

COMMONWEALTH OF PENNSYLVANIA

DEPARTMENT OF HUMAN SERVICES

INFORMATION TECHNOLOGY STANDARD

Name Of Standard: Cognos Reporting Deployment	Number: STD-EKMS005
Domain: Knowledge Management	Category: Data Warehouse/Business Intelligence
Date Issued: 03/03/2008	Issued By Direction Of: Kevin Gray, Dir of Enterprise Apps
Date Revised: 02/18/2016	

Abstract:

The purpose of this Standard is to establish enterprise-wide standards and guidance for the deployment of Cognos BI (Business Intelligence) applications to the production DHS Cognos BI web reporting site.

Cognos BI provides a variety of reporting, analysis, dashboard, and scorecard capabilities to provide the right amount of detail to the report consumer. Analytical, historical, and trend analysis reporting should be implemented using this toolset.

General:

This standard applies to all content on the Cognos servers managed by DHS. This standard outlines production implementation procedures for any and all content placed on the Cognos BI platform regardless of report database source or report audience.

Standard:

Deployment of reporting applications to the DHS managed production Cognos environment occurs through the submission of appropriate request forms described in this standard. Reporting applications that do not meet the Cognos Reporting Development standards or have previously approved exceptions will not be deployed. The following items are prerequisites to a production deployment. An asterisk (*) indicates an item only required on new "first time" deployments (not redeployments for bug fixes):

1. * All required appropriate documentation including but not limited to a description for each object in Cognos Connection, package update documents, and training/user manuals.
2. * User acceptance testing and a user signoff for the application(s) to be deployed.
3. * Addition of any user class(es) to the appropriate namespace necessary for the required authorization.

The following steps must be followed to get BI content into the production DHS Cognos BI environment.

1. Verify that the applications to be deployed function properly in the staging environment when run through the same user classes that will be running them in production. Content in the staging environment should look exactly as it will when deployed to production with the exception of output versions and scheduling options.
2. * Verify that the content to be migrated is invisible to the user classes prohibited from seeing it.
3. * Verify that the Cognos Reporting Development standards regarding naming conventions and object descriptions have been followed.
4. * Include on the deployment request a list of everything outside of the content store that must be in its proper place on a production server in order to have the release function in production as it does in staging. This includes cubes, components such as maps (CMF files), help files, images (e.g. GIF, JPG, PNG), etc. All deployments must include the Framework Manager project file(s) used in the creation of the applications being deployed. All content must be in place at least five business days prior to the deployment date listed on the deployment request.
5. * Include on the deployment request a list of everything in the staging content store that must be in the production content store in order to have the release function in production as it does in staging. This includes containers (i.e. packages and folders) and any items (e.g. reports and links) contained therein, data sources, jobs, etc. Special deployment folders should be utilized when a subset of a program area's applications are being deployed for one initiative while work continues concurrently on another subset of that same program area's applications to avoid deploying any content before it is ready or after it is obsolete. All content must be in place at least five business days prior to the deployment date listed on the deployment request.

Attention: No jobs should be scheduled to run in staging. Establish the job object in staging and place the schedule on the Cognos Deployment Request Form referencing the appropriate job.

6. Include on the deployment request any file system locations required for externalizations. File system locations are defined within the content store but they create folders outside the content store, so it's hard to categorize them as entirely within or outside of the content store, which is why file system locations should be listed separately from everything else.
7. Send the Cognos Deployment Request Form that lists the required items external to the content store, the required content in the content store, and the release deployment date via email to the Cognos BI Administrator (RA-bihelpdesk@pa.gov) so that the administrator can make sure external items are in place prior to doing an export to a zip file that includes the necessary content to migrate any content store content that may be dependent upon those external items. Requests must be received at least five business days prior to the deployment date listed on the deployment request.

Attention: No output versions will be deployed from staging into production. Output versions must be created in production after the deployment date.

8. Supply a Package Update Document to the Cognos Administrator for any changes to packages directly accessible to users through Report Studio prior to the day of the production deployment. Update documents are not required for developer packages.

9. The Cognos Administrator will assure that all necessary items external to the content store are in place. PowerCubes must be placed on the application server in a directory that matches the PPES folder source, which must be consistent between staging and production. Cube models and cube data sources must be on the cube build server along with the necessary build scripts. Help files and other documents linked through Cognos Connection must be on the production web server and the links in both staging and production should refer to the same location on that web server. Components such as maps (CMF files), etc. must be in the proper directories as per Cognos technical specifications. Images should be placed at D:\Program Files\ibm\cognos\c10_64\webcontent\images.
10. The Cognos Administrator will export the staging content to a zip file (unless a complete zip from development last used to update staging already exists or can easily be taken) and move that zip file from the source deployment directory to the production deployment directory.
11. The Cognos Administrator will import the content to the production content store on the agreed upon date, but at a time of his/her choosing unless he/she previously agreed to follow special instructions from the requestor to deploy at a particular time of day. The administrator will, if necessary, manually add directory content such as new data sources, groups and roles. The administrator will move the deployed content to the proper location if it was deployed through a special deployment container. The administrator will also place PDF versions of any package update documents onto the production web server at D:\Program Files\ibm\cognos\c10_64\webcontent\Help\Package_Updates and create links to those documents which will be contained within the packages they apply to such that they are accessible to the package users, as well as place Word versions of those documents onto DocuShare. Once complete, the administrator will notify the developers that their work has been deployed to production.
12. Developers will double check the deployed application(s) in production to make sure they function properly. Developers may request a reverse deployment of the updated content to the Production Image area in development when they are sure what was deployed to production will not have to be undone. Production Images should be kept up both as repositories for starting new development as well as for rollback of bad production deployments.
13. Announcements will be sent out by the developers to the users of the deployed application(s) informing them that they can now access the application(s) in production.

Exemptions from this Standard:

There will be no exemptions to this standard.

Refresh Schedule:

All standards and referenced documentation identified in this standard will be subject to review and possible revision annually or upon request by the DHS Information Technology Standards Team.

Standard Revision Log:

Change Date	Version	Change Description	Author and Organization
2/28/2008	1.0	Initial Creation	Larry Leitzel, EKMS
5/8/2009	2.0	Increase lead days to 5 and clarify metadata, schedule, and output version requirements.	Larry Leitzel, EKMS

12/4/2013	3.0	Clarify new versus re-deployments. Update "catalog" to "folder" nomenclature. Added path for image files.	Rick Allen, EKMS
1/22/2015	4.0	Replaced metadata references with package update document references. Replaced DPW and Public Welfare with DHS and Human Services. Reworded how to list content and how the administrator will deploy that content. Eliminated inconsistencies (e.g. output versions) and omissions (e.g. production images, file system locations).	Joe Sweigard, EKMS
2/18/2016	4.1	Updated Issued By Direction Of: section and changed ra-bihelpdesk@state.pa.us to RA-bihelpdesk@pa.gov .	Joe Sweigard, EKMS