

ISA Cognos Training – The Roadmap

Select the Right Course for your Diverse Users

Debra_Hallisey@isaconsulting.com

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Webcast Goal and Objectives

Goal: To increase understanding of how the various Cognos licenses fit the needs of your diverse user community.

Objectives:

- Outline the four most common BI information end user roles.
- Align the 3 Cognos licenses with the four end user roles.
- Differentiate the Cognos 8 software by end user roles with a demonstration of Cognos Connection, Analysis Studio, Query Studio and Report Studio
- Discuss ISA training recommendation for your diverse user community.

Objective: Outline the four most common BI information end user roles.

- The four typical user types within an organization:
 - Report Consumers
 - Managers
 - Business Analysts
 - Business Analysts / Report Writers

Objective: Outline the four most common BI information end user roles.

- Report Consumers
 - These end users run canned reports (i.e. reports created by someone else) for themselves or a manager. These canned reports are pushed out via a portal or dashboard that can look and feel nothing like Cognos Connection.
 - Canned reports are usually created at a high level and use prompts that allows the report consumer to self select the data they need.
 - Report Consumers may need to work with these reports as Excel or PDF files.
 - They may want to schedule reports to run automatically.
 - Except for answering prompts differently, Report Consumers would not change the basic content, look or feel to a report.

Objective: Outline the four most common BI information end user roles.

- Managers
 - These users often come out of a sales group. They need to manage and analyze their business beyond pre-defined reports
 - They have little or no report writing experience against a database, so a contained world within a cube, plays to their business knowledge strengths.

Objective: Outline the four most common BI information end user roles.

- Business Analysts
 - These users do have experience in writing database reports in Access, Excel or some other software that goes against a data base or warehouse.
 - They need to find answers to questions that are not too complex and an Ad Hoc tool works well for them.
 - The reports do not have to be beautifully formatted, nor do they require multiple passes against the data to get the business question answered.

Objective: Outline the four most common BI information end user roles.

- Report Writers / Business Analysts
 - These users have extensive experience in report writing usually with a developers tool like SAP.
 - Reports they create are complex and need to be carefully formatted.
 - These reports will be consumed by upper management or pushed out to Report Consumers.

Objective: Align Cognos licenses to end user roles.

- The three Cognos “End User” License Types
 - Cognos 8 BI Consumer
 - Cognos 8 BI Advanced Business Author
 - Cognos 8 BI Professional

Objective: Align Cognos licenses to end user roles.

- Cognos 8 BI Consumer

This license gives your end users access to:

- Cognos Connection
- Portal pages created by your organization (usually via Cognos Connection)
- Event Studio notifications
- Go! Office module and functionality

Objective: Align Cognos licenses to end user roles: Cognos 8 BI Consumer = Report Consumer End users

- Cognos BI Consumer License
 - Cognos Connection and/or Portal pages created by your organization (usually via Cognos Connection)
 - Receive Event Studio Notifications
 - Go! Office module and functionality
- Report Consumer End Users
 - These end users run canned reports that have been pushed out via Cognos Connection or a company portal.
 - These “canned” reports typically are designed with prompts which allows the end user to narrow down the report result by selecting only the “geography, product or time” relevant to them.
 - Often Report Consumer end users want to schedule the reports available to them to run automatically.
 - Often they need to work with their reports as Excel or PDF files and they can set personal preferences.
 - An e-mail may be sent to them advising them of an event that precipitates a look at a specific report.
 - They can work with these canned reports in PowerPoint, Word or Excel via the Go! Office module.

Objective: Align Cognos licenses to end user roles.

- Cognos 8 BI Advanced Business Author

This license gives your end users access to:

- Cognos Viewer / Event Studio Notification / Go! Office
- Analysis Studio
- Query Studio
- Report Studio Express Authoring Mode (not the full functionality of Report Studio)

Objective: Align Cognos licenses to end user roles: Cognos 8 BI Advanced Business Author = Manager and/or Business Analysts

- Cognos BI Advanced Business Author License
 - Cognos Viewer / Event Studio Notification / Go! Office
 - Analysis Studio
 - Query Studio
 - Report Studio Express Authoring Mode (not the full functionality of Report Studio)
- Manager and/or Business Analysts End Users
 - Analysis Studio = Manager
 - These users often come out of a sales group. They need to manage and analyze their business beyond pre-defined reports
 - They have little or no report writing experience against a database, so a contained world within a cube, plays to their business knowledge strengths.

Objective: Align Cognos licenses to end user roles: Cognos 8 BI Advanced Business Author = Manager and/or Business Analysts

- Cognos BI Advanced Business Author License
 - Cognos Viewer / Event Studio Notification / Go! Office
 - Analysis Studio
 - Query Studio
 - Report Studio Express Authoring Mode (not the full functionality of Report Studio)
- Manager and/or Business Analysts End Users
 - Query Studio / RS Express Authoring Mode = Business Analyst
 - These users do have experience in writing database reports in Access, Excel or some other software that goes against a data base or warehouse.
 - They need to find answers to questions that are not too complex and an Ad Hoc tool works well for them.
 - The reports do not have to be beautifully formatted, nor do they require multiple passes against the data to get the business question answered.

Objective: Align Cognos licenses to end user roles.

- Cognos 8 BI Professional

This license gives your end users access to:

- Cognos Viewer / Event Studio Notification / Go! Office
- Analysis Studio
- Query Studio
- Report Studio
- Metric Studio
- BI Event Studio

Objective: Align Cognos licenses to end user roles: Cognos 8 BI Professional = Report Writers and/or Business Analysts

- Cognos BI Professional License
 - Cognos Viewer
 - Analysis Studio
 - Query Studio
 - Report Studio
 - Metric Studio
 - BI Event Studio
- Report Writers / Business Analysts End Users
 - These users have extensive experience in report writing usually with a developers tool like SAP
 - Reports they create are complex and need to be carefully formatted.
 - These reports will be consumed by upper management or pushed out to report consumers.
 - As part of creating reports that will be consumed by others, this end user may get involved with creating Metrics and Events

Objective: Differentiate the Cognos 8 software by End User roles with a demonstration of Cognos Connection, Analysis Studio, Query Studio and Report Studio

- The following demonstrations will use the Cognos sample data and give you a glimpse into ISA training:
 - Report Consumers and Cognos Connection
 - Managers and Analysis Studio
 - Business Analysts and Query Studio
 - Report Writers and Report Studio

Objective: Discuss ISA training recommendation for your diverse user community.

Report Consumers: This group is an excellent candidate for Custom training

- The business question being answered by the report is highlighted in training by going through the prompts, report results and/or drill through. Best practices for the organization can be incorporated into the training.
- Highlighting how to use the PDF and Excel functionality within the Cognos Viewer is key to the Report Consumer.
- Wrapping important Cognos Connection features like Report View, Saving Prompts and Scheduling gives added value.
- Training can be anywhere from 1 – 3 hours depending on the number of reports that need to get introduced.
- Training is easily conducted as a Webex class.

Objective: Discuss ISA training recommendation for your diverse user community.

Managers: This group is an excellent candidate for Custom training:

- Using relevant business questions to train on the feature / functions of Analysis Studio increases the learning and retention.
- Highlighting how to use the PDF and Excel functionality within the Cognos Viewer is key to a manager that wants to use this data off line while working with sales representatives, national accounts or other clients.
- Highlighting the strategic use of this tool as opposed to focusing on sales performance or compensation shows the true strength. (i.e. trying to determine where best to put additional dollars? Take a list of all your accounts and determine who the top 10 are by sales in a region or product. Or take a list of all your accounts and see who has the most potential to contribute to increased sales.)
- Training is typically 4 hours.
- Training is most productive as standup but can be conducted as a Webex class with additional labs.

Objective: Discuss ISA training recommendation for your diverse user community.

Business Analysts: This group does well with generic training if they have report writing experience already, if they are new to report writing custom training works well for them.

- Seeing the immediate results of report creation (Ad Hoc mode) and Query Studio's ease of use is key for this group and report creation.
- Responding to a question by a client which requires a more detailed answer is also typical of this end user. Usually results of this query will be used by the Business Analyst alone or shared with just a few people.
- Reports need to be accurate but not pretty.
- Training is typically 8 hours.
- Training is most productive as standup but can be conducted as a Webex class split into 2 or more sessions with additional labs.

Objective: Discuss ISA training recommendation for your diverse user community.

Report Writers: This group does well with generic training because they have report writing experience already.

- Understanding joins behind the scenes facilitates filtering and performance enhancements.
- Complex reports with multiple queries and passing parameters is common.
- Recreating the look and feel of current reports often plays into the report consumers acceptance of the new tool.
- Training is typically 16 hours to accommodate Introductory and Advanced Features
- Training is most productive as standup to facilitate questions that bridge the knowledge between this end users current reporting tool and Report Studio.

Training Recommendations

- Report Consumers – Cognos Connection
 - Custom
 - 1 – 4 hours
- Managers – Analysis Studio
 - Custom
 - 4 hours
- Business Analyst
 - Custom or Generic
 - 8 hours
- Report Writers
 - Generic
 - 16 hours

Thank you for your time and here's a look going forward:

- Future Web casts:
 - Custom vs. Generic Training: What's the return on investment?
 - Standup vs. Web based vs. CBT training options: When does one make sense over the other?
- Please feel free to contact us if you have any further questions.
- We appreciate your completing the evaluation via a Poll so that we can continuously improve. Please rate the presentation from 1 – 5 with 5 being the highest.