



**SENTURUS**

# **Automate a Cognos Content Inventory: Speed Cleanups & Migrations**

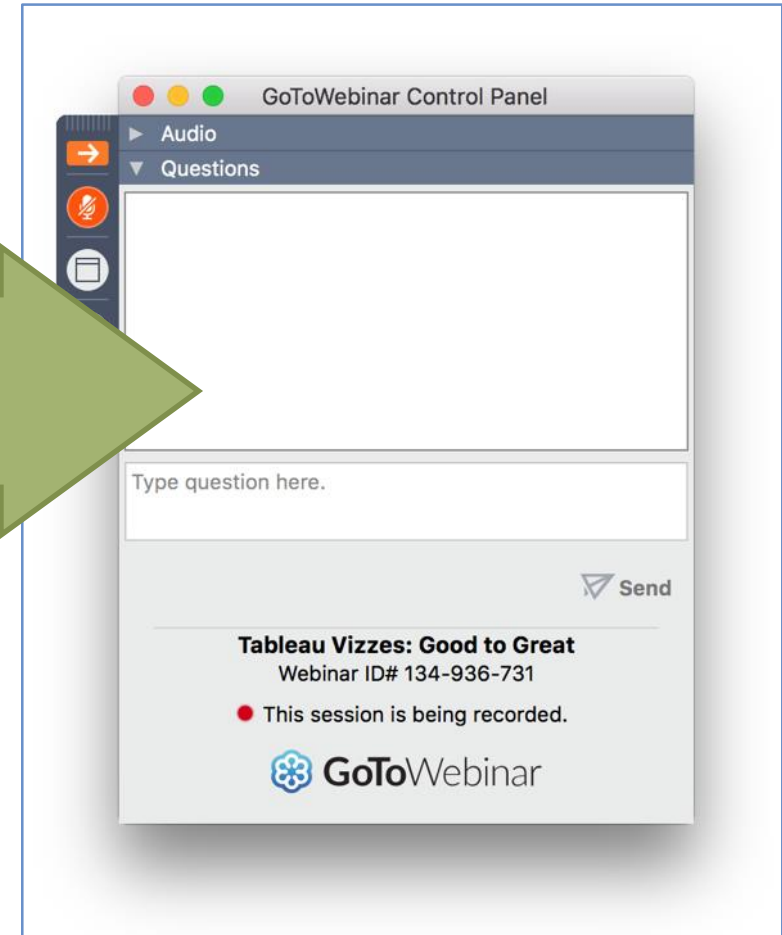


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### Topics


- Analytics Connector
- Cross Vendor Comparisons
- Dashboards Reporting & Visualizations
- Data & Cloud Architecture
- Data Prep & Modeling
- Deployments & Performance Optimization
- IBM Analytics & Cognos
- Microsoft Azure & Power BI
- Security, governance & administration
- Snowflake
- Tableau




**Webinar**  
**6 Ways to Publish & Share Tableau Dashboards**  
How-to demo and discussion of pros, cons and considerations




**Webinar**  
**How to Successfully Implement Self-Service Analytics**  
Agile, governed self-service BI with a focus on Cognos analytics




**Webinar**  
**Creating a Power BI Report Your Boss Can Navigate**  
How to design a user-friendly nav experience



**Webinar**  
**Power BI Report Builder & Paginated Reports**  
Creating pixel-perfect reports for printing and PDF



**Webinar**  
**Using Python with Power BI**  
Learn the basics, including the software and plotting libraries



**Webinar**  
**Streamline Cognos Migrations and Consolidations**  
Automatically decode Cognos content and reduce migration time by 90%

# Agenda

- Introductions
- Why are we here
- The challenges
- Create an inventory
- Demo
- Senturus overview and additional resources
- Q&A

# Introductions



**Peter Jogopulos**

Senior Consultant  
Senturus, Inc.



**Todd Schuman**

Practice Lead Installations, Upgrades  
and Optimization  
Senturus, Inc.

# Poll #1

What are your goals for Cognos? (Select all that apply)

- Changing data source(s)
- Moving to the cloud
- Migrating to a new BI platform
- Cleaning up Cognos environment
- Other

# Poll #2

How many Cognos reports does your organization have?

- 0-500
- 501-1000
- 1001-10,000
- 10,001+
- Don't know





**Why are we here?**



# Common Drivers for Cleanup & Migration Projects



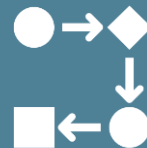
Data Source  
Changes

Vendor to vendor  
On-premise to  
cloud



Analytics  
Platform  
Changes

Recreate models  
Rebuild reports  
Capture logic



Analytics  
Footprint  
Changes

What do I have?  
Unused content  
Duplicates  
Reduce cost of  
ownership

# #Content

What are the challenges?



The image shows a spiral-bound notebook on a wooden desk. The notebook is open to a page with the title '#Content' written in large, bold, black letters at the top. Below the title, there are several hand-drawn wireframes for a mobile application. The wireframes are drawn with black lines and some green highlights. They represent different screens of the app, including a login screen, a home screen, and a settings screen. There are various text boxes, buttons, and icons drawn on the wireframes. Some of the text is handwritten in red ink, such as 'Report', 'Collect', 'Market', and 'Contribution'. A hand is visible in the bottom right corner, holding a black pen and pointing at one of the wireframes. In the background, a white keyboard and a smartphone are partially visible.

# End user experience – Looks simple

Users see defined metadata

- Defined business logic and terms
- Organization of subject areas
- “Trusted” data

		Fax		E-mail		Mail		Web		Telephone		Sales visit		Special		
		Quantity	Revenue	Quantity	Revenue	Quantity	Revenue	Quantity	Revenue	Quantity	Revenue	Quantity	Revenue	Quantity	Revenue	
Personal Accessories	Watches	Legend	2,762	\$687,713.20	8,890	\$2,226,730.60		307,421	\$79,147,588.60	11,338	\$2,824,962.60			342	\$85,740.00	
		Mountain Man Deluxe	3,212	\$246,645.72	5,554	\$424,249.36	3,154	\$242,872.09	140,948	\$10,939,177.76	13,339	\$1,024,040.91	16,335	\$1,257,579.41	995	\$76,020.04
		Mountain Man Extreme	850	\$237,987.49	1,098	\$307,656.70	789	\$219,770.67	18,251	\$5,155,841.54	2,457	\$689,227.81	3,582	\$1,002,102.10	492	\$137,186.31
		Mountain Man Digital	2,408	\$95,773.88	6,805	\$270,038.82	1,688	\$66,841.81	77,719	\$3,107,730.58	14,579	\$577,166.39	7,837	\$307,103.21	869	\$35,126.82
		Mountain Man Combination	1,451	\$136,960.69	2,729	\$256,067.97	871	\$81,922.99	34,456	\$3,277,752.68	5,824	\$545,960.38	5,845	\$550,753.77	600	\$56,254.08
		TX	5,012	\$945,516.00	12,502	\$2,357,768.70			558,965	\$105,787,762.50	19,656	\$3,701,208.50			459	\$86,480.00
		Lux	1,389	\$232,580.00	2,523	\$422,427.60			186,236	\$31,716,170.40	4,413	\$736,786.40			212	\$35,750.40
		Sam	4,290	\$192,621.00	13,739	\$615,583.40			668,401	\$30,925,852.00	17,936	\$803,179.30			741	\$33,270.90
		Infinity	1,046	\$240,466.00	4,890	\$1,444,335.00			402,745	\$94,630,161.20	4,692	\$1,078,727.80			71	\$16,080.00
		Zodiac	39	\$4,079.40	786	\$83,842.40			143,716	\$15,689,152.10	287	\$31,031.30				
		Kodak	3,027	\$366,610.10	7,541	\$917,351.20			275,648	\$34,410,501.60	11,656	\$1,410,874.90			189	\$22,736.70
		Venue	8,518	\$602,395.00	19,949	\$1,412,624.00			868,016	\$62,495,938.00	36,402	\$2,566,905.00			1,550	\$108,500.00
		Mountain Man Analog	2,972	\$141,777.66	7,981	\$378,471.33	7,006	\$335,009.69	234,587	\$11,353,456.68	25,793	\$1,224,855.13	27,166	\$1,297,744.47	958	\$45,243.85
	Navigation	Glacier GPS	7,504	\$797,287.98	20,236	\$2,171,263.81	3,858	\$419,871.58	272,023	\$28,016,144.87	37,612	\$4,051,977.14	36,232	\$3,827,553.29	3,828	\$396,723.43
		Sky Pilot			601	\$215,158.00			42,759	\$15,307,722.00	40	\$14,320.00				
		Glacier Basic	20,335	\$639,069.55	51,119	\$1,571,161.62	7,723	\$244,282.56	665,158	\$20,720,666.82	96,110	\$2,914,965.43	87,259	\$2,651,101.87	8,332	\$260,482.00
		Astro Pilot	93	\$13,485.00	1,839	\$208,381.00			169,525	\$26,441,893.00	457	\$66,265.00				
		Trail Scout	603	\$143,514.00	2,268	\$539,784.00			51,420	\$11,843,160.00	2,214	\$525,057.00			70	\$16,660.00
		Trail Master	502	\$183,230.00	1,373	\$483,435.00			21,713	\$7,695,820.00	1,886	\$656,190.00			103	\$37,595.00
		Glacier GPS Extreme	3,566	\$1,203,677.67	4,622	\$1,540,143.31	2,383	\$803,766.28	89,597	\$30,177,494.77	11,920	\$4,015,049.73	17,182	\$5,756,168.72	1,838	\$617,471.77

- ✓ GO Sales (query)
  - > Parameterized Products
  - > Inventory (query)
  - > Product forecast (query)
  - > Returned items (query)
- ✓ Sales (query)
  - > Sales
    - Margin
  - > Branch
  - > Order
  - > Order method
  - > Parameterized Products
  - > Products
  - > Retailer type
  - > Retailers
  - > Sales staff
  - > Time
  - > Time (close date)
  - > Time (ship date)
  - > User
- > Sales target (query)
- > Filters and calculations

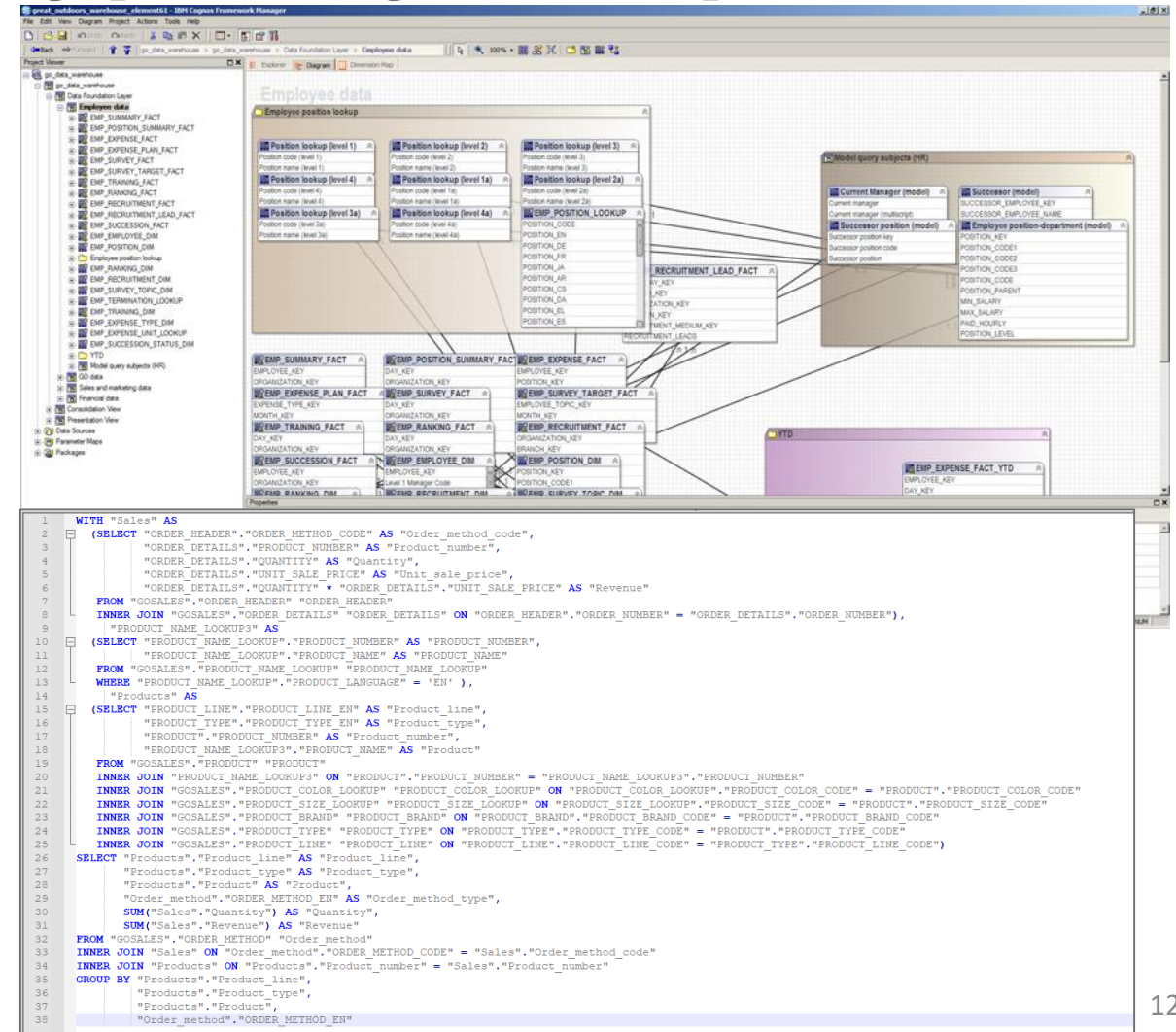


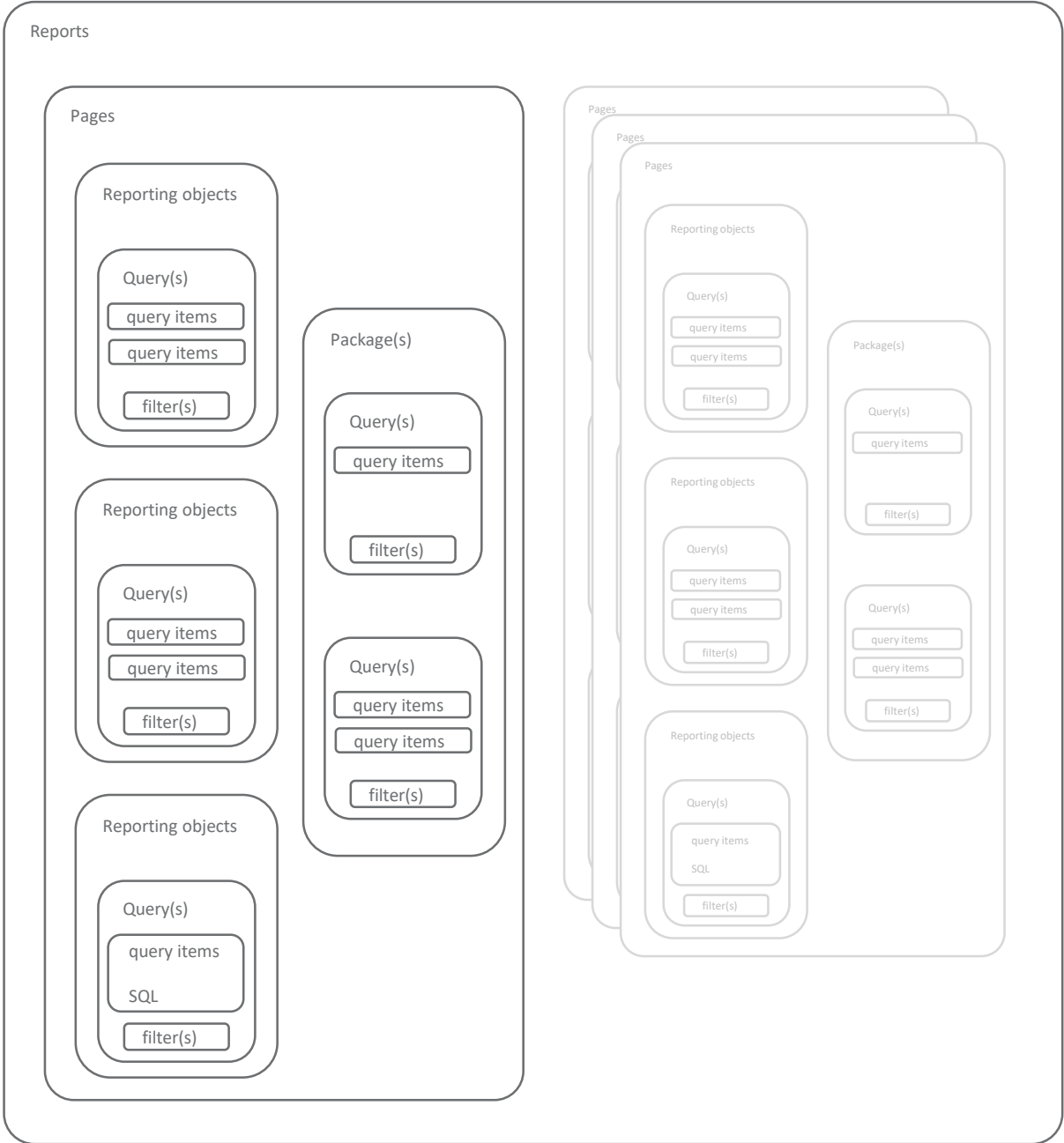
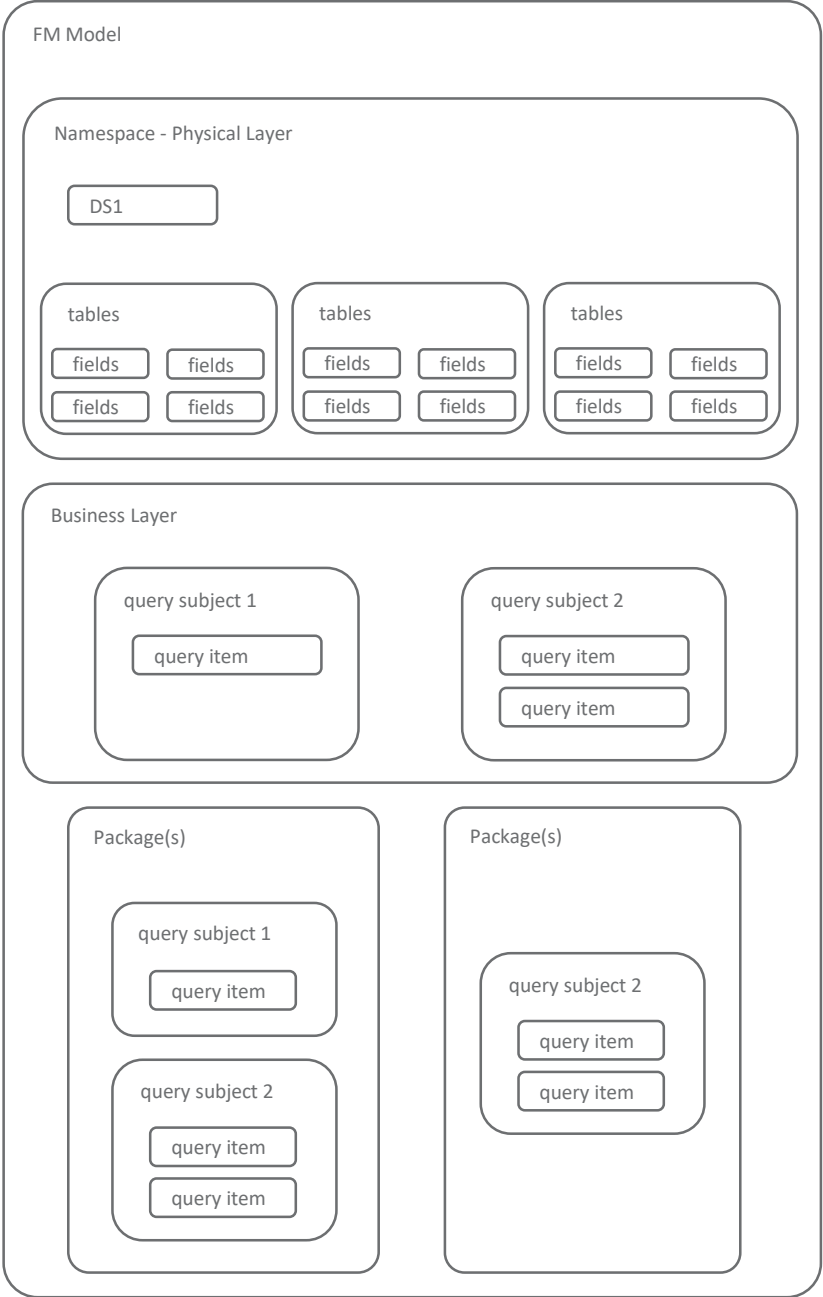
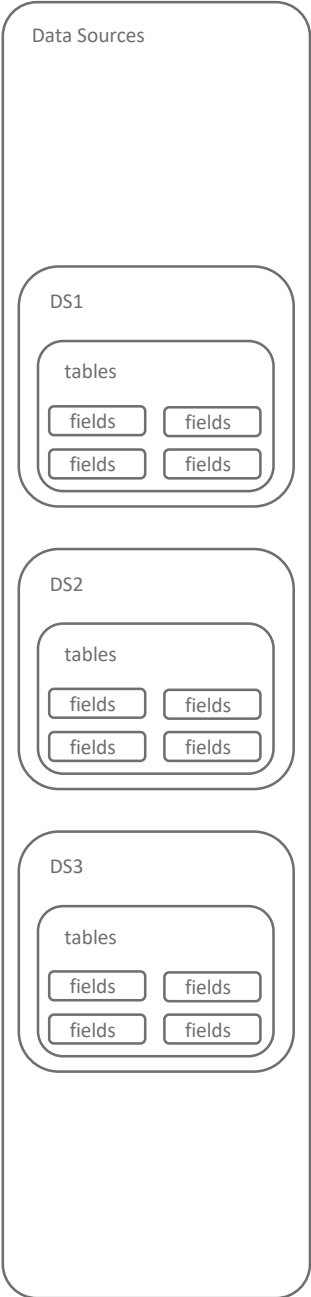


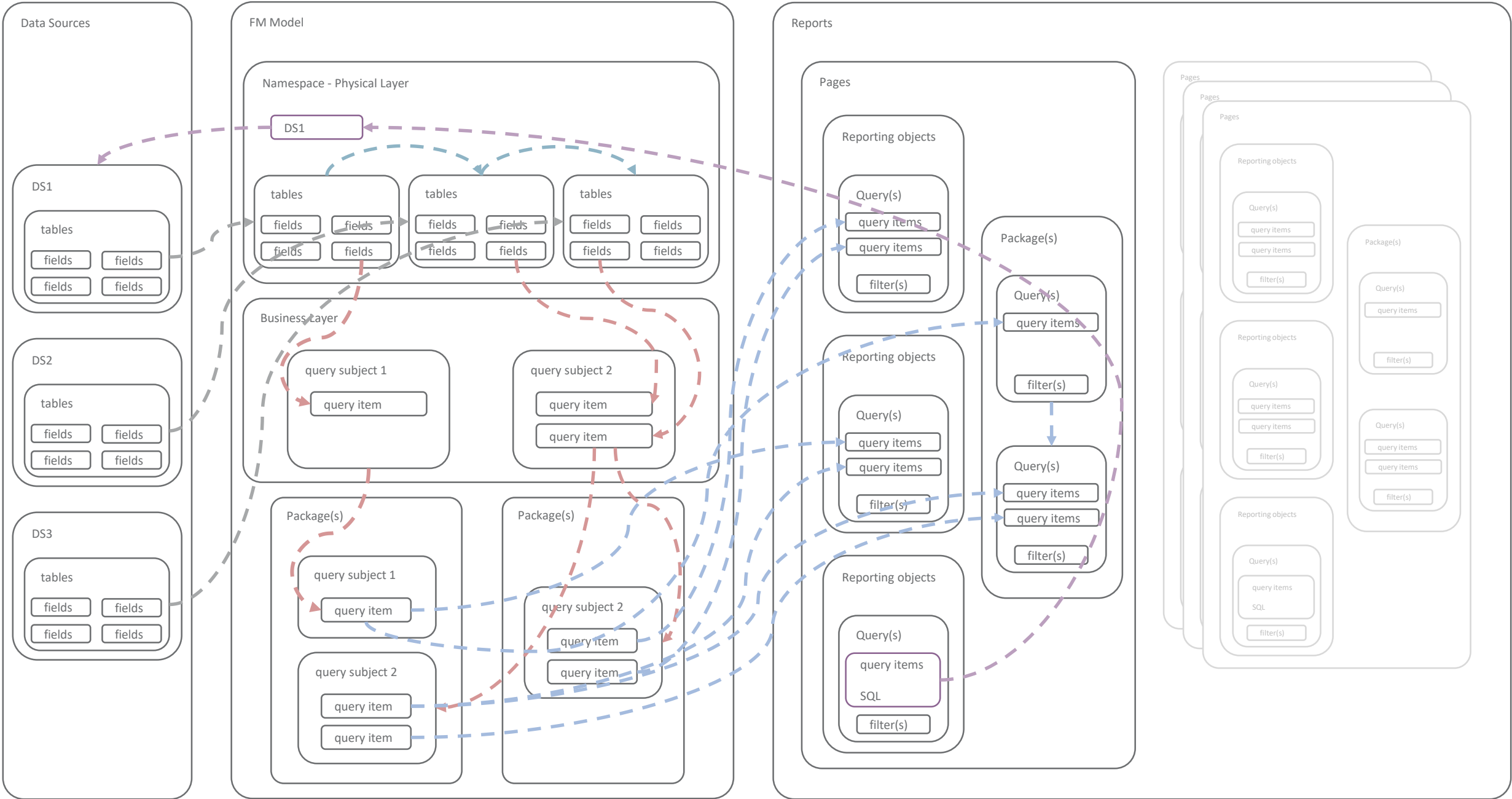
# Models/reports are typically complex

## Complexity hidden from users

- Cryptic source systems
- Massive data warehouses (tables)
- Complex transformations and logic
- Elaborate data models
- Complex reports and dashboards







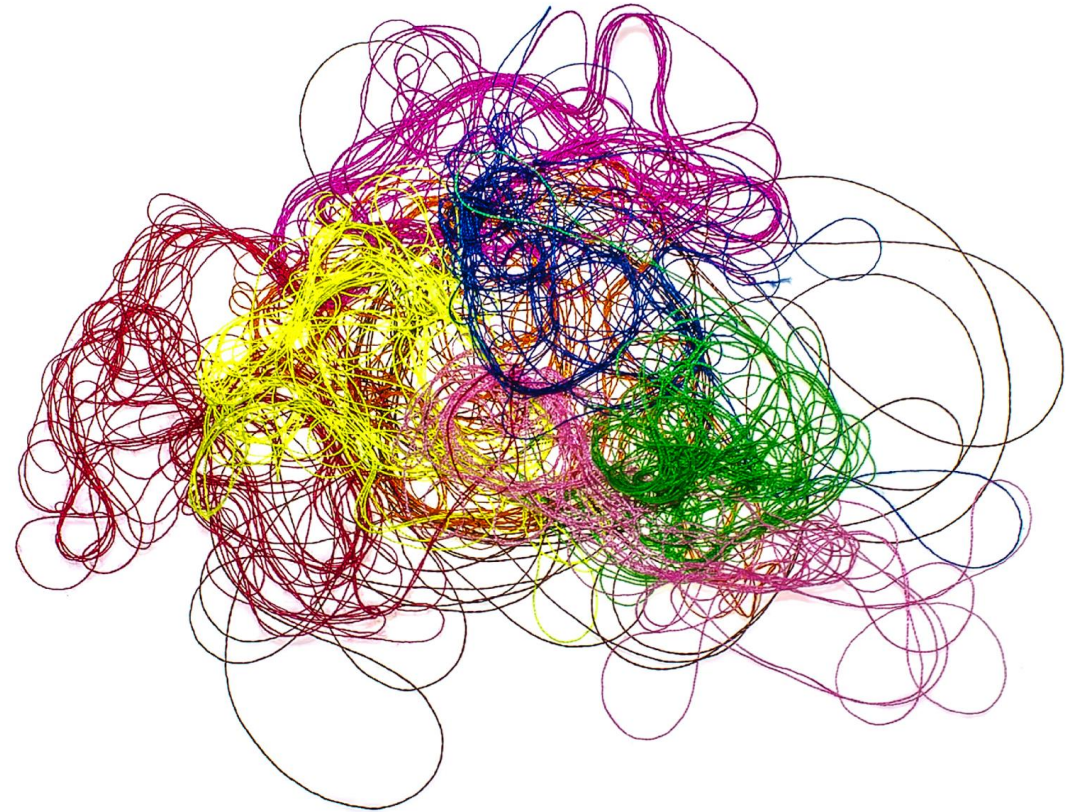
# Unraveling Cognos content

Go into **every single report individually to manually** view lineage, filters and parameters

Many reports are sitting in users' **My Content** folders

**No consolidated view** of which data sources and models are still needed and used

Cognos audit **data is limited**





# Questions

What do I need to cleanup / migrate?

- How many reports do I have?
- Do I need all of them?
- Are any of them duplicates or very similar?

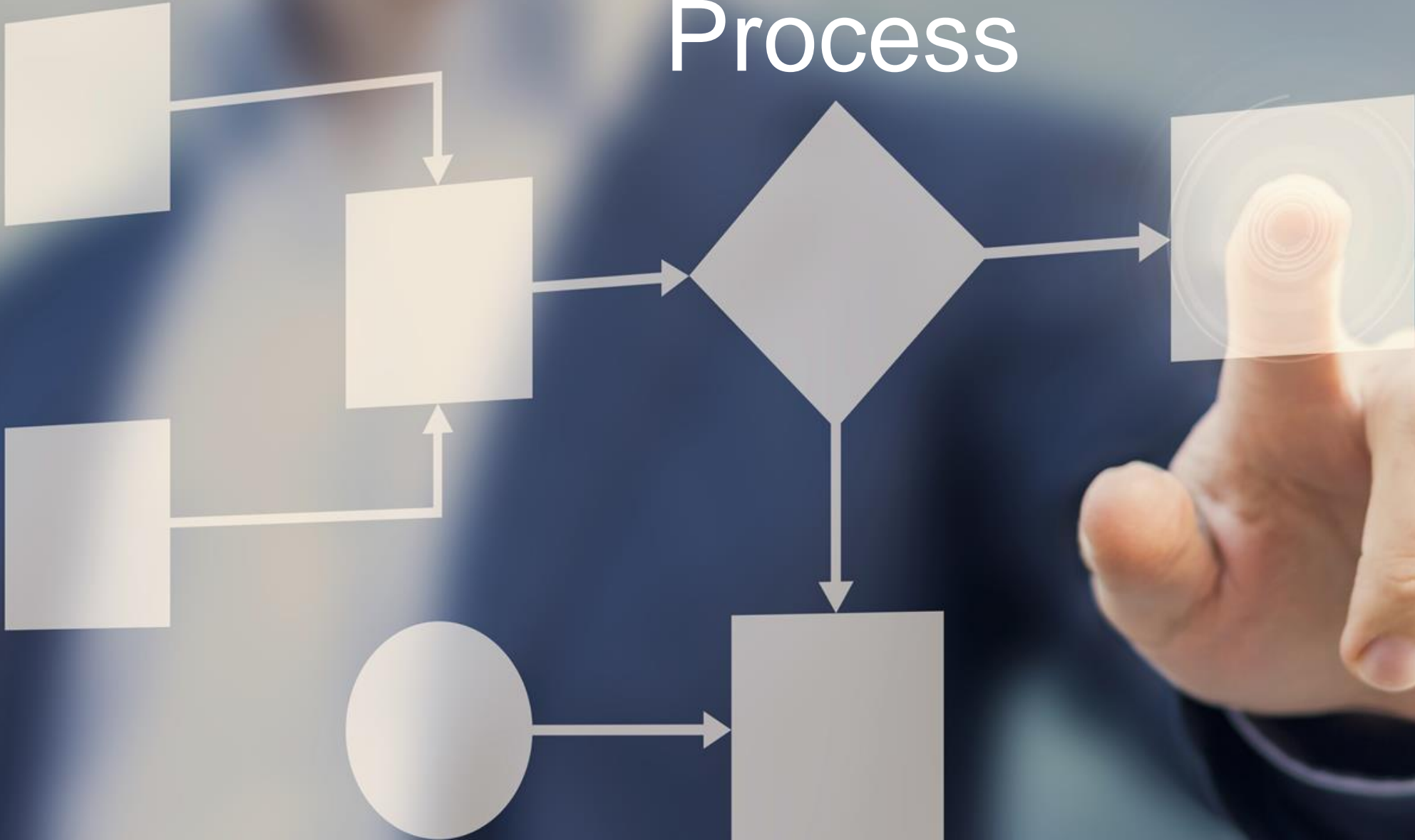
How do I cleanup / migrate them?

- What does each report contain?
  - Queries, Calcs, Filters, Joins/Unions, Prompts, Data Objects
- What are the sources for these reports?
  - Multiple DB Vendors, databases, tables, views

Where do I begin????



# Process



# The migration process

## Assess



### Starts with an inventory

- ✓ Index all reports, packages, jobs, schedules, etc.
- ✓ Capture lineage of all objects
- ✓ Capture usage (and reports with none)

## Roadmap



### Make a phased plan

- ✓ Target by business units?
- ✓ Target by data source?
- ✓ Target by usage?
- ✓ Target by users?
- ✓ Target by priority?
- ✓ Target by timing?

## Optimize



### Improve the process

- ✓ Clean up unused reports (what can I delete?)
- ✓ Remove duplicates (is monthly sales v2 the same as monthly sales?)
- ✓ Reduced inventory
- ✓ Leverage common models/subject areas

## Execute



### Rebuild smart

- ✓ Leverage roadmap targets for faster build
- ✓ Apply optimizations for clean build
- ✓ Leverage inventory to get model/report specs
- ✓ Create old reports in new tool





**Where should we start?**

**Create an inventory**

## 2 options

### Manual

Catalog each report and package

Leverage existing Audit Data for usage

Tie all pieces of meta data together

### Automate

Run the Migration Assistant tool on your Cognos environment

Review pre-defined reports that allow visibility into all aspects of your content



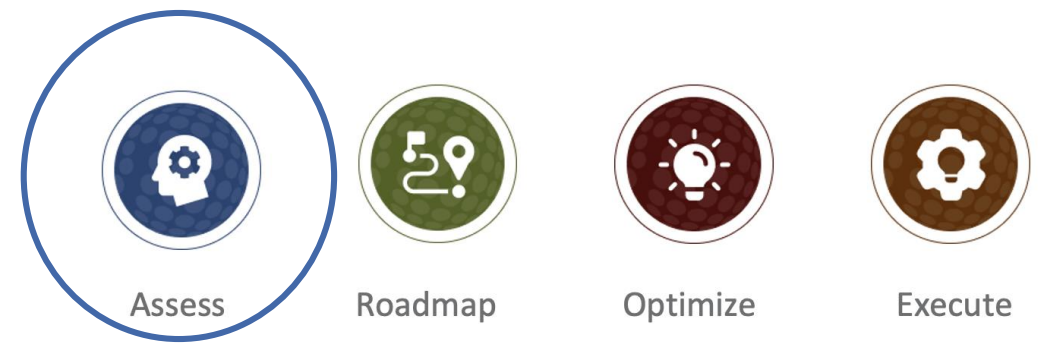
# What it does

Programmatically **decodes** and **inventories** multi-layered Cognos **reports and packages** into a database

**Identifies details** including data source(s), lineage, relationships and usage



# How it helps



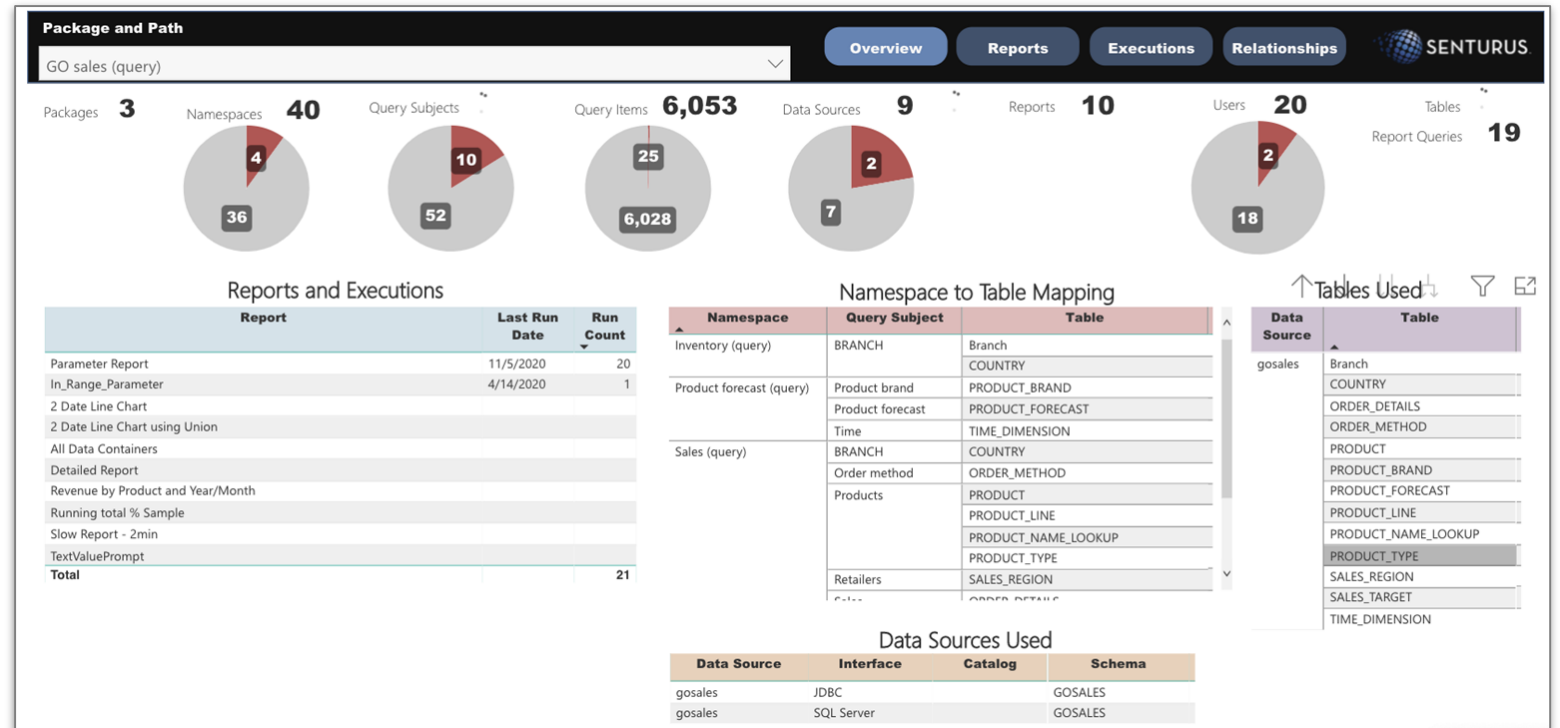
1. **Eliminate** unused and duplicates
2. **Plan and prioritize** high-priority or impacted items
3. **Simplify** and consolidate similar items
4. **Automate** manual work while eliminating errors of inventory process
5. **Create** report and dashboard “recipes”; reduces the need for “unicorns”


*“Compression factors” of 90-95% are common*



# Demo

- Overview
- Reports
- Executions
- Relationships



The background of the slide features three red lollipops. One is in sharp focus in the lower center, while the other two are blurred in the background, one to the left and one to the right. The text "What's next?" is centered over the image.

**What's next?**

# Learn more about creating an inventory of your Cognos content



Sample dashboard



Demo

<https://senturus.com/products/cognos-migration-assistant/>



## Case Study

### Reducing Unnecessary Cognos Complexity for Better Reporting

Industry: Distribution



## Case Study

### Accelerating a Cognos Data Storage Migration

Industry: Banking



## Webinar

### Confidently Assess & Budget a Cognos Cleanup or Migration

Proven methodology and secret weapon.



## Webinar

### Preparing for a BI Migration

Methodology for scoping and executing an analytics migration.

# Additional resources

## Unbiased product reviews



## Technical tips



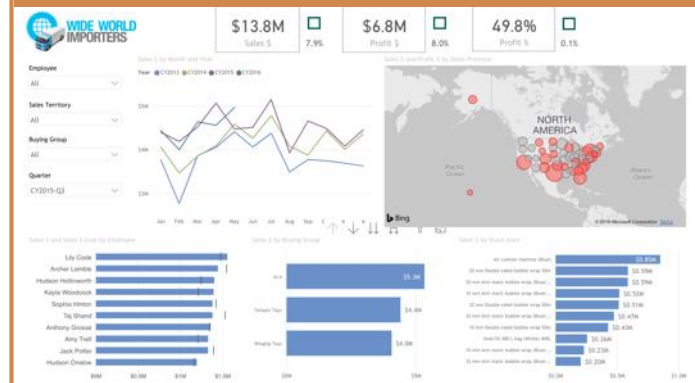
## Insider viewpoints



## More on this subject



## Product demos



## Upcoming events



# Upcoming events

## **Data Prep: Power BI vs. Cognos vs. Tableau**

Thursday, Oct 27, 11am PT/2pm ET

Register: <https://senturus.com/events/data-prep-power-bi-vs-cognos-vs-tableau/>

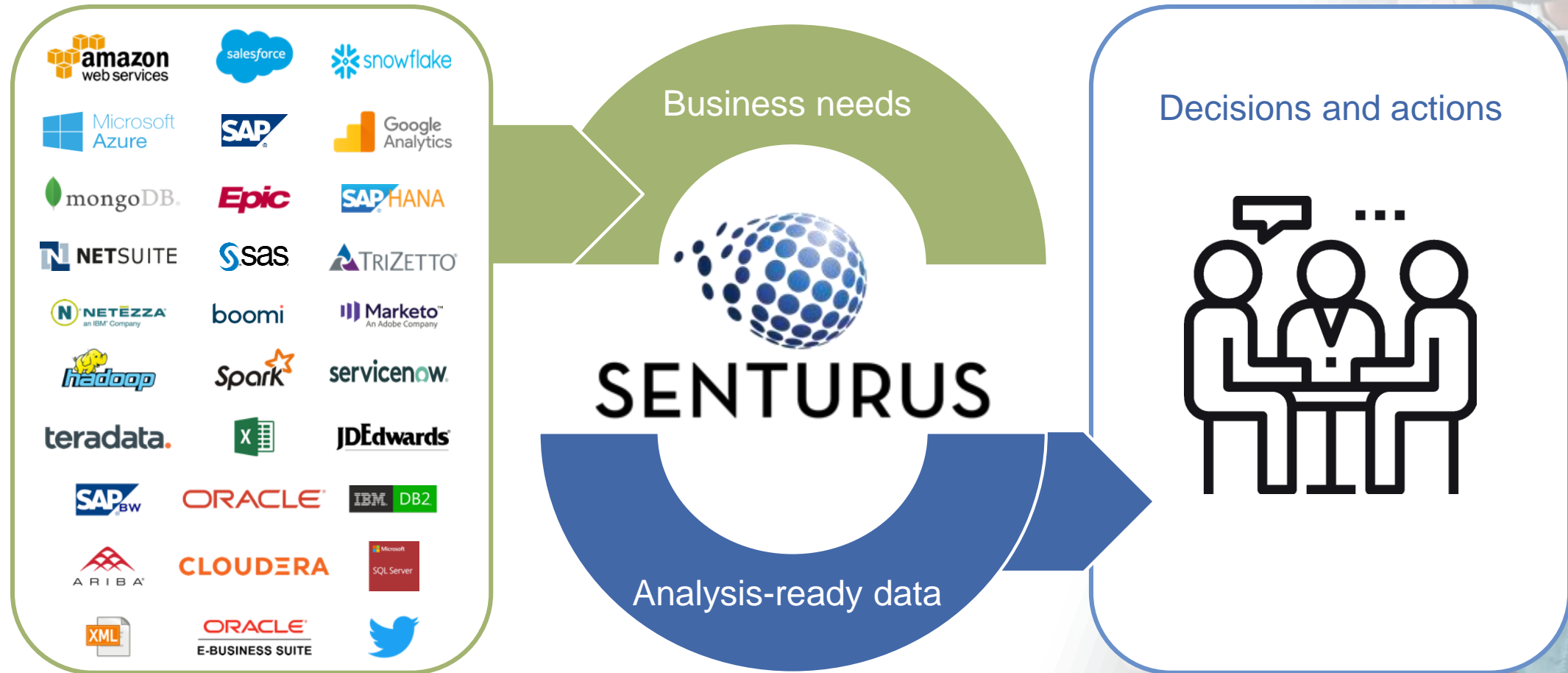
## **Agile Analytics for Cloud Cost Management**

Thursday, Nov 3, 11am PT/2pm ET

Register: <https://senturus.com/events/agile-analytics-for-cloud-cost-management/>



# Modern BI: accelerated & accessible



# A long, strong history of success

21+ years

1350+ clients

3000+ projects







# Join the Senturus team

We're hiring talented and experienced professionals

- Senior Microsoft BI Consultant
- Managing Consultant

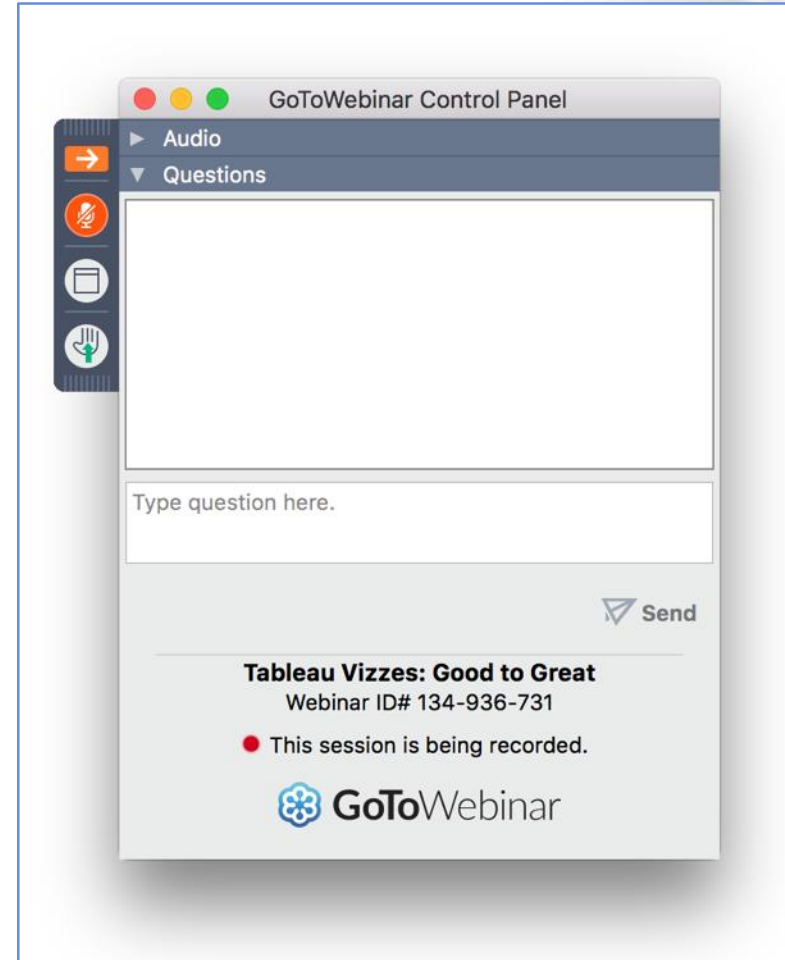
See job descriptions: <https://senturus.com/why-senturus/careers/>  
Send your resume to: [jobs@senturus.com](mailto:jobs@senturus.com)

# Q & A

If your question or issue is broader than what we are able to answer today, contact us at:

[info@senturus.com](mailto:info@senturus.com)

and we will set up a free consultation.



# Thank You



## SENTURUS

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# Addendum



# Report complexity

- Insights into Cognos environment
- Migration plan begins to take shape
- Instant insights into content that is stored within “My Folders”



Report Complexity

Content Store: ☐ Cognos11\_CS\_2020-01-14T21-23Z

My Folders?: ☐ No ☐ Yes

MIGRATION ASSISTANT

Execution data from 1/1/2021 - 5/13/2022

457	1881	643	9823	1624
Reports	Report Queries	Report Pages	Report Query Items	Report Filters

Report Name	Report Complexity Score	Total Report Executions	Total Unique Executions	Referenced by Report Views	Execution Average Milliseconds	Report Path
Report Insights (by Package)	208	283	4	0	509	/ > Team Content > Report Insights > Report Insights (by
Table Relationship Drill	58	183	3	0	429	/ > Team Content > Report Insights > Content and FM Re
Report Catalog	79	114	4	0	1,189	/ > Team Content > Report Insights > Report Catalog
Lineage	68	72	1	0	685	/ > Directory > Azure AD > Todd Schuman > My Folders >
Parameter Report	36	64	3	0	315	/ > Team Content > Analytics Connector > Parameter Rep
Lineage Drill	47	43	3	0	558	/ > Team Content > Report Insights > Content and FM Re
Crosstab with Prompt Page	59	38	1	0	1,177	/ > Team Content > Samples > Cognos Report Type Sam
Report Insights - Drill Target	151	36	4	0	434	/ > Team Content > Report Insights > Content and FM Re
Setting the _as_of_date global parameter	43	36	1	0	1,812	/ > Directory > Azure AD > Pedro Ining > My Folders > KF
New report	29	35	1	0	483	/ > Directory > Azure AD > Todd Schuman > My Folders >
Named Report 1	24	22	2	2	507	/ > Team Content > Migration Assistant > Test Cases > R
Content Item Details	107	20	2	0	1,862	/ > Team Content > Cognos Audit Extension > Content Al
Setting the _as_of_date global parameter	40	20	1	0	2,999	/ > Team Content > My Folder > Pedro > WLGore > Relat
Execute reports by package and report	91	19	2	0	10,032	/ > Team Content > Samples_Audit > Audit > Execute rep
List with Prompt	45	17	2	0	2,796	/ > Team Content > Samples > Cognos Report Type Sam
Execution history by user	74	16	2	0	27,944	/ > Team Content > Samples_Audit > Audit > Execution h
Report Specs (by Package)	208	16	2	0	308	/ > Team Content > Migration Assistant > Report Specs (t
Sample Prompt	34	16	1	0	1,144	/ > Team Content > My Folder > Sample Prompt
Logon operations by time stamp	67	15	2	0	2,486	/ > Team Content > Samples_Audit > Audit > Logon oper
Parameter Report 2	33	12	2	0	1,549	/ > Team Content > Analytics Connector > Parameter Ret

Report Complexity

Content Store: ☐ Cognos11\_CS\_2020-01-14T21-23Z

My Folders?: ☒ No ☐ Yes

MIGRATION ASSISTANT

Execution data from 1/1/2021 - 5/13/2022

47	95	57	518	44
Reports	Report Queries	Report Pages	Report Query Items	Report Filters

# Model complexity

- Insight into FM models
- Ability to determine reports by FM model
- Ability to determine usage metrics

**Model Complexity**

Content Store: ☐ Cognos11\_CS\_2020-01-14T2... My Folders?: ☐ No ☐ Yes # of Data Sources: 1 3

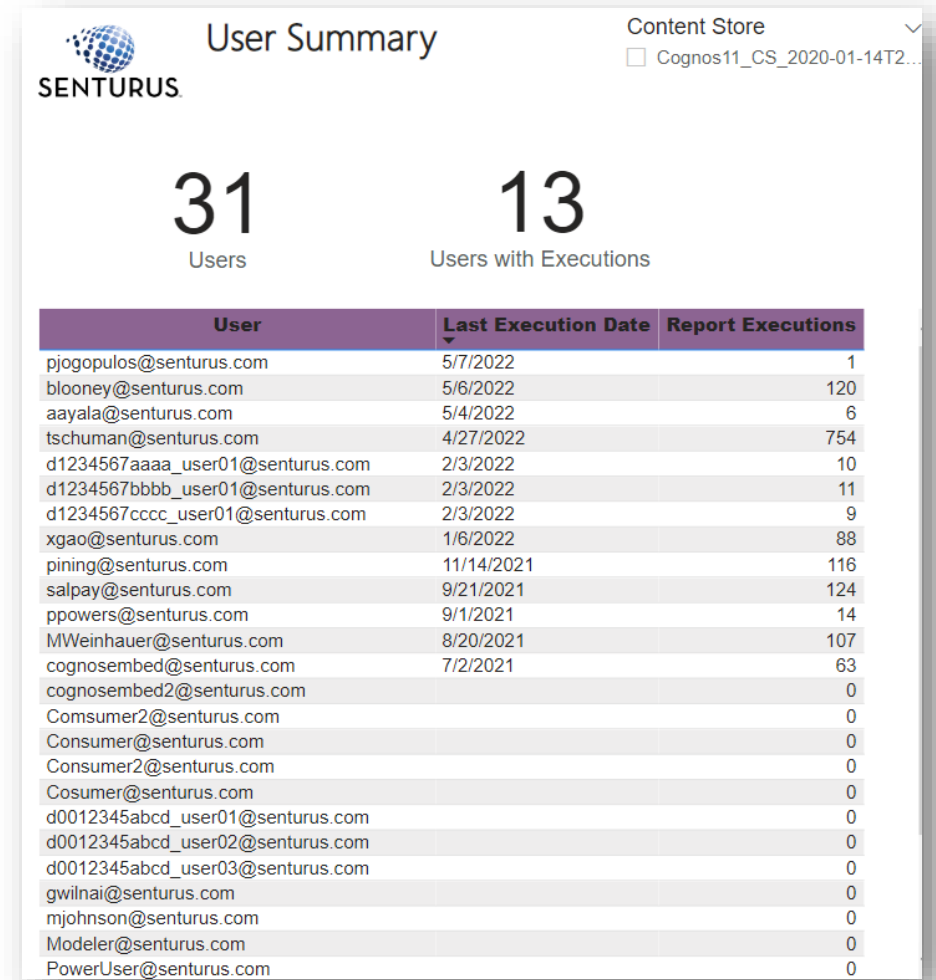
**24** Models **3** Data Sources **2371** Query Subjects **38K** Query Items **40** Namespaces **318** Associated Report Queries

Execution data from 1/1/2021 - 5/13/2022

Package Name	Model Complexity Score	Query Subjects	QS - Database Table	QS - Model Query	Query Items	Data Sources	Report Query References	Report References	Report Executions	Report Unique User Executions
Audit	667	38	24	14	529	1	63	31	115	4
GO Sales (query)	2,268	106	36	70	1,906	3	43	20	90	4
GO Data Warehouse (simple)	274	13	5	8	201	2	8	5	56	2
Migration Assistant	423	45	15	30	267	1	39	27	50	3
Cognos Audit Extension	1,417	124	96	24	1,024	1	61	15	48	2
DEMDemo	53	5	5	0	17	1	1	1	35	1
GO Sales (query)	2,268	106	36	70	1,906	3	18	17	33	4
GO Sales (query)	2,268	106	36	70	1,906	3	5	4	27	2
GO Data Warehouse (analysis)	7,556	381	71	102	6,389	1	24	9	12	2
GO Sales (analysis)	2,654	119	36	31	2,253	3	13	5	7	2
GO Sales (query)	2,268	106	36	70	1,906	3	2	1	4	1
cog_rpt_sp	21	0	0	0	0	1	1	1	2	1
GO Data Warehouse (query)	6,078	328	71	257	5,010	1	26	9	2	2
cog_rpt	243	29	10	19	135	1	2	2	0	0
GO Data Warehouse (query)	6,018	328	71	257	5,010	1	12	6	0	0
GO Sales (analysis)	2,676	121	36	31	2,269	3	0	0	0	0
GO Sales (analysis)	3,213	152	37	63	2,713	3	0	0	0	0
GO Sales (query)	2,268	106	36	70	1,906	3	0	0	0	0
GO Sales (query)	2,214	102	36	66	1,864	3	0	0	0	0
KM Package	289	8	5	3	224	1	0	0	0	0
KMDWH2	273	7	4	3	231	1	0	0	0	0
...	...	...	...	...	...	...	...	...	...	...

# User summary

- Users that accessed Cognos
- Users that run reports and how many times



The screenshot displays the 'User Summary' interface. At the top left is the SENTURUS logo. The title 'User Summary' is centered at the top. On the top right, there is a 'Content Store' dropdown menu showing 'Cognos11\_CS\_2020-01-14T2...'. Below the title, two large numbers are shown: '31' for 'Users' and '13' for 'Users with Executions'. Below these numbers is a table with three columns: 'User', 'Last Execution Date', and 'Report Executions'. The table lists 25 users, including various system users and specific user accounts, along with their last execution dates and the number of report executions.

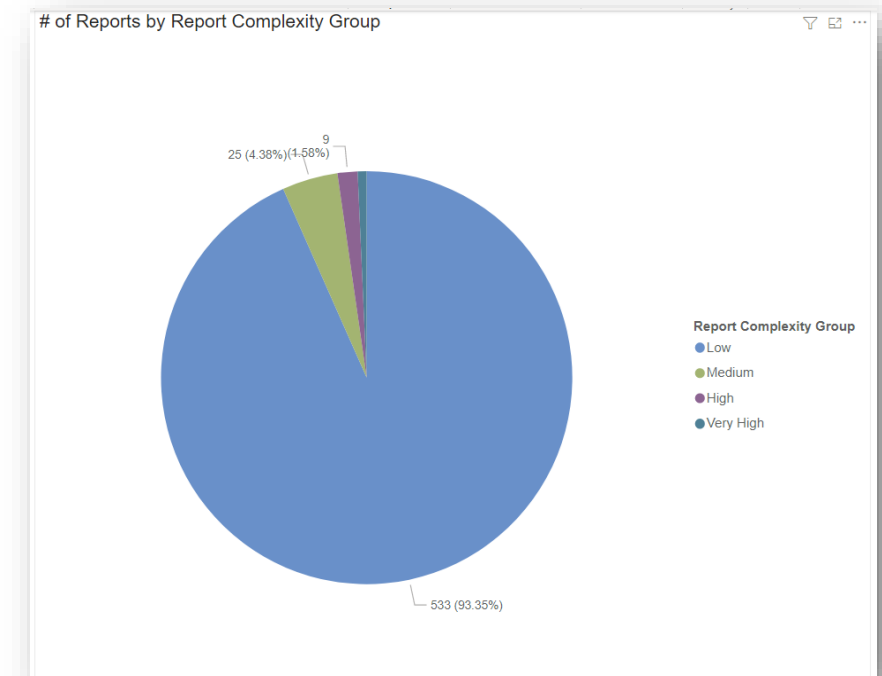
User	Last Execution Date	Report Executions
pjogopulos@senturus.com	5/7/2022	1
blooney@senturus.com	5/6/2022	120
aayala@senturus.com	5/4/2022	6
tschuman@senturus.com	4/27/2022	754
d1234567aaaa_user01@senturus.com	2/3/2022	10
d1234567bbbb_user01@senturus.com	2/3/2022	11
d1234567cccc_user01@senturus.com	2/3/2022	9
xgao@senturus.com	1/6/2022	88
pining@senturus.com	11/14/2021	116
salpay@senturus.com	9/21/2021	124
ppowers@senturus.com	9/1/2021	14
MWeinhauer@senturus.com	8/20/2021	107
cognosembed@senturus.com	7/2/2021	63
cognosembed2@senturus.com		0
Comsumer2@senturus.com		0
Consumer@senturus.com		0
Consumer2@senturus.com		0
Cosumer@senturus.com		0
d0012345abcd_user01@senturus.com		0
d0012345abcd_user02@senturus.com		0
d0012345abcd_user03@senturus.com		0
gwilnai@senturus.com		0
mjohnson@senturus.com		0
Modeler@senturus.com		0
PowerUser@senturus.com		0



# Report complexity groups

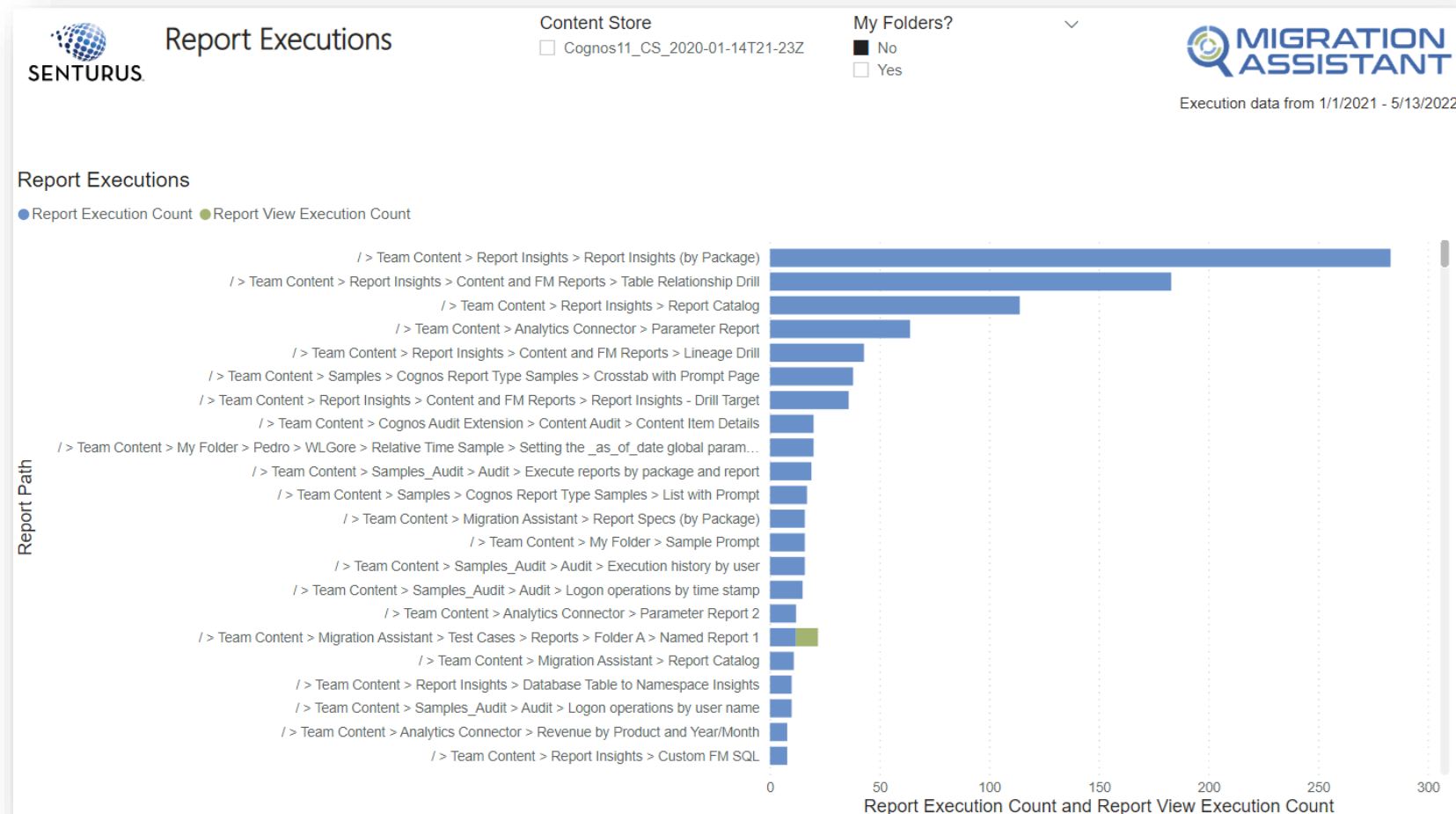
- Breakdown of reports by complexity
- Ability to adjust the scoring mechanisms
- Score based upon report, crosstab, visualizations, queries

Complexity	Report Complexity Group	# of Reports
1	Low	533
2	Medium	25
3	High	9
4	Very High	4
Total		571



# Report consumption

## Insight into reports that are run.

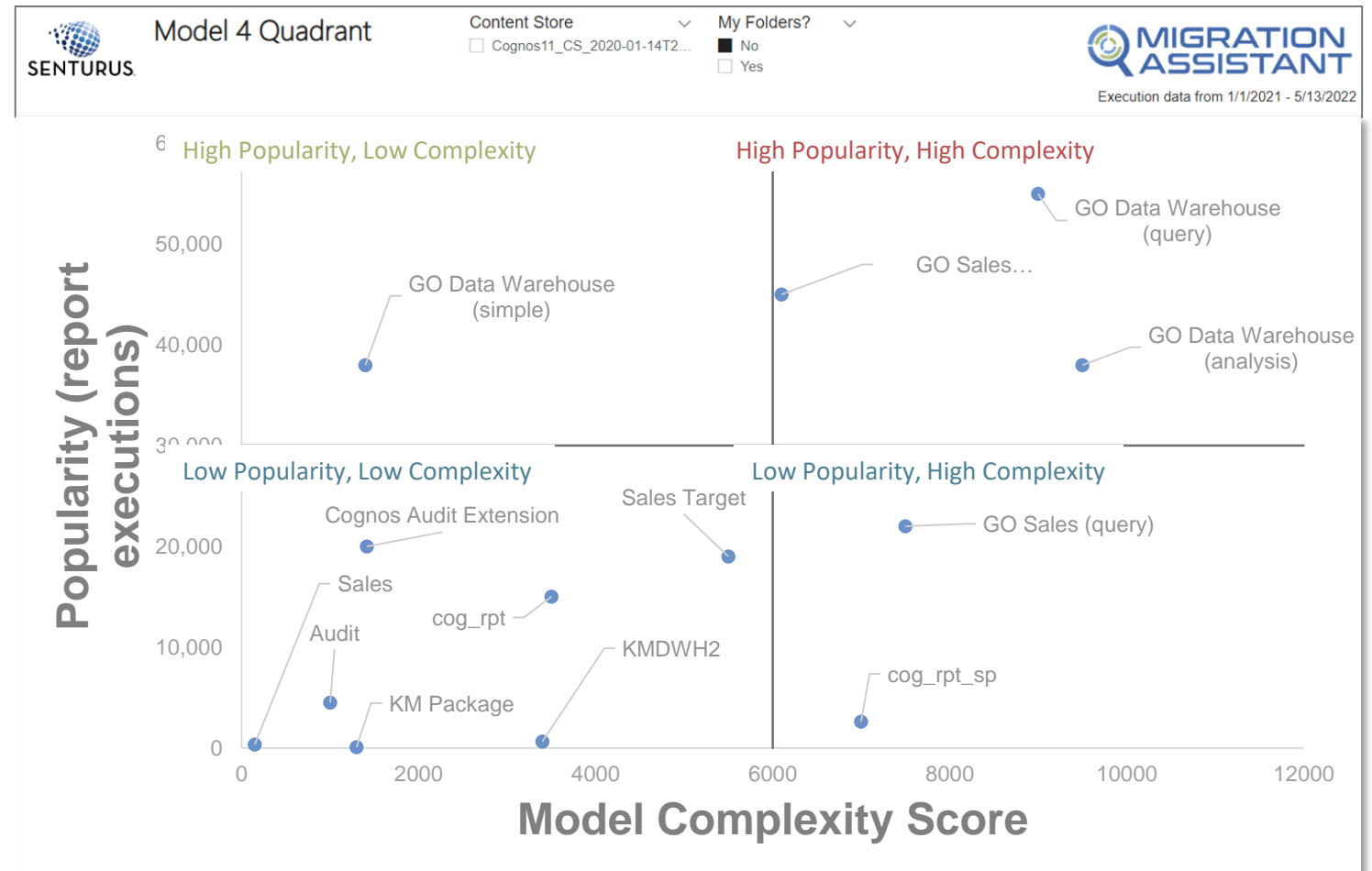


# Model popularity/complexity quadrants

Models by usage and complexity

Recommendation:

- Start with **High Popularity, Low Complexity**
- move onto **High Popularity, High Complexity**
- move onto both **Low Popularity** quadrants



# Findings – package popularity & complexity

## Packages

### Popularity

**Go Data Warehouse Query**

is the most popular package

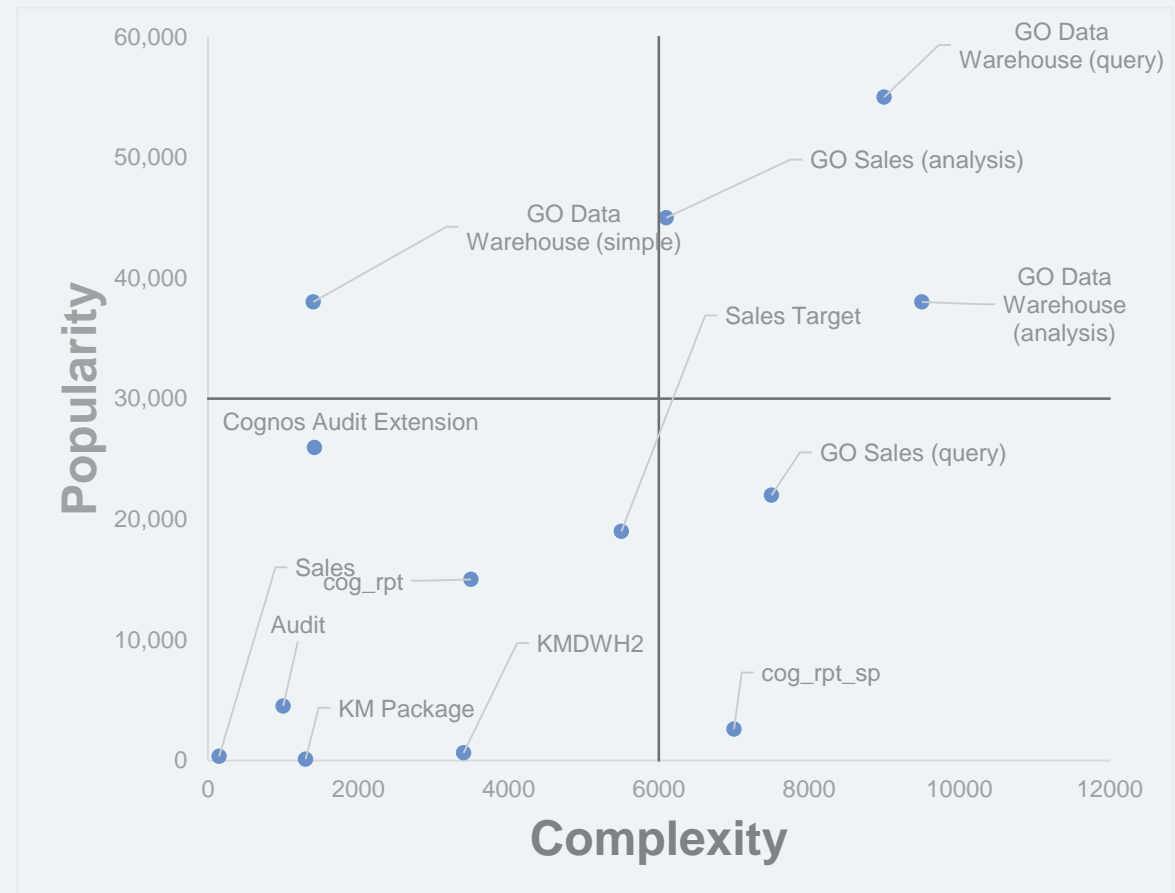
### Complexity

Generally, the **Analysis and Query** related packages reach the highest levels of

### Key Findings

**Analysis and Query**

packages are popular and complex, implying higher risk and expected effort



# Report assessment details

## Reports

### Details

In this content area, there are 504 reports, which have been executed 37,021 times by 398 users

This content contains 1,158 pages of information, utilizing lists, crosstabs and graphical delivery methods

Package Name	# of Report s	# of Report Exec.	# of Users	# of Rpt Pages	# of Cont. Type	# of Lists	# Cross tabs	# Chart s
Pkg 1	4	226	3	5	3	2	1	2
Pkg 2	17	420	24	37	19	14	5	2
Pkg 3	7	928	12	15	7	6	1	2
Pkg 4	5	243	8	8	4	3	1	2
Pkg 5	6	536	2	6	5	4	1	2
Pkg 6	24	3500	58	49	65	37	8	22
Pkg 7	321	11785	184	716	850	486	249	117
Pkg 8	12	2369	51	27	29	26	3	2
Pkg 9	4	230	5	4	3	2	1	2
Pkg 10	34	1156	43	71	84	78	3	5
Pkg 11	18	299	16	44	101	26	17	60
Pkg 12	50	12104	118	141	307	58	240	11
Pkg 13	5	229	4	12	7	6	1	2
Pkg 14	17	5259	28	47	49	37	12	2
Pkg 15	10	1097	27	21	11	8	3	2
<b>Grand Total</b>	<b>534</b>	<b>40381</b>	<b>583</b>	<b>1203</b>	<b>1544</b>	<b>793</b>	<b>546</b>	<b>235</b>



# Pkg 1 details (executed in month of year)

## Report Complexity

### Low Complexity Conversions

**Low** Score = 0 to 100

Cognos Skill Rec. = Jr. Dev

Power BI Skill Rec. = Jr. Dev

### Medium Complexity Conversions

**Medium** Score = 100 to 500

Cognos Skill Rec. = Sr. Dev

Power BI Skill Rec. = Sr. Dev

### High Complexity Conversions

**High** Score = 500+

Cognos Skill Rec. = Sr. Arch.

Power BI Skill Rec. = Sr.

Package Name	Report Execution	# of Users	Complexity Score	# of Report Pages	# of Containers	# List Count	# Crosstab Count	Arch. Count	# of Report Queries	# of Report Query Items	# of Report Filters
Report Pkg 1	2679	95	2527	28	38	21	12	21	111	724	225
Report 001	5	4	45	5	6	7	7	8	10	24	14
Report 002	18	9	291	6	6	7	7	8	22	123	25
Report 003	16	11	159	5	6	7	7	8	13	82	27
Report 004	113	12	120	6	6	7	7	8	13	46	23
Report 005	29	15	223	7	14	6	7	17	16	39	28
Report 006	312	11	167	6	6	7	7	8	15	71	24
Report 007	37	12	855	6	11	11	8	8	46	271	96
Report 008	2	3	136	7	6	7	7	8	15	41	21
Report 009	493	7	142	6	8	7	8	9	15	34	22
Report 010	635	14	142	6	8	7	8	9	15	34	22
Report 011	520	9	143	6	8	7	8	9	15	35	22
Report 012	510	10	142	6	8	7	8	9	15	34	22
Grand Total	5,370	214	5,095	104	136	114	108	138	330	1,568	582

\*Example of detailed report inventory details and scoring from the full version of the Senturus Migration Assistant.

# Findings – model source matrix

## Possible duplications

Pkg 1, Pkg 2, Pkg 3 all appear to have similar/related DNA

## Well distributed subject areas

Pkg 4, Pkg 5, Pkg 6 appear to have little overlap, likely by des

## Key findings

Some refactoring should be considered in some of the packages in the target env. \*

