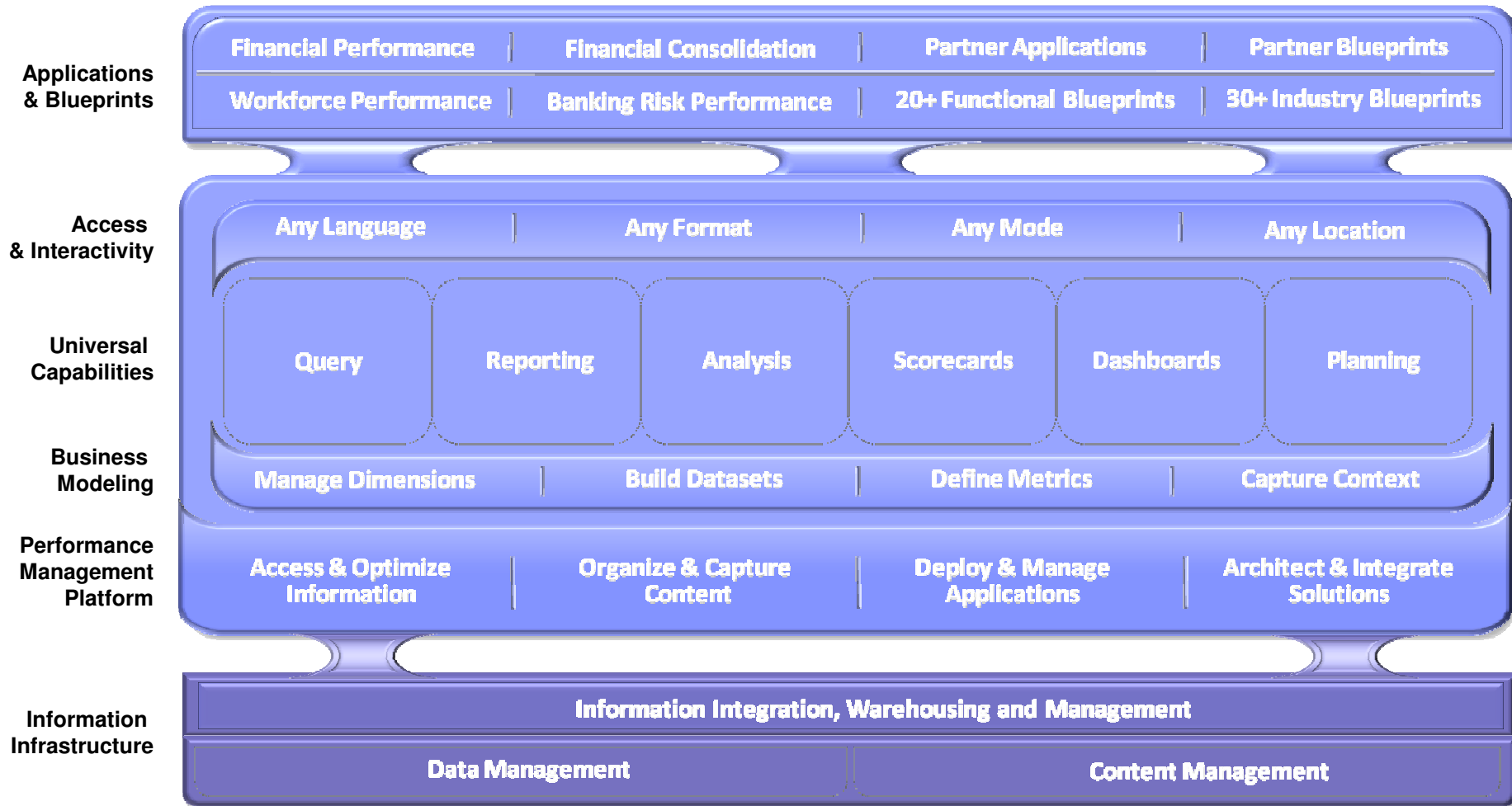


- > Minimize risk in Migrations implementations
- > Transforms business reqs into tangible solutions
- > Critical link between customer, partner & Cognos
- > Success plans, risk analysis, recommendations
- > Best practice advice, guidance
- > Migration Issues Resolution
- > Leverage & Engage specialty Services

TECHNICAL MIGRATION ASSISTANCE SERVICES
&
MIGRATION PROJECT START UP SERVICES



Enablers of IBM Cognos Performance Management System



IBM Cognos Software Group Service – Enablement Offerings

- > **Project Services**
 - Cognos Series 7 (Reportnet, Powerplay, Impromptu)
 - Cognos 8 (Enterprise Planning, Business Intelligence, Data Warehousing, Project Management)
- > **Review Service (Health Checks, Application Review)**
- > **Specialist Services (Technical Architects)**
- > **Guardian Service (Mentoring & Best Practice)**
- > **Migration Service**
- > **Conversion Service**
- > **Off Shore Services**
- > **End User Adoption Service**
- > **Business Intelligence Competency Centres**
- > **Education Services**

Summary

- > Security migration will greatly affect the scope and complexity of the migration. It is important to determine this early in the migration plan.**
- > Security is more than login credentials, all security aspects need to be assessed as part of the migration plan**

Evaluation Forms

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- > **Complete evaluations for every session you attend** and qualify to win an additional \$500! An overall conference survey will be available at IBM Cognos Central on Friday morning, and will also be emailed to you.