

**IBM Cognos Performance**  
Better Intelligence. Better Business.

# Migrating from IBM Cognos Series 7 BI: Best Practices

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## ***Goals of This Presentation***

- After this Presentation, Business Decision Makers should understand
  - Benefits of Migrating from Series 7 to IBM Cognos 8
  - What Options Exist
  - That Migration is a Process - It's not just about migration tools
  - The High-level Process Steps
  - How to Learn More



## *Agenda*

- The Road to Successful Migration
- IBM Cognos 8 Benefits for Series 7 Customers
- Understanding Your Options
- Migration step-by-step
  - Process Overview
  - Determine when to Migrate
  - Evaluate your Applications and Determine Migration Approach
  - Build and Execute Migration Plan
- What You Should Do Next



### ***Common Misconceptions***

- “I understand that I must migrate to IBM Cognos 8 now because Series 7 is being discontinued”
- “If I’m using PowerPlay today, I should migrate to Analysis Studio”
- “Migration Tools are all I need to get to IBM Cognos 8”
- “I can only have dual support licenses for Series 7 and IBM Cognos 8 for 12 months”
- “Migration is an activity I can complete over the weekend”



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## *Common Issues Organizations Face*

- Cost of Ownership
  - Complex administration of many products - unnecessary high costs
  - Need to administer BI on too many Windows desktops across your company
  - Products that require too much different training
- Globalization
  - Lots of data in lots of languages in your global organization
  - Lots of people wanting BI capabilities with user interfaces in their own languages
- Agility
  - Rapidly changing demands for new capabilities
  - Need better integration with your infrastructure
  - Need to be able to dynamically balance loads



### ***The Power of IBM Cognos 8 BI: One Product, One Architecture***

- Lower Cost of Ownership
  - All BI capabilities in one product
  - Zero-footprint, web-based user interface plus flexible access modes
- Global
  - Unicode\*
  - Built for a global audience
- Highly Agile
  - Openness - leverage existing security, portal, app servers; access to relational or OLAP data from any capability
  - Web services-based Services Oriented Architecture (SOA) that fits into complex environments



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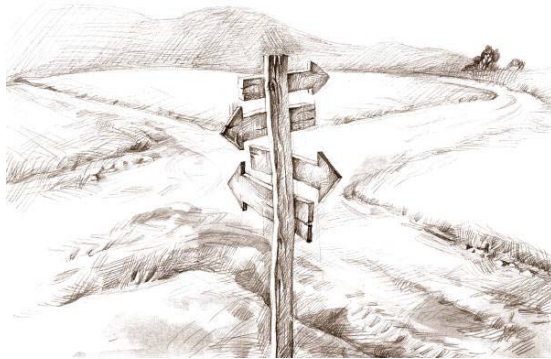


### ***Evaluate your Existing Applications and Determine Migration Approach***

- You have
  - Many applications with many data sources
  - Used in many sites / locations
  - Serving multiple communities of users, with different needs
- One size does not fit all
  - Just as all customers and their applications are different, each migration plan is similar but unique
  - Successful migration require the right approaches for your needs



## *Understanding Your Options*



- Option 1: Wait
  - Stay with Series 7 for the near future
- Option 2: Migrate applications to IBM Cognos 8
  - All At Once
- Option 3: “Best of Both Worlds”
  - Planned, staged migration, possibly with interoperability

*One, two or all options may be applicable to you depending on your applications*

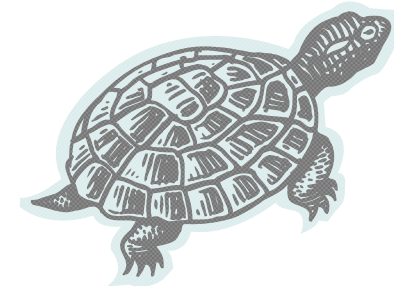
### **Choice influenced by many factors**

- Desire for IBM Cognos 8 benefits and how soon you want them
- Application Portfolio – Type, Age, Size, Number of Applications
- User Communities, Their Current and Future Needs
- Budget and other External Factors



## *Option 1: Wait*

- You don't have to migrate right now
- Benefits
  - Continuity for your business users
  - Less disruption
- Risks
  - Missing opportunities available with IBM Cognos 8
    - TCO, globalization, and agility
- Do what's right for your business when you need to



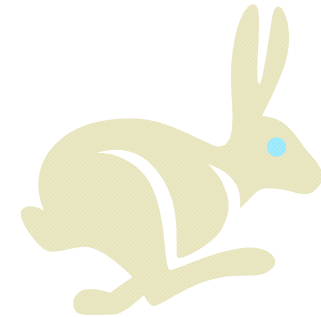
## *The Future of Series 7*

- Series 7 will continue to be developed and maintained as long as customers demand it and it makes business sense
  - There is no End-of-Support date
  - [http://support.cognos.com/supported/en/support/w/hatscoming/series7\\_commitment.html](http://support.cognos.com/supported/en/support/w/hatscoming/series7_commitment.html)
- New Series 7 Releases:
  - Series 7 Version 4 – Summer 2006: Continued product enhancements
  - Series 7 Version 4 Maintenance Releases – 2007, 2008, 2009...
  - Series 7 Version 5 in planning

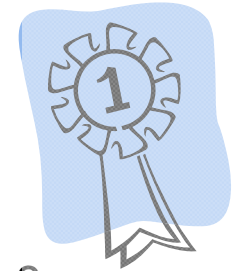


## ***Option 2: Migrate all applications to IBM Cognos 8***

- Fastest route to IBM Cognos 8
- Benefits
  - Get to IBM Cognos 8 benefits faster
    - TCO, globalization, and agility
- Risks
  - Conceptually simple but can be high risk
    - Application portfolio will determine ease of migration
    - Differences exist between Series 7 and IBM Cognos 8
  - May not realize opportunities to fully benefit from IBM Cognos 8
    - Need experience with IBM Cognos 8
  - Mistakes can be expensive
  - Can be disruptive to business users – must absorb change quickly (training needed)



## ***Option 3: Best of Both Worlds – Recommended***



- Safest route to IBM Cognos 8 for most customers
  1. Build new applications with IBM Cognos 8
  2. Migrate most PowerPlay users and applications to PowerPlay 8
  3. Maintain other Series 7 applications “as is”, set up interoperability between Series 7 and IBM Cognos 8, as necessary
  4. Then, with a pragmatic plan, gradually migrate existing applications & users to IBM Cognos 8
- Benefits
  - Gets you to the same place as “All at Once”, but lower risk and disruption to end users
  - More predictable results
- Risks
  - Likely takes longer than “All at Once”
  - More overhead – costs more to administer (2 infrastructures, 2 sets of hardware, 2 skill sets, etc)

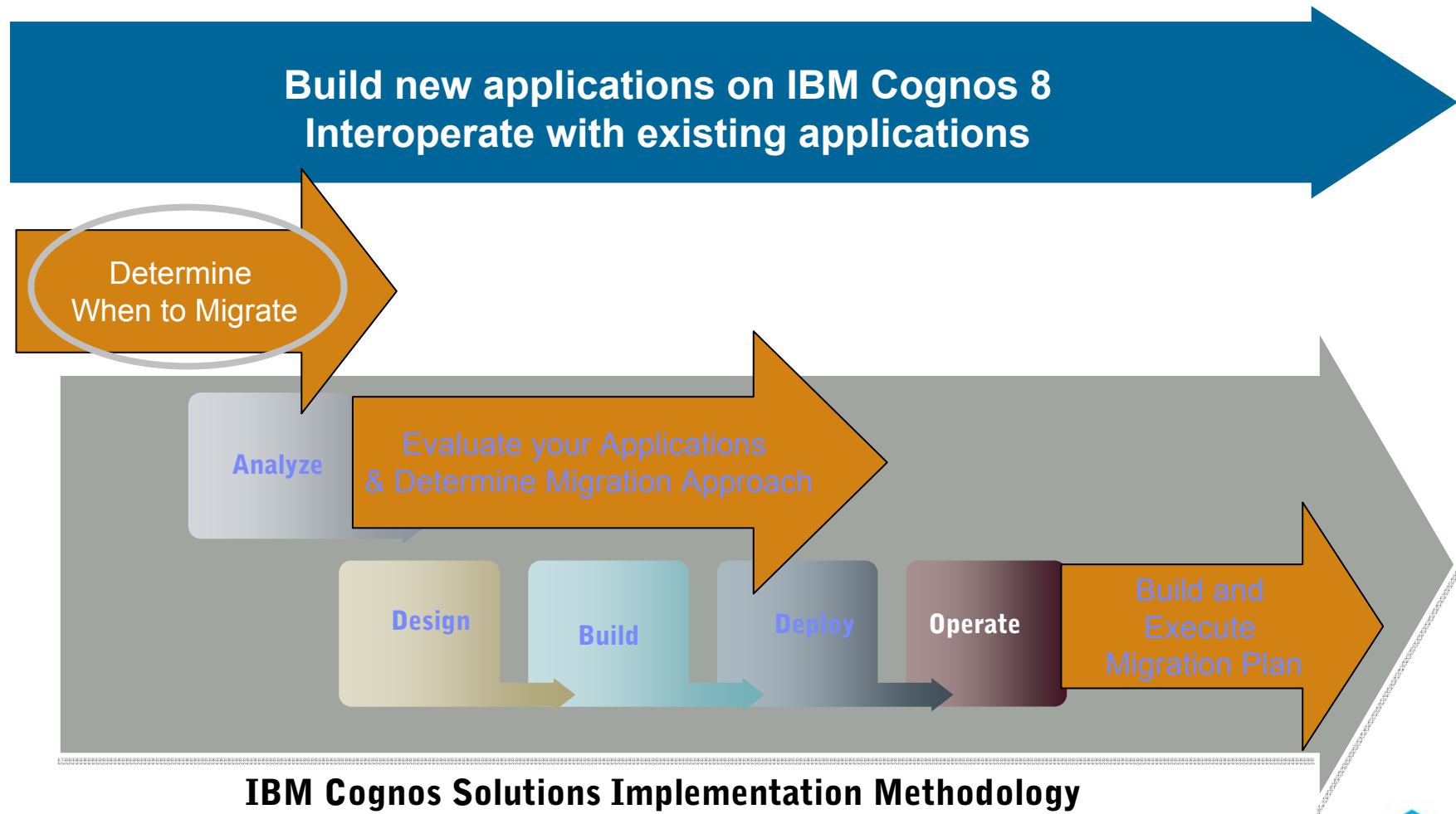


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## Migration Process Overview



**IBM Cognos Solutions Implementation Methodology  
Migration Project Management**





## *Determine When to Migrate: Balancing Business and IT goals*

### IT Goals

- Reduce risk
- Reduce costs
- Governance



### Business Goals

- Deliver shareholder value
- Grow revenue and profits
- Provide value in innovative ways

### Common Goals

- ROI on investments
- New innovative technology investments
- Manage corporate risks



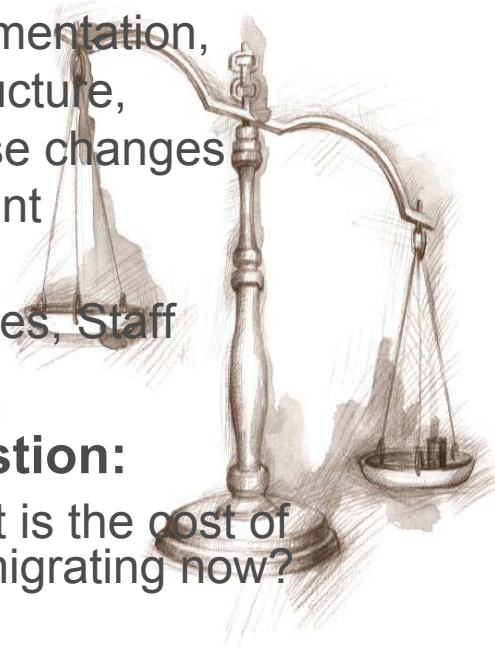
## *Determine When to Migrate*

### **Costs:**

- Migration implementation, Training, Infrastructure, Hardware, License changes but with investment protection
- Budget: Expenses, Staff skills, Time

### **Question:**

What is the cost of not migrating now?



### **Benefits:**

- Lower cost of operation
- Global, Scalable
- More open - use BI across more data sources

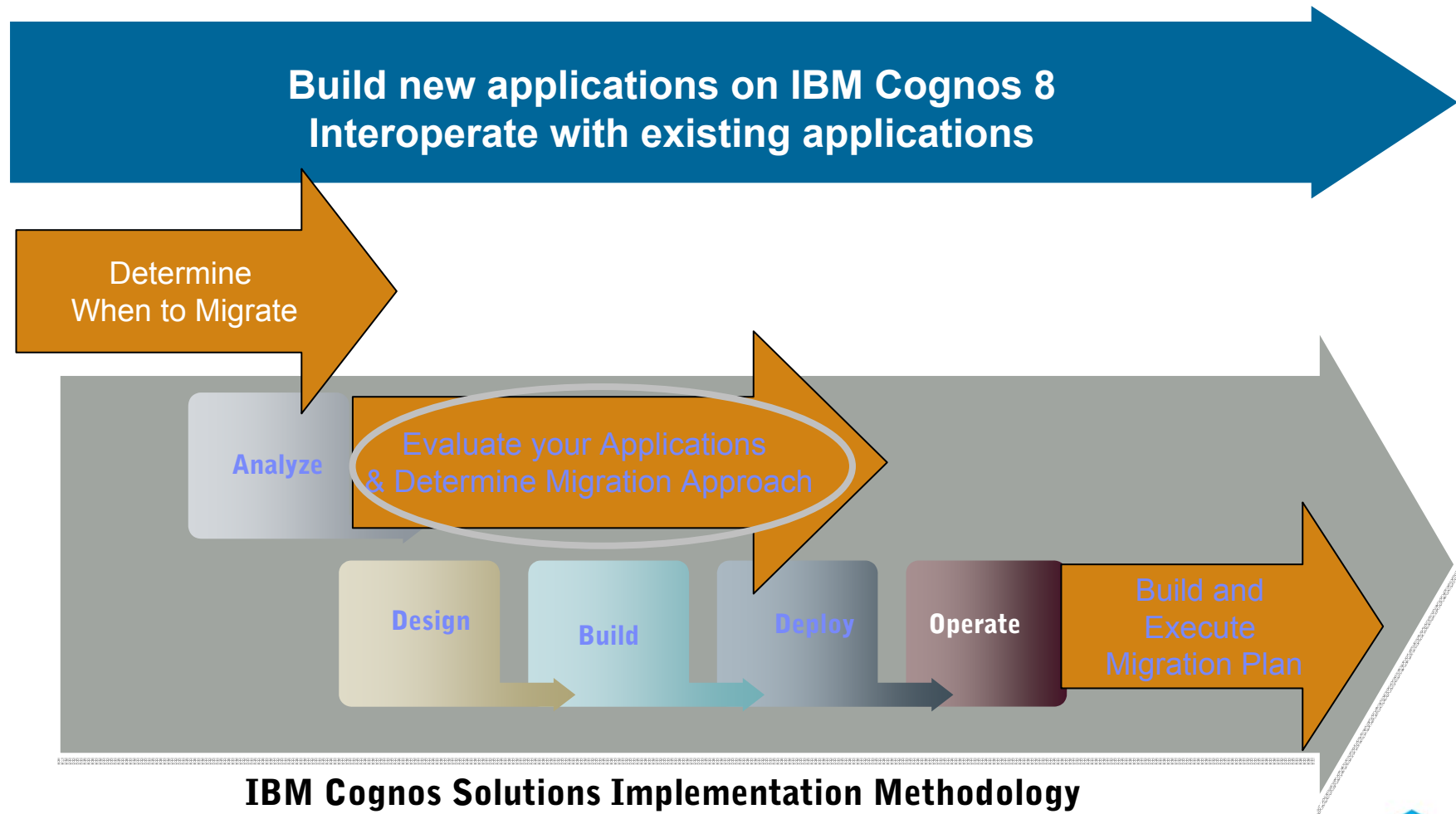
### **Influencers:**

- Appetite for Disruption to Current Plans and Priorities
- Tolerance for Change in Business Community

**Only you can determine when IBM Cognos 8 is right for you**



## Migration Process Overview

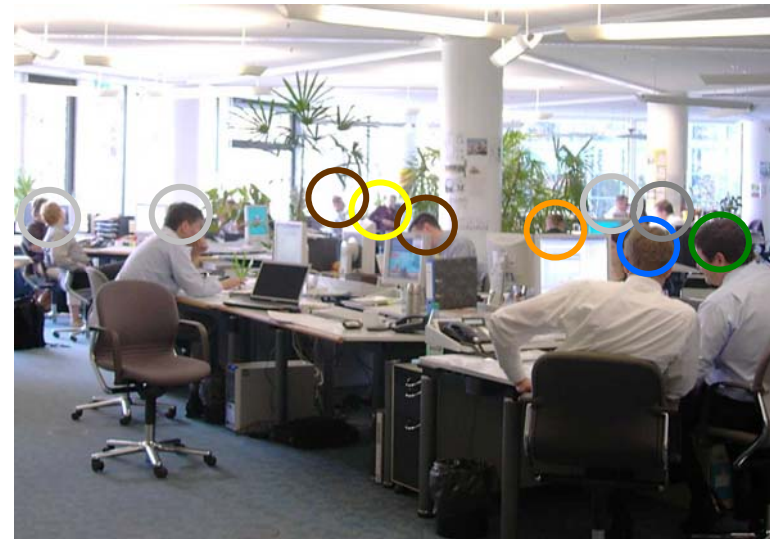
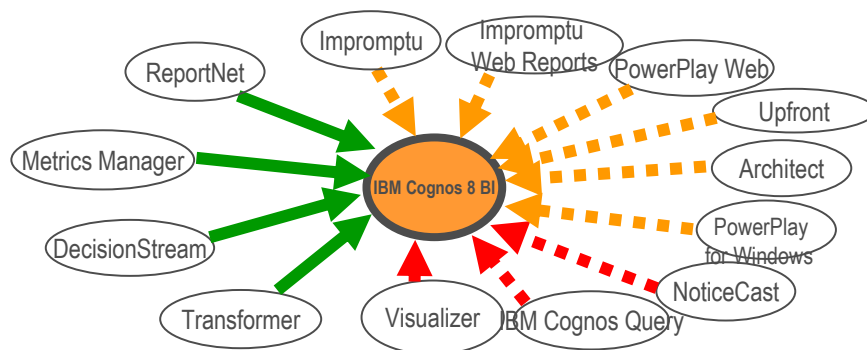
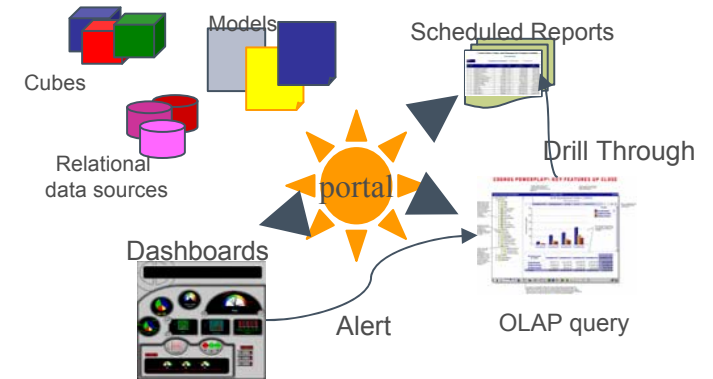


**IBM Cognos Solutions Implementation Methodology  
Migration Project Management**



## *Influencing Factors in choosing your approach*

- Application Characteristics
- User Communities
- New Capabilities in IBM Cognos 8
- Variances between Series 7 and IBM Cognos 8
- Migration Tools



## Slide 20

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## Technical Migration Approaches

### LIFT & SHIFT

- Replicate reports in new environment “as is”
- Focus on moving batches of BI elements quickly
- Can use offshore approach for additional savings of time and money
- Good candidate: PowerPlay applications

### HYBRID

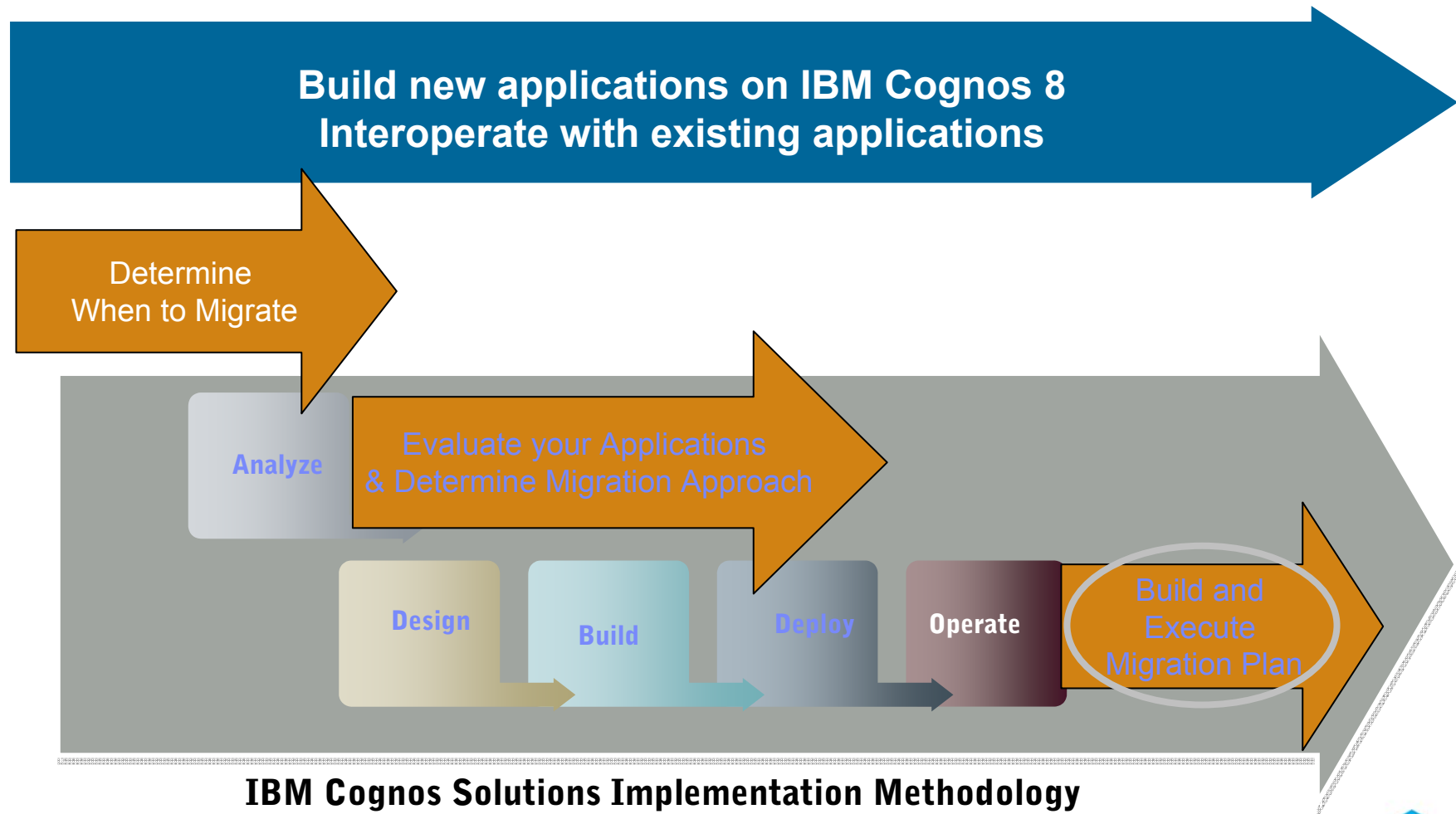
- Customize a combination of both approaches as makes sense for your business needs
- Leverage efficiency gains (compress & optimize) while quickly moving (lift & shift) essential reports
- Good candidate: PowerPlay applications with drill-through to IWR

### COMPRESS & OPTIMIZE

- Eliminate redundant or unnecessary reports
- Focus on new features & technology of IBM Cognos 8 to improve on existing applications
- Identify today (and tomorrow’s) business needs & ensure they are met
- Good candidate: IBM Cognos Visualizer applications



## Migration Process Overview



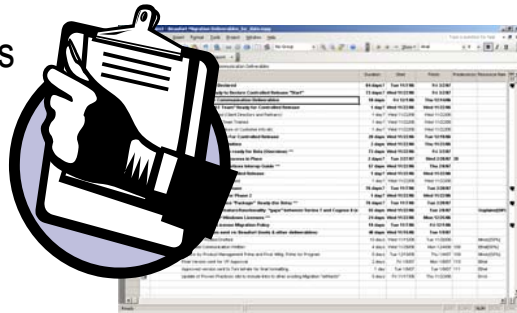
**IBM Cognos Solutions Implementation Methodology  
Migration Project Management**





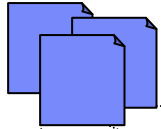
## Build and Execute Migration Plan What Does Your Migration Plan Look Like?

Checklists



Project Schedule

Artifacts



| Application | Module | Approach            |
|-------------|--------|---------------------|
| HR          | HR1    | Lift & Shift        |
|             | HR2    | Compress & Optimize |
|             | HR3    | Interoperate        |
| Inventory   | INV1   | Hybrid              |
|             | INV2   | Interoperate        |



Business Community



Business Community



Application Portfolio



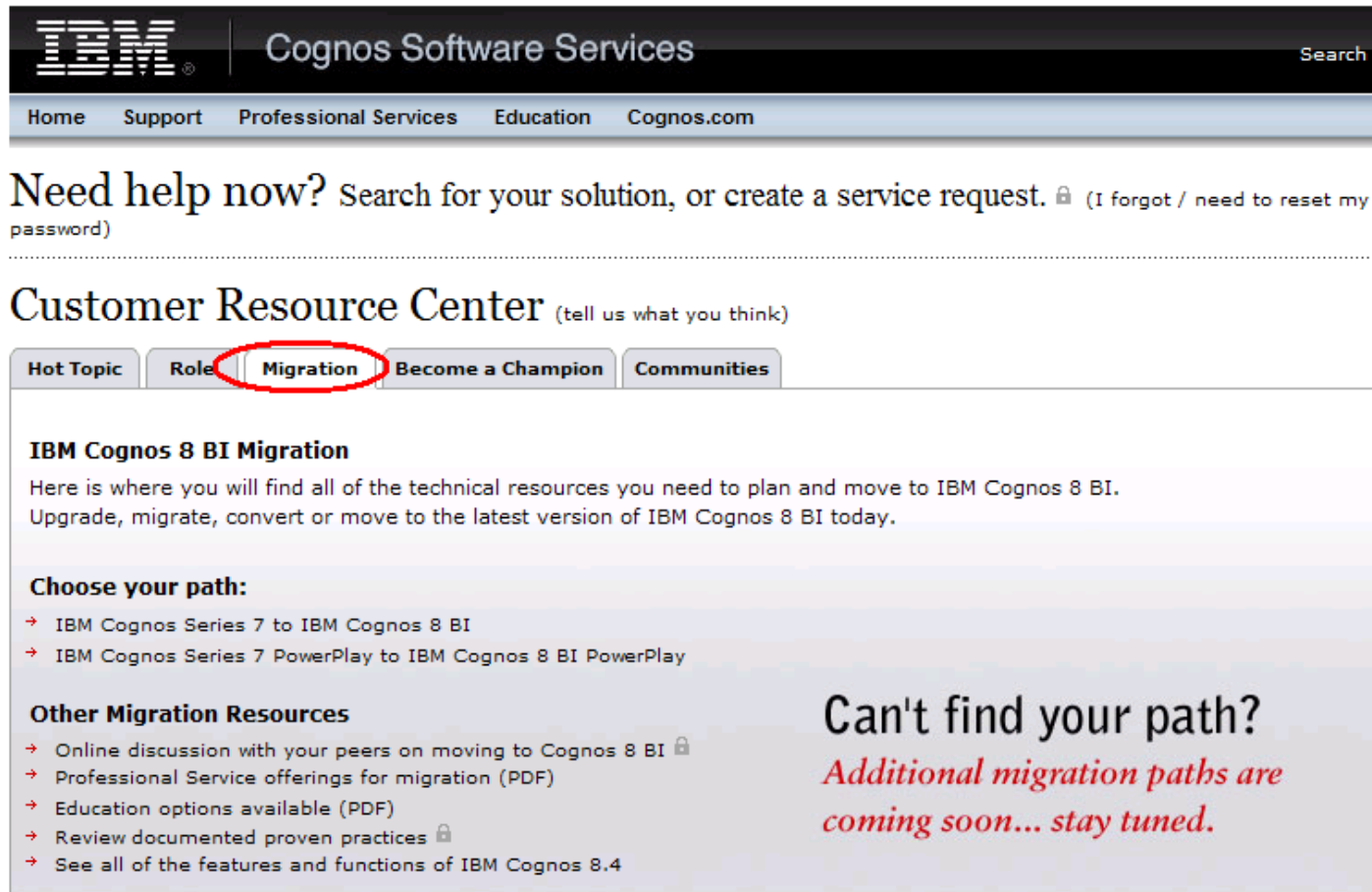


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***For more information, go to the Customer Support Resource Center***



The screenshot shows the IBM Cognos Software Services website. The top navigation bar includes the IBM logo, "Cognos Software Services", and a search field. Below the navigation bar are links for Home, Support, Professional Services, Education, and Cognos.com. The main content area features a search prompt: "Need help now? Search for your solution, or create a service request. (I forgot / need to reset my password)". Below this is the "Customer Resource Center (tell us what you think)" section, which has several tabs: "Hot Topic", "Role", "Migration" (highlighted with a red circle), "Become a Champion", and "Communities". The "Migration" tab is active, displaying the following content:

**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
- Professional Service offerings for migration (PDF)
- Education options available (PDF)
- Review documented proven practices
- 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.*



## *Summary*

- IBM Cognos 8 has new capabilities that can change the way you approach the solution you offer to your business users
- Successful Migrations
  - Are planned projects – leveraging experience from IBM Cognos Global Services or Experienced Migration Partners. It's not just about tools
  - Involve learning about IBM Cognos 8 on a new application before migrating anything
  - Are influenced by many factors in your environment, including application characteristics, and your user community needs
  - Combine varying degrees of Lift and Shift, Compress and Optimize, and Interoperability depending on your needs

