

## IBM Cognos Software Demo Transcript

### IBM Cognos 8 Business Intelligence Demo

#### Overview

The more people in your organization that use business intelligence, the more return you realize from information investment. Cognos enables everyone in your organization, together with your partners, suppliers and customers, to make more informed, faster and more aligned decisions.

IBM Cognos 8 BI is designed to give business users the access to accurate information and interactivity they need to drive business performance.

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Consider, for example, the executives who lead the company and need fast, accurate and reliable information about key performance indicators of the business. Or, the managers who are responsible for performance within their respective domains, together with the people who report to them who wish to manage by exception or review standard reports. Or, the business analysts who examine corporate data to understand trends and drivers and then highlight these to managers with the aim of refined measurement and consistent improvement.

Or, the information specialists, like business intelligence professionals, data modelers, and system administrators, translate the requirements of all BI users into comprehensive high-performance BI systems. All of these people need access to a lot of different kinds of information to do their jobs and need to interact with that information in the way that makes the most sense to them.

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IBM Cognos 8 BI helps everyone make more informed, faster and more aligned business decisions, based on a complete, consistent view of trusted business information. With IBM Cognos 8 BI, that trusted view can take whatever format any user requires, whether it's reporting, analysis, dashboards, or scorecards, all accessible through the Web.

And with Microsoft Office integration, the ability to search and find the right information and mobile devices, IBM Cognos 8 BI ensures that all user communities gain the task-based capabilities to use the information how, when and where they need to.

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Cognos is unique in providing an open platform that's built on a Services-Oriented Architecture to ensure capability with an organization's existing investments. This modern architecture provides the system management tools, flexibility and extensibility to enable IT to scale systems in response to growing user populations.

And with more than two decades of innovation and expertise in the business intelligence market, Cognos provides the frameworks and proven practices that partners and

customers can use to ensure their success -- frameworks like the performance management book that defines the sweet spots of information and metrics required to drive performance across different industries...

And, like our proven practices that help organizations by putting in place business intelligence competency centers so they can excel in their deployments and their success. So who benefits most from using Cognos 8 Business Intelligence? The simple answer is everyone in their own way.

### **Executives**

For executives, IBM Cognos 8 BI provides immediate and simple understanding of the key factors driving the business so that they can effectively drive organizational execution and achieve their strategic objectives.

IBM Cognos 8 Go Dashboard allows executives to monitor the things that are most important to them like key human resource measures such as employee rankings. Wherever a downward trend is spotted, drilling into details lets executives quickly identify where issues are happening.

For example, here we see a downward trend in Finland with respect to employee ranking. It's likewise a simple matter to find out which departments are over or under staffed based on plans.

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A key design principle for Cognos 8 BI Go Dashboards is that of author once, consume anywhere. The content you see here is simply a Cognos 8 BI report rendered directly in this dashboard. And as you can see, all the benefits of proven Cognos 8 BI reporting are here, like conditional formatting together with out of the box drill down capabilities.

**(01:04)**

Lower down on the dashboard, it's very easy to zero in quickly on where expenses are highest using this slider object. And it's just as easy to see where they're lowest. The Flash-based animated charts and tables automatically refresh based on whatever is selected.

It's easy to browse through measured groupings like these expense types quickly gaining an understanding of regional expense patterns. And here we see one of the regional slices is consistently smaller than the others. Hovering over it shows it's the northern Europe region, so possibly related to the issue we saw earlier in Finland.

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But this display doesn't allow for easy comparison of expense volumes across the various expense groups like pay, benefits and training. No problem. IBM Cognos 8 Go Dashboards allow users to display data how ever they want with several palettes available together with a wide selection of display formats, executives can display their data how ever they need to.

Displaying the information as a bar chart makes it immediately obvious that payroll makes up the bulk of the expenses. And using this slider to the left, it's easy to narrow in on the lower level expenses, comparing expenses across benefits, bonus and training, for example.

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Lower down, scorecards provide visibility into critical metrics of organizational performance and measurement against strategic initiatives with insight into what's really impacting the business. These key metrics can be sorted on any combination of columns and arranged how ever best suits the need at hand.

The dashboard is also a launching point for related information, like this briefing book style report. Briefing books provide exactly the kind of information executives need: comprehensive overviews with the right level of detail all in one place, on demand. And all based on real corporate data -- not on data that's been extracted and then massaged in a spreadsheet -- so executives can trust the information in front of them.

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With reports like these, busy executives can quickly and easily navigate to exactly the information they need. For example, an HR exec can see key employee data broken down across regions and zero in on any outliers or issues. Highly visual displays like this heat map make it very easy to see where any measure value is concentrated. In this case, expenses. And tabular information combined with micro charts provides insight into trends for any key measure or combination of measures.

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Measure summaries can be quickly and easily understood for any group at any level of consolidation: geographical by department or by any other type of measure. And as you see here, report pages are oriented for optimal display of the information they contain.

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Because executives are often traveling, it's essential that business intelligence follows them wherever they are. IBM Cognos 8 BI Go Mobile means executives can stay informed when they're on the road. In fact, on mobile devices, IBM Cognos 8 BI can take care of location intelligence, automatically filtering a report based on regional data - for example, so a report automatically displays information for customers where the executive is currently located.

Users can quickly display any of the report pages available. Here's the heat map we saw a few moments ago. You can focus on whatever part of the report you wish to investigate and zoom in as required. Also using the scroll wheel you can view the actual data values associated with the segments of this or any other chart.

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As we mentioned earlier, a key design principle of Cognos 8 BI is, author once consumer anywhere. The mobile report we're looking at here is in fact exactly the same briefing book report we saw a few seconds ago rendered in PDF format on the Web. No changes whatsoever are required to run and explore the report on the Blackberry, on Windows Mobile or Symbian mobile devices.

And that means any report that an executive needs can be accessed at any time from anywhere, with no intervention from IT, no extra overhead to build special versions of this report.

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And while this brief demonstration is focused on business intelligence for the HR executive, these kinds of dashboards, scorecards and reports can be delivered for any executive team based on data integrated from multiple systems and data sources delivering a coordinated view of business performance in easy to explore, easy to understand, high-impact business intelligence.

### **Managers**

Managers have always received reports in some fashion, but often found the data unreliable or in conflict with other data sources. IBM Cognos 8 BI ensures managers can actually trust the numbers they're looking at and understand their business with reports that are easier to access and interpret than ever before.

IBM Cognos 8 BI delivers a broad range of reporting styles to suit each manager, and makes them easily accessible by ensuring they're organized for quick access in multi-tab portal pages.

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As managers review reports like this regional forecast by product line report they may notice things that require attention like a shortfall in sales for a particular quarter. Directly within the portal is access to the sales forecasting application. Within this application, managers can do things like forecast revenue or expenses and then see the impact that changes will have on profit and loss statements.

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Adjusting the forecast is simple. Within the context of a previous submission, the manager can increase the forecast by a specific amount or by a percentage and then immediately see the ripple effect this will have on monthly totals, as well as on the overall year total.

Once the adjustments are done, the manager can submit them to the system and update the plan of record. The updates take effect immediately, and the new numbers are reflected as soon as the Cognos 8 report is refreshed in the portal. And if a specific report is not available, IBM Cognos 8 BI provides simple yet powerful ad hoc reporting that makes it easy for any manager or for one of their staff to create the view of information that they need. And they can do this without involving IT.

## Employees

Business Intelligence should help all users make sound data-driven decisions at all levels of the business. This includes employees, potentially the biggest user population.

IBM Cognos 8 BI gives users quick access to the reports that are important to them. Users can save and access their reports how ever they want -- for example, as tabbed portal pages. Within these portal pages, it's a simple matter for users to run the reports they want and focus on the data that's most relevant to them.

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Users can organize their reports how ever it makes the most sense for them -- for example, monthly reports that get printed once a month or delivered once a month; key metrics that they may be interested in. All of this is controllable by the user, or in fact by the administrators who manage the system.

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Beyond the scope of a user's personal folders or personal portal tabs is where there may be a problem. Users often have a hard time finding the information they really want. Cognos 8 Go! Search Service makes it possible to find strategic business intelligence right from a standard browser-based search.

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Users can quickly and easily specify how they'd like to search -- for example, by name, by description or both -- and then type the string they wish to search for using exact words or partial matches.

Users can also specify what types of objects they'd like to be considered in the search -- for example, reports, analyses, metrics, scorecards, or in this case, a portal page. It's important to note that it's not just the names and descriptions that are searched, but the metadata within these objects as well.

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Results are returned in descending order of relevance, and it's a simple matter for users to launch the content directly from the returned results. Within the returned results, users can easily change what's displayed -- for example, changing this chart to a bubble chart, or to a list. Changing this one to a bar chart or to a cross tab.

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Users can also choose how and when they want to receive certain information. For example, they can choose to be alerted by e-mail or Web whenever a particular value crosses a specific threshold.

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Users can specify the condition for the threshold as well as its value and the context in which it should be applied. Users can also choose how they wish to stay informed, either by e-mail or by having the alert published into a portal page.

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Once they assign a meaningful name to the alert associated with this watch rule and save it, users are automatically informed whenever the specified threshold is crossed.

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With IBM Cognos 8 BI, you empower your casual users to control when and how they want their relevant information.

### **Business Analysts**

Of course, business intelligence has always been a mainstay of the business analysts whose needs are clear: easy ways to access and analyze large volumes of data. With IBM Cognos 8 BI, business analysts can quickly and easily spot trends, isolate issues, quickly investigating the underlying details and drill into increasing levels of detail.

When an anomaly is spotted, it's easy to isolate it and then analyze it in the context of other dimensions of the organization, viewing it from a different perspective to gain additional insight.

For example, analysts can quickly find top or bottom performers across a specific geography for a product that's under performing in terms of sales. IBM Cognos 8 BI provides all the analysis capabilities required by the most demanding business analyst with the flexibility for them to model data dimensionally.

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Once information is found that needs to be shared, analysts can leverage the full breadth of Cognos BI capabilities to deliver the results of their analysis in virtually any format, as interactive analysis results like the one shown here. Or, as data displayed within Microsoft Excel. Or, as a formatted professional report published to the BI portal.

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For business and financial analysts, IBM Cognos 8 BI delivers a level of self-service that's unmatched. Using simply Cognos 8 BI queries, business analysts can quickly and easily create simple output reports saving them as a source for their analyses. They can then use these reports as data sources to build powerful multi-dimensional models and compact high-performance cubes with the perspectives and hierarchies they want.

The cubes created can quickly and easily be published as information packages for use in the BI portal, and then used to create powerful financial analyst reports such as these, all with no requests to the IT department.

### **Business Intelligence Professionals**

For the BI professional who has to deliver reports across the desktops of hundreds or even thousands of business users, IBM Cognos 8 BI provides complete professional reporting capabilities. They can easily create multi-page reports where each page has its own custom layout and underlying data queries; or, use queries that are shared across multiple pages and report objects.

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When building any report, advanced reporting capabilities provide the ability to develop complex report layouts, pulling together information from multiple data sources. For example, this Sales Rep Profitability Report Page contains a chart showing revenue success by order method, a cross tab showing values and difference for actual and planned revenue, a second chart showing the top sales reps in terms of sales revenue; and, a table containing some key summary values.

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If we run this report in PDF format, it looks like this, with all of the pages rendered based on their specific layout properties with their own custom content and underlying queries.

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Here is the Multi-Object Sales Rep Performance Page. Reports like these are easily built using this comprehensive collection of insertable objects. Report developers can fully customize the look and feel of the reports they create, catering them to the specific needs of their user communities with objects like calculations, conditional blocks that show or suppress content based on data values in a report, and embedded HTML or JavaScript.

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Using any of these objects is a simple drag and drop operation. For example, to add a map showing geographical profitability, simply drag the map on to the report. And then, populate the map with the data values, in this case, adding country as the region and gross profit as the measure that controls the default colors that the map will use.

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When the report is re-run, the updated page is displayed. The map displays at the top of the page with default supplied for the color palette and the threshold values, both of which are easily modified back in the design environment as required.

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In every report, business intelligence professionals have complete access to the underlying SQL or MDX for every query used to see exactly how the data is being accessed. Advanced data manipulation capabilities like set operations such as unions, intersections and exceptions, make it possible to combine the data and the underlying queries how ever it's needed for reporting purposes.

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Additionally, built-in prompt objects make it very easy to add run-time prompting so a single report can serve multiple user needs across multiple geographies or departments. Adding a run-time prompt is as simple as selecting the data item to be used for prompt values and then generating the required prompt, which automatically gets added as a prompt page.

This capability, together with advanced multi-lingual capabilities not shown in this brief demonstration, make it possible to deploy highly-flexible reports across a broad range of user communities. All of these powerful reporting capabilities and many more not shown here make it easy for business intelligence professionals to deliver and maintain sophisticated reports that combine data from many data sources in a multitude of formats.

### **Data Modelers**

The business adoption of any BI system hinges largely on everyone being able to navigate, trust and understand the information it delivers. The underlying data model is therefore a critical success factor for business intelligence deployments and is often under emphasized. Too many implementers of BI focus too heavily on advanced reporting features often at the expense of critical data modeling capabilities.

Without a model that delivers information in terms business understands and insulates business from the underlying complex and disparate data sources, a BI deployment is difficult or impossible to implement on a large scale.

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Data modeling is a true strength of IBM Cognos 8 BI. Cognos Framework Manager provides data modelers with the ability to build real enterprise scale data modelers, using any data source or combination of data sources. The result is high-performance data models optimized for business intelligence providing a common unified view of information across reports, analysis, metrics and scorecards.

After importing data from any data source or from multiple data sources, data modelers can build logical data model layers that shield end users from the complexity of the underlying data sources.

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The separation of logical and physical layers insulates the BI system from changes in the underlying physical databases. As a result, IT is afforded the flexibility to change the physical layer when necessary for application maintainability, data integrity and performance characteristics that are critical to successful deployments. Data modelers can take advantage of advanced built-in model features like global filters and calculations, parameter maps that can be used in macro expansions as run-time substitution values, advanced object security, and more.

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Data modelers can also use the built-in Model Advisor to create their initial designs and get up and running faster. Model Advisor analyzes the information in the model and highlights areas for possible investigation.

For example, when a query subject has multiple cardinalities relative to other query subjects and therefore may be treated as a fact or dimension depending on how it's used in queries.

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Directly from within Model Advisor, data modelers can investigate the underlying query subjects and address problems if any exist. Model Advisor guides even advanced modelers with hints and recommended proven practices that ensure your data models are optimized for your business.

### **System Administrators**

Once you've chosen a BI system, system administrators are the key people who make it all work. They maintain security and ensure the system keeps running 24/7. They're the ones who own how business intelligence is deployed across your existing environment to fit in with your standards, and they're the ones who manage system upgrades and migrations.

If the business intelligence system administrator's job is too complex or difficult due to the architecture and tools of the system implemented, then maintaining the system becomes an expensive, time-consuming issue. And over time, the system itself may become fragile, resistant to change and service level agreements may not be met.

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In installations of all sizes, IBM Cognos 8 BI provides a rich administration environment for BI system administrators with clear visibility into system metrics. Within the administration console, system administrators can monitor activity across all active BI servers making it simple to isolate and resolve issues when they occur. The nature of the IBM Cognos 8 BI Service-Oriented Architecture where dedicated services communicate indicate peer to peer makes it possible to see the performance profile of an entire system.

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The built-in ability to take a snapshot of system health provides proactive system administration whereby system administrators can spot and resolve potential problems before end users are impacted.

In addition to system administration, IBM Cognos 8 BI provides Upgrade Manager as a utility to systematically upgrade your BI systems when the time comes. To facilitate a system upgrade, built-in workflow validates and generates BI output in both the source and target systems.

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When discrepancies occur, they can be investigated in a highly visual side by side or overlay comparison to identify data or format discrepancies. In the past, this type of comparison was time-consuming and error prone, as visual differences are not always easy to spot. In addition to the visual comparison, a list report identifies the results of a data comparison and any differences are clearly identified.

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As a result, potential problems are isolated, allowing them to be flagged for investigation and also allowing for the creation of a realistic work plan for the upgrade process to be successful.

With IBM Cognos 8 BI, everyone across the organization can make more informed, faster and more aligned decisions. With a complete set of capabilities and the ability to deliver consistent and trusted information wherever, how ever and whenever it's needed, each user community in the organization can drive overall organizational performance. And for IT, IBM Cognos 8 BI is an open enterprise class platform built on a Service-Oriented Architecture that ensures a sound fit with existing standards and investments.

It provides the system management tools, flexibility and extensibility that enable IT to scale an application in response to growing users populations or needs. With IBM Cognos 8 BI business and IT across your organization are empowered to drive to the next level of performance.

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