C11.1 Upgrade and Authenication Change [1]

June 19, 2019 by Aron Sage [2]

As promised in our IRM Stakeholders meetings and trainings, we are proceeding with a Cognos upgrade (CU-Data) this summer. We will be reaching out to you in functional areas to determine a specific timeline, although all users will move to the upgraded environment between July and September 2019.

This upgrade has two components: an authentication provider change and a software update. The first, the authentication change, is a significant change in security that moves our Cognos installation from using custom code to an IBM-supported provider, which will significantly increase the reliability of our configuration. This change, implemented through a fresh installation of the latest and greatest version of Cognos on new, upgraded servers, along with our distributed installation with multiple dispatchers, load balancing health checks, and rolling restarts will establish a stable reporting system that will also allow our team to more effectively support users.

We have identified the following functional areas. We have divided the areas amongst the three IRM-BI resources: Nabin Pouydal, Aron Sage, and myself (Elizabeth Snow-Trenkle) and identified the Cognos Content Product Owners. All values in this table are subject to change based on upcoming conversations.

Campus	Functional Areas	BI Team Primary

System	Access Management/Security Coordinator	Aron Sage
System	Advancement	Aron Sage
System	FIN (PS Finance)	Aron Sage
Denver	CS - Admissions	Aron Sage
Denver	Anschutz	Aron Sage
Denver	CS - Financial Aid	Aron Sage
Denver	CS - Student Records (Registrar Office)	Aron Sage
Denver	CS - Student Finance (Bursar's Office)	Aron Sage
System	System reports	Nabin Pouydal
System	System reports	Nabin Pouydal
Boulder	CS - Admissions	Nabin Pouydal
Boulder	Facilities Management	Aron Sage
Boulder	CS - Financial Aid	Nabin Pouydal
Boulder	CS - Student Records (Registrar Office)	Nabin Pouydal
Boulder	CS - Student Finance (Bursar's Office)	Elizabeth Snow-Trenkle
Springs	CS - Admissions	Nabin Pouydal
Springs	CS - Financial Aid	Nabin Pouydal
Springs	IR (Institutional Research) - UCCS	Aron Sage
Springs	CS - Student Records (Registrar Office)	Nabin Pouydal
Springs	CS - Student Finance (Bursar's Office)	Nabin Pouydal
System	DATC	Elizabeth Snow-Trenkle
Boulder	eRA	Elizabeth Snow-Trenkle
Denver	eRA	Elizabeth Snow-Trenkle
		Elizabeth Snow-Trenkle
System	eComm	Elizabeth Snow-Trenkle
System	Skillsoft	Nabin Pouydal
System	HCM (PS Human Capital Management)	Aron Sage
System	ePers	Aron Sage
System	IRM	Aron Sage
Boulder	Leeds	Elizabeth Snow-Trenkle

IRM will be initiating communication with the Cognos Content Owners over the next few weeks. When we reach out, we will first get a general idea of when it makes sense for your area to upgrade. Then we will schedule a kick off meeting to review the following:

Cognos content location and Cognos content owner (UAT sign off)
review testing process and discuss timeline, clarify Stakeholders team
Determine location of My Folders drop box folder in c11.0 (all environments) that will be migrated to c11.1
Setup weekly or biweekly status meeting
Discuss data owner, security groups, and discuss access request process

After the kick off meeting, we will ask Stakeholders to review their Cognos content, finalize any questions/concerns regarding security and access requests, determine our timeline for upgrading, and determine our communication plan with users. This could also be the ideal time for the IRM resource to create the "drop box folder" for My Content in each environment and for Stakeholders to communicate to users the steps to move My Content into the drop box folder in each environment.

The upgrade process will start in Cognos Upgrade WRT. IRM will migrate content from current WRT to Upgrade WRT (including creating data source connections, migrating packages, migrating content, securing content, and conducting preliminary testing) and then alert Stakeholders that the environment is ready for testing. Stakeholders will then be able to begin testing access, reports, and content in Cognos Upgrade WRT. Testing recommendations include:

Test access - have developers log in to new environment
Test data source connections - run reports against each package
Test report components - run reports that use visualizations, html, or JavaScript
Test report content - run reports in different outputs, check visual output, check line counts, check report totals

When testing is complete and the Stakeholders approve the upgrade for WRT, IRM will remove access to the current WRT environment in order to ensure that development takes place in only one location and everyone is clear on which environment they should be accessing.

After completing the upgrade in WRT, IRM recommends entering an emergency only migration freeze since we will be running two different versions of the software. Migrations from 11.1 to 11.0 are not encouraged. At this point, we will be ready to upgrade QA and then

Prod, following the above steps. We will discuss the timeline for testing for each environment with each functional area to determine how much time Stakeholders need to test each environment, and how quickly we want to move throughout the process.

When the Stakeholder has approved the upgraded Cognos Prod, their users will be able to access CU-Data Prod (upgraded) through a new link on the Portal page. The Upgraded WRT and QA will have new URLs for access.

If you have any questions, please reach out to us individually or at irm@cu.edu [3].

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