

## SMOOTH TRANSITION TO COGNOS REPORTING IMPROVES UNIVERSITY INFO ACCESS

### CLIENT OVERVIEW

An historical northeastern university aimed to provide more efficient access to Banner data across the university community. Converting from a dated and complex reporting tool to a more robust Cognos reporting platform would result in a more powerful, end-user friendly tool to better support university data needed for day-to-day operations.

### CHALLENGE

#### *Smoothly Transition to Cognos Reporting Platform*

In order to achieve maximum efficiency, the university had to transition from an already existing reporting system to the Cognos platform, while minimizing the operational impact on the staff. Implementing Cognos would require several incredibly well-thought out stages of implementation:

- Environment and Security Configuration
- Efficiency Data Extraction
- Report Requirement Gathering and Design
- Report Conversion and New Report Generation
- Cross-Department Training and Rollout

With the new implementation, the goal was for university departments to have better access to the data needed to conduct business more efficiently, and give departments the tool set and processes that would enable them to design new reports that could further streamline communication and administration efforts.

### SOLUTION

#### *Efficient Approach to Configuration, Report Development, and Training Achieves Smooth Transition*

Aspect took the following approach to smoothly transition the university community to the new reporting platform:

#### **Implementing a Secure Configuration**

The first step in the project was to configure the Cognos environment and define and set up an advanced security configuration, so that the right departments had access to the right data. The Aspect Cognos security expert worked with university stakeholders to conduct a role assessment, and determine role hierarchy across environments. Users were then added and granted the appropriate access.

#### **Extracting Data Efficiently**

Next, ETL experts were utilized to extract the necessary data from the university's student management system, Banner. A new, more efficient content store enables users to access only the data they need for reporting purposes.

#### **Designing Reports to Improve Day-to-Day Operations**

Aspect's report design expert worked with university stakeholders to develop a department by department roadmap for implementation. The Aspect expert interviewed stakeholders to gather report requirements, determining which existing reports were candidates for conversion, and leveraging the new platform to determine where reporting could be improved. Aspect consultants were able to successfully automate previously manual tracking processes, especially surrounding new student orientation planning, the tracking of placement results, the communications and tracking surrounding freshman computer assignment, and the tracking of housing deposits.

#### **Cross Department Training Leads to Smooth Adoption**

Upon project completion, Aspect provided report generation and report creation training for university staff. In order to ensure standardized report creation going forward, Aspect **created a Document Report Standard** containing report templates, and established a repository for storing functional and programming details for reports going forward.

Aspect also established the concept of **training department mentors**. Mentors were instructed in Query Studio and template design and charged with establishing individual department standards. Training sessions were then held for each department, with **training materials (sample report sets & documentation) targeted to each particular department**. This approach allowed the trainee to better follow the instructor, and have meaningful samples to utilize after class.

### BENEFITS

#### **Better Access to Data and Improved Operational Processes:**

- **Migration Planning Leads to Smooth Transition:** Aspect's step-by-step, prioritized approach to the configuration and rollout to the new tool resulted in a fast adoption, with little or no issues.
- **Training Practices Ensure New Reporting Methods Adopted:** Aspect's training practices also helped to ensure that new reporting processes were adopted and used, and that report generation going forward was standardized both functionally and programmatically, for ease in support.
- **Improved Day to Day Efficiency:** The client was able to see significant time and cost savings in university operations due to improved availability of data, easier report generation, and newly automated tracking processes.