

IBM Cognos TM1 Custom Training

Business Overview

Our client (“INSCO”) is a medium-sized suite of companies with a long history of specializing in insurance, offering a full range of insurance services--automobile, property, liability, and life insurance.

Business Challenge

INSCO had a full installation of a suite of planning and budgeting tools from IBM (TM1). They were relying on outside consultants to periodically help them as they wanted to do analysis on data within their systems. They wanted to develop their people to be self-sufficient in accessing data necessary for their roles. Some roles required only simple tool understanding due to the structured design and interactive nature of the TM1 tool (“end user” role). Other roles within INSCO were heavy analytical roles and sometimes required advanced understanding of how to build reports and extracts from the tool (“developer” role).

Solution

LPA created a custom two-day TM1 introductory end-user training class for those end-user employees who needed basic understanding of TM1 for their job. We also created a two-day advanced course for analysts to allow them to do their own report development.

In conversations with INSCO management, LPA collected enough information to design a course meeting the INSCO end user’s needs. We understood the current level of understanding the end users had of the environment, the process and requirements maturity of the organization, the existing data model and environment, and the goals management had for training.

The end user training class started with the foundational items of TM1 architecture and terminology and understanding what OLAP is. Typical business analysis using Excel, and how to integrate that effort into TM1 came next. A refresher on cubes followed. Then a series of hands-on exercises, using INSCO’s environment and data – navigating a cube (and then creating one), filters, data spreading, sandboxes, display

LPA Systems Business Case Study: **Custom Training** (cont'd)

options, snapshots, active forms, Excel actions, introduction to Turbo Integrator, Rules operations, publishing TM1 to the web, and finishing with security.

The “developer” training followed a similar, but more technical path and in more detail.

Because this is customized training, we encourage each individual to bring a problem (like a report that they want to have) that can be work on during the training so that they accomplish something directly in line with what they need.

Results

- Employees who know how to use the tool to do their job better and faster, because they learned on their schedule, in their environment, with their data