



## **Modernizing Without Disruption:** How a Large American Bank Migrated Cognos Users with Speed and Precision

Early on a Saturday morning, a large American bank took its IBM Cognos Analytics environment offline to make a critical move. Over the weekend, Attain Insight guided a complex user migration that would help modernize the bank's infrastructure and streamline user access across critical systems. By Monday morning, operations resumed without disruption for employees. Behind the scenes, the migration consolidated three legacy directory instances into one Microsoft Active Directory instance, an essential step toward enabling smartphone-based authentication through Okta, a cloud-based authentication solution that enables single sign-on access to enterprise applications and services.

### **The Challenge: Migrate Thousands of Users Quickly and Accurately**

To pave the way for Okta implementation, Attain Insight's client (a major U.S. bank with 17,000 employees), opted to modernize its directory services for IBM Cognos, the bank's business analytics platform used by a large percentage of employees. While that sounds simple, in practice, there is a lot to consider.

Because the bank's Cognos platform delivers operational and financial intelligence to thousands of employees, taking it offline for user migration created the potential for significant business disruption. Careful project management, clear communication with end-user teams and a fast migration were critical to minimize downtime and reduce the impact of content freezes, automated process shutdowns and temporary loss of user access during the main

weekend-long user migration event. And if things didn't go well, rescheduling would have disrupted an already full IT calendar of previously scheduled work.

Much more than simply copying accounts, this IBM Cognos user migration was a precision operation involving thousands of interlinked permissions, roles and scheduled tasks that must continue to function seamlessly after the cutover. Like many Cognos environments, this bank's contained thousands of user profiles tied to fine-grained access rules to ensure that only the right people have access to different levels of financial information. Every user ID appears throughout the system in reports, schedules and folder ownership, which means that each user had to be precisely mapped from the three directory services to the target directory service, i.e., the consolidation of directory services for development, testing and production into a single, modern directory service. The unified security environment that Attain Insight generated using its powerful security orchestration capabilities eliminated redundant user accounts, reduced administrative overhead and improved visibility and control – key steps toward stronger security and more efficient operations. Even a small mismatch in the migration process could disrupt access to critical business data. Because Cognos supports day-to-day reporting and operational insight across the bank, even a short outage has a high business cost, underscoring the need for a fast, flawless transition.

## The Solution: Planning and Performing a Complex User Migration

Given the complexity and high stakes of the project, the bank turned to Attain Insight, a leading provider of advanced solutions for IBM Cognos Analytics and the creators of a specialized user migration application for Cognos. Attain Insight has planned and executed similar migrations for other large organizations, continually enhancing its solution with each new Cognos release and every client engagement.

### Fast, Precise User Mapping with Security 4X

To automate the most time-consuming and error-prone steps of the migration process, Attain Insight's Security 4X orchestration solution and Cognos user migration extension was used to map more than 50,000 directory records to more than 15,000 identified Cognos accounts. Purpose-built to meet the challenges of Cognos user migrations, Security 4X helps organizations map and migrate users, groups and permissions across directory services with minimal downtime. The software interfaces directly with each directory service and each Cognos instance to manage the entire process using its powerful security orchestration engine with accuracy, speed and control – a distinct advantage over similar solutions.

Security 4X identified every place in Cognos where a user ID appeared – such as report ownership, permissions, schedules and distribution lists – and automatically replaced it with a new ID in Active Directory, preserving all permissions and ensuring data integrity.

Given the volume of users and Cognos objects involved, speed of processing was essential to minimize downtime and meet the Monday morning availability deadline for Cognos. The optimized automation and validation capabilities of Security 4X keep the downtime window as small as possible and enabled Attain Insight to complete the full migration of the bank's large Cognos instances before business resumed on Monday morning. Attain Insight's product guided both Attain Insight and the bank's internal teams through each migration phase, automatically tracking and reprocessing any failed steps and verifying changes made, confirming completeness and accuracy before go-live.



### Content Cleanup with Security 4X

Security 4X revealed that the bank's Cognos environment had accumulated a huge store of personal content. Some users had more than 50,000 objects in their personal folders – most of it outdated, redundant or left behind by former employees. This excess data consumed storage, increased administrative time and costs, lengthened backup and restoration times and slowed the time-sensitive migration process.

Security 4X automatically scanned and reported on personal content and flagged inactive or departed users so the bank could decide what to keep, archive or delete before migration. The process cleaned up almost 25% of the content, shortening the migration time and improving performance during the transition.

### Expert Guidance through Attain Insight Professional Services

The partnership between Attain Insight and the bank's technical teams enabled the bank to do most of the migration work, with Attain Insight providing expertise, risk management and advice on sequencing and contingency strategies when issues surfaced. For example, when an internal automation process for provisioning new users failed early in the migration, Attain Insight helped diagnose the cause and evaluated options in consultation with the bank to keep the project on track.

## Impact: Minimal Downtime, Maximum Confidence

Attain Insight delivered the Cognos migration on plan with minimal downtime. In addition, Attain Insight showed the bank how to improve and automate security across its Cognos environments with Security 4X, including modernizing the integration of its selected provisioning application, [SailPoint](#).

Attain Insight experts also showed the bank's employees how to use Security 4X for ongoing content cleanup, and automated removal of Cognos user accounts when users have left the organization. This was similar to the process used for the user migration to monitor inactive accounts and keep content volumes under control, resulting in a more efficient analytics environment.

Normal operations resumed by Monday morning with minimal impact to users. In the week following, fewer than 10 help desk tickets were logged, none of which were tied to Security 4X or the user migration.

The bank successfully retired its legacy directory services, simplifying IT management, reducing its support contracts and eliminating redundant systems. As a result, the company is now ready to implement Okta smartphone authentication across the company to strengthen user access control.

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Cognos users across all instances are now sourced from a single Active Directory instance.

The streamlined environment also strengthened security by giving IT centralized control over user access and reducing the risk of overlooked or duplicate accounts.

## Modernize Without Disruption

The bank's user migration demonstrates how modernization doesn't have to be disruptive. With careful planning, expert guidance and the automation from Attain Insight's Security 4X software, the bank completed a complex transition with speed and precision to streamline its infrastructure and prepare it for further modernization.

**To learn more about how Attain Insight simplifies IBM Cognos user migrations, visit:**

<http://attaininsight.com/ibm-cognos-user-migration-with-attain-insight-security-4x/>

## Security 4X Supports All Major Directory Services

Attain Insight Security 4X is purpose built to handle complex IBM Cognos user migrations with speed and accuracy. The platform interfaces directly with both source and target systems, allowing organizations to migrate users, groups and permissions between virtually any directory environments.

Supported directory services include:

- OpenID
- Active Directory
- LDAP
- Microsoft Entra
- Google Identity
- eDirectory
- Okta Universal Directory
- PingDS
- PingFederate
- AWS Identity and Access Management
- HCL Domino