



## **Using IBM Cognos 8 Business Intelligence to meet executive user needs**

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## Abstract

This white paper explains the reasons behind executives' business intelligence demands and the challenges IT faces in meeting them. It goes on to describe the features of IBM Cognos® 8 BI version 8.4 and how those features – including an intuitive front-end that allows users to do more on their own – can help bridge the gap between IT's current capabilities and the increasing information demands of executives.

## Overview

Given the ever-increasing performance mandates on today's executives, their varied and complicated information requests make sense. Unfortunately, executive users rarely understand the work effort faced by IT in meeting their expectations.

Fortunately, IBM Cognos 8 BI version 8.4 resolves these challenges by giving executives easier access to the information they most need with new functionality that includes interactive dashboards and scorecards, mobile integration, locale recognition, a unique annotation feature, personal alerts, flexible report formatting, consolidated data reporting, and even a business glossary

## Business problems

### Is that *all*?

It's easy for an executive to say "I need it all." Delivering everything – the challenge faced by IT – is another matter. And not every business intelligence solution is created equal.

Although many BI systems promise self-service functionality, user interfaces are often complex and difficult to navigate, making it unlikely that executives will spend the time to craft the reports they need.

Accessing only high-level data customized to the issue of the day also creates a challenge, often requiring IT to custom-code dashboards and scorecards – reports that are expensive and time consuming to build and difficult to maintain. The complexity of this effort also rises each time an executive user makes a seemingly "simple" request to alter a graphic element of the report, pull in data from disparate sources, or present the information in different views.

Similar challenges arise when attempting to provide executives with flexible access to key data. Delivering reports to executives on the device of their choice frequently entails creating multiple versions of the same report – compromising IT productivity and service levels. And without automated alerts, IT must engage in significant manual effort to notify executives each time key performance indicators change.

## Business drivers

### Easy, enjoyable, accurate, accessible

It's sometimes said you can't understand other people until you walk a mile in their shoes. That may explain why IT professionals sometimes view executive requests for information as frustrating – and occasionally unreasonable. But if you take a look at the typical day of your executives, it helps to better understand their information needs.

In essence, executives have three primary mandates when it comes to their data requirements:

- **The interface they use must be easy enough to enable self-service and enjoyable enough to encourage regular use.** Your executives have no time to sift through reams of information to locate the one fact they need. They are typically responsible for driving the success of the business, which means they need easy access to understandable information on which to base their decisions. If the data they seek is more than one or two clicks away, executive users are bound to abandon the effort to find it at all. Instead, they will pass that burden on to IT while at the same time questioning the effectiveness of your business intelligence (BI) investment.
- **The information they do find must be accurate and provide insight into larger business trends.** Executives are responsible for both keeping the business ahead of its competitors and communicating strategic initiatives that can affect the course of the enterprise. If they make one careless mistake, the entire organization can suffer. For these reasons, executives need the ability to detect trends, changes, and exceptions and understand how they map to strategy. They need an inside view into client requirements that allows them to respond in real time. They must be able to track team performance and accountability to ensure the company gets maximum value for its investments. And they must be able to funnel information from various sources into one intuitive view that gives them a high-level understanding of key performance indicators.

- **Data must be accessible anytime, anywhere, and in a variety of formats.**

Given the pace at which the markets move, executives rarely have time to wait for a scheduled weekly report to get the news they need. In truth, executive users require round-the-clock access to up-to-the-minute information – whether they’re on a plane, in a taxi, or walking into a meeting. They also expect to be able to view their data in the format they choose, for example in different languages and on different devices. And to ensure they can mobilize their teams to action before issues escalate, they need critical data pushed to them so they do not have to hunt for it.

Read on to learn how the enhanced features of IBM Cognos 8 BI version 8.4 can help IT meet the demands of today’s executive users.

## The solution

**Multiple self-service reports, one authoring environment.**

**How does IBM Cognos 8 BI version 8.4 give executive users easy access to at-a-glance information to support their decision-making process?**

To monitor corporate results, maintain a pulse on the status of the business, and guide their teams on appropriate response strategies, executives need quick and easy access to summarized information that can provide them with a holistic view of the business. There was a time when creating this type of dashboard required IT to spend significant resources customizing reports.

That time is now past. With a powerful new interactive dashboard feature that delivers an at-a-glance view of key metrics, IBM Cognos 8 BI version 8.4 puts executive users in the driver’s seat. An intuitive interface, drag and drop functionality, and Flash-based visuals make it easy – and enjoyable – for executives to self-assemble personal dashboards. For instance, users can select critical metrics from one source, a chart from another, and even pull in parts of reports they think are valuable to create their very own view of the business. To keep on top

of how the company is performing relative to its competitors or the marketplace, executives can pull non-BI content into their dashboards, improving productivity by eliminating the need for users to waste time looking for related context. A new annotations tool even allows executives to capture comments and make “notes in the margin” of their reports, enhancing enterprise-wide collaboration.

To further cut down on requests to IT for specific information, IBM Cognos 8 BI version 8.4 includes ad hoc query functionality that lets executives locate answers to their specific questions and share their results with other users. With simple formatting, they can add the data to corporate templates to improve the look and feel of their reports. Automatic alerts also deliver reports and metrics to users whenever, and however, they choose to receive them, enabling executives to monitor changes and exceptions, ensure early detection when the business is out of adherence, and maintain continuous visibility into their key numbers.

This more visual and dynamic dashboard experience does more than deliver a summarized view of organizational performance. It also lets executives meet their unique information needs in real time, improving both user satisfaction and BI adoption rates. Without the need to learn multiple tools, executives can spend more time proactively managing the business and less time opening tickets requesting IT assistance.

Despite this more user-friendly front-end, our back-end remains all business. IBM Cognos 8 BI version 8.4 is built on one of the strongest platforms in the industry, ensuring all data flows through one spigot to deliver one consistent version of the truth. This empowers executives to access data wherever it resides, including from complex ERP sources, while masking the complexities of the underlying data sources. By presenting data in common business terms that executives can understand, the system encourages user self-sufficiency, reducing the burden on IT teams. The result? Even novice users benefit from BI more quickly, while your time is freed up to focus on strategic initiatives.

## Digging deeper

### **Does IBM Cognos 8 BI version 8.4 allow executives to align key metrics with corporate strategy?**

While dashboards provide executives with a critical at-a-glance view of key business metrics, sometimes executives need access to more detailed information. That's where scorecards come into play. The sweet spot of a scorecard is that it's built around corporate strategy – such as Six Sigma, Lean initiatives, or a similar strategic process. The aim of a scorecard is to provide details about the specific tasks individuals are performing across the organization and determine how those actions are contributing to larger strategic goals.

While nice in theory, scorecards have traditionally been extremely difficult to compose. Many strategic processes are not effectively automated, making it difficult to track progress against strategic objectives. Individual efforts by workgroups to create scorecards in spreadsheets often lead to a non-integrated view of activities. At the same time, these spreadsheet-based scorecards frequently cannot be associated with supporting reports. And a lack of visibility into organizational strategies hampers the IT team's ability to prioritize report requests.

IBM Cognos 8 BI version 8.4 tackles these challenges by automating the scorecarding process. By tracking the status of key performance indicators within a strategic framework, such as the Balanced Scorecard, the system enables executives to align their teams and tactics with strategy and monitor performance against targets. By gaining consistent access to enterprise-wide information, executives can base decisions on the same set of data to improve decision-making. Guided analysis functionality allows executives to view underlying metric details with one click. By identifying reports as scorecards, the system even helps to clarify the priority of executive report requests.

As an added advantage, executives can choose to view their data in a briefing book format. These multi-page, multi-style reports deliver critical information in one brief, for fast, easy consumption. Horizontal and vertical pagination can be mixed to optimize the presentation of information. And by seamlessly linking to other parts of the BI platform, both scorecards and briefing books provide executives with a better understanding of the issues driving strategy.

**Anywhere, anytime access in a variety of formats**

**How can IBM Cognos 8 BI version 8.4 simplify the creation and distribution of multiple report formats?**

Today's executives are always on the move, and they expect their data to keep pace. Gone are the days when large printed reports were handed to executives at scheduled intervals. In our fast-paced, always-on business environment, executives need the ability to access critical data in a variety of formats, through disparate applications, in different languages, and across numerous devices.

IBM Cognos 8 BI version 8.4 delivers on all counts. Unlike some BI systems that require IT to author multiple versions of the same report, IBM Cognos 8 BI version 8.4 lets you author a single report which can automatically be consumed in multiple ways, across multiple devices, in multiple languages. For instance, a report you create for the Web can easily be converted to an Adobe® PDF or different file format. It can be viewed in different applications, such as Microsoft® Excel®, Microsoft PowerPoint®, Microsoft Word, and other common systems. Locale sensitivity automatically converts the data into the user's preferred language or currency.

Executives can even access the report in a variety of environments – through a Web browser or search engine, via an intranet or extranet, as an e-mail attachment, or through the mobile device of their choice. In fact, IBM Cognos 8 Go! Mobile is designed to provide users with real-time data, not static renditions of previously generated reports. That means executives can take advantage of native mobile device behaviors, such as scrolling, touch screen technology, and clicking to navigate reports and menus.



Personal alerts allow users to receive updated versions of scheduled reports via e-mail or be notified whenever a specific watch rule they set is met. And the recent introduction of a business glossary provides one click search access to terms and taxonomy, ensuring all users interpret the data consistently and can collaborate on defining a common terminology across the enterprise.

This functionality does more than empower executives to increase their productivity and improve decision-making when working remotely. With access to information that consolidates all the various data sources within the organization, executives have only one place to go to understand the business. With a zero footprint, Web-based interface, executives have control over when they receive reports and in what format they receive them. Similarly, remote installation and centralized administration allow IT professionals to quickly distribute functionality and upgrades to users, ensuring a consistent quality of content regardless of a user's location or environment.

## Conclusion

In an effort to improve organizational performance and achieve their strategic objectives, executives need the ability to self-assemble customized reports that deliver an accurate view of the facts, anywhere they are, in a variety of languages and formats. IBM Cognos 8 BI version 8.4 delivers this complete range of BI capabilities, including dashboards, scorecards, and pervasive access, all on an open, enterprise-class platform. This latest release delivers new and enhanced capabilities to address executive demands for greater usability, accessibility, and control without compromising IT's high standards for conformance, compliance, and cost-effective scalability.



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