

CO-OPERATIVE EDUCATION PROGRAMS



uOttawa

L'Université canadienne
Canada's university

TELFER SCHOOL OF MANAGEMENT ACCOUNTING

Second Work-Term Report Examples

Title	Page no.	Term
Business Intelligence & Performance Management, The Toolbox of a Techy	2 – 23	Winter 2009

Disclaimer

Copyright © All rights reserved. The work-term reports are the property of the author or authors and they are subject to copyright, trademark, and other laws. Your use of the Web site does not transfer to you any ownership or other rights in the contents of the work-term reports. The work-term reports are posted courtesy of the CO-OP Office, students and employers and with their explicit permission. All students are subject to the University policy on fraud, which prohibits the copying or use of any parts of these reports for use in other reports.



CO-OP Work-Term Proposal

“The Toolbox of a Techy”

Submitted to:

Dr. Denis Caro & Ms. Stephanie Mainville

Telfer School of Management

University of Ottawa

Submitted by:

Student #

ADM 3901

Friday, February 13, 2009

General Information:

Title: The Toolbox of a Techy

School Course Code: ADM 3901

Working Title: Performance Management & Business Intelligence Analyst

Dates of Work Term: Start: January 5, 2009
End: May 1, 2009

Submitted by:

Home Address: Ottawa, Ontario
Canada

Home Phone:

Preferred E-mail: @uOttawa.ca

Employer Name: Cognos, an IBM Company

Work Address: Cognos, an IBM Company
62 Auriga Drive, P.O. Box 9707 Station T
Ottawa, Ontario
Canada
K1G 4K9

Work Phone: 1(613)738-1338

Supervisor: Manager IBM Business Intelligence and Performance Management
Manager and Head Coach of CO-OP Team
@ca.ibm.com
1(613)738-1338

Description:

“Cognos, now known as IBM is an Ottawa, Ontario based company which makes business intelligence (BI) and performance management software. Founded in 1969, Cognos employed almost 3,500 people and served more than 23,000 customers in over 135 countries. Cognos was originally known as Quasar and adopted its current name in 1982. On January 31, 2008, Cognos was officially acquired by IBM.”ⁱⁱ

“Cognos provides world-class enterprise BI, planning and consolidation software and services to help companies plan, understand, and manage financial and operational performance. Cognos brings together technology, analytical applications, best practices, and a broad network of partners to give our customers a complete performance solution. We provide an open and adaptive solution that leverages an organization's ERP, packaged applications, and database investments.”ⁱⁱⁱ

The CO-OP program at Cognos was created over eight years ago, and has enjoyed great success both for Cognos and their customers. Top recruits from across the nation are given the opportunity to demonstrate their skills in a work place setting, while also exploring future job endeavours. CO-OPs go through an intense four-week training period, where they are treated like full time employees and given the chance to develop.

As a technical analyst, it is my duty and pleasure to give customers great customer support with any technical questions regarding hardware and software developed and created by Cognos. As the initial contact medium at Cognos, my role is to communicate with customers and advise them in a direction that will help them answer the following questions:

- How are we doing?
- Why are we on or off track?
- What should we do about it?

My role at Cognos, which now looks like a baby compared to “Big Blue,” has not changed with the acquisition that took place. If anything IBM takes pride in helping and developing their employees to become better in every aspect of their job. My role at IBM requires the same skills, but I feel like I am a bigger and more important piece to the growing puzzle.

Learning Objectives

Learning Objective 1

There are many objectives that can be written down here, but I believe there are a few that are more important than others. The biggest objective I have is to learn how to learn. I know this sounds very funny, but many people do not know how to learn. Everyday children, students, adults and professionals are drowned in knowledge and information that they do not know how to use. I think obtaining knowledge is only half the step, knowing how to use it is totally different and a skill I want to strengthen. This relates to both my professional and academic goals. In my work place I am always needing to evolve and diagnosing data in order to accomplish my daily routines. As for academics, learning visually in class works for some and learning by example works for others, I believe I need to know what works best, and this will help as I progress through my education.

Learning objective 2

Most of what I do involves troubleshooting and finding the root issue to customers’ problems. A lot of the time customers are not straight forward, or the problem at hand is complicated to understand. Troubleshooting is a fundamental skill that would allow me to successfully break down each problem and then fix it. This also relates to my academics because as my courses get more challenging so will the content and exams, greater strength in trouble shooting will allow my to investigate and solve even the most difficult problems.

Learning Objective 3

Probably the most important skill you can bring to tech support/customer support is soft skills. Being a commerce student, I understand the importance of communication, but I want to improve my soft skills when it comes to situations that are not perfect. EX: angry customers, stressful issues, urgent matters, and on the spot questions. Soft skills are very important for my professional career but also for my academic career. Most of the classes I am enrolled in require presentations and communication between my peers. If one cannot do these tasks they will have a very rough time getting through successfully. Not only does communication help my schooling, but it also leads to meeting people and creating those important contacts that may help me out later on in my professional career.

Performance Objectives

Performance Objective 1

When I first started my CO-OP at Cognos I thought my technical skills were well beyond what I needed. I have come to the realization that this is not the case. Another goal I have is to improve my technical skills to a point where I feel comfortable instructing clients while satisfying their fast pace environment. I believe that my technical skills are at a level that is above what is needed for my academic success, but for my current job it is not. Technology is a never-ending advancing beast, technical skills always need to be advances and I believe this will help me succeed in my workplace.

Performance Objective 2

A key part to succeeding in a demanding workplace is organization. Performance is achieved from a combination of components, but having accurate information and access to organized data, it will help me pursue and overcome many problems that I meet. Organization is also important in my academics. It leads to efficient time management skills, and deadlines being met. It will help me prosper as I conclude my education.

Performance Objective 3

All great accomplishments in society have come from great leaders. For my last performance objective I want to become a better leader and a person who people will come to. This is my second work term at Cognos, and it was apparent from day one that the other co-ops were coming to me for advice and help. Leadership would not only be good for my professional career but also my academic. Employers love leaders, they demonstrate everything the company strives for while also increasing the ability of others around them.

Proposed Final Report Table of Contents

1	Title Page ii. Letter of Transmittal iii. Executive Summary iv. Table of Contents
2	Introduction 1.1 - Overview of Cognos 1.2 - Overview of IBM 1.3 - Overview of Customer Support Division and Cognos 8 Sub-Branch
3	Tools and Resources 2.1 - Overview of Trakweb 2.2 - Overview of Insight 2.3 - Overview of DCF 2.4 - Overview of Webex 2.5 - Additional Resources 2.6 - Coaches 2.7 - Knowledge Base
4	Tech/Customer Support 3.1 - Contact Methods 3.2 - Initial Contact 3.3 - After Contact 3.4 - Service Requests 3.5 - Communication Strategies
5	CO-OP Program at Cognos 4.1 - Improvements 4.2 - Experiences 4.3 - Achieved Goals 4.4 - Attained Values and Knowledge for future Careers
6	Appendices and References A - References B - Bibliography C - Other

Key Target Dates:

	Key Work-term Activities	Specific Date
1	Official start date of your work term	Monday, January 5, 2009
2	Proposal Submission Date	Friday, February 13, 2009
3	Work-term Report Completion	Friday, April 3, 2009
4	Approval of Work-term report by Manager	Friday, April 8, 2009
5	Official Final Date of Work term	Friday, May 1, 2009
6	Submission of Report to CO-OP Office	Friday, May 15, 2009

Level of Confidentiality:Confidentiality Level:

A

Description:

Basic

Preliminary References

Weyworth, Pj. "Building an Early Warning System -- How to Help Team Leaders Intervene Before Agents Burnout and Attrition Rises." Call Center Magazine 20 (2007): 43. 12 Oct. 2007

<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?did=1281833041&sid=2&Fmt=3&clientId=3345&RQT=309&VName=PQD>>.

Fluss, Donna. "Speech Analytics: the Fastest Growing App in Contact Centers -- Audio Mining Finds Hidden Insights, Implicit Customer Needs and Wants, and the Root Causes of Issues Embedded in Conversations." Call Center Magazine 20 (2007): 8. 05 Oct. 2007

<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?did=1281832961&sid=2&Fmt=3&clientId=3345&RQT=309&VName=PQD>>.

Anonymous. "Offshore Call Centres? We've Had Enough ..." Credit Management (2007): 11. 05 Oct. 2007

<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?did=1295048221&sid=2&Fmt=4&clientId=3345&RQT=309&VName=PQD>>.

Axtell, Carolyn. "Enhancing Customer Service: Perspective Taking in a Call Centre." European Journal of Work and Organizational Psychology 16 (2007): 141. 05 Oct. 2007

<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?did=1284671901&sid=2&Fmt=2&clientId=3345&RQT=309&VName=PQD>>.

Pollitt, David. "Headsets and Mindsets; It's the Employees Who Determine Customer-Service Levels in Call Centers." Human Resource Management International Digest 14 (2006): 38. 05 Oct. 2007

<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?did=1140296121&sid=2&Fmt=3&clientId=3345&RQT=309&VName=PQD>>.

ⁱ Wikipedia

ⁱⁱ Cognos

Bibliography

IBM. (2008). *IBM Completes Acquisition of Cognos*. Retrieved June 1, 2008, from Online resource Web site: <http://en.wikipedia.org/wiki/Cognos#References>

Ashe, Rob. (2008). *Overview*. Retrieved June, 1 2008, from Cognos Web site Web site: <http://cognos.com/company/index.html>



Business Intelligence & Performance Management

The Toolbox of a Techy

Submitted to:

Dr. Denis Caro

Telfer School of Management

University of Ottawa

Submitted by:

Student #

ADM 3901

Executive Summary

“International Business Machines Corporation, abbreviated IBM and nicknamed "Big Blue" (for its official corporate color), is a multinational computer technology and IT consulting corporation headquartered in Armonk, New York, United States. The company is one of the few information technology companies with a continuous history dating back to the 19th century. IBM manufactures and sells computer hardware and software, and offers infrastructure services, hosting services, and consulting services in areas ranging from mainframe computers to nanotechnology”.ⁱ

Cognos is an Ottawa, Ontario based company which makes business intelligence (BI) and performance management software. Founded in 1969 Cognos employed almost 3,500 people and served more than 23,000 customers in over 135 countries. Cognos was originally known as Quasar and adopted its current name in 1982. On January 31, 2008, Cognos was officially acquired by IBM.

The CO-OP program at Cognos was created over 8 years ago, and has enjoyed great success both for Cognos and their customers. Top recruits from across the nation are given the opportunity to demonstrate their skills in a work place setting, while also exploring future job endeavours. CO-OPs’ go through an intense four-week training period, where they are treated like full time employees and given the chance to develop.

As a technical analyst it is my duty and pleasure to give customers great customer support with any technical questions regarding hardware and software developed and created by Cognos. As the initial contact medium at Cognos, my role is to communicate with customers and advise them in a direction that will help them answer there performance and financial questions.

As a technical analyst at Cognos, there are no set projects to work on. Yes of course there are many extra things that could be done to contribute to the organization, but nothing with a precise due date. As a returning CO-OP I was given many enhanced responsibilities as soon as I came though the door on the first day. I was expected to be a leader and help my fellow peers succeed as I did the first time I was there. Again I was given a brand new laptop, an office, and was expected to learn new software that was recently released to clients.

IBM is one of those companies where there is an enormous amount of room to grow and explore. The organization prides itself on giving employees the opportunity to advance and to move around the world. There is also a large amount of room to be a leader. It was my second CO-OP work term, and also my second at IBM (Cognos). I was given the opportunity to run weekly meetings and case reviews. About twice a week I had to organize and run an effective case review, which was a division wide discussion about ongoing cases and new administrative functions in the business. I took great pride in this leadership role and tried to learn as much as possible from it.

Before the work term started, I had my goals I wanted to achieve. When I arrived at IBM, I made new goals based on the job I was performing everyday. The biggest task I wanted to accomplish was getting my technical skills to par with the other analysts and even clients who have been working with the software longer then I have. I am happy to say that once again I went well beyond my goal and by the end of my second work-term I was performing on the same level as my colleagues. Coming from a business background, my soft skills have already been developed, but I quickly remembered that not all communication with clients was relaxed. Every so often, clients would call being very hysterical. Some would swear, some would even cry, and it was my job to help them and make them calm down. I believe that this elevated my soft skills to a new level, and it has helped me prepare for situations that need to be addressed with speed.

Working at IBM was a great experience, and I have met some great people along the way. I have grown as a student, and as a person. I have advanced my knowledge in many fields, and added to my skills. It was a great opportunity and I am very please that I had the chance to work at such a reputable organization.

Statement of Academic Integrity

STATEMENT OF ACADEMIC INTEGRITY

See www.uOttawa.ca/academic/info/regist/crs/home_5_ENG.htm

I have carefully read the Telfer School's academic integrity rules. I attest that this work conforms to these rules of the University of Ottawa.

Date and Signature:

Table of Contents

Executive Summary.....	I
Statement of Academic Integrity.....	II
Letter of Transmittal.....	1
1.0 - Introduction	
1.1 - Overview of IBM.....	2
1.2 - Overview of Customer Support and Success.....	2
1.3 - Overview of Cognos 8 BI Team.....	2
1.4 - Overview of the CO-OP Program.....	2
2.0 - Tools and Resources	
2.1 - Overview of Insight.....	3
2.2 - Overview of Webex.....	3
2.3 - Knowledge Base.....	3
2.4 - DCF.....	3
2.5 - Trak Web.....	4
2.6 - Lotus Sametime.....	4
2.7 - Case Review.....	4
3.0 - Technical and Customer Support	
3.1 - Logging Service Requests.....	4
3.2 - Assigned and Submitted Service Requests.....	5
3.3 - Pre-Initial Contact.....	5
3.4 - Post-Initial Contact.....	5
4.0 - Cognos 8 BI General Products	
4.1 - Reporting: Report Studio.....	5
4.2 - Analysis: Analysis Studio.....	5
4.3 - Dashboards.....	6
4.4 - PowerPlay Transformer.....	6
4.5 - GO! Mobile.....	6
4.6 - GO! Office.....	6
5.0 - Types of Problems	
5.1 - Report Design.....	6
5.2 - Configuration and Setup.....	7
5.3 - Install and Upgrade.....	7
6.0 - IBM's Acquisition of Cognos.....	7
7.0 - CO-OP Program at IBM	
7.1 - Improvements.....	7
7.2 - Experiences.....	8
7.3 - Achieved Goals and Attained Values.....	8
7.4 - Learning and Performance Objectives.....	8
Appendices	
Appendix A - IBM/Cognos Awards.....	10
Appendix B - SR Calls.....	11
Appendix C - Client Priority.....	12
End Notes.....	12
References.....	13

Ottawa, Ontario
K1N 6B6

Professor Denis Caro
CO-OP Academic Coordinator,
Telfer School of Management,
Desmarais Building
University of Ottawa
Room 5141
55 Laurier East
Ottawa ON K1N 6N5

May 15, 2009

Dear Professor Caro,

Attached please find a copy of the report titled "Business Intelligence & Performance Management. The toolbox of a Techy," which I am submitting in partial fulfillment of the requirements for ADM 3901.

This was my second CO-OP term working for Big Blue (IBM), and the experience was more enjoyable than the first. During the last four months, I have been working at IBM under Xxx Xxxxx who is the Manager of Cognos 8 Business Intelligence support and head of the CO-OP program. IBM is a multinational computer technology and IT consulting corporation headquartered in New York. With over 388,000 employees worldwide, IBM is the largest and most profitable information technology employer in the world. I work for the subgroup formally known as Cognos, which IBM recently acquired. Cognos specializes in business intelligence and performance management software. My role at IBM was a Technical Analyst and I was to provide clients with best practice solutions and expertise, while also providing clients with renowned support dealing with Cognos 8 BI software.

As a returning CO-OP to the organization, I was expected to take on an increased leadership role towards new hires and fellow CO-OPs'. From day one I was asked to teach and even evaluate the work of my colleagues as I obtained the procedures the knowledge to do so in my previous term. I also took on the role of preparing and running team meetings for my business group. These were bi-weekly presentations given in a boardroom setting.

As an accounting student working in a high-tech based setting, I knew my skills were going to fall far short the first time around, but did not think it would as a returning student. At the beginning of the term my confidence was very high, but I soon came to learn that learning about evolving software is a never-ending learning process. Once again I needed to learn about new software versions that were totally redesigned, to a point where I was comfortable giving support to clients. It took several weeks but I eventually got to where I wanted to be. My communication and interpersonal skills were also taken to a new level. Dealing with customers was easy, but when they were losing millions of dollars, it was not a pleasant task. At this point I would like to acknowledge my coaches and peers. Whenever I needed help they were always there to lend a hand. I also want to thank Xxx Xxxxx and IBM for giving me the opportunity to work for such an extraordinary organization again, and also allowing me to develop professionally and personally.

Sincerely,

@uOttawa.ca

1.0 Introduction

1.1 - Overview of IBM

“International Business Machines Corporation, abbreviated IBM and nicknamed "Big Blue" (for its official corporate color), is a multinational computer technology and IT consulting corporation headquartered in Armonk, New York, United States. The company is one of the few information technology companies with a continuous history dating back to the 19th century. IBM manufactures and sells computer hardware and software, and offers infrastructure services, hosting services, and consulting services in areas ranging from mainframe computers to nanotechnology”.ⁱⁱ Formally known as Cognos, which IBM acquired, is now a sub-group of Big Blue. “IBM has been known through most of its recent history as the world's largest computer company and systems integrator. With over 388,000 employees worldwide, IBM is the largest and most profitable information technology employer in the world.”ⁱⁱⁱ IBM supports Cognos software to more than 23,000 customers in over 135 countries. “Cognos was originally known as Quasar and adopted its current name in 1982. On January 31, 2008, Cognos was officially acquired by IBM.”^{iv} Cognos provides world-class enterprise BI, planning and consolidation software and services to help companies plan, understand and manage financial and operational performance. Cognos brings together technology, analytical applications, best practices, and a broad network of partners to give its customers a complete performance solution. Revenue in 2007 was just short of \$1 Billion USD, a first for the organization. Cognos, now an IBM Company prides itself on customer loyalty and expects revenue to rise to a new height in the close future.

1.2 - Overview of Customer Support and Success Department

Technical support at Cognos, subgroup of IBM, is unlike any other in the industry and worldwide. It is one of the largest and strongest links attributing to the growing success of the organization. “In fact, the support division at Cognos is so strong that it accounted for nearly half of the revenues recorded in 2007”^v. With the bulk of the operations located in Ottawa, Cognos completes most of its support in this area. The Ottawa office handles about 85% of the service requests in North America, including Mexico. There are also offices located in Australia, Europe, and Latin America, which handle all other service requests that Ottawa cannot, due to language and time zone barriers. Cognos prides itself on customer satisfaction and life long customers. The organization is currently enjoying a 90% renewal rate which is well above the industry average. Cognos has also received numerous awards for outstanding work and accomplishments. All awards are listed in Appendix A – “IBM/Cognos Awards.”

1.3 - Overview of Cognos 8 BI Team

As of 2005, Cognos had released their most recent software which is Cognos 8 BI. This software is based on the internet and most applications were built so they could be in sync with the Web. “IBM Cognos 8 Business Intelligence delivers the complete range of BI capabilities on a single, service-oriented architecture (SOA). Author, share, and use reports that draw on data across all enterprise sources for better business decisions”^{vi}. However, older software such as Series 7 is still in use by some clients, and a small portion of support deals with Series 7 applications. Series 7 products are close to being phased out and the remaining clients who use Series 7 will start to migrate to Cognos 8. The Cognos 8 BI team is made up of about 300 analysts of whom 25 are CO-OPs.

1.4 - Overview of the CO-OP Program

IBM has one of the best CO-OP programs in the nation. The jobs offered are very diverse. Students from all different faculties have the opportunity to get their foot in the door and develop a career. CO-OP positions are in the following departments: Administration, Development, Quality Control, Sales, and Technical Support. There are currently 25 CO-OPs employed in the Customer Support division, and this number is expected to be larger next work-term. From the first day, CO-OPs start a rigorous four-week

training program to get them familiar with the software. As a business student the training was challenging once again as the software evolves to new versions but at the same time easier as this was the second time around. CO-OPs' are given the ability to learn on their own and also with help from senior analysts' who are more than willing to share their knowledge. When the four-week training program is completed, CO-OPs are expected to deal with clients who have millions of dollars on the line. If it were not for the superior training and great coaches, this feat would not be possible.

2.0 Tools and Resources

2.1 - Overview of Insight

"*Insight*" which was introduced in the Fall of 2007, is currently the pinnacle of initial contact and communication with clients. Basically *Insight* is a tool that all technical analysts' use daily to manage their service requests while recording all communication and findings. From the clients' perspective, the software is based entirely around a Web application for logging product and account inquiries. Clients' can also use it to manage their login to the Cognos Global Customer Services Web site and update their contact information. Clients have the ability to log Service Requests for any technical issue regarding a Cognos product, if the client/company has support for that product in their contract. *Insight* is unlike any software on the market right now, and allows clients to get their production back up and running quickly without any disturbances.

2.2 - Overview of Webex

Given today's complex technologies, problems can arise when running an application. This is when clients' submit a service request, but at times it's still impossible to reproduce the exact situation the customer describes over the phone. This is where Webex shines. It is a Web application tool that allows analysts and clients to view the problem over several monitors. It is as simply as typing in a number and analysts can see a perfect image of the clients' system. The capabilities of Webex include the ability to run applications, perform tasks, transfer files, and verify configurations on remote computers. The benefit of Webex is the improvement in time management and time to resolution. Clients and analysts can jump right into a Webex session and immediately start diagnosing the issue. Another positive about Webex is that the application is very easy to learn. After about five minutes worth of training, analysts are ready to use it. There is no software installation, only a one time plug-in with a very small footprint.

2.3 - Knowledge Base

The Knowledge Base is like a solution guide to a textbook, not all the answers are in there, but there are great ideas and suggestions that point you in the right direction. The Knowledge Base is a Web based archive that allows you to search by error code, product, and version. It is a dictionary of solutions and documentation that has been building for almost a decade. Both clients and analysts have access to the Knowledge Base, but are solely built by analysts. As an analyst, this is by far the most useful tool I have to find a solution. I do not find an answer every time, but will usually find a direction to follow. The Knowledge Base is also used extensively by clients. I have heard testimonials from clients where they have solved their own problems even before logging a service request, simply by accessing the Knowledge Base and searching their issue. Clients have the ability to try and solve their problem initially before contacting Customer Support. This process allows the client to solve issues in a timely fashion, and maintain a high level of production.

2.4 - DCF

Decision Control Facility was introduced the last week before my term was over. It is a new application that IBM has brought over since the acquisition of Cognos. It was built into Lotus Notes (Email System

Application) and was used in place of the knowledge place. All Knowledge Base documents were copied over to DCF for easy access and use.

2.5 - Trak Web

Trak Web is another application that analysts use for solutions. Basically it is an archive of problems and bugs within the software that have been found and recorded. Over the years many different versions and builds have been developed. With every new version and build there are a number of bugs that are within the software. These problems really only appear as the software is being used, and unfortunately this is done by the clients. If we can reproduce the problem on another system we write up an “information request” which is written in Trak Web. The new request is then picked up by developers and the bug is fixed for the next build release. This tool is very useful because we can search for problems in the archive and see if anything matches what a client is experiencing. We can then direct the client in the appropriate direction and get production back up and running. This application is very effective and helps analysts cut down on overall time between the point of initial contact and a proposed solution.

2.6 - Lotus Sametime

“IBM’s Lotus Sametime is the IBM award-winning and market-leading platform. Lotus Sametime software offers integrated, enterprise instant messaging, point-to-point video, integration with desktop productivity applications such as Microsoft Office, file transfer, integrated chat histories, and optional integration with supported audio, video, and telephony systems. Lotus Sametime software’s enterprise instant messaging capabilities help streamline communications, connect with supported mobile devices and other, supported IM networks, and include built-in VoIP, video chats, and presence awareness. Lotus Sametime software’s enterprise instant messaging capabilities also provide a solution for businesses concerned about security and compliance risks associated with unmanaged use of public IM networks.”^{vii} This software is really essential because it allows CO-OPs to instantly communicate with Senior Analysts and coaches when they need help. The software also sends out reminders and scheduled timers. It is very handy when work gets chaotic.

2.7 - Case Review

Like all new things we learn, there are difficulties and challenges. Learning Cognos software is no different. There are service request’s received that are very challenging and due to the clients configuration, solutions that should work do not. So in response to these daily challenges, twice a week all CO-OPs and Series 7 analysts get together in the boardroom and share ideas. This is very useful because you have all senior staff on hand, and they bring many years of experience to give help. On top of having all Series 7 analysts together, two developers of the Series 7 software also participate, because they know the software inside and out. From my own experience I have really come to appreciate the knowledge of senior staff, and also the generosity of support they are willing to provide.

3.0 Technical and Customer Support

3.1 - Logging Service Requests

Every year Cognos receives approximately 150,000 service requests from clients. Some are logged as Customer Care cases, but most are technical cases. It all starts when clients come to Cognos looking for a solution to improving and managing their organization. Clients and sales representatives will come to an agreement about what is needed to best manage their business operations. Clients now have the ability to log service requests for the products they have purchased support for. Clients can log service requests in three ways: 1) *Insight* 2) Telephone 3) Technical Analyst. As mentioned in an early section of this report, *Insight* is the Web based application which clients can use to log and track service requests. Clients can also call Cognos and log a Service Request with our Administration Team. The last method clients can use

to log a service request is through a technical analyst. This is usually done when a case is already open and another issue has been found. Technical analysts will open a new service in the clients' name, and assign it to the right division. **Please see Appendix C for Priority and Segment Importance**

3.2 - Assigned and Submitted Service Requests

After the client logs a service request, it first gets sent off to the appropriate geographic area depending on language and then is sent to *Assignment Manager*. *Assignment Manager* is a program that picks up all service requests and assigns it to the appropriate technical analyst. Every morning, all analysts start with a score. The score is based on how many services requests analysts have in their bin at that current time. Basically, service requests will be assigned equally among analysts depending on scores. Once the service request has been assigned to an analyst, the analyst will now be able to see it in their bin. Once they have opened the new service request analysts have a certain time period for which they must make initial contact with the client.

3.3 - Pre-Initial Contact

Once a service request is received by analysts, they have to check a few things in the pre-initial contact phase. When a service request first arrives, it is essential to verify that it has been assigned to you, and then see when the SLA is. The SLA is the time you have before you must make initial contact. The SLA is based on the priority of the call, and the segment the client is in. Please see Appendix C – “Client Priority”, for priority and segment descriptions. Once an analyst knows when they must make contact, they will start to read the problem description as well as what product the problem is occurring in. They will then start research to try and find a solution or look for ideas in the Knowledge Base. If the description is not clear enough to understand the issue, the analyst will prepare to ask for appropriate information and data to have full details.

3.4 - Post Initial Contact

Initial contact can be executed by phone or email. This is decided by the client when they log the service request. The majority of the calls begin by email, this is either to get additional information or schedule a Webex session. After initial contact analysts only have two options. If they understand what the issue is based on the description, they can continue to do research and see if a solution is available. If the description is not useful, the analyst now waits for a reply from the client so they can get all the information about the error. Sometimes this can be a lengthy process because many clients are multitasking. Based on the response, analysts solve the issue and/or go to development for support. If clients do not respond at all the service request is closed.

4.0 Cognos 8 BI General Products

4.1 - Reporting – Report Studio

“Reporting gives you access to a complete list of self-serve report types, are adaptable to any data source, and operates from a single metadata layer for a variety of benefits such as multilingual reporting. With the reporting capability, you can personalize the style and quality of BI delivered to your key stakeholders; and you expand the community of BI users.”^{viii} This is the most used product, it allows for all knowledge levels and various levels of employees to design, create and product reports.

4.2 - Analysis – Analysis Studio

“Analysis enables the guided exploration of information that pertains to all dimensions of your business, regardless of where the data is stored. Analyze and report against online analytical processing (OLAP) and

dimensionally aware relational sources. Show me a demo of IBM Cognos 8 BI Analysis.”^{ix} With the analysis capability, you can personalize the style and quality of BI delivered to your key stakeholders and you expand the community of BI users.

4.3 - Dashboards

“Business dashboards communicate complex information quickly. They translate information from your various corporate systems and data into visually rich presentations using gauges, maps, charts, and other graphical elements to show multiple results together. IBM, offers the full range of dashboards; operational, tactical, strategic; to help you monitor, measure, and manage corporate performance.”^x

4.4 - PowerPlay Transformer

Cognos PowerPlay lets you analyze critical corporate data from any angle, in any combination. Quickly grasp business issues, manage performance, and focus your actions through the strength of multidimensional analysis. Corporate data is complex. To learn from it and act on it, we need analysis tools that can make sense of it. PowerPlay Transformer is a summarization tool that allows users to report on many different levels and also acquire information about every aspect of the business. Users can pinpoint specific details in their reports that are not easy to evaluate.

4.5 - GO! Mobile

“IBM Cognos 8 Go! Mobile extends the value of the proven IBM Cognos 8 Business Intelligence architecture by providing users with access to timely, secure, and personalized information on their mobile devices and operating systems, including BlackBerry, Windows Mobile and Symbian S60 wireless.”^{xi} With IBM Cognos 8 Go! Mobile, users can increase their productivity and improve their decision-making when working remotely by accessing operational and strategic information about customer orders, product performance, and more.

4.6 - GO! Office

“IBM Cognos 8 Go! Office lets you view and consume IBM Cognos business intelligence content within Microsoft Office applications such as PowerPoint, Excel and Word”.^{xii} IBM Cognos 8 Go! Office eliminates users' need to cut and paste or manually load data into spreadsheets or presentations. This saves time, prevents errors, and allows users to focus on making decisions rather than data entry.

5.0 Types of Problems

Percentage of calls available in Appendix B – “SR Calls”

5.1 - Report Design

Cognos 8 products are very user oriented and all reports must be built manually. The reason so many organizations around the world chose Cognos for software is because it is so advanced in the field of customization and organization. Cognos 8 products have the ability to customize in endless ways, and many clients take advantage of this. You can make customer calculations, build filters, design custom reports with graphics, insert prompts, and it is really endless. When you get all of these options thrown into one report, it is hard to generate a full report that runs successfully because of all the overlapping data. About 60% of the service requests deal with report design issue, and it is the analysts' job to mimic what the client is trying to product, and create it on their own system to get the clients overall objective. Many of these service requests take several days to solve, because of the complexity of the report and data, but over time it becomes routine.

5.2 - Configuration and Setup

Typically there are a few service requests that are easier to solve. In today's fast-paced technology driven economy, organizations will have multiple servers, with multiple networks, and a massive amount of power. With all this comes configuration and security. All Cognos products have to be configured together and most importantly, be secured from intruders and hackers. The configuration process is not long, but if one thing does not match another, even as small as a spelling mistake, all the products will not work. About 25% of service requests are related to configuration, and it is up to analysts to try and sort the issue out. It is also very important that security is enabled and all granted users can access the correct information.

5.3 - Install and Upgrades

All Cognos 8 products come with support documentation instructing clients how to properly install and upgrade versions. Many clients neglect the available documentation and proceed with the install. This can become a very costly procedure, and in the end the client has no other option but to start from scratch. The remaining service requests are of this nature and are very easy to solve. There is strict guidelines on how to do these things successfully, and all analysts have to do is direct the client to this documentation. Basically the issue would not have been encountered if the proper precautions were taken before initiating the install. Many clients do have backups that can be reloaded, but there are the odd clients that do not, and lose a lot of completed work.

6.0 IBM's Acquisition of Cognos

On November 12, 2007 IBM announced a definitive agreement to acquire Cognos. "IBM acquired Cognos to accelerate its Information on demand strategy, a cross-company initiative that combines IBM's strength in information integration, content and data management and business consulting services to unlock the business value of information."^{xiii} Through this acquisition, IBM and Cognos will become the leading provider of technology and services for business intelligence and performance management, delivering the industry's most complete, open standards-based platform with the broadest range of expertise to help companies expand the value of their information, optimize their business processes and maximize performance across their enterprises. "The Cognos acquisition supports both IBM's acquisition strategy and capital allocation model, and will contribute to the achievement of the company's objective for earnings-per-share growth through 2010."^{xiv}

I decided to include this acquisition in the report because many employees do not get to go through the experience. I must admit that the acquisition had minimal impact on the work term, but I found the experience very beneficial. As a young employee, I had the opportunity to see how an acquisition was implemented and how full time employees were affected. The first feel of change was during my third week. I was pulling into the parking lot and the signs in front of the building had changed from "Cognos" to "IBM". I know this is minor, but it was somewhat exciting to see. There was lots of paper work to be done, and everyday it was noticeable that the full time employees were getting forms filled out. Overall the acquisition was quite successful and there were no major glitches. There were minor changes to processes and how things needed to be done, but nothing to substantial.

7.0 CO-OP Program at IBM

7.1 - Improvements

Although this was my second work term, I do not believe I will find another CO-OP placement that has been so beneficial and have the same opportunities for me to improve on so many essential skills. All aspects of the organization were above satisfactory and there is nothing that really needs to be improved. If there was anything that could have been changed, I would have liked to been trained on all the software at one time. The training was split into four weeks, which two were on one product and the other two were on

another product. When the term first started, the CO-OP group was split into two groups, and each group worked on a different product. We then started receiving service requests on that product and three weeks later we were brought back into the classroom to learn another product. I believe it would have been more efficient to have gained all knowledge or both products and then taken on service requests.

7.2 - Experiences

Over the last four months I have experienced it all. On my first day I was pretty excited to be entering an environment that I knew so much about and had the ability to be a leader. As a returning student I knew I was expected to be a leader. I came to realize very quickly that everyone (new COOPs) was very nervous and I took the initiative to make them know how laid back and easy to interact it is with all employees. I experienced an intense four-week training program that is usually three months in length, and I give credit to my instructors who did a great job once again. I had to take part in training again because the software I was working with this term was new. I experienced busy weeks and slow weeks and all of the implications that followed them in between. I have spoken to the most respectful and kind individuals on the phone, but also the rudest and most ignorant people. When I was first interviewed by Xxx for my first work term, I was told that this was going to be the hardest CO-OP I was ever going to have. I kind of laughed in my head silently but soon came to realize he was right. Once again, during my second work term at IBM, it was a very busy and difficult CO-OP. Now when I look back on all the things that I experienced, I believe that his statement was correct, but because of the people that were around me and the support I received from them, it was not all that bad. I do not believe I will be returning to IBM for a third term although it was a wonderful place to work, I want to move on to a placement more geared towards my option in accounting. The biggest gain I am going to take from this work term is the relationships I have made and all of the friendships that will continue after the term have come to an end. If it were not for my peers and coaches around me, I would not have been able to succeed as I did.

7.3 - Achieved Goals and Attained Values

I came into this position thinking I knew a lot about computers and the technical aspects of computers. I was very wrong. Although this was my second term at IBM, there is a never-ending line of knowledge or skills that can be obtained when it comes to evolving technology and software. I came into my second term knowing that the other CO-OPs around me had much more technical education, and I was actually behind, but I had the advantage of being in their shoes before. Right from this point, my biggest goal was to be as much of a leader as possible and help them succeed with their training program and experience. Although I could not give them all the technical advice, I was able to give them confidence and help out with most of the administrative tasks that were needed. So I guess in a sense my first goal was to be a leader and take initiative to take a more important role in my environment. Over the last four months I believe I have made a large step forward towards this goal. I helped all of my fellow colleagues in one way or another, and believe I made their time their better. I also wanted to improve on my soft skills. As a business student there is nothing more important than having the ability to communicate effectively. This job required verbal and written communication on a daily basis and it helped me bring my soft skills to another level. It is easy talking to a client when they are happy and satisfied, but it is a different story when clients are in a panic and do not have time for workarounds. I think that this is a skill that can be applied to all aspects of life, and I will be able to value this in all work environments.

7.4 - Learning and Performance Objectives

Learning Objectives

Learning Objective 1

There are many objectives that can be written down here, but I believe there are a few that are more important than others. The biggest objective I have is to learn how to learn. I know this sounds very funny, but many people do not know how to learn. Everyday children, students, adults and professionals are drowned in knowledge and information that they do not know how to use. I think obtaining knowledge is only half the step, knowing how to use it is totally different and a skill I want to strengthen. This relates to both my professional and academic goals. In my work place I am always needing to evolve and diagnosing

data in order to accomplish my daily routines. As for academics, learning visually in class works for some and learning by example works for others, I believe I need to know what works best, and this will help as I progress through my education.

Learning objective 2

Most of what I do involves troubleshooting and finding the root issue to customers' problems. A lot of the time customers are not straight forward, or the problem at hand is complicated to understand. Troubleshooting is a fundamental skill that would allow me to successfully break down each problem and then fix it. This also relates to my academics because as my courses get more challenging so will the content and exams, greater strength in troubleshooting will allow me to investigate and solve even the most difficult problems.

Learning Objective 3

Probably the most important skill you can bring to tech support/customer support is soft skills. Being a commerce student, I understand the importance of communication, but I want to improve my soft skills when it comes to situations that are not perfect. EX: angry customers, stressful issues, urgent matters, and on the spot questions. Soft skills are very important for my professional career but also for my academic career. Most of the classes I am enrolled in require presentations and communication between my peers. If one cannot do these tasks they will have a very rough time getting through successfully. Not only does communication help my schooling, but it also leads to meeting people and creating those important contacts that may help me out later on in my professional career.

Performance Objectives

Performance Objective 1

When I first started my CO-OP at Cognos I thought my technical skills were well beyond what I needed. I have come to the realization that this is not the case. Another goal I have is to improve my technical skills to a point where I feel comfortable instructing clients while satisfying their fast pace environment. I believe that my technical skills are at a level that is above what is needed for my academic success, but for my current job it is not. Technology is a never-ending advancing beast, technical skills always need to be advances and I believe this will help me succeed in my workplace.

Performance Objective 2

A key part to succeeding in a demanding workplace is organization. Performance is achieved from a combination of components, but having accurate information and access to organized data, it will help me pursue and overcome many problems that I meet. Organization is also important in my academics. It leads to efficient time management skills, and deadlines being met. It will help me prosper as I conclude my education.

Performance Objective 3

All great accomplishments in society have come from great leaders. For my last performance objective I want to become a better leader and a person who people will come to. This is my second work-term at Cognos, and it was apparent from day one that the other CO-OPs were coming to me for advice and help. Leadership would not only be good for my professional career but also my academic. Employers love leaders, they demonstrate everything the company strives for while also increasing the ability of others around them.

APPENDICES

Appendix A – IBM/Cognos Awards

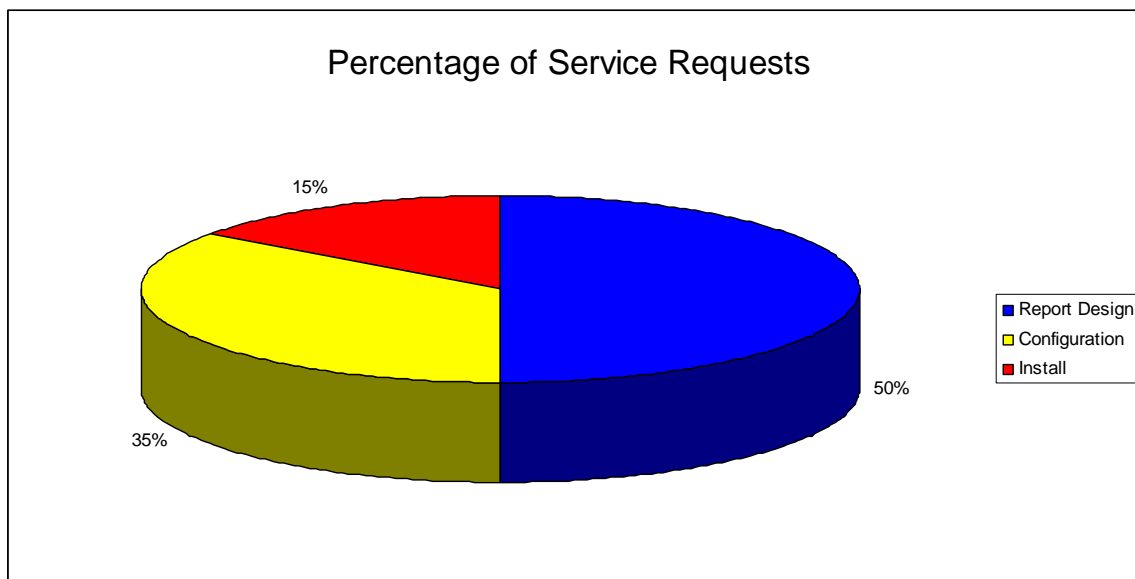


EXPLANATIONS

1. Cognos, an IBM Company has won an International Stevie Award for Best New Product or Service in the Computer Hardware and Software Category in The 2008 International Business Awards.
2. Cognos Awarded "Insurer's Choice" Awards from Financial Insights, an IDC Company, & Tech Decisions Magazine.
3. Cognos Wins IR Magazine Canada Grand Prix Award for Best Overall Investor Relations, Large Cap Companies.
4. IBM Cognos Go! Mobile wins Datamation 2008 Product of the Year.
5. Cognos Now! Wins SearchDataManagement.com Product of the Year for BI/Analytics.
6. *CRM Magazine* Names Cognos Leader in Business Intelligence in 2007 CRM Market Awards.
7. Cognos Executive named to VARBusiness' Rising Stars: Executives to Watch list.
8. IBM Cognos Now! Selected to Supply & Demand Chain Executive 100.
9. Cognos selected to Global Logistics and Supply Chain Strategies' 100 Great Supply Chain Partners list.
10. Cognos has won the award for "Best Midmarket Strategy" at the Midsize Enterprise Summit Europe Event.
11. Cognos Awarded "InsurTopTech" Award from Financial Insights, an IDC Company, & Insurance Networking News
12. Cognos Chosen As One of START-IT Magazine's "Hottest Companies of 2007"
13. IBM PartnerWorld Beacon Award for Innovation that Matters in Government
14. Cognos Customer Mölnlycke Health Care Named to IDG's InfoWorld 100
15. Cognos Named to InformationWeek 500
16. Cognos Ranks in Canada's Top 100 Employers list for 2006
17. Cognos Customer Support achieves prestigious Support Center Practices certification for third consecutive year.
18. Fifth win for support.cognos.com
Cognos was named as one of the Ten Best Web Support sites for 2005 by the Association for Support Professionals (ASP).

These are just the awards for 2007 and 2008. All awards can be found at www.cognos.com/news/awards and www.ibm.com.

Appendix B – SR Calls



Appendix C – Client Priority

Importance of Service Request

<div></div>	<div></div>											
	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

End Notes

i Wikipedia

ii www.ibm.com: Web page

iii ibid

iv www.wikipedia.com: Web page

v IBM internal document

vi www.cognos.com: Web page

vii www-01.ibm.com/software/lotus/sametime/

viii www.cognos.com: Web page

ix ibid

x ibid

xi ibid

xii ibid

xiii ibid

xiv ibid

References

Preliminary References

Ashe, Rob. (2009). *Overview*. Retrieved April 13, 2009, from Cognos Web site.
Web site: <http://cognos.com/company/index.html>.

Cognos. (2009). *IBM Cognos 8 Business Intelligence*. Retrieved April 5, 2009, from Cognos Web site
Web site: <http://www.cognos.com/products/cognos8businessintelligence/index.html>.

IBM. (2008). *IBM Completes Acquisition of Cognos*. Retrieved on April 3, 2009, from online resource
Web site: <http://en.wikipedia.org/wiki/Cognos#References>.

Secondary References

Anderson, Shannon; Klein Pearo, Lisa; K Widener, Sally. "Drivers of Service Satisfaction." Journal of Service Research: JSR Vol 10, ISS 4; pg 365 May 2008
<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?index=4&did=1460438471&SrchMode=1&sid=4&Fmt=2&VInst=PROD&VType=PQD&RQT=309&VName=PQD&TS=1213036088&clientId=3345>>.

Coifman, Harry. "A Call for Improvements." Quality Progress: Vol. 41, ISS 5; pg. 88 May 2008
<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?index=4&did=1481742001&SrchMode=1&sid=30&Fmt=4&VInst=PROD&VType=PQD&RQT=309&VName=PQD&TS=1213038416&clientId=3345>>

Jacobs, Paula. "Cross-Cultural Connection." InfoWorld: San Mateo: Vol. 20, ISS 19; pg 110 May 1998
<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?index=10&did=29332369&SrchMode=1&sid=16&Fmt=3&VInst=PROD&VType=PQD&RQT=309&VName=PQD&TS=1213037244&clientId=3345>>

Roggeveen, Anne; Bharadwaj, Neeraj; D Hoyer, Wayne. "How call center location impacts expectations of service from reputable versus lesser known firms." Journal of Retailing: 83, Apr 2007. pg 403 – 410
<<http://proquest.umi.com.proxy.bib.uottawa.ca/pqdweb?index=3&did=1392112421&SrchMode=1&sid=25&Fmt=6&VInst=PROD&VType=PQD&RQT=309&VName=PQD&TS=1213038104&clientId=3345>>