BI without a Data Warehouse?
An Effective Strategy for Midsize Companies

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Speakers: Mark Morton, *Product Marketing Manager, Midmarket Business Analytics, IBM*
Stephanie Cronin, *Marketing Manager, Midmarket Business Analytics, IBM*

Moderator: Kyle LeRoy

Kyle LeRoy: Hello, and welcome to a SearchDataManagement.com presentation, 'BI without a Data Warehouse, an Effective Strategy for Midsize Companies'. This presentation is being brought to you by IBM. For more information on IBM, you can click on their logo in the lower portion of your screen. My name is Kyle LeRoy, and I am the moderator for today's presentation. Joining me today is Mark Morton, Product Marketing Manager, Mid Market Business Analytics for IBM and Stephanie Cronin, Marketing Manager for IBM. Before we begin the presentation, I would like to review a few items with you. The slides for this presentation will be pushed to your screen automatically. If you have any questions throughout the presentation, you can type them in the 'Ask a Question' area, which is located on the right-hand side of the viewing console and they will be addressed at the end of the presentation. If you have any difficulty reading or viewing the slides, there is an 'Enlarge Slide' button that you can click on, which is located just below the slides. And if you experience any technical difficulties during this presentation, there is a help link that you click on over on the lower right-hand corner of your screen. With that being said, I am now going to turn things over to Mark Morton to begin the presentation. Mark.

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Mark Morton
Product Marketing Manager, Midmarket Business Analytics, IBM

Stephanie Cronin
Marketing Manager, Midmarket Business Analytics, IBM

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Mark Morton: Thanks very much, Kyle. Good morning or afternoon everyone. Yes, I am Mark Morton, I am the product marketing manager at mid market business analytics for IBM, and I am joined by Stephanie Cronin.

Stephanie Cronin: Hello, I am Stephanie Cronin here, Marketing Manager also for Business Analytics at IBM and I will be moderating today's Q&A.

What we promised:

- Where to start any BI project
- How to turn your data assets into information without a data warehouse
- Useful tips and techniques to drive maximum value
- How to empower business users to be self-sufficient
- Learn how to achieve a high level of benefit from BI tools without a heavy investment

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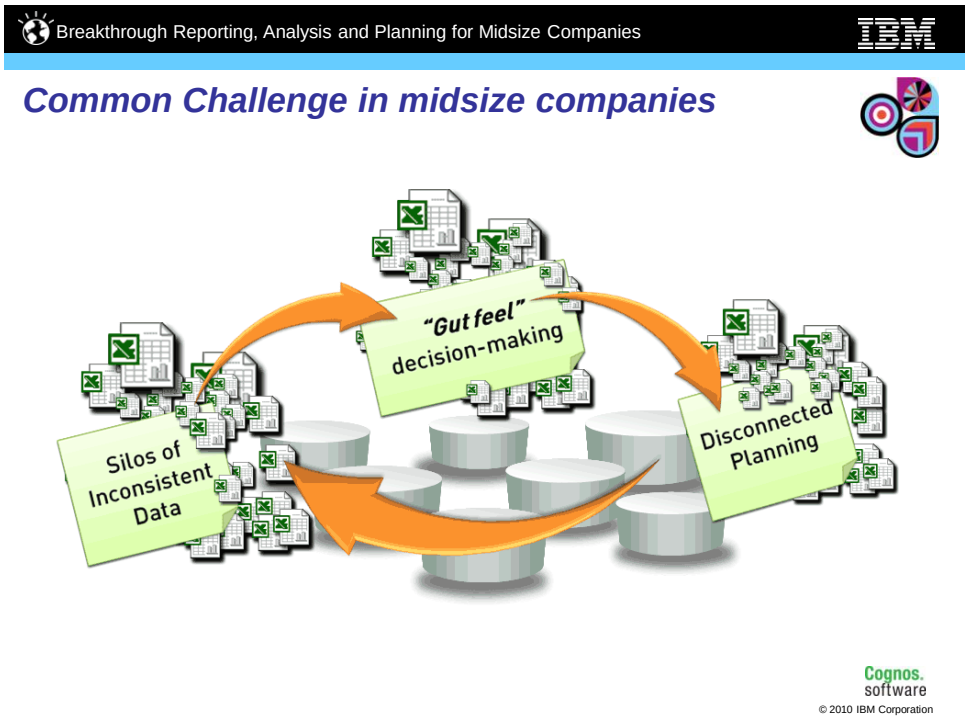
Mark Morton: What we promised you, well where to start an EBI project, how to turn your data assets into information without a data warehouse useful tips and techniques to drive maximum value, how to empower business users to be self sufficient and learn how to achieve a high level of benefit from BI tools without a heavy investment. One, two, three, four, five things to do about in the next 40 minutes. Hope we keep a good pace going and I encourage you to type any questions as we go, Stephanie is going to monitor those. It will help me do something that is relevant to you if you ask questions as we go along. So help me a little bit with that. I am going to ask you a couple of questions just to start out. The first has to do with how many employees are there in your organization. If you could just click on those radio buttons and quick submit answer in there, we are going to collect those and it will give me a better idea of the size of the organizations we are dealing with on the call today so that we can idea where should be focus our examples and the kinds of things that we were talking about. I hope that is not too much to ask for. I am also going to ask you what industry you are in, next but first up I just want to have some idea of the size of organization.

Give out a couple of more seconds to give people time to submit their answers. And then I will ask Kyle to kind of display those results for us to see. All right. Kyle, I think people had some time to try and do that. Can you show us feedback there? Okay there we go, so we have a fair bunch people in the 500-1000 and another bunch of people in the 1000 plus. Thank you very much. So I will try and pick examples you know that are suitable for that type of thing.

The next question has to do with industry you are in. Once again, just choose a radio button, choose out there if you don't happen to have yours in order to get the number of selections down. I am going to take a stab at guess and let's say if you are in computer data or software you are probably a consultant I am assuming. And welcome to have you aboard. We are looking for lots of partners in our organization so happy to see you on

board. Different kinds of other industries there and you know other when they follow up at some later date to get more detail around the kinds of industries that are most interesting you know to be bulleted, its best to see examples from onto our website and the like. And I will give you another couple of seconds to just click on that button and submit your answer and then I ask Kyle maybe you can display once more for us to give us a sense of what that split looks like. Here we go, lot of manufacturers, lot of financial services people. Welcome. Okay we will try and keep our examples in that space.



So common challenges in organizations when I say mid size that is pretty good, you know under 1000 or perhaps departmentally in the larger organizations who are taking place, our experiencing in talking with their clients and customers has been that what you quite commonly see lots of data out there and it is not a big surprise to anyone, lots of spreadsheet helping everybody doing their job. You know none of us can live without our spreadsheets in the world but what we find is people have a lot of those in my personal experience is a spreadsheet is great if I designed it and I understand what is all about. When I get someone else's spreadsheet, unless they have done an awful lot of work to describe it to me, I have some trouble in dealing with it and at some level I am not quite sure what everything means. In any case, when people have lots of information moving around often and flat-falls and spreadsheets and what have you and a lot of decision making is done based on gut feel, there is nothing wrong with gut feel. That is where we have all you people out there who have experience and do have understanding of how your industry works and what kinds of things are important but certainly you would like to see that kind of gut feel backed up by data assets that actually give you some sense of you know, some justification for why you are making the decisions you know the rationale behind them. And really when you start to get stuck is when you start going into a planning process.

Our experience again is a lot of organizations have a kind of budget process that they follow but the overall business plans and things are quietly commonly disconnected from what the line people are actually trying to do. They have a general guidance and stuff but these are day-to-day and the real planning is not tightly integrated in with the kind of reports that they are using to drive their business or to make their decisions on. So what we recommend, its kind of at high level is think big and start small, that is not just meant to be a catchy phrase. We actually mean that and actually it has some substance to it.

So when we say think big, we mean have a vision for how you want to see your organization develop. I do have an idea, look for day-to-day, what information how much information should people have available to them as you move forward.

Think Big

- A vision for an information driven culture
- Answer the three key business questions
  - ✓ How are we doing?
  - ✓ Why?
  - ✓ What should we be doing?
- Link information and insights gained through BI with action from planning
- Provide a path to future enterprise-class requirements

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Clearly at day 0, you are not going to have everything so prioritize what are the things that are most important to your business people. We know that any organization and any kind of level of organization needs to know how are we doing, are we on track, or we ahead of track or we behind and regardless of what we are doing, on, above or below, why, what is that we are doing well, what are we not doing well, where do we need to improve and the last thing what should we do and I think it involves a lot of planning as to how can we get further ahead, if we are behind how do we do catch up and get ahead. If we are doing well, how do we make sure we continue to do, let us put together some planning that help us do that in a systematic fashion.

You want to link the information and insights that you get from your information assets that you have in your organization all the way through the day-to-day activities into the forward looking planning. If planning is just a discrete thing done once a year, it is not going to help people day-to-day. If reporting is something that happens once a quarter, once a month or whatever and people are not really getting the information they need day-to-day, they cannot make decisions that are as effective as it could have they had the rate information at their fingertips and regardless of how you are proceeding going in doing anything, do have a vision and a path to let you move as your organization develops and grows to let you step up in the future to something that will be enterprise class because you know all with the best things in the world, as your organization keeps growing, gets really successful, you want to be able to manage that success. So you want to pick something that has the ability to grow.

Start Small

- Create a roadmap that builds on small successes
- Modular and incremental strategy
- Start anywhere (Reporting, Analysis, Planning, etc)
- Deploy tactically yet ensure initiatives are connected

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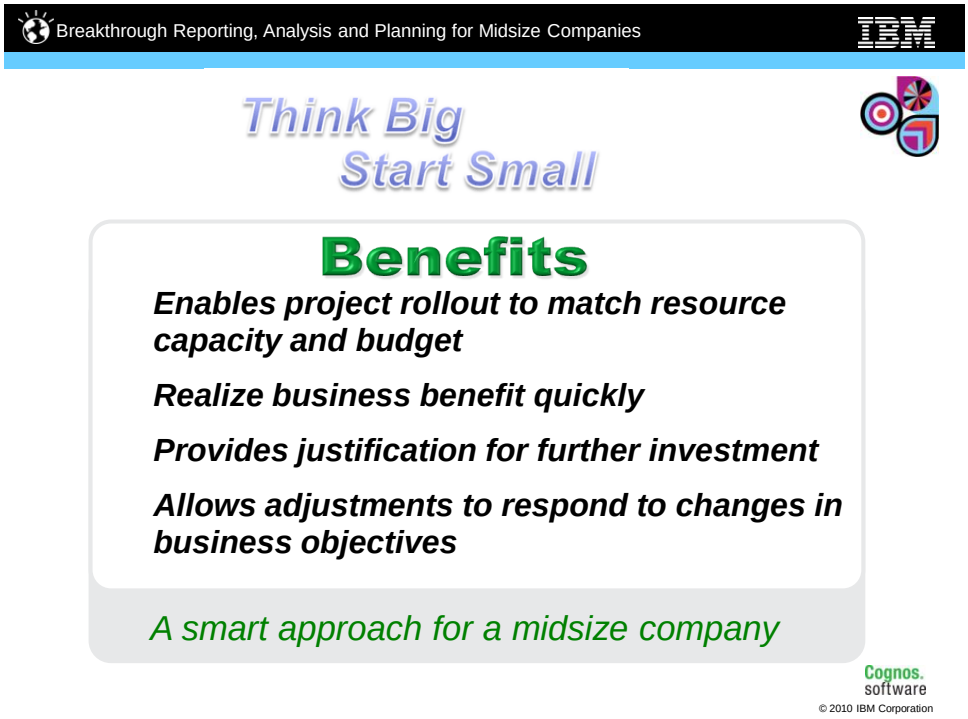
So have a vision, really tie your information assets to what people are doing like give them the stuff that they need to get their job done and let them be able to plan to move forward. So let us think big. But start small. Biggest thing here honestly we have to impart at some level is take small bites. Our experiences have shown that if you have a project that will complete and deliver something in say 90 days, then you can string together a number of visible successes overtime, people are motivated by projects that do complete, that do show deliverables. So create a road map for yourself to accomplish the thing big idea but take small bites as you go along. So for example if you are in manufacturing, you might choose to say you know most important for us might be your parts and suppliers, you know so focus on something and say let us say well in 90 days let us get to a point where we know who are our top suppliers for certain classes of pieces that we need and let us be able to deliver that to whoever the key people are who are responsible for that. You might in financial services you might say let us our understand our customer base and let us establish what percentage of our existing customers have which of our financial offerings and who are the ones that are most likely to want to cross sell or up-sell from one product to another.

Now, again, so to break that down further then say all right well what information do we need in order to that. We will need some customer information or for the manufacturers, we are going to need some supplier information and some parts information. How are we going to get that, if you have nothing at all, you would have to get something but doubtless you do have some amounts of that information already together in your organization? If you don't have a data warehouse and I am assuming if you have jumped on to this kind of a presentation, you may not have a fully developed warehouse a desk or those kinds of things. So how are you going to do that? Well you are going to need to collect information at least in some place where you can get at it and start to do some intelligent things and we will talk about that as well as we move forward. So create a

roadmap for yourself. Here is what we want to get to. In the long term we might have a full-blown information system that will do all kinds of things but start with something that is manageable, do that one, have that be successful, move on to the next piece that you want to do and add something in it. And you might expand from say from your customer area over to your product area, you might go from your suppliers over to financials. You have to decide as you move along, where is the next most important thing and which one is in fact feasible. Sometimes you don't have the information for certain kinds of solutions but you do for others. So that is got to be part of your thinking. Do try and take small bites- 90 days or less is a really good time line to manage a project piece too because if you can show something after that and people say hey that kind of worked and when you come back and say I would like to do another one, that is kind of good and by the way you can start in a number of areas, you might start choose to do reporting for us or you might have reporting in place, no problem and you want to take some analysis and start getting better understanding of what is going on or you have got those pieces around but it is actually your planning is weak and so you have taken on an initiative. It will say let us give people the information they need update a plan, kind of a rolling plan monthly instead of a single budget plan yearly.



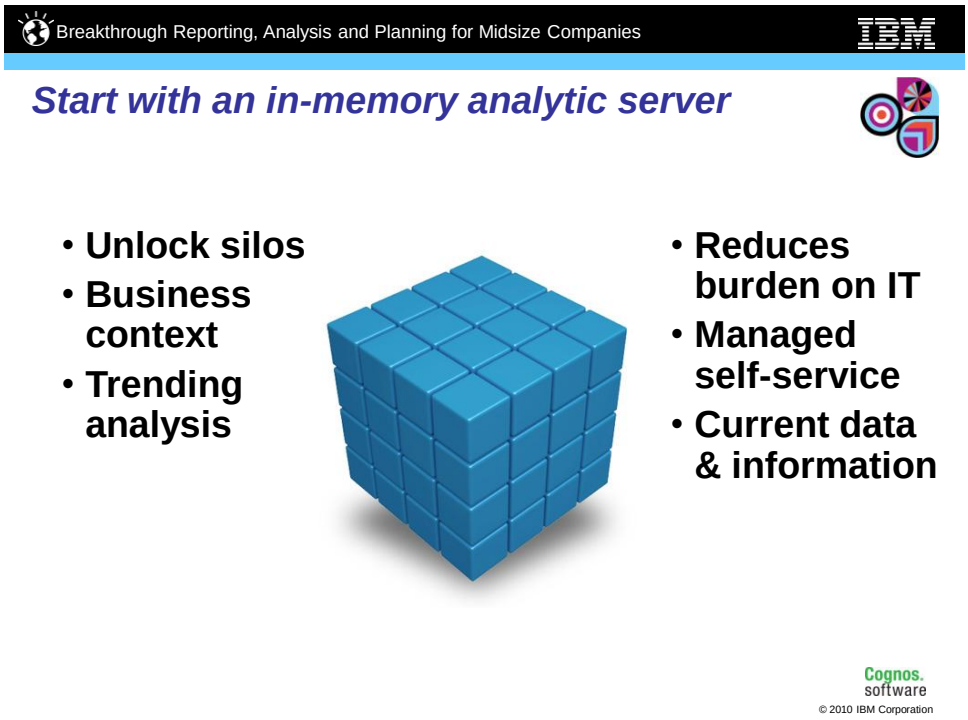
Benefits, well your roll out can match the resource capacity and budget you have in many midsize organizations, you don't have the budget to take on a huge project, however you may be able to get budgets to take on one of these 90 day pieces. And if that comes in and delivers successfully you may then be able to get support from the senior management to take on another piece. Realizing the benefits quickly, if you choose your project well to take something that really delivers visible benefits to your organization that is a good thing. It means if people around your organization will see the results of your efforts, you will actually be able to use that to help your organization perform better and hopefully then develop you know something that will give you budget to do more

and it allows you too by taking small bites you can adjust to changes in your business objectives to the market cycles, to the clients of things that are going on around you, so that you can reorient yourself as necessary. If there is a shift in the business cycle or in your business organizational goals, your next phase, your next 90-day piece can be moved in a different direction even if it was not part of your original plan to go that way, something they change, no problem. You add that into the overall view and start moving to accommodate that as well. So this is a pragmatic approach that has shown to actually work very, very well in quite a number of organizations.

So a good place to start overall. If you don't have a data warehouse, then we would certainly highly recommend that you do some work upfront to start looking at the data that you do have in your organization. It is very common to have again the vision of many spreadsheets floating around all based on different areas and there is going to be something work necessary to aggregate the data and make sure that you are taking the correct source of the correct information. Several parts of your organization might have different customer information, for example and they might assign some arbitrary customer ID that may not agree from one to the other. So there will be a process where you would have to go through and say well wait a minute, we have John Smith in two different places but he has a different ID, let us do some work to bring all of this together. One of the ways to do that and is to bring in the different sources of the information and do reports to cross match between them, so you can begin to see, oh wait a minute, yes we do have common names.

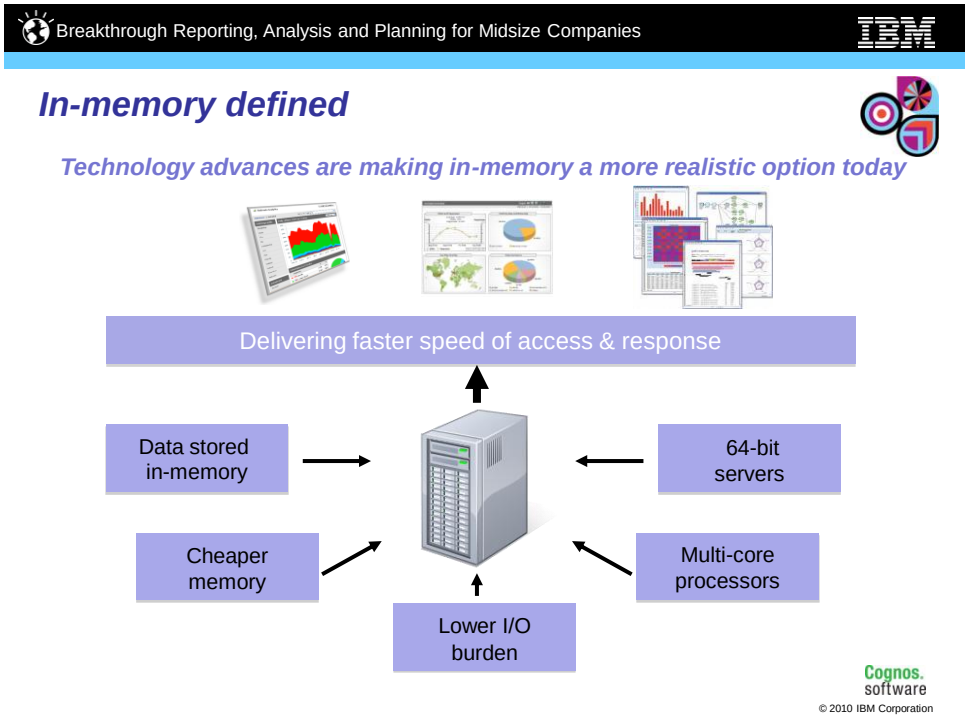
There are a number of tools of course available to help you do that type of ETL type process or what have you or you may have to boot force it depending on your budget. But in any case, you are going to look for things like the same person with different IDs, the same person under you know you might be John Smith in one system and John P.

Smith in another and you know Jonathan Smith or something in some other system. So you are going to have to do some work to look for those kinds of things, to make sure you can really get the information out of the data resources that you have and that is just one piece of it. But in any case you are going to prioritize for your 90-day job, what is that you need and do the pieces needed to set yourself up to that. It is very common that early on if you have not already done the work to do data warehouses, if there are data issues, you need the result before you will be able to move forward with some of the other ones. So you need to have realistic goals in that to realize you are not going to have 100% data integrity when you start and plan for that as part of your process. You have some existing process today that lets you get business done, you are going to implement something new and you are going to need to compare the two in parallel and work towards getting the newer system to be more effective than your existing one or may be you augment that the existing system with your automated one in order to make it more efficient for people, more useful for people out there. So get control of your data is an excellent place to start.



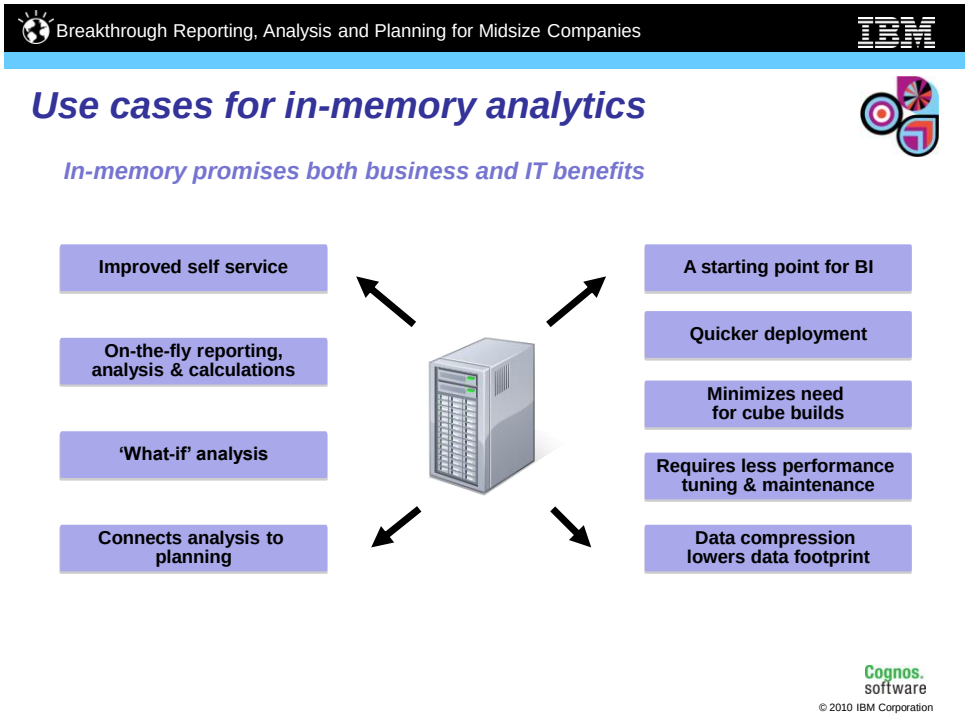
How we help with that is we have a concept of an in memory analytic server. I will go through this in some length to give you a idea but what it does it lets you move those different silos of data into a central place it is flexible, allows you to adjust them quickly and easily. It lets you input business rules and business logic into a central place, so if there is a revenue recognition rule that needs to be put in, perhaps not every one in your organization understands the nuances of that, but you put that into the central store so when someone reports revenue, the business rules are applied automatically when that is put into this in memory analytic server space and that means even if people don't themselves understand all the details, the correct numbers will show up in reports. This is a great place to begin to do trend analysis from as well because you have all other things there, you have your history in place and you can see how things have changed

overtime. There is certainly some initial IT work to help get this all setup but we found that it can actually be managed in a self-service environment. There are a lots of organizations that has end-user communities who do the lion's share of the work in keeping the dimensional structures up to date and keeping the information clean and clear because it is easy enough that they cant, they don't have to have a huge IT staff in order to do this, it is pretty low stress.



Now in memory servers and technologies is not a new concept. It has been around for quite a while but there has a number of breakthroughs in the last little while in terms of things like the bigger one has been cheaper memory as memory prices have come down, the idea of having large amounts of memory on a central server has become more and more practical. The multicore servers give you a lot more horsepower to apply to the problem. 64 bit servers means that you can address a lot larger central memory and not have problems with that, so that has all become quite practical within the last few years, so the cost of having this type of a structure which you know some years ago was too expensive, has now come down to a point where a midsize organization certainly can afford this. You know very affordable box that you could have effectively under your desk almost would have a kind of an enormous amount of horse power, servers and the ability to address a large memory space which really will accommodate the amount of data that your organization would require and what do you get out of this, well because it is low stress, you do get improved self-service. People can actually get out the information they need, these are, in our implementation you can actually write back and correct information through write back, you can do what-if analysis, different scenarios of what would happen if our organization had to grow by 20%. What would happen if the business cycle changed in these ways, what would show up, what would be the impact on different aspects of our business? You can connect through this and once you have those kinds of things, it is very easy to do both reporting, analysis or planning off of

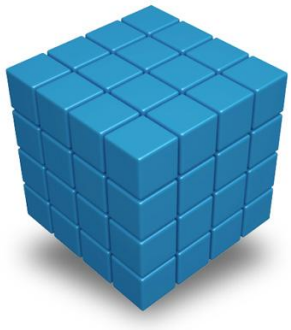
the central store and it makes a great starting point for things like your reports when you want to add in a new module, you bring in new information and you click that into this structure and suddenly that makes your deployment very easy to move forward.



You don't have to do a lot of you know data capture and rebuilds because this is a persistent store, it stays around. People can do updates to it and can be used as your system recorded it if you so desire and again because of a newer technology, very little performance tuning and maintenance, kind of get it setup you understand your growth how it is going to happen and very, very easy to accommodate growth as you go forward and if you need more processes, you have them in and things work quite well and there is lots of data compression and stuff, so things get in the memory the way you would want. So in memory analytics are very hard area, it has been growing in the last while, shown up in the lot of analysts reports and things in an area that had a kind of renaissance based on the idea of faster processors, memory costs coming down so much on the 64-bit in particular.

The benefits of an in-memory analytic server

- **Modern architecture for unmatched performance and flexibility**
- **Combine large amounts and different sources of data**
- **Consistent and centrally manage data, business hierarchies, rules and calculations**
- **Multi-dimensional for powerful analysis and more natural organization of information (products, customers, sales)**
- **Write back delivers closed loop process linking analysis and planning**



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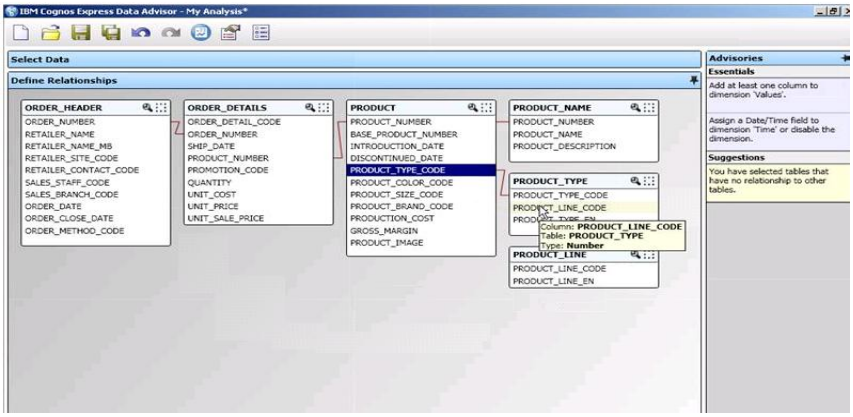
So if you do this, what happens? Well you have this architecture, which is very flexible. It is something that the user community can actually control in the sense of structuring the dimensions needed to run the business the way it is actually done. It is flexible, it is not stuck in a steadfast kind of set of rules, it can actually be tailored to the rules needed for your business, put that business logic into this structure whatever it is. Even if it is inconsistent in certain areas that is okay. There are ways to say, for this are treat it like this, for this other area, treat the rules like this. We will do that, so you can actually do a real world implementation that has value to your organization. The multidimensional means you can get to whatever level of detail you want, manage it, see it, plan for it, do analysis at the level that you require and the write back means that it can be updated as required and again there is security built all around this, so only the right people are enabled to do write backs or to change structures. You are able to control that very simply.

Creating an in-memory cube: Access your data



See technical demonstrations at:
http://www-01.ibm.com/software/data/cognos/cognos-express/on-demand-webinars.html

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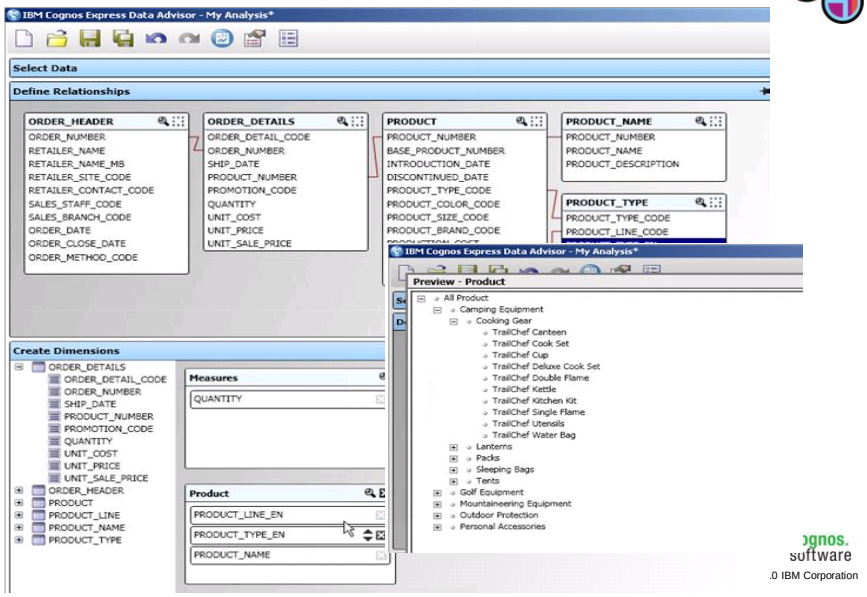
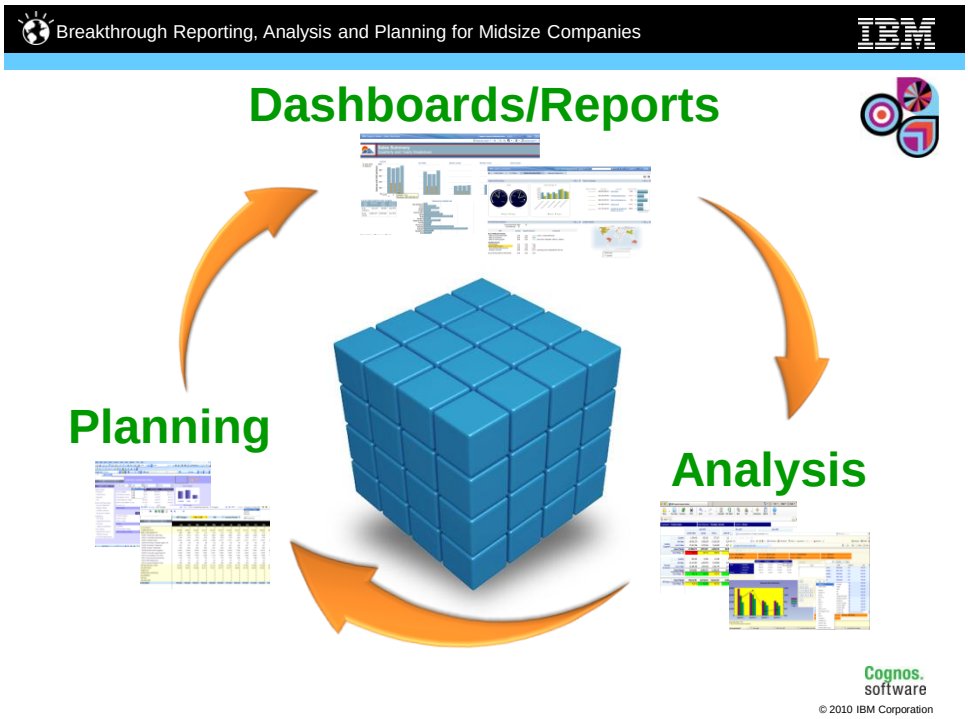
Hope you can see on this, this is just a quick idea just to give you some sense of what creating one of these cubes looks like. This would be a very simple example where we have a number of different things and actually I can make this big enough to see myself. I think I see products and order entry. Now these might be tables in a data warehouse. They might be tables in a database, they might be different flat files or spreadsheets that had information that you have collected from a number of ways, what you would do is bring them in and point this to roll out them and then establish the linkages between the different collections of data, be they tables or what have you. So you can see things like the order number being used, you just drag and drop and you can see the screen captures in the process of dragging and dropping something. Most commonly the names of these linkages have the same, you know we have the same code in different tables, but if there are different names that is okay you can say no I want a product code to match over here to product number in this other table or this other collection of data and that is okay. You can specify how to do that. So that allows you set up linkages between all of these so that you can build the cubes that you need from it. Now there is a link at the bottom of the page there that will get to you and give you a lot more technical example of a full blown webinar just on this topic by all means you can download the slides and link through to that data.

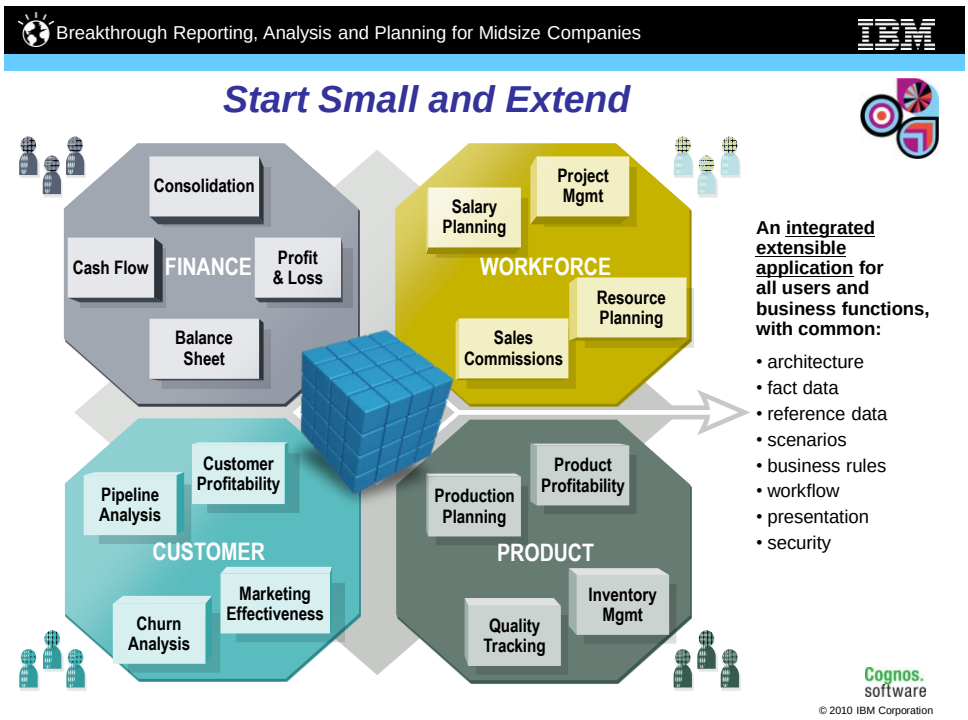
Define your dimensions



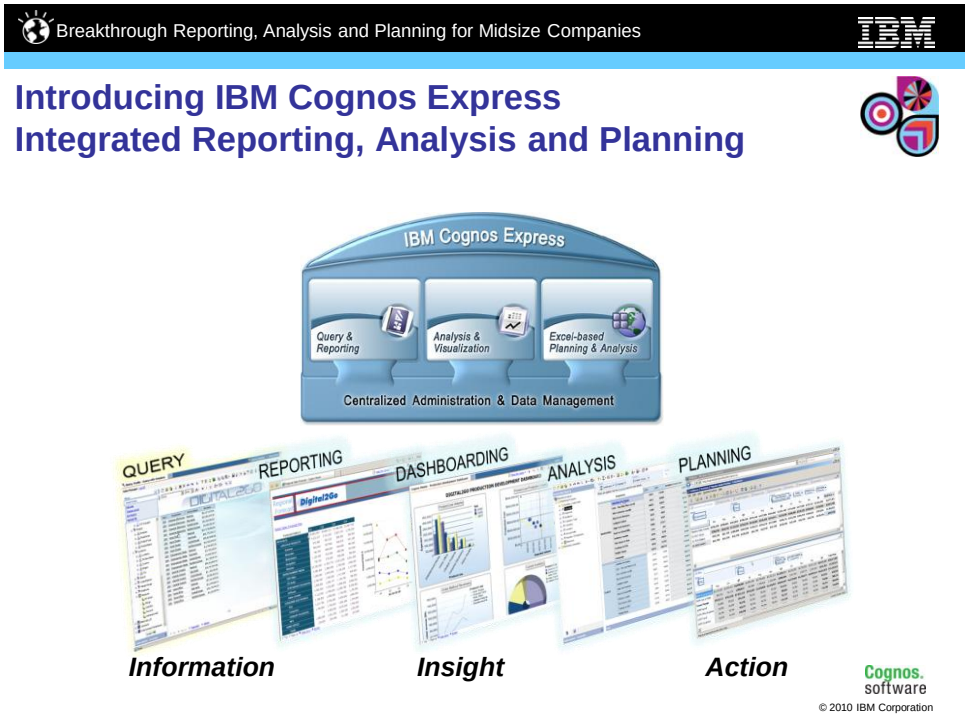
The next thing you would do then is to find dimensions based on the information that provided in. So you know you had product information to read in that into the tool and then look and say on here is how I would like it structured. So there is you know different structures underneath. You can have product types and product classes and product families or what have you and you can actually see what they look like in place and if you see this is pretty straightforward, you don't need to be an IT person to do this, this is where end-users can actually do this for themselves and appropriate people to say well yes we do structure our products in this way and if a change is needed, you can do this very simply again the appropriate people can just go in and change the structure. May you would like some of your golf equipment to show up under leisure instead of under recreation for whatever reason and you move those across, or may be your reporting relationships have changed and you take a group and move them under a different director, it is very easy to do kind of drag and drop in this environment to do that. But there is the kind of thing that will allow your user community to get involved hands on to actually manage the business and have the structures be represented the way they really do business. I do recommend going to the link that was on the previous page and have a look so that you can see how things are going. Whether it makes sense for your organization.

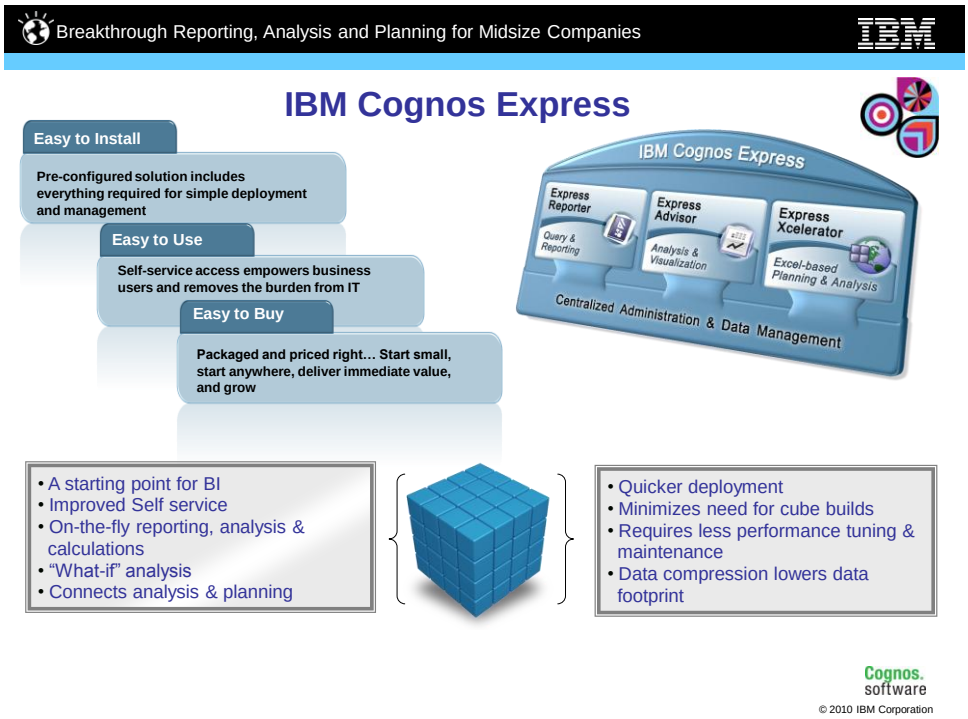


What do you get out of this, well you have that cube now, you built that well that can be the core from which you do dashboards and reporting from which you do trending and analysis and even where you do planning in scenarios what would happen if this happens, and what happens to this, collect your different plans and put them altogether in a common place. We can help you with that.



We have actually blueprints and things, again if you go to the link that I will give you at the end of the presentation, there are all kinds of blueprints and things to give you examples how people have structured, what information have they actually put together in what way, so you are not having to create this from a blank page, you have got sort of things to get you started to show you what kind of structures are common, what kinds of information does the human resources group need and you know where would you find that kind of thing. So the products that we have to help you with this, they are the ones that have been alluding to all the way long and it is called IBM Cognos Express.





It gives you integrated reporting analysis, planning. It is based on the concept of this in memory analytic server and you find it is not onerous to install, it is easy to use. It is actually quite affordable as well. It gives you the kinds of benefits we have been talking about, quick deployment a good place to start your BI from you don't need a data warehouse to start doing this. it is okay if you have one, you take those tables that we were showing from your data warehouse, put them together, this would still give you much faster performance to your reporting, to your analysis and place to do common based planning all in one spot, with those business logic built in place even in addition to an existing warehouse that is widely acceptable.

Reporting

Reporting and Ad Hoc Query

- **Simple, intuitive authoring for novice to experts**
- **Reports and dashboards to meet the needs of different users**
- **Breadth of report coverage – operational, transactional, managed, dashboards, ad hoc**
- **Connect to any type of data and in any combination – relational, OLAP, desktop files**
- **Flexible report delivery via web interface, PDF, Excel, email or Portal**

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So then on the reporting side to give you little more detail, there are a number of different ways of doing the reporting, there is a simple end user drag and drop version and then there is a more robust professional version of doing this you can connect to a number of data sources not just that single cube we talked about. You can get relational sources of any kind basically and you can deliver your reports by the web, PDF into XL if you wish or e-mail or through the portal that is part of this solution as well. And you can have any kind of reports that you want, manage reports, transactional reports and analytical reports the whole gamut, we have been doing this for a very long time and quite been sure in the kind of offering we have here is and we have put it down in a form that is very easy for people to get out.

Breadth of reporting coverage

Managed Reports

- One to many reporting
- Flexible prompting and bursting
- Scheduled

Production Reports

- Large volume
- Presentation quality formatting
- Output to a number of different file types

Transactional & Operational Reports

- Use case: provide a point In time picture of performance to budget, a KPI, or, to monitor indicators

Ad-Hoc Reports

- Interactivity and flexibility
- Self service
- Financial information

Analytical Reports

- High level information with the capability to drill-down to understand details
- Leverages a number of different data sources across the organization

Breakthrough Reporting, Analysis and Planning for Midsize Companies IBM

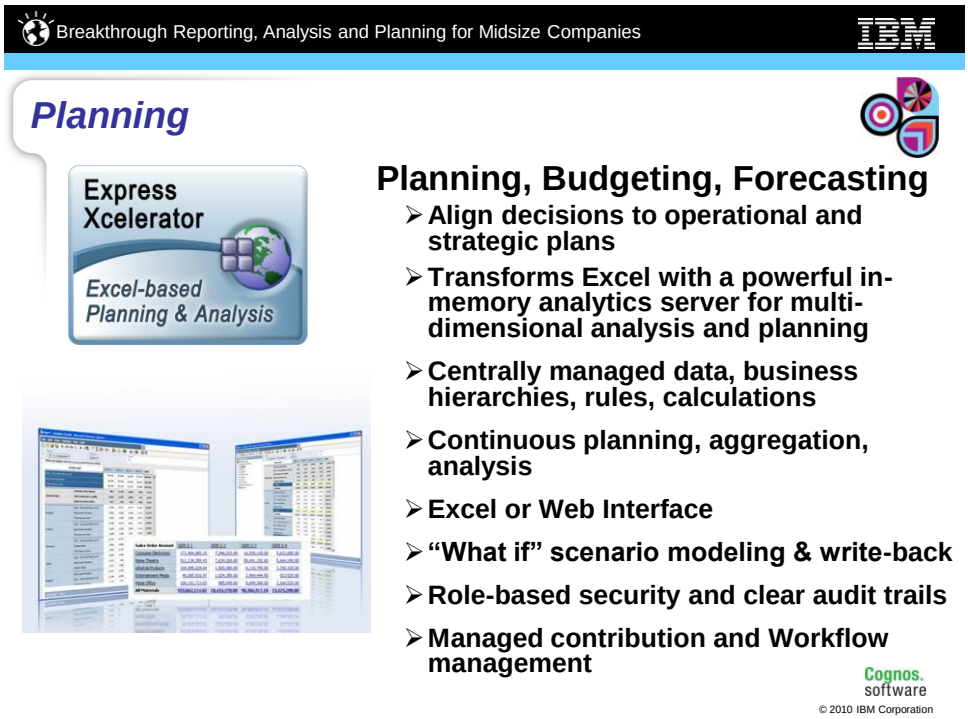
Analysis

Analysis and Visualization

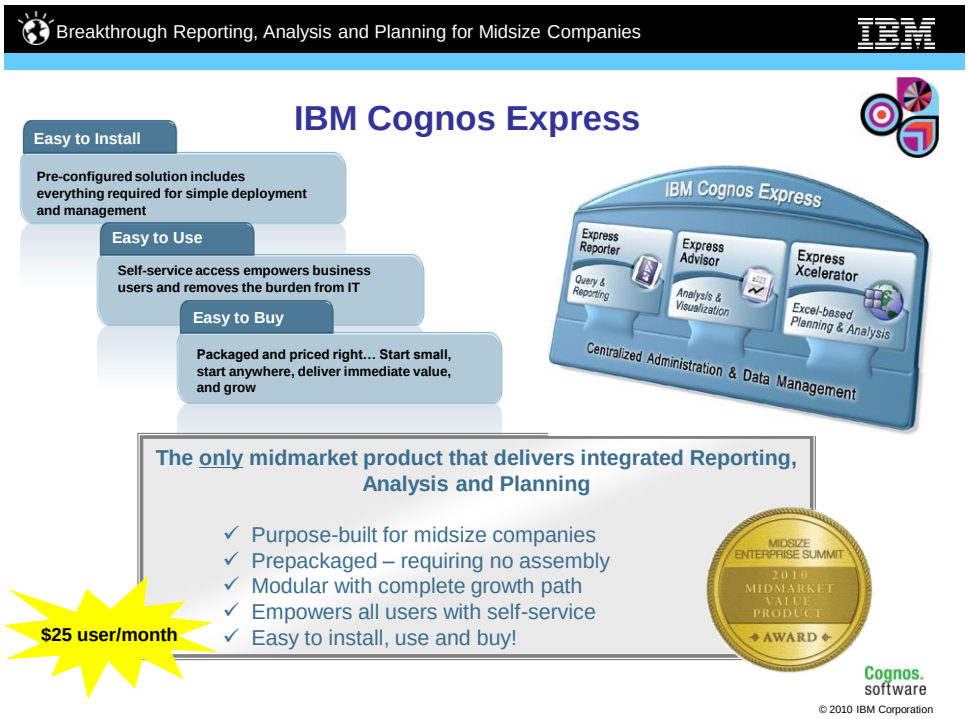
- **Real-time analysis with in-memory multidimensional capability**
- **Slice and dice, drill down/through capabilities**
- **High impact data visualizations**
- **Simplified business view creation and building**
- **On-the-fly business view changes**
- **'What if' scenarios with write-back**
- **Embed live content into MS Office applications**

We also have some terrific analysis and visualization, you can do dashboards and score cards, you can do interactive ones. You can actually do write backs with these rate in place, to update a plan based on what you are seeing, wait a minute, the business conditions have changed, write in place through the dashboard that has that for an appropriate individual you can do that and also take the content and embed into Microsoft office applications if you wish. It will work interactively through those and so it's very,

very powerful, lets you get information and the analysis all through your organization in a form that people are used to seeing it. They are used to working from PowerPoint, put in PowerPoint. If they are used to Word, put in Word. If they want to see through the web, because they want to have it wherever they are, you deliver it that way and they can make use of it.



The last piece in the secret sauce if you will is planning, the integrated planning, budgeting and forecasting. This is something that many solutions out there cannot do in an integrated fashion as easily as we do and it is kind of what differentiates us from some of the other offerings out there. You can have an XL or a web interface for this, you can have spreadsheet or you can actually put it in a websheet if you will where it is available through the web, people can get out it but role based security and clear audit trails, all the way through in any of this, if someone is doing a write back, they have to have privilege and security to do so. There is also an audit trail, so you can go back and look and say wait a minute, who changed what on what date and you know you can even put comments around it and you can collect that at the time of change, why are we making this change so you have a corporate memory of why decisions were made, what changes were made and who did them.



And it is affordable. The way the scenario would work is something like I think is 20 or 25 users doing reporting, this is an actual purchase price. It is not a rental. You can actually finance the software through based on something like 25 years and a three-year payback, it would work out to 25 dollars per user per month to have that. You choose the functionality that you want, you don't have to buy everything, you don't want to do reporting, you don't have to do. You want to do planning or analysis, you need to purchase you choose what functionality you want. If you later decide you want to add one of those functions in, you just add it in. You enable it on and it goes forward from there. So this is a modular type solution. It is one that is affordable for midsize organizations and by the way if you grow and you do want to get to a point where you want to go to a full-blown corporate enterprise wide type of solution there is a very easy glide path to move this into our IBM Cognos 8 Enterprise Solution, everything migrates up in a quite nice fashion.

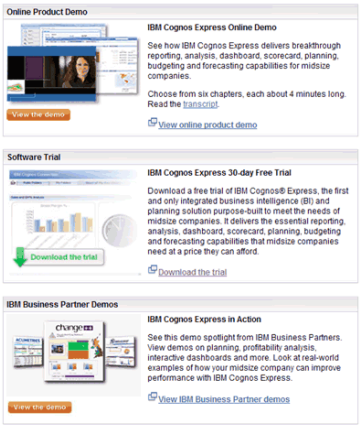
For more information:

Check out the website:

- www.ibm.com/cognos/express

Access demos and 30-day Free Trial

- www.ibm.com/cognos/express/demos



and see for yourself!

So and the last thing I want to share is how to get more information. So I want to share a couple of sites here, a couple of other sites, one is our main website, www.ibm.com/cognos/express, the other one is to let you see some online demos or even download a free trial and that is www.ibm.com/cognos/express/demos. Have a look there. There are a number of examples, there is a great deal of information that is open to you that you can interact with in a number of ways.

Breakthrough Reporting, Analysis and Planning for Midsize Companies IBM

I would like to turn the presentation over to questions at this point. I don't know if people have been typing anything in as we went along, now would be a good time, if you have any questions to go ahead and do that and I will try and respond as we have another 10 or 15 minutes, worse case. By all means, Stephanie, have you got anything for me?

Stephanie Cronin: Yes, I do. We have got quite a few questions coming in and just to remind the audience that you can submit your questions right now through your Q&A window and we will be accepting those right now. I do want to remind people we did get some questions about the slides that can be downloaded in the window right now at the bottom right hand corner of your screen, there is a download button for the PDF and those that are seen in the session on demand after this event but will be posted on the searchdatamanagement as well including a transcript of today's presentation. So the first question we have actually is from one of our financial services or insurance company friends out there, talking about getting control of the data. This particular person had asked, you know they have created a staging area for their data as there are multiple sources. They said the biggest challenging is correlating the various versions of their data, so example they have a single supplier and in our case, they have 4000 insurers and then when they correlate, they actually get down to 200 insurers. What is the best approach for correlating the type of data, do we have any recommendations for them in this capacity?

Mark Morton: Okay, well two things come to mind, one is at this level, clearly you are being able to do it, and albeit you are probably just group forcing it. One way if you imaging this is the role you want to approach, if you imagine having the number of sources where you are coming in and you have the names of your different insurers in those systems and you might actually put up imaginal report that showed the data coming from the various system side by side so that you could begin to do a kind of multidimensional report which wait a minute, where are the overlaps. Suppose on your rows you would be doing one supplier and in your columns the other supplier or the other insurer, and you would actually look to see where have they lined up and it would help you spot areas in your data where the different sources agree and where they differ. You then drill in to that cell, you drill down to see well wait a minute, what are the specific names of the customers involved and it helps you go in your cell to know where do I have to do corrections. So it is a vague kind of thing, but you are doing basically a multidimensional type report that allows you to compare different sources in rows and columns and then where you have an intersection, you can go in and say okay these ones are good, here is the one that should be in that other group and it is not because it shows up in one of the other columns when it should have been in with the other group. Now that is a roll your own approach. There are by the way a large number of tools that do ETL-type matching. IBM has some, there are other fine suppliers that have some as well. So this is an area that is a particular challenge to you, I would recommend yeah you talk with one of the account executives and stuff to help you pick amongst quite a number of tools that are available that simplify that process. We have you know again our own tools that I know to some degree lots of things that will help you spot the different name for the same customer, the same insurer or what have you in different systems or the

same code being used improperly or what have you. There really are tools to help with that. Hope it gives you some idea as well. Other questions, Stephanie.

Stephanie Cronin: Yeah then somebody who was asking once the applications have been running, where do you keep the calculated data?

Mark Morton: Yeah the functions and stuff, that is part of the again I cannot not doing a live demo here but it is part of the in memory analytic server, you are able to establish business rule. So it is that calculative data. There is a view of it that would say okay we have the dimension, we have a matrix called say revenue, actually too broad but in any case, particularly kind of revenue and then you are going to have a set of rules associated with it, if it came from this company it should be for this country. It should be calculated in the local currency and then you know moved over to a standard currency. If it came over here, perhaps you have different tax laws and one geography is compared to another that is all put into the cubes, so when the data is loaded and those rules can be applied. Now if you are talking about how do you then calculate up and down your hierarchy with our particular solution that is actually done on the sly. You keep the detailed level down below that is what goes in and dynamically it is calculated that is one of the nice things about the in memory server, very, very rapid calculations, so you can go through an entire hierarchy filling it all the different rules and all the things on the sly and as you change things, if you add new data in on the sly or write back something, those we calculate in front of your eyes. So we can store it in the in memory analytic server.

Stephanie Cronin: This is a nice segue to this next question, as to what data sources can this application support?

Mark Morton: Simple answer. We will either hook directly into the sort of the well-known databases of the world for less common ones that is typically an ODBC driver all the way through to you could be loading in flat files and CSP format or what have you as long as you can describe that spreadsheets or anything like that any or all of those are very valid source of data. So we have been doing this for quite a number of years, so I don't know off hand of any sources that we don't support but sometimes you do need an ODBC driver to make that possible.

Stephanie Cronin: Okay is there integration with share point?

Mark Morton: Absolutely integration with share point out of the box, it can be installed a number of, I forget the appropriate term, but anyway its objects that show up in the share point offering, so you can drag and drop a report into a sharepoint portal and it shows up you know that is interactive, you can have our own portal and it can show as a window within the sharepoint portals, so if you have a setup that way and it just plays together, we know you need it, so we support it happily.

Stephanie Cronin: Okay great. Stefan is asking about the reporting feature and is there a scheduling report feature part of the solution?

Mark Morton: Yes there is. We are able to sort of in an integrated fashion through it say listen I would like this report to run daily, weekly, every third Friday of the month or whatever, or if you have your own kind of scheduling we can also talk to those as well, so we have support for that. It is very common in a lot of organizations you need to schedule reports for different groups and we integrate the security for that as well. So you know okay we want this to run and these people can see it and that one cannot and that is quite acceptable and it is all provided as part of the infrastructure.

Stephanie Cronin: Another question about the security. Does that leverage existing security, you know what are the parameters to set that up.

Mark Morton: Okay if you have a Microsoft active directory server, we support that directly. You can also you know establish other further kinds of security from within so that you know within a different particular workgroup you can and cannot see different data elements break down to the detail levels. So it is quite extensive security support and again for any of those, there is auditing on the fly as needed, so if someone changes something or changes the shape of the dimension or changes the data element somewhere that is audited, you can roll it back if you have to and what have you.

Stephanie Cronin: Okay. Back to the reporting Greg is asking if it can it tie into Microsoft reporting services.

Mark Morton: Reporting services, yes. You can certainly take a Microsoft reporting services report and show it through our environment, through the portal if you have sharepoint already you could also do that. You can have Microsoft reports in one place and our own reports and analysis beside with them that will work okay. We certainly support SQL server as a data-source and there is no issue there or SQL server analysis services as possible in the reporting environment as well. So lots of good you know interplay between those two is quite acceptable and in fact encouraging.

Stephanie Cronin: Steve is asking is this application hardware and database independent or does it require certain certification to run?

Mark Morton: You know I have an I-Pod in my pocket and it cannot run the service on an I-Pod, so there will be some kind of, certain kinds of hardware restrictions to it. The best place to get that if you go to the Cognos/Express page, from off there if you check our support sites, there is full conformance in terms of which versions of which operating systems on which kinds of hardware are available. You know certainly we run fully on Microsoft and a number of things like that but again the demo is always in the detail, so you would want to check the website to be sure that you know the required stuff for your environment is appropriate.

Stephanie Cronin: Okay great. We are actually getting quite a few questions around the cost and licensing. So I will try to summarize three of these questions here. About the 25 dollars per user per month, we are talking about licensing or maintenance costs.

Mark Morton: The 25 a month that was a purchase cost and maintenance work. Anyway that would be purchase cost as well what we were talking about and that would include maintenance certainly and you know while the purchase was going on, to be honest I am sorry I don't know what happens after we purchase, there might be an ongoing charge but it would be much smaller, that would be the actual purchase cost of the 25 a month.

Stephanie Cronin: Can you define a user, with regards to licensing as a user to someone who can view reports or build reports?

Mark Morton: An user can do anything, build or use you can turn off security, we don't want to give an user to be able to create reports and print that off, so they cant harm you but it is the same price regardless. And it is a named user model.

Stephanie Cronin: Okay. Someone is asking for the details around the memory server, just in case scenarios say that the server goes down, do you need to reload the data again in the server, is there any idea of about what will happen if the server goes down, I guess they are looking at worse case scenario maybe in the case of catastrophe and I am not quite sure this person's request but if everything is in the server, is there redundancy models for it.

Mark Morton: You are now into a sort of depending on your designer system you need but certainly the in memory thing, you know there is a sort of a an ongoing backup so if it goes down and you restart, you don't have to reload from 0, you just pick up from where you left off, so that part is kind of we all handle, any time of transaction, some is writing back to it, that is logged, there is a log file for all of that, so you can go back and see who did and what have you. So if you have to come up at a certain point after a sudden failure, you can certainly come back based on your last backup, you applied the logs against that quite quickly and the way you go you are back in business again. So again if you have very specific uptime needs, you might have redundant servers going on and what have you, multiple servers that sort of piggyback on one another, warm backup, hot backup etc. The simple case is it is one machine and there is a log of what is going on since the last time you did a backup and you apply that on top when you recover.

Stephanie Cronin: Okay I think we just got through most of the questions, and we have one last that came in, is a license required just for viewing reports?

Mark Morton: If you want to do for example put out a report into PDF and then e-mail that to a 1000 people go ahead, you just need the one person who is able to build the report, however if what you want is that when I log on, I am the east coast manager, so I see east coast information. But that same report that is shown to the west coast manager will see west coast information, now you are letting the system do some heavy lifting for you, that would require a license for the east coast guy and a license for the west coast guy in order that they are looking at the same report see information that is personalized to them. If it is just like a magazine or PDF and you want to broadcast that to the world that is okay, they can read that, there is no license needed for that.

Stephanie Cronin: Okay and some folks are asking some questions about the licensing or the financing options for the 25 dollars per user per month, I will actually answer that question, there is a paper on our website, if you go to the IBM.com/Cognos/express site you can drill into the library and we will be happy to actually send out more information on that, it is listed as a data sheet that is called IMB Cognos express, IBM financing, advantage express solution as a PDF that explains how many months this calculation is done over how many what period of time, so I know that needed to be clarified it is not 25 years, the licensing in this, I just pulled up the PDF, it is 25 dollars per user per month based on a minimum investment of 225 US dollars which is 25 users financed over 36 months and then the actual rate may based on your credit worthiness etc. So there is a datasheet with this pricing if that is what you are interested in, and that is a good source to go to. Okay. I don't see more any more questions today. So why don't we wrap today's call? Again here is the access to the link and that is PDF to the trial if you are looking for trying the software yourself or go to our website and poke around and see some of the demonstrations and see how you could leverage this technology in your organization. Mark anything else?

Mark Morton: Nope just thanks, I will just push a thank you slide out there, thanks everyone for your attendance and we hope to hear from you in e-mail and what have you after the presentation.

Stephanie Cronin: Okay great. Kyle?

Kyle LeRoy: That concludes today's presentation, 'BI without a Data Warehouse, an Effective Strategy for Midsize Companies'. If you would like to review today's material at some later data, an archived version of this event will be made available on our Search DataManagement.com webcast library. I would like to thank Mark and Stephanie for taking time to be part of today's presentation. I would also like to thank IBM for sponsoring this event and as always thank you all for taking the time out to join us today. This is Kyle LeRoy, wishing you all a great day.