Information Management

IBM.

Zurich
TechTalk
Live
Event

Note: This presentation will feature product demonstrations with fonts around this size >

FINSLSW
- Periods
- Products
- Broker
- Staff
- Channel
- Sales Facts
- Data Tier
- Corporate Plan
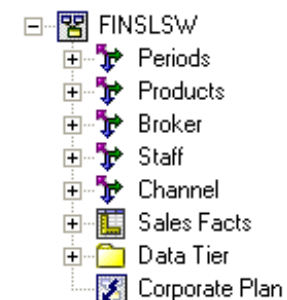
Please sit where you can comfortably read the above text.

IBM Cognos 8 BI

Matthias Urbanski

Cognos®
software

Three Questions that Drive Performance

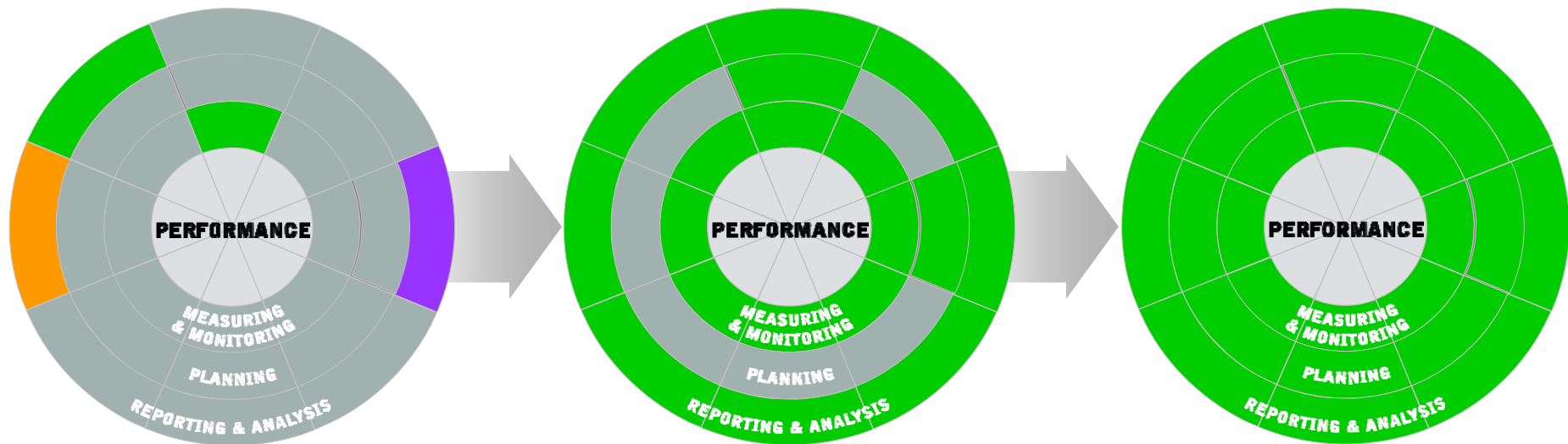| How are We Doing?	Why?	What Should We be doing?
SCORECARDS & DASHBOARDS	REPORTING & ANALYSIS	PLANNING BUDGETING, FORECASTING

Cognos. software

The Performance Management Journey
Customer Phases

Departmental BI Applications

Enterprise BI Capabilities Independent Planning

Coordinated Decision Making

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software

Why Migrate? IBM Cognos 8 BI Platform Benefits

Customers want	IBM Cognos 8 provides	IT benefits	Business benefits
Reliable and scalable software	**Proven Enterprise-Class Platform**	**Low cost to deploy, manage and maintain**	• **Lower TCO** • **Enable standardization**
Consistent, complete and accurate view of information	**User-Centric Information Packaging**	**Ensure users access to right information for better decision-making**	• **Drive user adoption** • **Reduce time to decisions**
Modern open architecture	**Purpose-built Web services SOA**	**Leverages existing standards and easily adapts to change**	• **Improve IT responsiveness** • **Ensure lifetime agility**

Cognos. software

IBM Cognos 8: The Industry's Leading Performance Management Solution
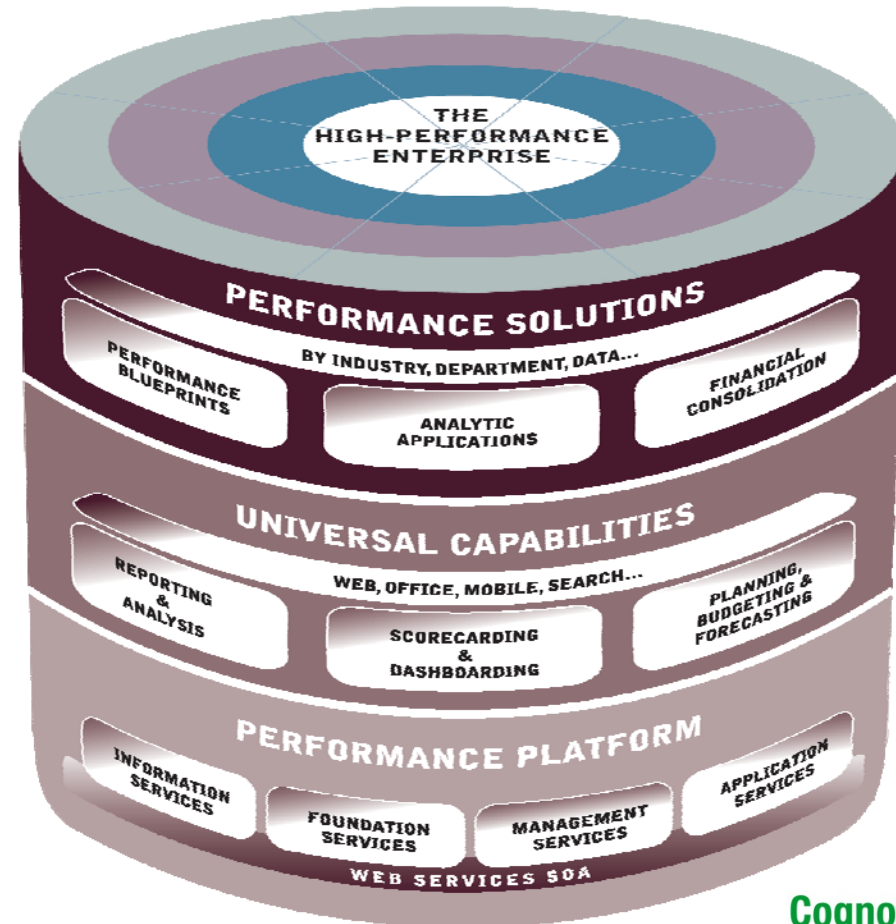
PERFORMANCE SOLUTIONS

Solutions Based on Best Practices

UNIVERSAL CAPABILITIES

Complete, Consistent View Anytime, Anywhere

PERFORMANCE SYSTEM PLATFORM

Enterprise Class Platform

THE HIGH-PERFORMANCE ENTERPRISE

PERFORMANCE SOLUTIONS
BY INDUSTRY, DEPARTMENT, DATA...

PERFORMANCE BLUEPRINTS

ANALYTIC APPLICATIONS

FINANCIAL CONSOLIDATION

UNIVERSAL CAPABILITIES
WEB, OFFICE, MOBILE, SEARCH...

REPORTING & ANALYSIS

SCORECARDING & DASHBOARDING

PLANNING, BUDGETING & FORECASTING

PERFORMANCE PLATFORM

INFORMATION SERVICES

FOUNDATION SERVICES

MANAGEMENT SERVICES

APPLICATION SERVICES

WEB SERVICES SOA

Cognos software

What is IBM Cognos 8 BI PowerPlay?

- IBM Cognos 8 BI PowerPlay is a version of PowerPlay that
  - utilizes the IBM Cognos 8 platform
  - offers PowerPlay customers a smooth migration to IBM Cognos 8 BI
  - delivers the same familiar and well-loved user experience
  - takes advantage of the common administration, security, cube creation and management, improved drill-through, content store and portal of the IBM Cognos 8 platform

- IBM Cognos 8 BI PowerPlay
  - keeps your users happy with the same great experience
  - makes it easy to offer additional capabilities like enhanced reporting
  - uses your existing investments in PowerCubes to drive a lower TCO

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What is IBM Cognos 8 BI PowerPlay?

- A service in the IBM Cognos 8 platform:
  - PowerPlay Enterprise Server
  - Web Exploration UI for PowerCubes
  - PowerPlay Windows
  - Client/server user experience with PowerCubes

- Takes advantage of key IBM Cognos 8 functionality:
  - IBM Cognos 8 BI Transformer – for PowerCube building
  - Drill Through improvements
  - Cube Management improvements

- Migration of PowerPlay content from:
  - PowerPlay Enterprise Server
  - PowerPlay Client Reports
  - Upfront
  - PowerPlay content published to Cognos ReportNet or Cognos 8

Cognos.
software

Agenda

9:00 – 9:15	Introduction
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IBM Cognos Series 7 source

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Configuring IBM Cognos 8

Cognos software

PRESENTATION TIER:

Zero Footprint Browsers

Go!
Office

Go!
Mobile
(Blackberry, PocketPC, Symbian)

- **Information 'bus': services plug into ubiquitous network (Internet)**
- **Open Web standards (HTTP, XML, SOAP, WSDL…)**
- **Leverage in-place application servers, technology & expertise**

Go! Search Service

ROUTER (optional)

- **Self-registering, self-starting services – add/configure as required**
- **Built-in intelligent load balancing**
- **Redundancy & failover protection**

Window Client/Add-ins
Disconnected OLAP Client
Planning & Analysis Excel Clients

APPLICATION TIER

FIREWALL/ROUTER/ENCRYPTION

Cognos BI Bus – SOAP, XML
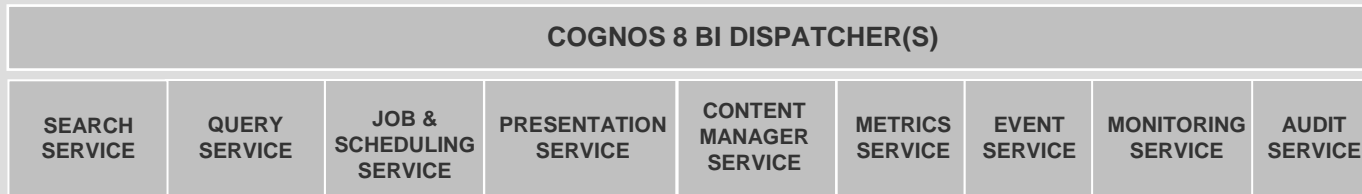
WINDOWS

UNIX

LINUX

COGNOS 8 BI DISPATCHER(S)

SEARCH SERVICE	QUERY SERVICE	JOB & SCHEDULING SERVICE	PRESENTATION SERVICE	CONTENT MANAGER SERVICE	METRICS SERVICE	EVENT SERVICE	MONITORING SERVICE	AUDIT SERVICE

- **Platform independence – leverage in-place infrastructure**
- **Complete flexibility, adaptability**
- **Support for heterogeneous environments**

DATA TIER

SQL   MDX

- **Peer-to-peer, loosely coupled services across ALL BI**
- **Single Query Engine**
- **Horizontal and vertical scalability**
- **High reliability**
- **Separation of presentation from data for optimal flexibility**

SECURITY PROVIDERS
LDAP, Active Directory,
NTLM, Netegrity,
SAPBW,
Cognos Namespace,
Custom Providers
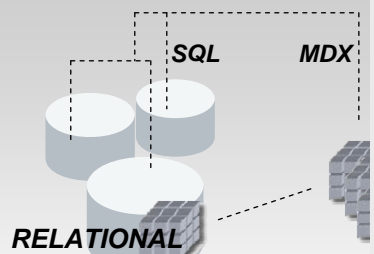
RELATIONAL
- *IBM DB2 UDB, Oracle, Microso SQL Server, other…*
- *Dimensionally Aware Relational*

PowerCubes: High Performance Dimensional Cache
- *Industry Standard OLAP Providers: Microsoft, IBM, SAP*

CONTENT STORE
DB2, ORACLE,
SQL Server, Sybase,
Derby

AUDIT
RDBMS, UNIX
Sys Logs,
NT Event Log

MODERN
- *XML, WSDL, LDAP, JDBC…*

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Transfer IBM Cognos Series 7 content to IBM Cognos 8

Cognos®
software

Information Management

TechTalk Live Event

IBM Cognos 8 PowerPlay Studio User Interface and Capabilities

Cognos®
software

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software

Information Management

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IBM Cognos 8 Transformer

Cognos software

Information Management

TechTalk Live Event

IBM Cognos 8 Administration

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software

Information Management

TechTalk Live Event

IBM Cognos 8 Framework Manager

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software

Information Management

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IBM Cognos 8 Report Studio

Cognos software

Enabling more users: Access Modes to the Cognos 8 Platform

END USER

Go! Access Modes & Zero Footprint Capabilities

Web   Search   Office   Excel Analysis   Mobile

| REPORTING | QUERY | ANALYSIS | DASHBOARDS | SCORECARDS |
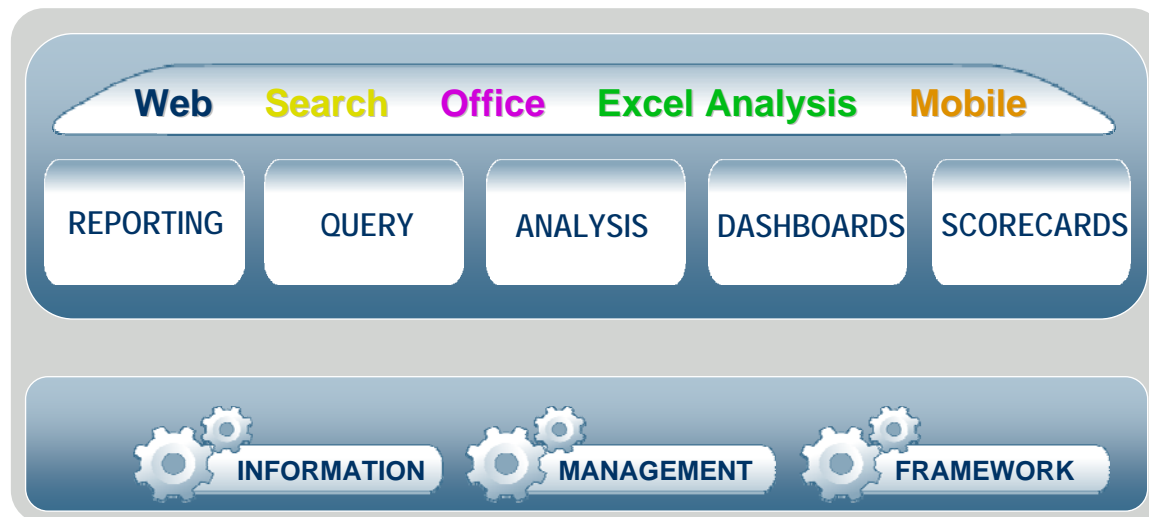
SERVICES

Purpose-Built Web Services Architecture

INFORMATION   MANAGEMENT   FRAMEWORK

DATA

Open Data Access

Transaction Systems

Warehouses (Relational & OLAP)

XML

Flat, Legacy or Modern

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Search Challenges

- Enterprise search engines provide comprehensive and easy view to unstructured data, but on their own they *can't…*

  - Access structured BI information securely

  - Recreate aggregate and contextual value of BI reports, scorecards, analysis etc.

- Organisations want the *average* knowledge worker to be able to access the strategic value of BI

  - Broader adoption for better decision making

  - Huge value in existing BI content, but users have to know where to look
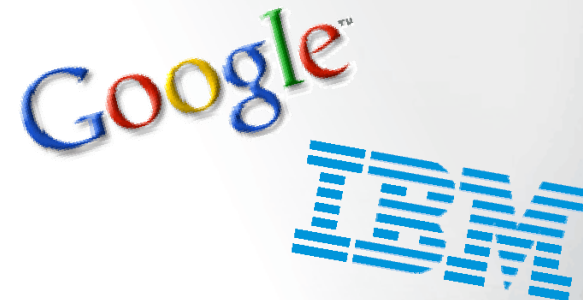
Cognos Go! Search Offers a Familiar Search Interface

- Standard search bar in Cognos 8 BI

- Searches full BI content (not just titles and descriptions)

- Standard tips and tricks to narrow criteria

- Fuzzy matching and word stemming improves results

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software
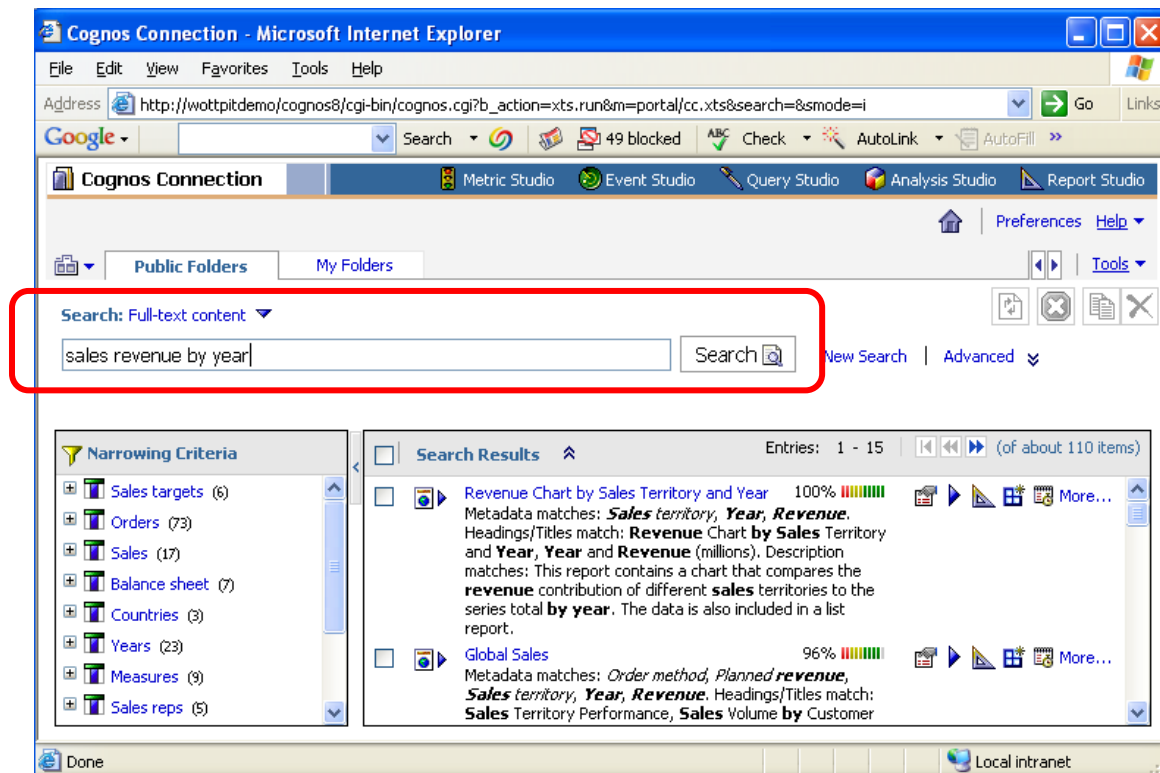
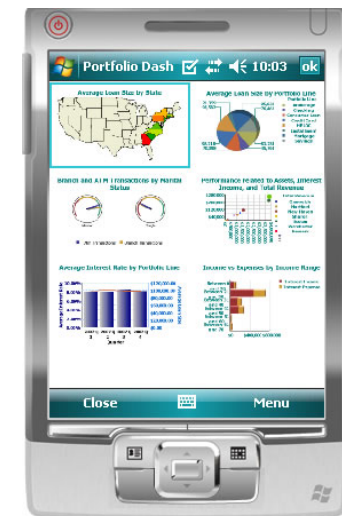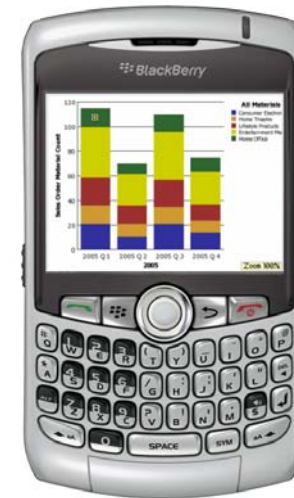# Integration with Enterprise Search Engines

Office Integration with Go! Office

Cognos 8 Go! Mobile

Extends full value of Cognos 8 BI

- No additional authoring

- Purpose-built, multilingual rich client
  - optimized viewing and interactivity

- Theft & loss protection

- Disconnected use when offline

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IBM.

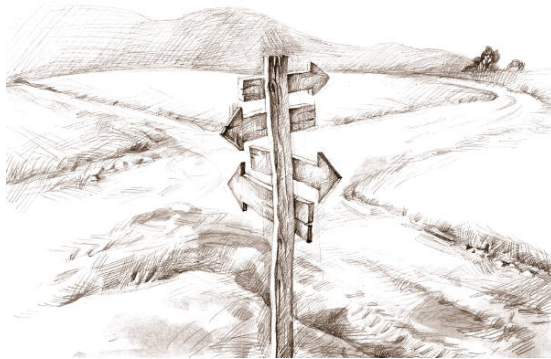# *Migration Assessment*
Services Offering

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Goals of this presentation

After this presentation you should understand:

– What Options Exist

– That Migration is a Process - It's not just about migration tools

– The High-level Process Steps

– How to Learn More

Understanding Your Options

Option 1: Wait

– Stay with Series 7 for the near future

Option 2: Migrate applications to IBM Cognos 8

– All At Once

■ Option 3: "Best of Both Worlds"

– Planned, staged migration, possibly
with interoperability

One, two or all options may be applicable to you depending on your applications

Choice influenced by many factors
- Desire for IBM Cognos 8 benefits and how soon you want them
- Application Portfolio – Type, Age, Size, Number of Applications
- User Communities, Their Current and Future Needs
- Budget and other External Factors

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Evaluate your Existing Applications and Determine Migration Approach

- You have

  - Many applications with many data sources

  - Used in many sites / locations

  - Serving multiple communities of users, with different needs

- One size does not fit all

  - Just as all customers and their applications are different, each migration plan is similar but unique

  - Successful migration require the right approaches for your needs

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Evaluate your Existing Applications – an Example

Location	in NewsBox	NewsItem Id	NewsItem UpdateDate	NewsItem ReadDate	Read	Write	Owner	Execute
//NewsIndex/Guide to Documentation	NewsIndex	6729e7edf36911dc84638b03a3094af8	Sunday, March 16, 2008 14:58:14					
//NewsIndex/Administration/NewsItem gateway manager	Administration	672c4a47f36911dc84638b03a3094af8	Sunday, March 16, 2008 14:58:14					
//NewsIndex/Administration/User manager - add	Administration	672c4a48f36911dc84638b03a3094af8	Sunday, March 16, 2008 14:58:14					
//NewsIndex/Administration/User manager - personalize settings	Administration	672eaca1f36911dc84638b03a3094af8	Sunday, March 16, 2008 14:58:14					
//NewsIndex/Administration/User manager - remove	Administration	672eaca0f36911dc84638b03a3094af8	Sunday, March 16, 2008 14:58:14					
//NewsIndex/Personal NewsBoxes/Administrator-NewsBox/Suppress Zero	Administrator-NewsBox	9624ab87f37a11dca5d59be9aaa81047	Sunday, March 16, 2008 17:01:14	Sunday, March 16, 2008 17:01:14				

Influencing Factors in choosing your approach

- Application Characteristics

- User Communities

- New Capabilities in IBM Cognos 8

- Variances between Series 7 and IBM Cognos 8

- Migration Tools

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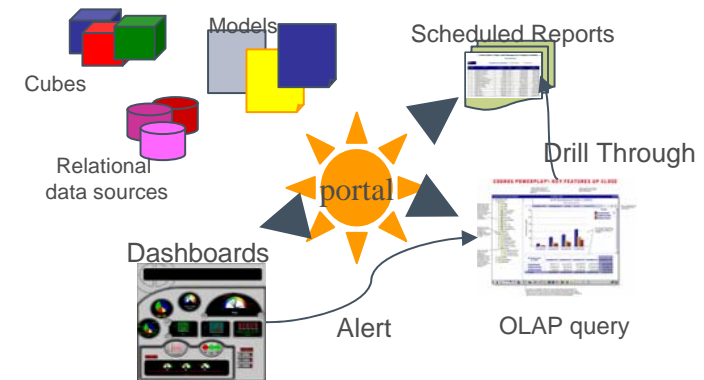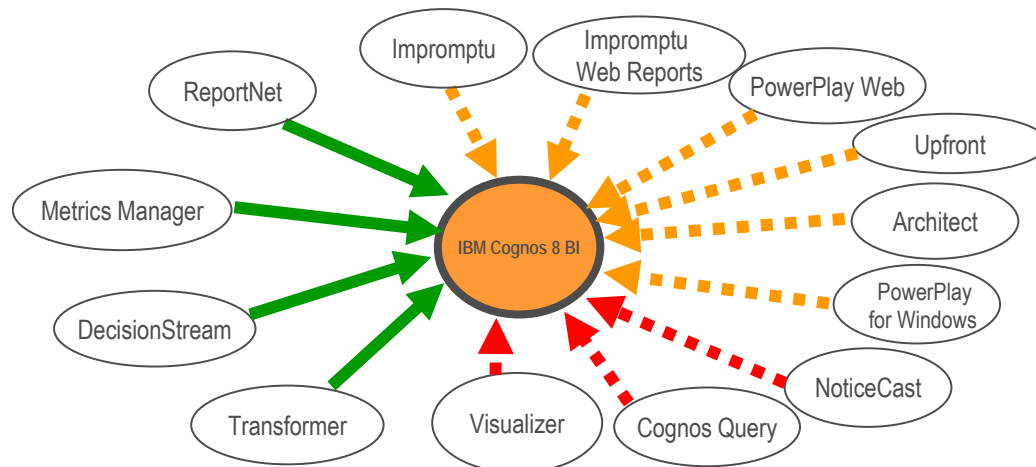
Technical Migration Approaches

LIFT & SHIFT	HYBRID	COMPRESS & OPTIMIZE
▪ **Replicate reports in new environment "as is"**	▪ **Customize a combination of both approaches as makes sense for your business needs**	▪ **Eliminate redundant or unnecessary reports**
▪ **Focus on moving batches of BI elements quickly**	▪ **Leverage efficiency gains (compress & optimize) while quickly moving (lift & shift) essential reports**	▪ **Focus on new features & technology of IBM Cognos 8 to improve on existing applications**
▪ **Can use offshore approach for additional savings of time and money**		▪ **Identify today (and tomorrow's) business needs & ensure they are met**

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Migration Process Overview

**Build new applications on IBM Cognos 8
Interoperate with existing applications**

Determine
When to Migrate

Analyze

Evaluate your Applications
& Determine Migration Approach

Design

Build

Deploy
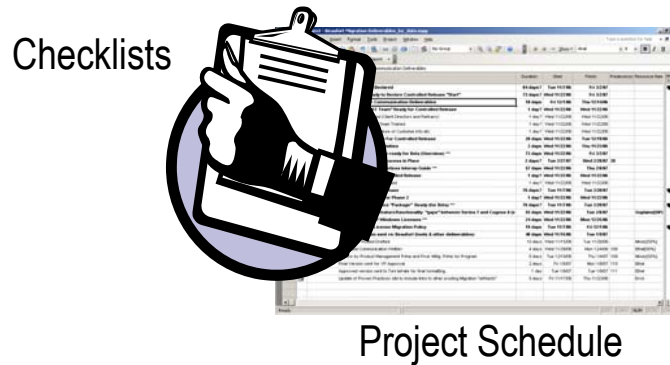
Operate

Build and
Execute
Migration Plan
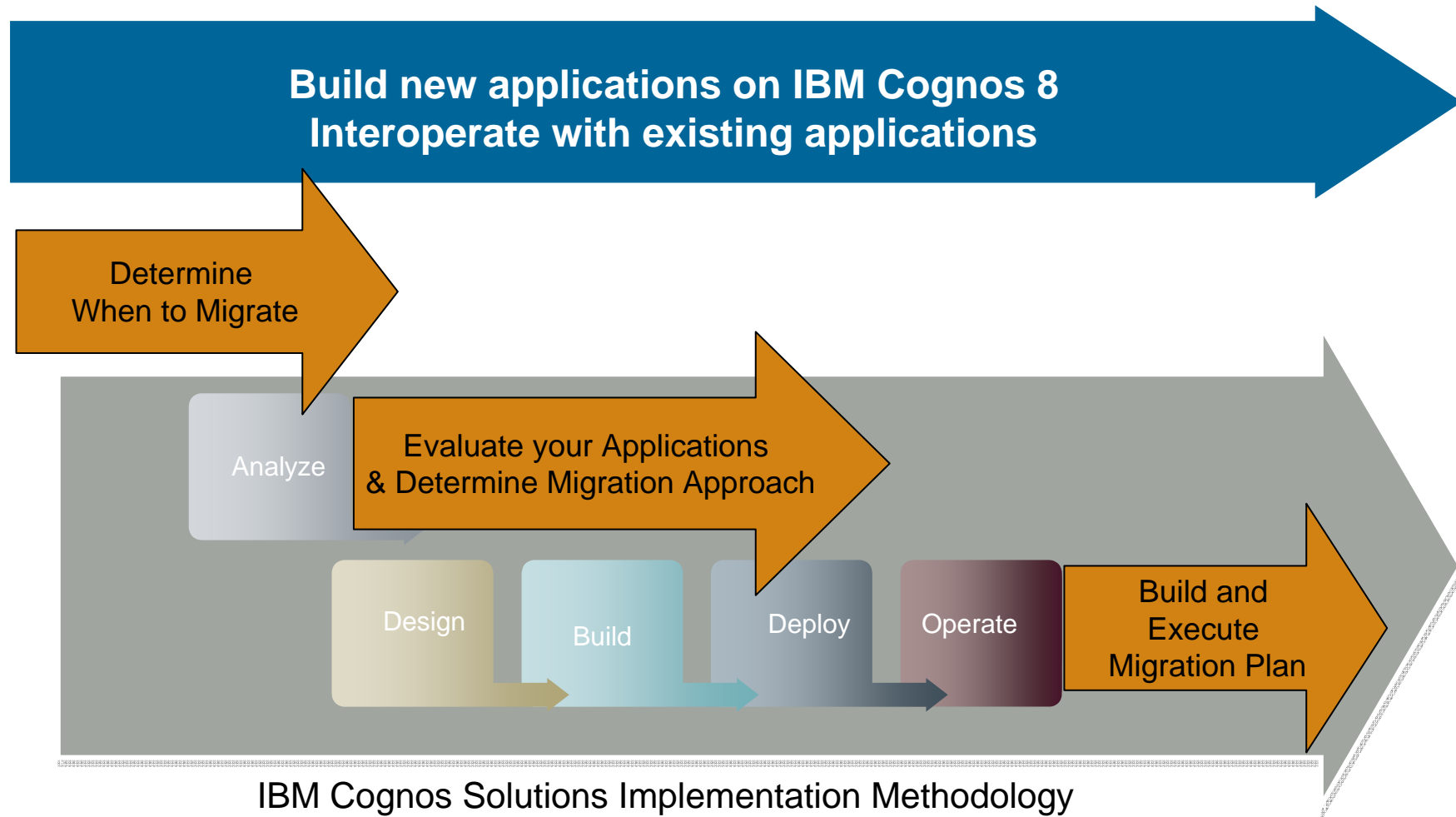
IBM Cognos Solutions Implementation Methodology
Migration Project Management

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Build and Execute Migration Plan
What Does Your Migration Plan Look Like?

Checklists

Artifacts

Project Schedule

Business Community

Business Community

Application Portfolio
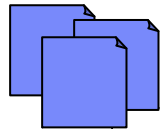
Application	Module	Approach
HR	HR1	Lift & Shift
	HR2	Compress & Optimize
	HR3	Interoperate
Inventory	INV1	Hybrid
	INV2	Interoperate

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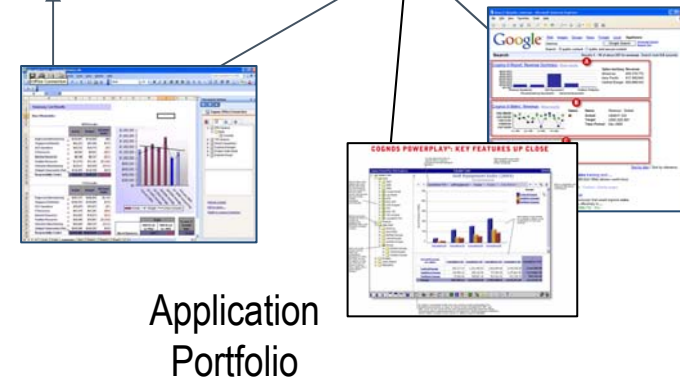
Ensure Your Success

Full curriculum for IBM Cognos 8 BI version 8.3

For business & professional authors

Classroom training, eLearning, user adoption

EDUCATION

Performance Management Framework

PROFESSIONAL SERVICES

THE HIGH-PERFORMANCE ENTERPRISE

SUPPORT

Migration Service & Migration Rapid Assessment Service

Report Authoring & Migration

Off-shoring Services

Migration Roadmap, part of the Cognos SIM

Customer Resource Center

Online resources for migration: Knowledge Base, Proven Practices, Supportlink articles, Documentation, SupportTalk (online community)

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Summary

- IBM Cognos 8 has new capabilities that can change the way you approach the solution you offer to your business users

- Successful Migrations

    - Are planned projects – leveraging experience from IBM Cognos Global Services or Experienced Migration Partners. It's not just about tools

    - Involve learning about IBM Cognos 8 on a new application before migrating anything

    - Are influenced by many factors in your environment, including application characteristics, and your user community needs

    - IBM Cognos Solution Methodology is available to support your Migration project

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One Product, One Architecture
Foundation for Performance Management

Zero-footprint, Web UI for *all* web users - no client downloads

Access Modes with Single Authoring, & Security

WEB, OFFICE, MOBILE, S

REPORTING	QUERY	ANALYSIS	DASHBOARDS	SCORECARDS

Purpose-built, web services are rapid to deploy, scalable and fault tolerant

INFORMATION   MANAGEMENT   FRAMEWORK

Single query service and single metadata layer provide consistent results

Transaction Systems

Warehouses (Relational

XML

Flat, Legacy or Modern

Leverages existing assets; open security, open data access

UNICODE support enables on-the-fly multilingual support

Cognos. oftware

IBM Cognos 8 BI PowerPlay : Benefits

- A single infrastructure

  – A lower cost to deploy, manage and maintain your BI environment

  – Single IBM Cognos 8 BI security environment

  – Single zero footprint administration environment

    - Load-balancing, failover, performance tuning & monitoring

  – Publish cubes as packages via Transformer or Framework Manager

  – PowerPlay Enterprise Server settings in Cognos 8 Content Store

  – Drill through integration and improvements with Cognos 8

    - No longer need to add drill through targets to Transformer

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IBM Cognos 8 BI PowerPlay : Benefits

- More return on your cube investment

  – Enhanced reporting on cubes

  – Multi-cube reports and dashboards

  – Scheduled, burst reports from cubes

  – Alerts, metrics, Go! Office …. And more to come

- "Easy Migration"

  - Low migration costs: PowerPlay to PowerPlay

  - Low retraining costs: only requires Cognos Connection training

- Keeps your users happy with the same great experience

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Information On Demand Unlocks the Value of Information to Optimize Business for Competitive Advantage

Financial
Risk Insight

Workforce
Optimization

Dynamic
Supply Chain

Customer & Product
Profitability

Multi-Channel
Marketing

**Better Business
Outcomes**

Business Optimization

COGNOS

Business Intelligence & Performance Management
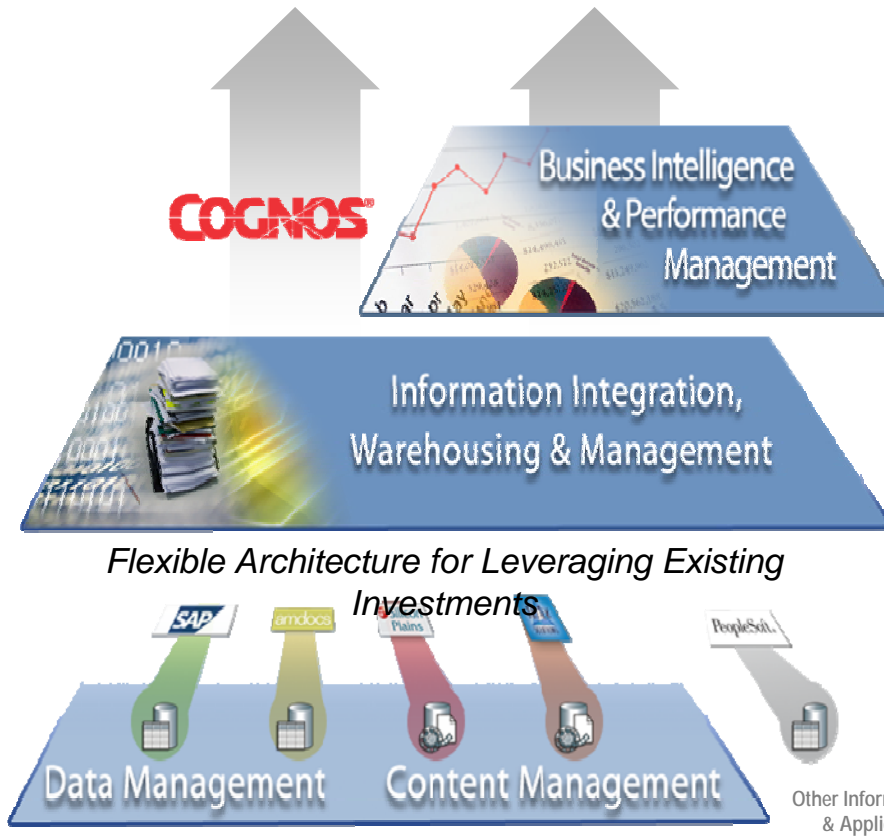
Leverage information to better understand and optimize business performance

End-to-end Capabilities

Information Integration, Warehousing & Management

Establish accurate, trusted information for a single version of the truth, managed over time

Flexible Architecture for Leveraging Existing Investments

SAP   amdocs   Plains   PeopleSoft.

Data Management   Content Management
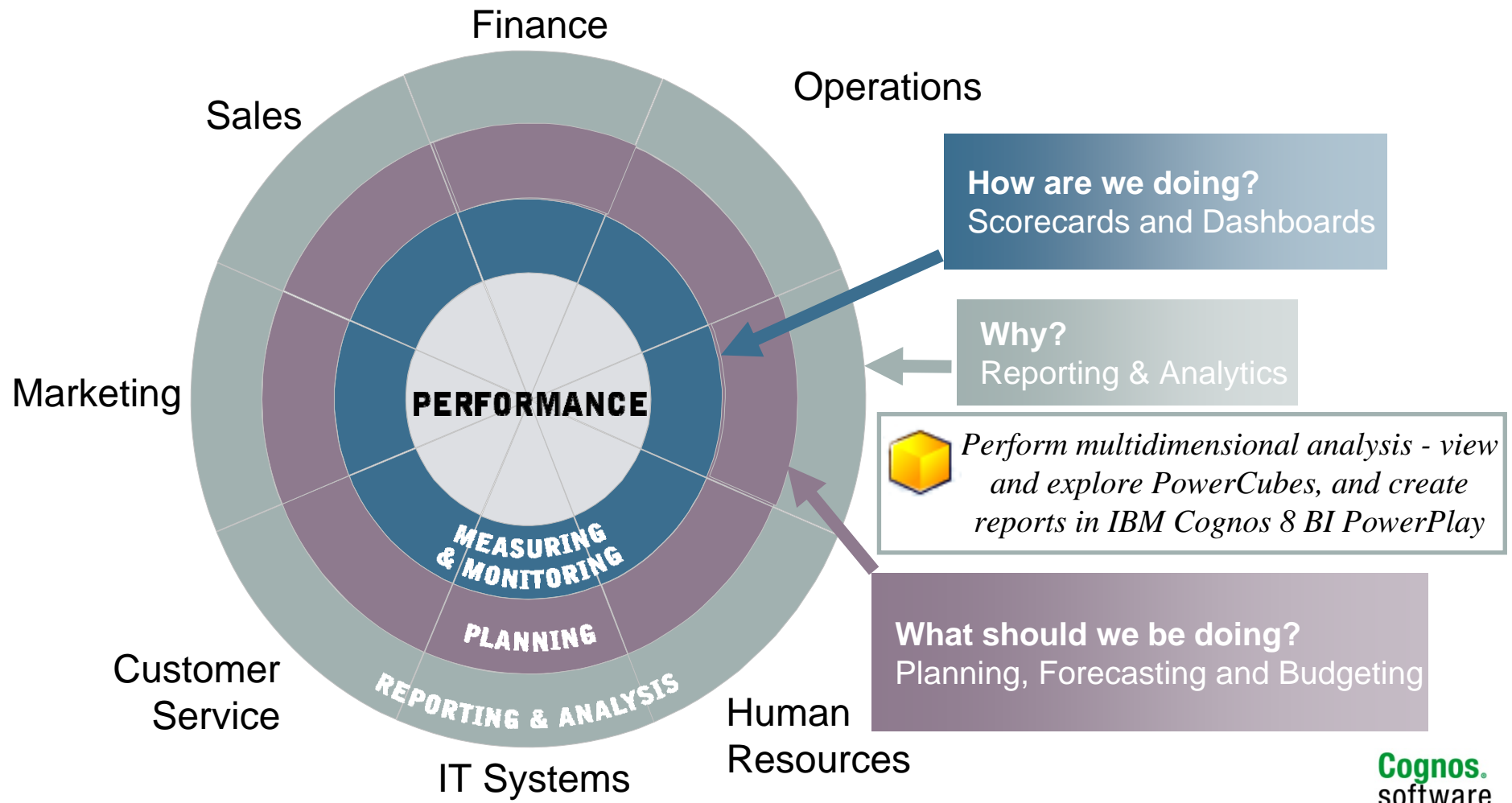
Other Information
& Application Sources

An efficient and solid foundation for managing data and content over its lifecycle

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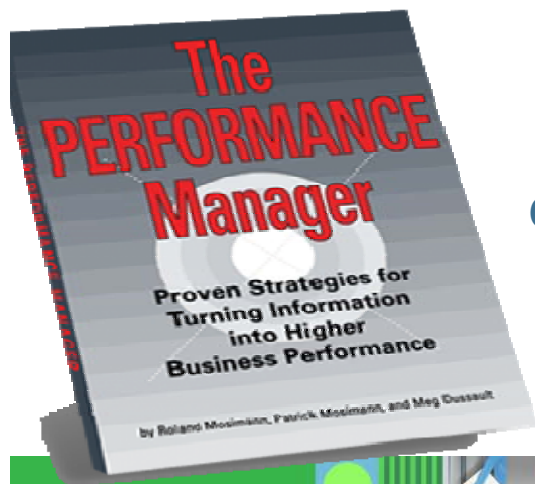# Business Intelligence & Performance Management
A complete platform to plan, understand and optimize performance

Finance

Operations

Sales

Marketing

Customer Service

IT Systems

Human Resources

PERFORMANCE

MEASURING & MONITORING

PLANNING

REPORTING & ANALYSIS

How are we doing?
Scorecards and Dashboards

Why?
Reporting & Analytics

Perform multidimensional analysis - view and explore PowerCubes, and create reports in IBM Cognos 8 BI PowerPlay

What should we be doing?
Planning, Forecasting and Budgeting

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Performance Management Framework for Coordinated Decision Making

Financial Management

Finance

Sales

Product Development

Expense Management

Revenue Management

Operations

Marketing

PERFORMANCE

MEASURING & MONITORING

PLANNING

REPORTING & ANALYSIS

Customer Service

Human Resources

IT/Systems

Long-Term Asset Management

The PERFORMANCE Manager

Proven Strategies for Turning Information into Higher Business Performance

by Roland Mosimann, Patrick Mosimann, and Meg Dussault

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