Introducing IBM Cognos 8 Business Viewpoint

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Agenda

- Define the problems with dimension management
- Introducing Business Viewpoint
- Typical real-life BI and Planning scenarios
- Provide demonstration
- Best practices to get started
- Q&A

Dimension Management Business Problems

- Business users cannot manage their views of the business
- Domain experts cannot collaborate effectively in the dimension management process
- Changes to dimensional models can have significant downstream impacts (e.g. to existing reports)
- There is no consistent shared view of the hierarchical structures across the organization
- There is no accepted repository for future planned members and hierarchies for budgeting and forecasting

Analysts Agree: Dimension Management Adds Value

Enterprise dimension management focuses on correctly managing the *dimensions* used to roll up data, analyze it and report it. Simply put, behind the clean-looking reports of many large corporations is a huge mess, which enterprise dimension management aims to fix.

BPM and Enterprise Dimension Management
Maximize Business Performance
Craig Schiff
DM Review Magazine

….by unifying the data management, it allows company-wide views of performance that are so important to business performance management (BPM).

Enterprise Dimension Management
Craig Schiff
DM Review

Dimension Management Business Problems

- ***"I wish the sales hierarchy reflected the latest re-organization."***

  Operations Manager

- ***"When will the data warehouse reflect my new customer list?"***

  Brand Manager

- ***"I want to realign my cost centers so I have plan and actual views."***

  Financial Analyst

- ***"I need my customer marketing hierarchy to be different from my shipping hierarchy."***

  Marketing Manager

How do customers solve the problem today?

- Working individually with own definitions and structures
- Manually reconciling dimensions and hierarchies in spreadsheets
- Spending time manually tracking changes because there is no automated process in spreadsheets
- Manually rolling up and reconciling spreadsheets to gain a corporate view
- Moving at the pace of IT not the speed of business

Introducing IBM Cognos 8 Business Viewpoint

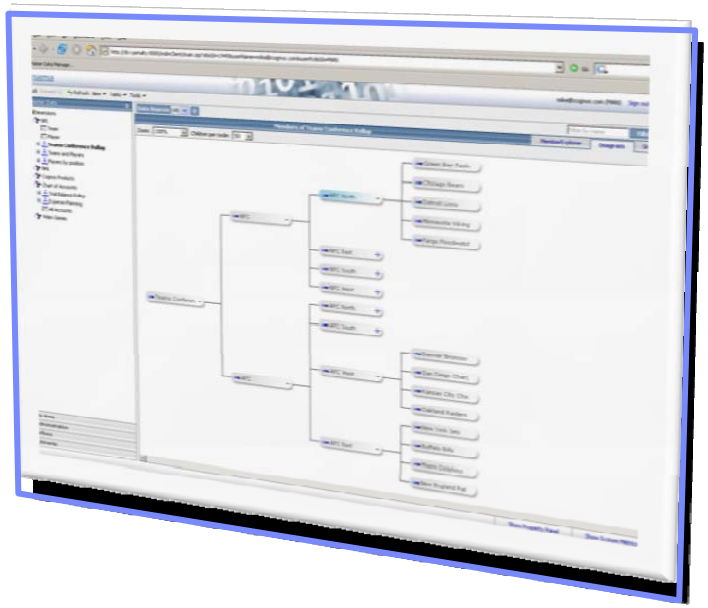
- **Solution**
  - For business users to easily maintain, govern and share the hierarchies for use … and reuse … across Business Intelligence and Performance Management solutions

- **Result**
  - Capture the business viewpoint on how to organize information to drive business performance
  - Save time spent on reconciling reports, plans, forecasts

Business Viewpoint Enables the Business

Create and Maintain

Enable the business to easily create their own perspectives with highly visual interface and fully flexible model



Govern and Collaborate

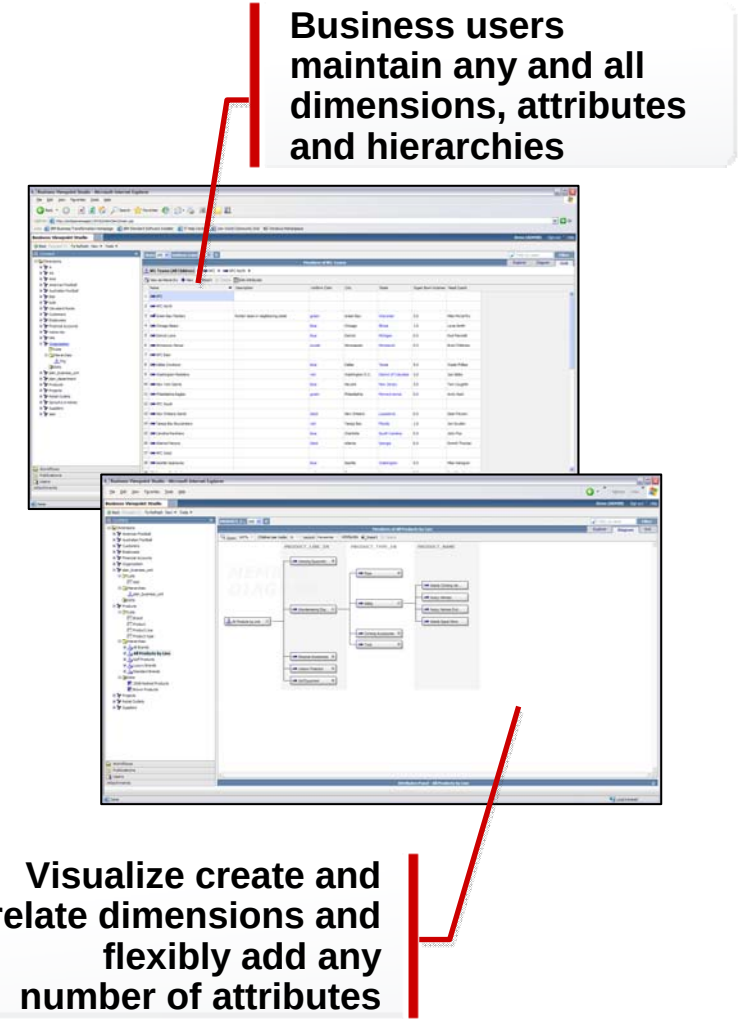
Replace manual, error-prone efforts with fully transparent, automated and auditable processes

Share and Synchronize

Deliver shared, approved viewpoints across Performance Management and provide bi-directional interfaces to external systems

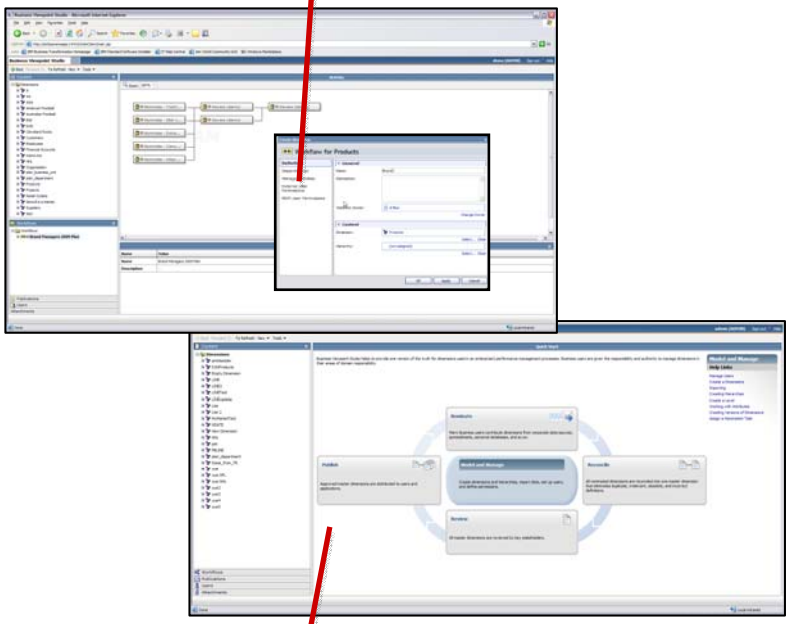
Create and Maintain

- **Enable Business Definition of common Dimensions**
  - Create, edit, manage, compare, import
  - All line item dimensions required for PM (chart of accounts, cost center, product etc)
  - Assemble multiple hierarchies, views or versions to support the performance management process
  - Work within familiar tools such as Excel
  - Notifications by role as changes occur



Govern and Collaborate

- **Enable Governance of common Dimensions**
  - Workflow collaboration, multi user contribution
  - Audit who makes changes and what changes are made
  - Version control and roll back
  - Security for dimensions, users and user roles
  - Lineage of maintenance history back to the source
  - Central dimension store

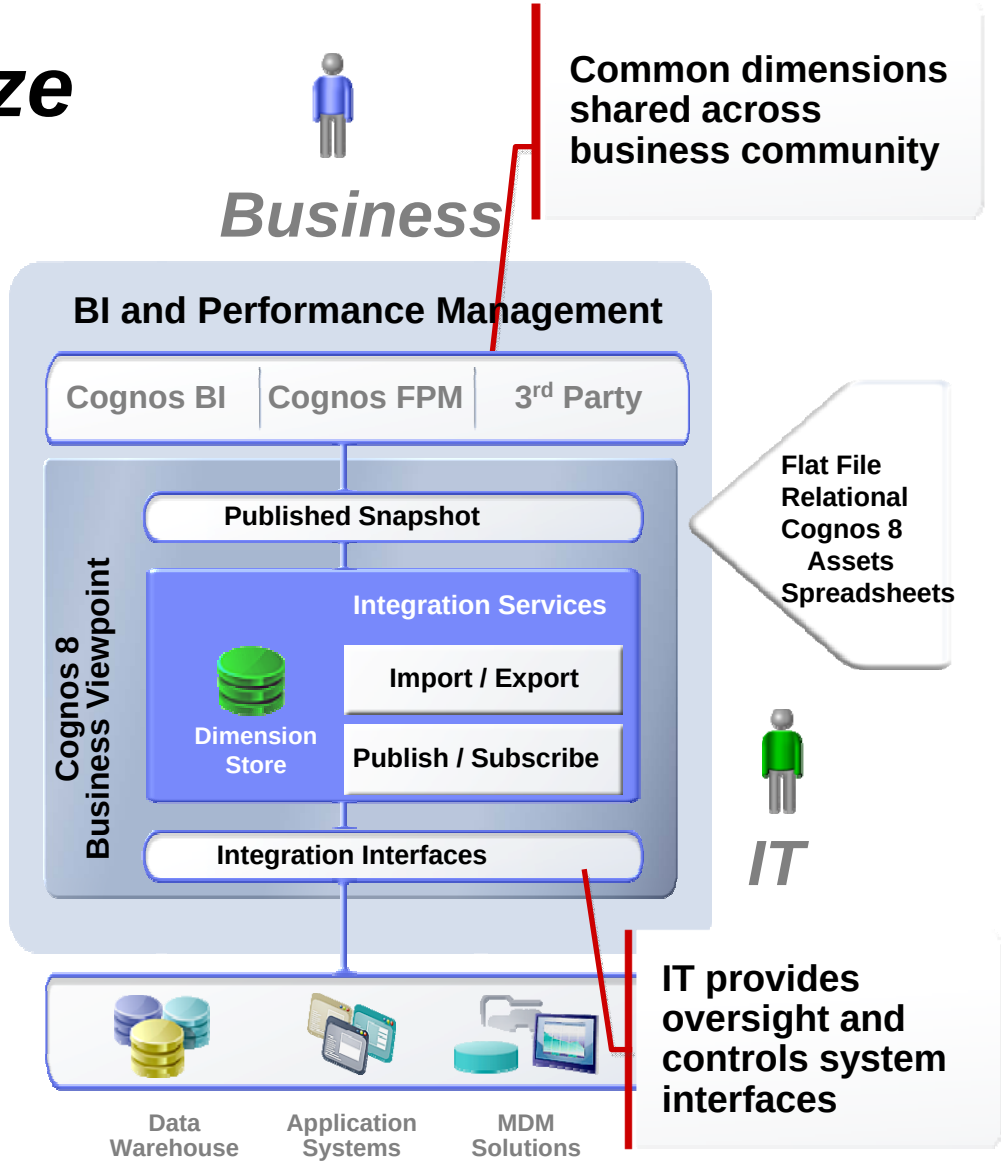


Manage nominations, approvals and versions with business workflow

Assign specifics roles and areas of responsibility across the business community

Share and Synchronize

- **Enable Consistent Use of Common Dimensions Across PM**
  - Selectively publish changes, or provide subscription services, to authorized applications
  - Leverage pre-built integration across Cognos performance management system
    - Cognos 8 Planning, Cognos 8 BI, Cognos 8 Controller, Cognos TM1, Cognos 8 Transformer, Cognos 8 Framework Manager
  - Open API and web services for 3rd parties

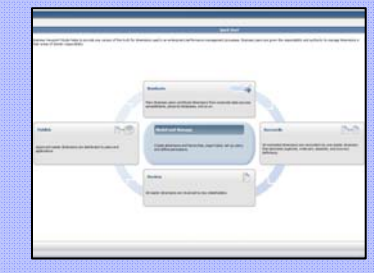


End-To-End Dimension Management for Performance Management

Cognos 8 BI

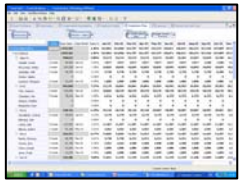
Cognos 8 TM1

Cognos 8 Business Viewpoint

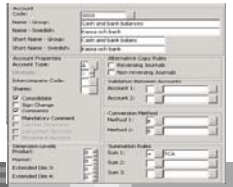


Cognos 8 Transformer

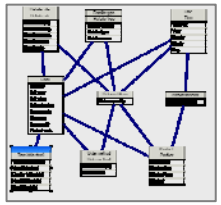
Cognos 8 Planning



Cognos 8 Controller



Cognos 8 Framework Manager



Who Uses Business Viewpoint?

- Who uses Business Viewpoint?
  - Business Manager
  - Financial/Business Analyst
  - Product manager
  - Brand/Category Manager
  - Director/VP of FP&A

- What are they working on?
  - Mergers and acquisitions
  - Launching new product lines
  - Opening new markets
  - Managing change to the business

- What type of domain?
  - Products
  - Customers
  - Channel
  - Chart of accounts
  - Cost centers

  …any domain in BI and PM

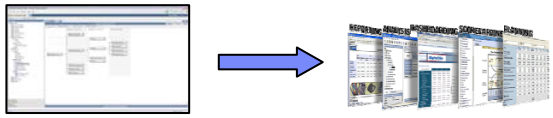
Reporting Employees after an M&A

5

My BI users can now report on the new corporate employee structure

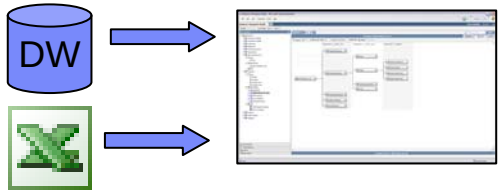
Task accomplished!!

- BV provides the shared common view to all subscribers



1

I need to pull the common Employee Structure from our warehouse and an excel spreadsheet from the acquired company



I need to report on the NEW corporate employee structure after a merger

HR Analyst

Now the changes have been approved I need to push them out to be reported on

4

- BV pulls data from warehouse and Excel and
- Combines them so I can work with them

2

I need to make changes to the new Employee Structure

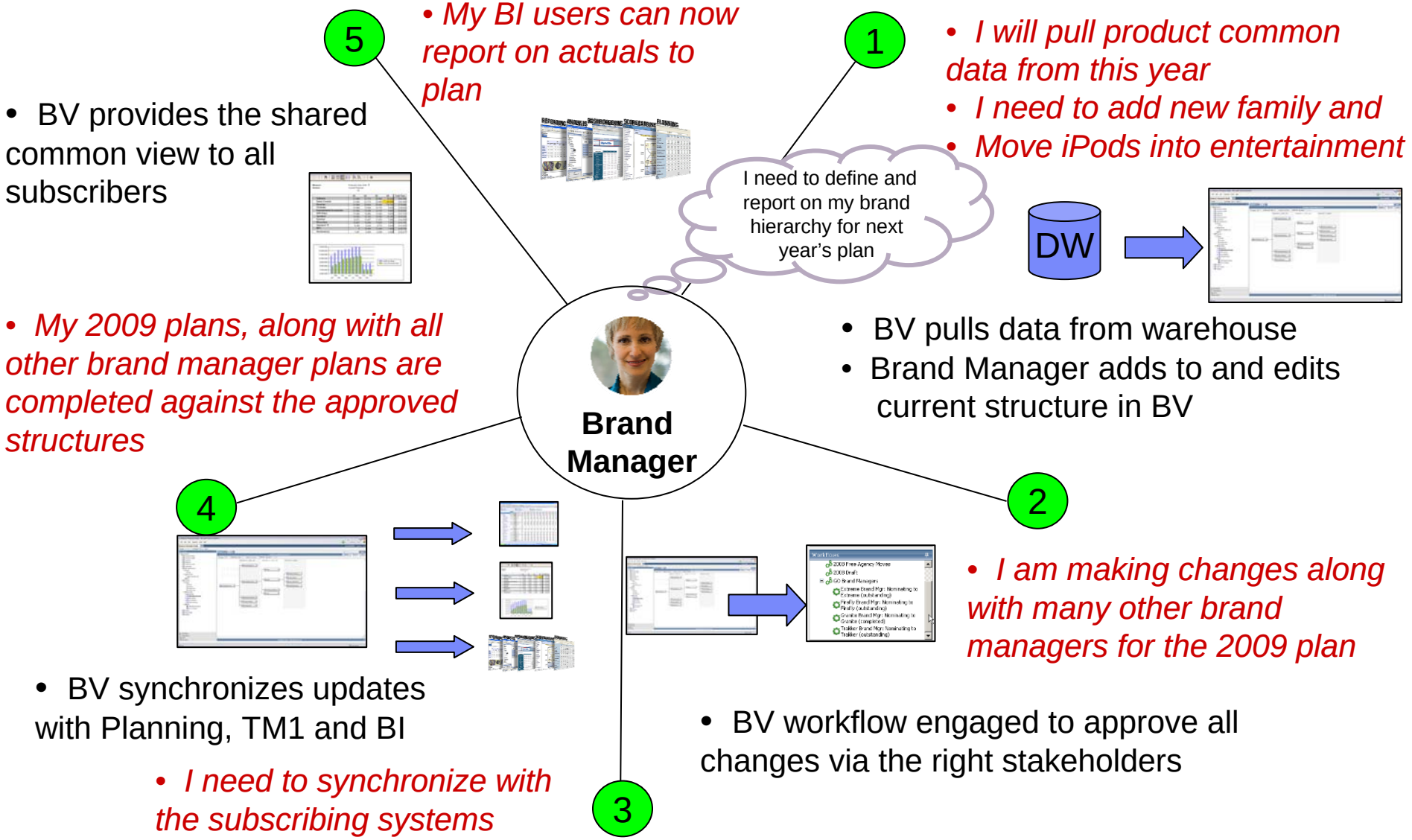
- BV utilises the workflow so the right individuals approve the changes

I need to get approval for the changes I have made

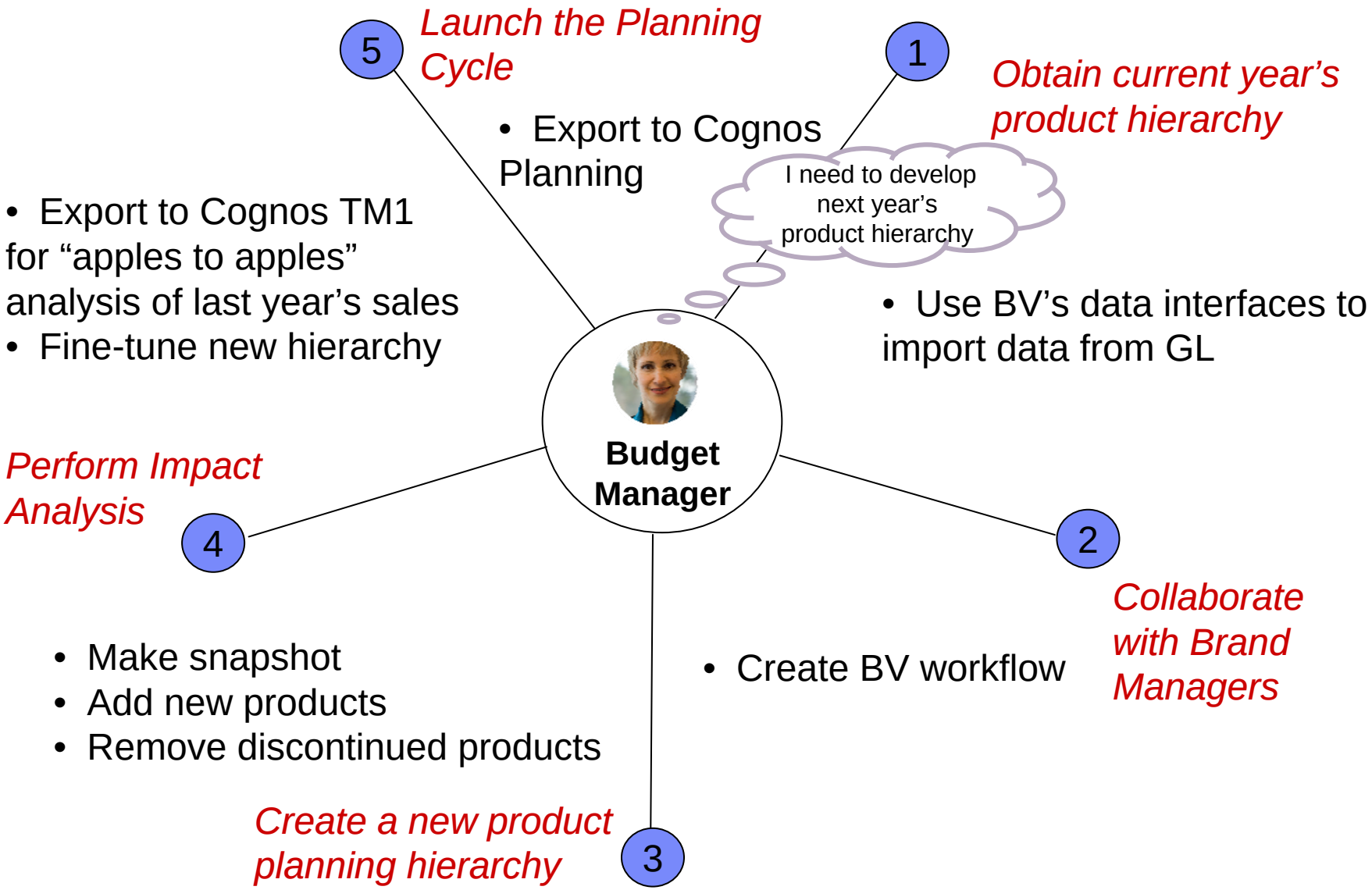
3

- BV allows me to:
  - Add new employees and
  - Move current employees to different departments

Brand Level Planning



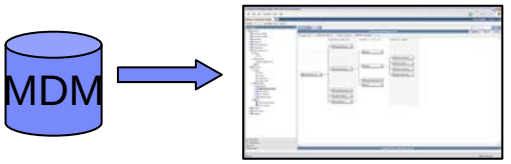
Corporate Level Planning



Product Sales Planning and Analysis

1

I will pull product master data from this year



I need to keep my product hierarchies up to date

Brand Manager

2

- BV pulls subset of electronics data from MDM

I need to add a new product family and move iPods into entertainment

3

- Brand Manager adds to and edits current structure in BV

My changes need to be approved

- BV workflow engaged to ensure the right stakeholders are approving changes

4

Sometime later…I need to keep updated when new products are added to the operational systems and MDM

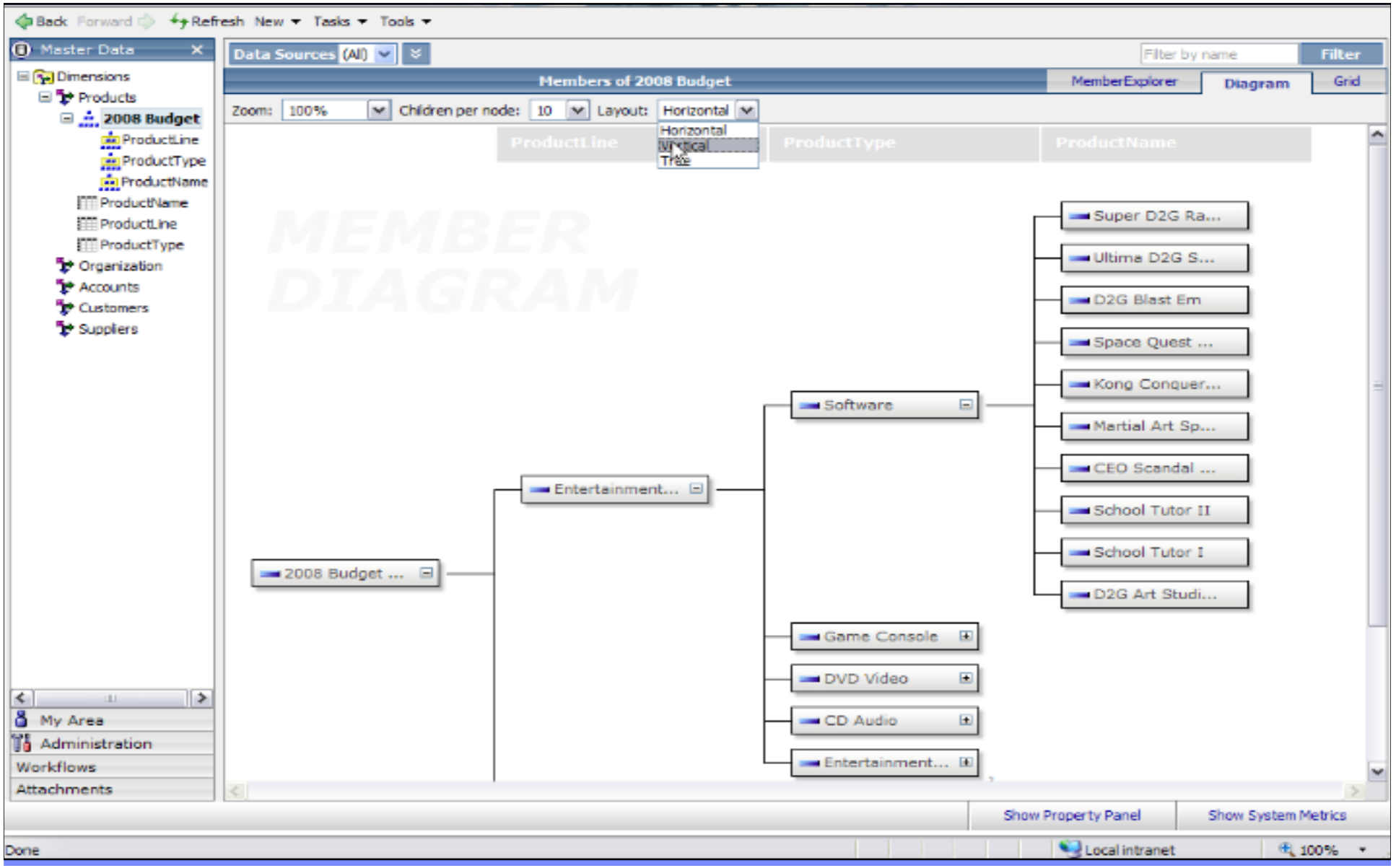
5

Planned products in BV are mapped to recently created products in MDM

My product hierarchies are current!!

- BV subscribes and synchronizes the dimension changes to get new products from MDM

Demonstration



Top 4 Best Practices

1. **This is a collaborative process with the business driving**
   - IT plays a supporting role
2. **Start small with your biggest dimension pain**
   - 80/20 rule
   - Each project after this increases in value
3. **Don't try to do everything at once**
   - Customer Accounts for Financial Services
   - Subscribers for Telecommunications
   - Products for Manufacturing
   - Stores or Products for Retail
4. **Build a strong user community**
   - Get the right stakeholders involved in the process
   - Establish a reconciliation process for disagreement

Summary: The result for customers

- Freedom to own dimension structures, relationships and attributes in a shared view
- Replacement of manual, error-prone efforts with fully transparent, automated and auditable processes
- Approved shared viewpoints for use across BI and Performance Management, and provide those approved structures to IT for other systems

- Embrace business ownership of dimensions while maintaining oversight of their work
- Retain control of how approved versions are published and used with minimal disruption to downstream systems
- Ensure organization can respond to business change with minimal delay

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Thank you

Questions?

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