

# Successful Migration from Cognos Impromptu 7 to Cognos 8 for Leading Healthcare Payer

## CLIENT

Our customer provides health coverage and constantly strives to evolve the services it offers to meet the ever-changing needs and preferences of its members.

## CHALLENGE

Our client wanted to eliminate inefficient, error-prone reporting and to resolve multiple performance issues that were inherent by their existing Cognos Impromptu 7 reporting solution. Their legacy system:

- Utilized a client-based tool that prevented consistent data integrity maintenance and often became unresponsive and could not address data validation;
- Contained existing Impromptu reports utilizing macros, hot files, and Excel files for reporting;
- Had overly complex structure, data and formatting in relation to generating reports;
- Used a database based security model that is hard to maintain and manage;
- Was riddled with errors since several existing Impromptu reports had errors due to incompatibility;
- Incorporated existing Impromptu reports which had several limitations in regards to report data, report format, and report output.

## SCOPE

The project's scope included a wide range of functional areas such as:

- Installation, configuration and performance tuning of Cognos 8.3 according to requirements
- Migration of existing catalogs and reports to enjoy the advantages of new Cognos 8
- Fixing security issues that result from a client-based impromptu solution to that of a web-based Cognos 8 solution.
- Maintaining the accuracy of administrative components in relation to consistency and migration of user access and security with that of existing system to decrease downtime.
- Provide training to end users for smooth transition from Cognos Impromptu 7 to Cognos 8.3.
- Performance tuning while addressing data validation
- Added business functionality without a compromise on data integrity
- Leveraging more advanced functionality found in Report Studio and Framework Manager; and

Delivery of Cognos based security model along with training of end users to confirm adaption of change

## SOLUTION

The client selected Cogent Data Solutions (CDS) to migrate their existing IBM Cognos Impromptu 7 to Cognos 8. CDS demonstrated exemplary knowledge and expertise in designing, building and implementing scalable business intelligence

solutions the client needed from a solution provider.

The CDS team consisted of certified IBM Cognos consultants and utilized CDS's proprietary methodology to complete the project in three primary phases referred to as Foundation, Implementation and Evolution. The Foundation phase recognized the readiness of people, infrastructure and process to make sure that both CDS and client teams were instantly productive at the commencement of the project. The Implementation phase provided the solutions that were in alignment with the project's business objectives. The Evolution phase made sure the solutions implemented were self-sufficient for customers in post-production phase.

### Foundation Phase

- Created a detailed migration plan after several planning meetings with the client
- Evaluated the existing process and gathered existing reports, information, and data sources required for the process as part of Discovery Stage.
- Conducted preliminary Cognos 8 training to customer's end users to prepare them in taking part in requirement gathering, design workshops and testing.
- Installed and configured Cognos 8 and performed all required integrations to dependent data sources within DEV, TEST, and PROD environments.

### Implementation Phase

- Applied CDS best practices when designing metadata, reports, and data models to attain consistency and be at par with industry standards.
- Produced several reports from scratch to ensure end users the same report formats because most reports lost formatting and data formats after migration.
- Completed catalog and report migration by ensuring they do not contain any functional errors, ambiguous relationships, and loop joins.
- Created several medium to high complexity reports which included calculations, filters, multiple prompts, charts, data based on several groupings, conditional formatting, date-time calculations, master-detail relationships, and heavy formatting.
- Validated every report manually with the Impromptu reports for consistency in report format, report data, and report output.
- Developed an effective security solution for user access that took advantage of Cognos 8 security features.
- Provided constant help and support to client staff throughout the project to ensure that knowledge transfer occurred to client.

## Evolution Phase

- Developed customized training materials on Cognos Connection and Report Studio and conducted classroom training sessions to power users and end users to make sure that smooth transition from Cognos 7 to Cognos 8 occurred.
- Created comprehensive documents for new report authoring and complete system maintenance and support to ensure customer self sufficiency post implementation.

## RESULTS

CDS was successful in delivering a solution that met and exceeded required functionality and training needs for the client's self-sufficiency.

- Successfully migrated all models and reports from Cognos Impromptu Series 7.1 to Cognos 8.3. CDS set up an intuitive and refined Framework Manager Model that allowed the client teams to create ad-hoc reports effortlessly.
- Established an efficient approach to provide access to every user based on roles and groups in Cognos 8.
- Enabled end users to generate reports, create ad-hoc queries and utilize other functions built into Report Studio.
- Provided end users with the necessary visibility into their data and a more efficiency related to generating the required reports;
- Completed implementation of reports within budget, before deadline, and exceeded client's expectations.



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