IBM Cognos Lifecycle Manager
Version 11.0

Installation and User Guide

IBM

Contents

Chapter 1. Installation, configuration, and preparation of IBM Cognos LifeCycle Manager

Cognos® LifeCycle Manager is a stand-alone single-user application that you can install on any computer that meets the necessary system requirements.

Cognos LifeCycle Manager does not need to be installed on the computer where IBM® Cognos Business Intelligence or IBM Cognos Analytics is installed. For performance, install Cognos LifeCycle Manager on a server rather than on a personal workstation.

Supported environments

IBM Cognos LifeCycle Manager supports several environments.

Cognos LifeCycle Manager supports the following environments as the source environment:
- IBM Cognos 8 8.4
- IBM Cognos Business Intelligence 10.1.x, 10.2.x
- IBM Cognos Analytics 11.0.x

Cognos LifeCycle Manager supports the following environments as the target environment:
- IBM Cognos 8 8.4
- IBM Cognos Business Intelligence 10.1.x, 10.2.x
- IBM Cognos Analytics 11.0.x

Installing IBM Cognos LifeCycle Manager

The installation wizard leads you through the process of installing Cognos LifeCycle Manager.

Before you begin

Cognos LifeCycle Manager has the following system requirements.

Table 1. Cognos LifeCycle Manager system requirements

Requirement	Specification
Operating system	Microsoft Windows Linux
RAM	Minimum: 4 GB
Disk space	A minimum of 3.6 GB of free space is required to install the software.
Java™ Runtime Environment (JRE)	IBM JRE 1.8 is installed automatically with Cognos LifeCycle Manager.
Web browser	Cognos LifeCycle Manager supports the same browsers as IBM Cognos Analytics.

About this task

`11.0.4` The Cognos LifeCycle Manager installation files are included in the IBM Cognos Analytics installation package.

You can install a new version of Cognos LifeCycle Manager on top of an existing version if you are using version 11.0.4 or later. However, you must first stop the Cognos LifeCycle Manager server.

`11.0.5` When you install Cognos LifeCycle Manager on top of an existing installation, the following content is backed up and restored.
- *install_location*\project
- *install_location*\benchmarks
- *install_location*\wlp\usr\servers\lcm\server.xml

In addition to these folders, you can back up other content, or the entire install folder.

If you have Cognos LifeCycle Manager version 11.0.3 or earlier, copy the following content to the location where you are installing the newer version of the product.
- *install_location*\project
- *install_location*\benchmarks
- *install_location*\wlp\usr\servers\lcm\server.xml
- *install_location*\configuration\lcm.properties

Procedure

1. From the directory where you downloaded the Cognos Analytics installation package, double-click the executable file.
2. Click the **IBM Cognos Analytics tools** radio button.
3. Follow the directions in the installation wizard to copy the required files to your computer.

   Note: The installation wizard prompts you to create a user and password. The user name and password is used to sign into Cognos LifeCycle Manager. The user that you define during the installation process has administration privileges.
4. Click **Finish**.

Related tasks:

"Defining user access to IBM Cognos LifeCycle Manager"
You can grant multiple users access to the Cognos LifeCycle Manager web application.

Before users can start working in Cognos LifeCycle Manager, you must start the Cognos LifeCycle Manager web application.

Defining user access to IBM Cognos LifeCycle Manager

You can grant multiple users access to the Cognos LifeCycle Manager web application.

Before you begin

Before you can add users, the Cognos LifeCycle Manager web application must be stopped.

About this task

Users can sign in to Cognos LifeCycle Manager by using the Cognos administrator user ID and password that were defined during the installation process.

Alternatively, you can define new users by adding their credentials to the `server.xml` file. The actions that a user can perform depend on the following user types.

Table 2. User types in Cognos LifeCycle Manager

User type	Description
User	Users can see only the results of a project. They can't run or create projects, and they can't create or view IBM Cognos server connections.
Project administrator	Project administrators can create and run projects and tasks, and see the results. They can't create or view IBM Cognos server connections.
System administrator	System administrators can create and run projects and tasks, and see the results. They can also create or view IBM Cognos server connections.

You define users in `server.xml` file by adding `<user>` elements. Users must be added to a `<user group>` element. User groups must be linked to a user type by adding them to one of the available `<security-role>` elements. By default, two user groups exist in `server.xml`. You can add system administrators to the `admins` group, and you can add users to the `users` group.

Procedure

1. If necessary, stop the Cognos LifeCycle Manager web application.
2. On the computer where Cognos LifeCycle Manager is installed, go to the *install_location*\wlp\usr\servers\lcm folder.
3. Open `server.xml` in a text editor.
4. In the `basicRegistry` element, create users and passwords, and if needed, user groups. For example,

   ```
   <user name="name1" password="pwd" />
   ```
5. Add the user as a member of a group. For example,

   ```
   <group name="users">
       <member name="name1"/>
   </group>
   ```
6. If you created a new user group, in the `<application-bnd>` element, add the new user group to one of the `security-role` elements.
7. Save the `server.xml` file.
8. Start the Cognos LifeCycle Manager web application.

Related tasks:

"Starting IBM Cognos LifeCycle Manager" on page 5
Before users can start working in Cognos LifeCycle Manager, you must start the Cognos LifeCycle Manager web application.

Configuring IBM Cognos LifeCycle Manager with SSL

Configuring Cognos LifeCycle Manager to work with IBM Cognos Analytics and the Secure Sockets Layer protocol.

Procedure

1. Start IBM Cognos Configuration.
2. In the **Explorer** window, click **Environment**. In the **Properties** window ensure that the dispatcher URI's use HTTPS instead of HTTP.
3. In the **Explorer** window, click **Security** > **Cryptography**.
   a. Set the *SSL Protocols* value to TLS 1.2, 1.1, 1.0 - the third option This option is needed as IBM Cognos Analytics uses TLS version 1.2, but Cognos LifeCycle Manager requires version 1.0.
   b. Change the Server Common Name and DNS names to be the Host Name of the server.
4. Restart the server.
5. Export the certificate. Use the following command from the `<cognos install dir>\bin` directory.
   `ThirdPartyCertificateTool.bat -E -T -r ca.cer -p NoPassWordSet` The default password for the cert is "NoPassWordSet".
6. Copy the *ca.cer* file to your Cognos LifeCycle Manager installation location.

   If you use LCM in a development environment with a self-signed certificate that is not from a trusted authority, the prompt page is displayed without any css styles, and the OK button to capture prompts does not work.

   To resolve these problems, open Cognos Analytics in another tab of the browser, and accept the certificate from the Cognos Analytics server. Do this for each Cognos Analytics server that you access.

   If you use a trusted certificate, this problem should not occur.

Configuring the IBM Cognos LifeCycle Manager *Server.XML* File for SSL

Configure the Cognos LifeCycle Manager *Server.XML* for SSL.

About this task

The *Server.XML* is stored in the following location: `<lcm install dir>\wlp\usr\servers\lcm\server.xml`

Procedure

1. Add an SSL Configuration block and keystore to the *Server.XML* file:
   ```
   <sslDefault sslRef="defaultSslConfig" />
   <ssl id="defaultSslConfig" keyStoreRef="defaultKeyStore" clientAuthenticationSupported="true"/>
   <keyStore id="defaultKeyStore" password="yourPassword" />
   ```
2. Add an HTTPS port number to your **httpEndpoint** element:
   ```
   <httpEndpoint host="*" httpPort="9305" httpsPort="9443" id="defaultHttpEndpoint"/>
   ```
3. Restart the Cognos LifeCycle Manager Server.
4. Locate the keystore file. It will be located in the following location: `<lcm install dir>\wlp\usr\servers\lcm\resources\security\<keystore name>` Keystore name is *key.jks*.

   Once you have your keystore file, you can import the *ca.cer* file that you created during your Cognos Analytics install.

5. Browse to the key tool that is part of the JRE shipped with Cognos LifeCycle Manager. The JRE is found at the following location: `<lcm install dir>\jre`
6. Import the *ca.cer* to two locations:
   a. To the *ca certs* file under `<lcm install dir>\jre\lib\security\cacerts`. The command to import the cert will look like:

      `<lcm install dir>\jre\bin\keytool -import -trustcacerts -alias myc11install -file <some fil`
   b. Import the *ca.cer* file to the keystore for liberty profile using the command:

      `<lcm install dir>\jre\bin\keytool -import -trustcacerts -alias myc11install -file <some fil`

   -alias is used to add a description to the keystore in case multiple certificates are used.
   The default password for the JRE Keystore is "changeit".

   The password to the liberty profile key store is "yourPassword" as specified in step 1.

Results

Cognos LifeCycle Manager should now be able to communicate using SSL with the Cognos Analytics server that you imported the certificate from.

Starting IBM Cognos LifeCycle Manager

Before users can start working in Cognos LifeCycle Manager, you must start the Cognos LifeCycle Manager web application.

About this task

The URL that is used to start the Cognos LifeCycle Manager web application in a browser includes a port number. The port number must match the port number that is specified in the *install_location*`\wlp\usr\servers\lcm\server.xml` file.

If users are not able to start Cognos LifeCycle Manager, the port number might be taken by another application. If that is the case, modify the port number in `server.xml` and in the URL.

Procedure

1. Start the Cognos LifeCycle Manager server:
   - On a Microsoft Windows system, from the **Start** menu, click **LCM Start**.

     Tip: You can also type the following command in a command prompt window, from the Cognos LifeCycle Manager install location. Depending on where Cognos LifeCycle Manager is installed, you might have to run the command prompt window as an administrator.

     `lcm_start.bat`
   - On a Linux system, run the server start script
     install_location`/lcm_start.sh`
2. Start the Cognos LifeCycle Manager web application:
   - On a Microsoft Windows system, from the **Start** menu, click **LCM URI**.
   - Type the following URL in your browser:
     `http://server_name:port_number/lcm_servlet/webcontent/index.html`
3. To stop the Cognos LifeCycle Manager server:
   - On a Microsoft Windows system, from the **Start** menu, click **LCM Stop**.

Tip: You can also stop Cognos LifeCycle Manager by typing the following command in a command prompt window, from the Cognos LifeCycle Manager install location. Depending on where Cognos LifeCycle Manager is installed, you might have to run the command prompt window as an administrator.

`lcm_stop.bat`
- On a Linux system, run the server stop script
  install_location/`lcm_stop.sh`

Defining IBM Cognos server connections

Define connections to the Cognos environments that IBM Cognos LifeCycle Manager works with.

About this task

For each Cognos server connection that you define, you must provide the following information:
- Gateway URI
- External Dispatcher URI

The New server window provides an example of the syntax to use for each URI.

The Gateway URI syntax that IBM Cognos Analytics uses is different than the syntax that IBM Cognos Business Intelligence uses. Cognos Analytics uses the following Gateway URI syntax: `http://`*server_name:port_number*`/bi/v1/disp`.

Note: To ensure that Cognos LifeCycle Manager does not encounter problems when connecting to a server, use fully qualified domain names.

Procedure

1. Log in to Cognos LifeCycle Manager.
2. Click **My servers** and then click the **Create server** icon .
3. In the New Server window, enter the required information for the server connection.
4. Click **Finish**.

Results

Server information is stored in the *install_location*`\project\servers\server.json` file.

Chapter 2. IBM Cognos LifeCycle Manager projects and tasks

You can use Cognos LifeCycle Manager to divide work into projects. You can break down projects into tasks.

For example, if an administrator is upgrading a set of reports (an application), the administrator creates a new project. If multiple report authors validate the results, the administrator creates a task for each user that authenticates the results, with multiple reports in each task.

The upgrade process

Upgrading to IBM Cognos Analytics is a process that you do in stages.

1. Create an upgrade plan, which includes the following activities:
   - Reviewing resources, such as documentation and the Cognos Upgrade Central website (http://www-01.ibm.com/support/docview.wss?uid=swg22011664)
   - Verifying the supported environments to ensure compatibility with your other software by going to the IBM Software Product Compatibility Reports page (www.ibm.com/support/docview.wss?uid=swg27047186). You might also want to go to this page if you are thinking of upgrading your operating system.
   - Evaluating your existing system to determine what you want to move to your new version of the product.
   - Creating a detailed plan to implement your upgrade strategy.
2. Create a development or test system with the new version of the product.
3. Use the information learned from the development or test system and apply it as you create your QA or production systems.

IBM Cognos LifeCycle Manager is a tool that validates differences in Cognos generated output (data and rendered view) that is run through the Cognos application.

Creating IBM Cognos LifeCycle Manager projects and tasks

To begin working in Cognos LifeCycle Manager, create an upgrade project and create tasks within the project.

About this task

You can create two types of tasks in a project.

- Comparison

  This type of task runs and compares reports in the source and target Cognos environments that you specify.
- `11.0.4` Benchmark

  This type of task creates a baseline of a Cognos environment.

Procedure

1. Click **My projects** and then click the **Create project** icon ![icon].
2. Specify a name for the project, and then click **Next** to create a task.
3. To set properties for the project, click **Show advanced properties**.
4. In the New task window, choose the type of task that you want to create.
5. If you created a benchmark task, provide the following information.
   a. Under **Benchmark name**, specify a name for the task.
   b. Under **Select the source IBM Cognos server**, specify the source Cognos server for the benchmark and then click **Next**.
   c. Select the reports to run and then click **Next**.
   d. For the reports that you selected, check which reports require prompt values by clicking **Check all reports for prompts**.
   e. Under **Report run options**, choose whether to validate reports before you run them, and whether to run the reports in Dynamic Query Mode (DQ).
   f. Under **IBM Cognos options: Output format**, select the output formats that you want and then click **Save** to save the task or **Run** to run the task.
6. If you created a comparison task, provide the following information.
   a. Under **Task name**, specify a name for the task.
   b. Under **Source content type**, choose the type of source content that you want to use.
   c. If you chose **Benchmark** as the source content type, select a previously created benchmark task for the benchmark source and the target Cognos server that you want to compare to the benchmark.

      Note: Benchmark tasks are linked to the project in which they were created. Therefore, benchmark tasks are available as a source only in the project in which the benchmark task was created. For example, you create a benchmark task in project A. The benchmark task is available as a source only in comparison tasks that are created in project A.
   d. If you chose **IBM Cognos server** as the source content type, specify the source and target Cognos servers and then click **Next**.
   e. Select the reports to run and compare and then click **Next**.
   f. For the reports that you selected, see which reports require prompt values by clicking **Check all reports for prompts**.
   g. Under **Report run options**, choose whether to validate reports before you run them, and whether to run the reports in Dynamic Query Mode (DQ).
   h. Under **IBM Cognos options: Output format**, select the output formats that you want and then click **Save** to save the task or **Run** to run the task.
   i. Click **Save** to save the task or **Run** to run the task.

Results

A project or task is created. You can modify a project or task by hovering over the project or task name, clicking the **More** icon ![icon] that appears, and then clicking **Edit**.

Projects are saved in the `install_location\project` directory. If you want to move or copy projects to another instance of Cognos LifeCycle Manager that is installed on another computer, move or copy the contents of this directory to the same location on the second computer.

Benchmark task results are stored in the *install_location*\benchmark directory. If you want to move or copy benchmarks to another computer, you must move or copy the contents of both the project and benchmark directories to the second computer.

Related tasks:

"Defining IBM Cognos server connections" on page 6
Define connections to the Cognos environments that IBM Cognos LifeCycle Manager works with.

Setting advanced properties for a project

You can set properties that control what Cognos LifeCycle Manager reports as differences when report outputs are compared.

Procedure

1. Create a new project or edit an existing project.
2. Click **Show advanced properties**.
3. Select the check boxes of the types of differences that you want Cognos LifeCycle Manager to detect.
4. For each report comparison threshold, move the slider to the value that you want.
5. Click **Finish**.

Capturing prompt values in IBM Cognos LifeCycle Manager

If your reports contain required prompts, you must provide prompt values before Cognos LifeCycle Manager can run the reports.

Procedure

1. Create a new task or edit an existing task.
2. If you created a new task, add the reports that you want to run in the task.
3. To check all reports for required prompts, click **Check all reports for prompts**.
4. To check an individual report for required prompts, click the **Check for prompts** link for the report.
5. For each report that requires prompt values, click the **Prompts required** link.
6. In the Capture prompt window, select the prompt values that you want.
7. Click **OK** to run the reoport.
8. If the prompt values that you selected produces a report that you are satisfied with, click **Capture Prompt Values**. Otherwise, click **Cancel** to pick other prompt values.

Results

The selected prompt values appear beside each report.

Running tasks in IBM Cognos LifeCycle Manager

Run tasks so that Cognos LifeCycle Manager can compare reports.

Before you begin

If some reports contain required prompts, you must first add prompt values to
these reports.

About this task

When you run tasks, Cognos LifeCycle Manager verifies whether report
specifications are semantically correct.

Procedure

1. To run all tasks in a project, perform the following steps.
   a. Click **My projects** and hover over the project.
   b. Click the **More** icon ▤ that appears.
   c. Click **Run**.
2. To run an individual task, perform the following steps.
   a. Click **My projects** and click a project.
   b. Go to the task that you want to run.
   c. Hover over the task, click the **More** icon ▤ that appears, and then click
      Run.

Comparing report output in IBM Cognos LifeCycle Manager

After you run comparison tasks in a project, you can compare the report output to
check for differences.

About this task

For comparison tasks, Cognos LifeCycle Manager creates XML output in addition
to the output formats that were selected when the task was created. The XML
output is used to compare the report data.

For each task, the icons under the **Validation**, **Run**, and **Compare** columns indicate
the current state of these processes. In addition, hovering the mouse cursor over
the dots shows tooltips that describe the current state.

Differences in layout are organized by category, or error code. For example,
differences in font size appear under the error code LCM_DIFF_FONT_SIZE. For
each error code, a number appears in parentheses to indicate the number of
differences that were found in the source and target reports for that code.

Procedure

1. In the Results page, click a task.
2. Click a report in the task.
3. To see information about the report data, click **Show details**.
4. If differences were found between a source and target report output, click
   Show comparison.

   Tip: You can also view report output if no differences were found.
5. If layout differences were found, go through the report pages and error codes
   to view the differences.

Tip: For each error code, click **Previous** and **Next** to cycle through the differences. Each difference is highlighted.

6. To toggle between report overlay view and side-by-side view, click **Show overlay view** or **Show side-by-side view**.

Appendix A. Troubleshooting

Use this troubleshooting reference to help you solve specific problems that you
might encounter during or after installation of IBM Cognos LifeCycle Manager or
when you are using Cognos LifeCycle Manager.

Problems are characterized by their symptoms. You can trace each symptom to one
or more causes by using specific troubleshooting tools and techniques. After you
identify each problem, you can fix them by implementing a series of actions.

When you are troubleshooting, log files can help you. Another valuable
troubleshooting tool is IBM Technotes, which are available on the IBM support
pages.

When you cannot resolve a problem, the final resource is your technical support
representative. To analyze a problem, your technical support representative
requires information about the situation and the symptoms that you are
experiencing. To help isolate the problem, collect the necessary data before you
contact your representative.

Log files

Log files can help you troubleshoot problems by recording the activities that occur
when you work with a product.

Operations that are performed by IBM Cognos LifeCycle Manager are recorded in
various log files for tracking purposes. For example, if you experienced problems
when you installed Cognos LifeCycle Manager, consult the installation log file to
learn what activities the installation wizard performed while it transferred files.

Installation log file

The installation wizard creates a log file in the *install_location*\logs directory.
The log file name includes the product name and time stamp. The installation log
file records the activities that the installation wizard performed while it transferred
files. The following example shows the file name format that used for the log file:

`IBM_Cognos_LCM_Install_02_23_2016_10_36_19.log`

Cognos LifeCycle Manager log files

Several log files are created when you work in Cognos LifeCycle Manager.

Log files that are specific to Cognos LifeCycle Manager are created in the
install_location\wlp\usr\servers\lcm\logs directory.

The `lcm_log.txt` file records Cognos LifeCycle Manager trace information.

IBM Cognos LifeCycle Manager known issues

Some known issues and limitations exist when you work in Cognos LifeCycle
Manager.

The following list describes known issues and limitations in Cognos LifeCycle Manager.

- Cognos LifeCycle Manager can stop working when it loads large images.
- Data comparison can take a long time with large reports.
- Report comparison is not supported for nested crosstabs when a sort is applied to the items on the nested edge.
- Cognos LifeCycle Manager does not support environments that are secured with Single Sign On (SSO) via a gateway installation.

  When a Windows environment is set up to use SSO, you access your IBM Cognos content by using the BI endpoint or dispatcher URL. You must use this URL as the gateway URL when you define a server in Cognos LifeCycle Manager. For IBM Cognos Business Intelligence 10.2.2 and subsequent releases, the content that you need is available when you are using the BI endpoint or external dispatcher URL.

  For versions earlier than Cognos BI 10.2.2, you must copy the contents of the webcontent folder into the servlet location. For more information, see the technote How do you run Cognos Business Intelligence without a webserver (http://www.ibm.com/support/docview.wss?uid=swg21339260).

Appendix B. About this guide

This information is intended for use with IBM Cognos LifeCycle Manager.

This guide contains instructions for installing, configuring, and using Cognos LifeCycle Manager.

Audience

To use Cognos LifeCycle Manager effectively, you must be familiar with the following concepts:
- Basic Windows or UNIX operating system administration concepts
- The existing server environment and security infrastructure in your organization
- Reporting concepts
- Metadata modeling concepts

Finding information

To find product documentation on the web, including all translated documentation, access IBM Knowledge Center (http://www.ibm.com/support/knowledgecenter).

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. Cognos LifeCycle Manager has accessibility features.

IBM Cognos HTML documentation has accessibility features. PDF documents are supplemental and as such, include no added accessibility features.

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