



Case Study

The University of South Australia

**Tridant's Technical
Architecture Team
helped upgrade the
University of SA to the
latest release of
IBM Cognos Business
Intelligence (BI).**

Need

UniSA required an upgrade and optimisation of their Cognos BI intelligence from v10.1 to v10.2.1 in order to enhance and simplify their core business processes, such as payroll, forecasting, marketing and staff performance.

Solution

The solution in this case involved leveraging Tridant's specialist skill set of Technical Architecture Services and expertise in consultation, education, support, training & mentoring to move UniSA to the next level of Business Intelligence Usage.

Benefit

This upgrade promised benefits to performance and flexibility for UniSA, with additional functionality including visualisations, dashboards and modified reporting. This enabled them to further support their ever-growing senior management information needs.



Background

The University of South Australia is the state's largest university, ranked 49th worldwide in the top 100 under 50 new institutions established in the past 30 years. With more than 400 courses on offer, the university educates over 30,000 per year across six campuses.

The successful partnership of the University of South Australia (UniSA) and Tridant has been formed through successive engagements since 2012, with Tridant significantly enhancing UniSA's Cognos technical capability through training, mentoring and responsive support to the Business Intelligence team.

The firm foundations of the business relationship were the starting point of a major upgrade and optimisation of UniSA's **Cognos Business Intelligence (BI)** environments to support continued growth in use of BI, particularly by management. This project saw University of South Australia leverage the specialist skill set of **Tridant's Technical Architecture Services** in 2014.

The Project Undertaking

Headed by **James Wakefield**, Tridant's Director of Solutions, Tridant's Technical Architecture services were pivotal in crafting a sound technical strategy for the upgrade from **Cognos Business Intelligence (BI) v10.1 to v10.2.1**.

Technical Architectural Services establish the sound foundations of infrastructure needed for successful technology implementations, installations and upgrades. They have an emphasis on creating the correct environment that not only adheres to Cognos best practice principles, but also takes into account where the client is on their BI maturity cycle. This ensures the optimal performance of Cognos BI and the best results for the client.

The Challenge

"It was vital for the project to get it right first time in order to move the University to the next level of Business Intelligence usage," said Mr Wakefield. "There was no room for delays nor errors due to tight timelines and the dependency of the current BI system to core UniSA business processes such as payroll, forecasting, marketing and staff performance. UniSA made it clear from the beginning that they were not just seeking a service provider who knew how to do things by the manual, but one that also had the depth of experience to quickly deal with the unknowns that can occur in a complex project like this with many stakeholders."



Solution Component

The upgrade was undertaken in four different environments;

- The Development Environment
- The Test Environment
- The Pre-Production Environment
- The Production Environment

“We had an agile consultative approach. We worked closely together to understand what was needed, acted upon their feedback, and they in turn knew exactly what was going to happen and what preparation was required”

Arun Ramanathan,
Lead Technical Consultant, Tridant

The Solution

Tridant’s Technical Architecture services start with the most important of steps – consultation. With both parties clearly understanding their expectations, the desired outcome and the processes to be undertaken, both Tridant and Uni SA could commence the upgrade with clearly agreed terms. These expectations must also consider the ‘soft stuff’ such as pro-active progress updates.

“Our goal is to establish trust with our client, and to put them at ease,” said lead **Technical Consultant, Arun Ramanathan**. “It is one of the most important things of any project. The client has to have faith and trust in our abilities to deliver what we promise, and we ensure that trust is not broken by meeting, and hopefully exceeding, their expectations.” **Kanul Wadhwa, Technical Consultant** for Tridant added, “We had an agile consultative approach. We worked closely together to understand what was needed, acted upon their feedback, and they in turn knew exactly what was going to happen and what preparation was required.”

“It is also an education process,” said Mr Ramanathan. “Our methods are Cognos Best Practice. It is not expected that a client to have the same skill and knowledge set as when it comes to Cognos, so transfer of knowledge is also very important.” Tridant’s Technical Architecture services between them have over 10 years of experience having performed 95 upgrades.

Tridant provided an Upgrade Checklist to UniSA in preparation for upgrades. This simple process is an extremely effective tool in the pre-planning stage, eliminating ambiguity and saving time once the upgrade is underway. UniSA’s BI Team worked through the checklist, confirming their environment was ready. It is a process that Tridant recommend for every customer about to undertake an upgrade, especially when multiple groups of business users and IT units – as was the case with UniSA – need to be involved.

Tridant also placed a strong emphasis on timelines and deadlines. Once agreed upon, the deadlines met are crucial to keeping the upgrade process on track.

The Outcome

Uniquely to this upgrade at the UniSA, the Development Environment ran the new version 10.2.1 in parallel without removing 10.2. This stage allowed for performance testing without going live, the benefit of a direct performance comparison between the old and the new versions and removed the need to provision additional servers which would have added time and cost.

Importantly, the processes involved in the upgrade were clearly captured and documented as the team moved from server to server to create consistency. Extensive notes and screen shots create a reference manual which can be referred back to during the upgrade, as well as into the future for the University's IT department. "It provides a level of self-sufficiency and confidence to the client [University], and most importantly, knowledge sharing and knowledge transfer", said Mr Wadhwa.

The second environment, the Test environment or phase, had Tridant's **Senior Consultant, Jared Innes** working closely with the University's Cognos Administrators to identify key reports and developed a test plan to ensure no unwanted surprises throughout the migration.

The new capabilities of v10.2.1 and its improved visualisation and dashboard tools were extensively used and thoroughly tested by the administration team and end users alike. Demonstrating the functionalities acquired by the upgrade was crucial for successful utilisation into the future.

Any issues that were identified were logged to an issues register, then prioritised and worked through accordingly. The end users were also involved at various times for stress testing and benchmarking, with the user also contributing to the issues register to log any areas of concern. An important aspect of this project was knowledge and skills transfer and re-use of approaches and techniques for future upgrades.

"The input of the end users was invaluable," said Mr Innes, "as people who generate reports frequently are often more familiar with specific functions of the product, and it was important to track any issues found. As with the whole project, we were sticking to a timeline, so when issues were logged in the register, it was pivotal to prioritise, address and thoroughly test them to keep the project travelling on track."

As part of the preparations, archiving was necessary with the transferring of data with the upgrade. Across all organisations, archiving accumulated data is needed when it is older or no longer in use. Tridant's recommended 'cleaning' process provided a process of auditing files to be archived, unburdening the system of reports created before a certain date and that hadn't been accessed again in recent times. The Audit Functionality was used weeks in advance of the upgrade to delete or archive older, not accessed reports to assist with a smooth transition. This also was an important skill set for UniSA to develop in its team. This in itself was a huge undertaking, with all significant number of end users needing to be contacted to green light reports and files flagged for archiving.

Green lighting achieved, the Tridant and UniSA team spent a weekend on-site at the Mawson's Lake campus, moving the University towards a genuine enterprise solution providing an optimised environment for future growth. The upgrade successfully went live with a seamless cut over for the users on Monday morning.

End users are now taking advantage of the enhanced capabilities of the upgrade, with users having the flexibility of creating their own modified reports, "which is a very powerful tool", added Mr Wadhwa, as well as the increased performance on more stable systems.

The entire upgrade process took less than two months and was a major result for the University. Unexpected issues did arise due to

cross-team and multiple dependencies, but this did not interrupt the upgrade.

"I am proud of the specialised skill set of my team, the meticulous planning and consultation, their agility and problem-solving and results we were able to deliver. The skills of Tridant's Technical Architecture and Consulting enabled the University of South Australia to receive the right enterprise solution for their organisation with minimal disruption and downtime."

- James Wakefield

In June 2015 the University of South Australia upgraded to Cognos BI 10.2.2 with the help from Tridant again. This time round the entire upgrade process took only 3 weeks to upgrade all 4 servers and including detailed testing.

The decrease in time for the upgrade proved the benefits of:

- Having detailed documentation around the steps
- Having the same team and service providers in place
- Making small incremental upgrades each year is a lot less painful than massive upgrades every 3-5 years

As a result, the cross team approach between Tridant, BI Team and IT department Cognos upgrades and fix packs are forward scheduled and 'business as usual', minimising the downtime and making sure the environment has the latest patches and functionality.

TRIDANT

data driving decision making

About Tridant

Tridant is one of Australia's largest specialist consulting firms focused on implementing performance management and information management solutions using IBM software, and other market-leading software companies, for both public and private sector organizations. Tridant's expertise spans numerous market sectors including financial services, mining, retail, education, oil and gas and government, and it operates nationally from offices in Australia and Singapore.

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