

COGNOS01: Intro to Business Intelligence and Reporting

Objective The primary goal of this training visit is to introduce and train staff to use the COGNOS Business Intelligence software. Attendees should have prior reporting experience, strong technical skills, and be detail oriented.

There will be hands on time during this visit to create and modify reports.

Trainer SunGard Onsite (Cognos Consultant)

Logistics Training/Lab Room, Internet Access, Projector, White Board
Training/Lab Room Requirements:

- End User Station for all attendees
 - Cognos Software
 - Microsoft Excel
 - Adobe Acrobat
 - Printer
 - Existing GLCF Data
 - Existing HR Data

Estimated Hours 32 Hours

Professional Services Cognos Instructor

Attendees Management and personnel assigned to read/write reports using Cognos.

Prerequisites

- SunGard Requirements:
 - Contract Signed
 - Verify COGNOS Install
 - Verify standard COGNOS reports
- Client Requirements:
 - Verify COGNOS access

- Verify COGNOS security for training participants
- Develop list of desired reports with specifications

Agenda

Day One – A.M.

- **All Roles – Admin/Enhanced Consumer/Advanced Business Author/Professional**
 - Demonstration of COGNOS
 - Accessing COGNOS
 - Navigating the System
 - Menu & Toolbar
 - Types of Reporting Tools
 - Professional Reporting
 - Introduction to COGNOS
 - Discussion of Security, Data Packages, and Structure
 - Discussion of BI Roles
 - Training format for remainder of the week
 - Types of Reports
 - Prompt Reports
 - Ad-Hoc Reports
 - Dashboards
 - Running a Standard Report
 - Location and Purpose

Day One – P.M.

- **All Roles – Admin/Enhanced Consumer/Advanced Business Author/Professional**
 - Workspace – Hands On
 - Accessing COGNOS
 - Navigating the System
 - Menu & Toolbar
 - Types of Reporting Tools
 - Professional Reporting
 - Building a Report using Workspace Advanced – Hands On
 - Building a Basic Report
 - Basic Toolbox functions
 - Refining a Report
 - Formatting
 - Visual Presentation
 - Borders, Backgrounds, and Fonts
 - Building a Report using Report Studio – Demo (Time Permitted)

Day Two – A.M.

- **Roles – Admin/Professional**
HRPY Team
 - Report Studio advanced training
 - Focusing reports using filters
 - Drill through definitions
 - Summary and Detail report views
 - Customize reports with conditional formatting
 - Lab Time – Report Development

Day Two – P.M.

- **Roles – Admin/Professional**
HR/PY Team
 - Lab Time – Report Development
 - Creating Reports using Report Studio
 - Ongoing Q&A and hands on training

Day Three – A.M.

- **Roles – Admin/Professional**
Finance Team
 - Report Studio advanced training
 - Focusing reports using filters
 - Drill through definitions
 - Summary and Detail report views
 - Customize reports with conditional formatting
 - Lab Time – Report Development

Day Three – P.M.

- **Roles – Admin/Professional**
Finance Team
 - Lab Time – Report Development
 - Creating Reports using Report Studio
 - Ongoing Q&A and hands on training

Day Four – A.M.

- **All Roles – Admin/Enhanced Consumer/Advanced Business Author/Professional**
 - Review and Questions
 - Feedback for consultant