Event ID: 284062
IBM Cognos Express Planner

Mark Morton: My name's Mark Morton and it's my pleasure to show you IBM Cognos Express version 9.5 today. I'll do this in a number of segments. And in the first segment I'm going to show you interaction with a dashboard, the way a CFO in an organization might do, having a look at overview in their business, in a number of ways, looking through maps and different reports and then actually interacting with a plan live through the portal.

I'll then show you how the CFO could go on to do some planning within a worksheet environment over the web, to look at the impact of currency changes. And, I'll show you that same kind of interaction being done in Excel.

Let's begin. So, here I am logged on as the CFO of this fictitious firm called AUTO2GO, and here on the "Start of Day" dashboard I'm going to look through different aspects of the business. I can click on maps to see how I'm doing in different areas. And if something's interesting to me I can actually hover over it to see what the values involved are, or I can click on it and actually drill through to a report submitted by each of the mangers in the area, giving me a snapshot of their sales and actually some commentary about what the causes are.

So, here we can see that Hybrids are selling well because of a producing -- price reduction program they have in place. I can also look at other reports, and again, drill through for more detail if I so choose. Here's the Hybrid performance for 2009 and 2010. I'll just drill through and then click through that report as needed.

Down below, you can see the actual planning environment that's going on. I have my current plan in place, but let's examine the revised plan. Maybe based on the idea that oh we're selling more Hybrids, so let's adjust our production figures for them. We were planning on selling 5,400 of them, but let's revise that up to 7,000 and what the "P" means is, allocate that proportionally across the different regions. Look over to the right and refresh this report, you can see instantly that's available to the rest of the organization.

So changes made to the analytic server are reflected all through the organization to anyone who has the security enablement to see it. So, the CFO may say, "Okay that's good enough."

Now, let's have a look at perhaps some of the different usage cases for the different kinds of currency numbers. So, I can actually take a look at – let's zoom in on this a little bit, and my base plan shows a revenue of $1.137 billion for the year. Now, that's in the base plan, now I prepared a plan already scenario that's called Weak Euro and we see the euro changing in value across the year. And, where the numbers have turned blue you can see that's the impact of that change in the production types, et cetera, down below. That moves us to $1.102 billion, that's quite a change.

So, let's put in another scenario here and say well, what would be the impact of say the changing dollar in action. So, let's say strengthening dollar, across the year, so we'll call that Strong Dollar, and now I'll do a quick planning revision here. We'll do a spread, just a straightline spread. So, from 1.6 down to 1.2, which is actually a strengthening, that's the way it works here.

You can see the numbers up above changing, you can see down below that's only in North America where the impact takes place, and in fact, of course in the United States is where that happens, so fair enough. And overall, the number –- the impact goes to 1.147 that would actually help us out as compared to the European base case 1.137. With the euro weakening of course, we had $1.102 billion; that was actually hurting our business.

So if I'm the kind of CFO though that prefers to work in Excel, well let's open up that same information. We go in through IBM Cognos Excelerator. This is an environment where we can work through Excel, connect onto our in memory analytic server. I log on so it knows what information I'm actually allowed to see. Different people would be allowed different information. And having identified myself, I have access to certain kinds of information. In this case, I'll call it the currency modeling spreadsheet and here in the same place there's the same scenarios that I just finished doing. They're mine, they are published where I can see them. And I can examine those, you see we use little blue triangles in Excel here, and we could then take them and if we chose I could make one of those scenarios, we could commit it so that other users could see it as well, but I won't do that in this case.

So, the CFO was able to, through Excel or through a websheet, is able to examine the impact of currency changes across the organization and in the bottom line of the business. They were also able to review at a high level the performance of the business through an interactive dashboard and even affect the plan for other people to see as well.

So, that's our first scenario. Now in the next one, we're going to take a look at how a user an end user, maybe one of the managers, Sean from Ireland, could go in and do some planning through the new IBM Cognos Express Planner module. Sean's going to open and revise his salary plan, take a look at drop-list functionality that lets you do driver-based planning and things, and take look at the impacts on overheads to different changes in their plan. Then, we'll see how an administrator can actually review said plan, and after that, how an administrator could actually go in and create the plan that we've just been looking at in a very few number of steps. Let's have a look.

So, I'm logged on here as Sean, the manager of Ireland, and as such, Sean sees only the information that's available for Ireland, because that's what IBM Cognos Planner Contributor, the security knows that's all he's allowed to see. So, I see just Ireland, I'm able to go into that, you can also see the plan is in progress. I've been doing some work already on this plan. So so far we have the revised plan in place here, and you can see I was taking a look at hiring a senior sales executive and another sales executive. And Sean's been actually planning to start different people at different times of year, and maybe we'll go in and adjust that a little more now. So, based on some of the assumptions from the currency changes or whatever, let's move that back to say March. And when I do that you can see the numbers blue you can see the impact on the plans, if I make it a graph down below you can see that a little more easily. And we can see where changes have made place because the planner turns things blue when we put new information in or when we make changes to things.

So, let's put another hire in here, and just see what that might do. We can use drop-down to see the type of person and again driver-based planning that gives me a target salary for that person. Let's put them in, in June perhaps, and you can see the numbers down below that have changed, the graph revises. Whatever I do just instantly is reflected all through the planning environment.

And in fact, not just in these two plans, I could actually see the impact on my overhead. So you can see it affects the salaries numbers of course, we saw those up above, but that rolls up into the total salary costs, and then that rolls over into total overheads, but it doesn't affect things like the marketing costs in this model.

So, what we do in one part of the plan is reflected all through the structures in reporting, in planning, no matter where they're used across the organization. Once I'm satisfied here I could submit the plan and commit it and that would make it finalized for review above. I won't in this case, because I might come back for a different demo or what have you, but at this point we would do that, we would commit it or send it for review, and it would be the plan would move through the work flow to change status.

Let's now log off and log on as the CFO who's going to review Sean's plan. So the CFO logs on and of course they have access to a lot more information across the organization then did Sean. So instead of seeing just Ireland, they're going to see a lot of different information. So, we're starting the contributor planning, and we open up this particular plan.

So as I said they can see all the statuses, all the different parts of the organization. They can see the statuses of the different parts of the organization, some are incomplete, some are in progress, some are not started, and we see Ireland is in progress.

So let's open that up. So I come into this environment, and I actually have the ability because I have the reviewing privilege, now everything's in place here for me. I can actually take ownership of this plan if I want and make revisions. I may decide I don't like what Sean's doing, so let's go ahead. So having gotten ownership, now I can make changes to this plan and say you know what, I don't think April is the right time, let's move him a little later in the year to August and that saves me a bit of money across – in the different overheads. If you can see the different parts of the organization, see it if we refresh down below, you see – there we go, we see those impacts. And so, we might say commit it or submit the plan as appropriate. So as a reviewer, I'm able to look at what Sean submitted and make changes if I so choose.

And at the higher level of course, I can see the status of all the different parts of the organizations, have they started, are they in process, who's complete, who's not, which makes it easy for me to administer the whole system.

Now at this point let me show you how easy it was to build a plan like this. So we're going to start from scratch and create the plan, this little salary planning application. So we say design an application, and this is where the administrative part of IBM Cognos Express Planner is started up. This will provide me with a wizard that will step me through the different requirements to build a plan.

So that opens up, and we have this nice workflow here, let's start with, we'll just give the plan a name. So in this case I'll just call it New Plann (sic). Now I want to say okay, now let's start to define the views of information that I want to make available to different people across the organization. You remember Sean was looking at the different salary views. So if we open up different things you can see different kinds of views that are available as part of the IBM Cognos Analytic Server or ICAS, if you click on one of these views you can actually see what it looks like and we confirm, yes I want people to use that, I want that salary by month view. Good, so those are two views that I would like to have people plan through, so, I'm going to drag and drop those up above into the views section. There's the first, and we put the salaries by month up there as well. One might also add things like the overhead, the sales figures, whatever else I wanted people to do. So that's the first step.

Next, we're going to define an approval higher archery, this is typically a subset of the geography or your management structure or what have you, so in this case we'll use a subset of the regions, and we just take that and we put that up above as well. So, I could go on dragging and dropping here. To save time I'm going to open a pre-populated version of this plan. In fact, the same one we were looking at and I'll show you what else I did here. So all I've done is drag and dropped a few more views and made sure that I had my regions just appropriately set up.

So we've done one defining both the views and the approval higher archery; now we deploy it. that takes those views and puts them out into the structure underneath, and now all we need to do is to link up the structural higher archery with the actual security roles in our system and we'll do that right here.

So, in this pre-populated plan, I already have Sean, the Ireland guy, he's up there. He has the ability to submit plans. Let's put in a review for his boss, the UK manager, and we'll give them review privilege on the right here, and say add to make that show up up above. And there it is. Now let's also add the CFO in, who can review everyone's plan, in this case I'm just doing this quickly. So, that's fine we'll give them review and add them in, and that's pretty quickly what we do. We would do that for each of the different regions, the different levels of the hierarchy to say who could take ownership and who can review the plans.

And, that's all there is to it. The plan is now ready for use just as you saw, Sean interacting or what have you. Very, very simple and very, very powerful, lets you deploy plans throughout your organization; very simply give the administrator the chance to review their status at a glance.

So let's turn now to the analysis capabilities of IBM Cognos Express Version 9.5. Here we have some new wonderful features to do traffic lighting to make it easy to spot best and worst performers. There's some existing functionality that's been there for a while, people weren't too -- hadn't heard much about, so I thought I'd highlight the ability to interact with bubble charts and do selections. And there's a fabulous new capability to allow business users to drag and drop dashboards for themselves, who -- on what we call canvases in the advisor module. So, let's have a look.

So, here I am logged on as the CFO, and I'm actually looking at what's called the sales canvas tab, and in fact it's an interactive dashboard that I was able to drag and drop for to create for myself. It's pre-populated at this point, but I can show you how to interact with that information and do some analysis. Let's just let you see a little better there.

So working here, you'll see that if I make changes on one particular object, that change can be reflected by other objects on the canvas. In this case, the objects on the left are paired and so are the ones on the right, so here on the left, if I just select a different product type like our Hybrids, you'll see that the two charts on the left changed, but the two on the right stayed the same. You can actually see how the actual versus plan performed in the two years, and you can see the average selling price in local currencies, how that worked at different times. If we look across all products you see the curves change again. We're able to look at that in some detail, if we chose to.

Now on the right, you'll see these two charts are also in sync, so we're looking at the plan versus the revised plan, and if we were to change the regions or, maybe take a different, instead of volumes, let's look at our revenue. When I make that change, you'll see that both of our charts change. And put that back, this is very simply done and we'll just take a look at what's called a panel option and we specify a channel, in this case total regions, the two on the right and the two on the left had a different channel to talk to, and that's how you control which objects control which other objects and which ones listen to that, so that's pretty simple.

The other thing you could do is just drag and drop information to move it around, reformat it, you just open a report and drop it onto this canvas and then move it around. Very simply, resize it, do whatever you want and just to show you, you see that kind of idea it's just do whatever you like. And move the other objects around as needed in order to fit. And if you need more room you can actually scroll the canvas down, it's unlimited to go all the way down beyond what you can see here I can actually scroll down to add more objects in there just like that. See, there's room there anytime I want.

So, this capability -- the canvas capability is new in IBM Cognos Express Version 9.5, lets business users create dashboards for themselves from existing reports and what have you. Now, there's other ways here. You notice you can have nice graphics in the behinds of charts now, and you're able to interact with these charts. And here we'll just select these two, they're outliers, and instantly I filter to see that was Hatchbacks for 2009, 2010.

Let's look at -- what are all these yellow ones here? Of course that's the Hybrids you can isolate them very simply and focus in on their performance, but here's a bunch here over on the left, why are they all low. If you just grab and select them like that, oh of course, that's my 2011 sales and it's only a partial year so, of course they're much lower than the other years. So, that's very sensible on that, so very simple way to select things, filter in.

Here’s the new traffic lighting functionality on the left here, you can color code things, have trend indicators. Color the backgrounds to let you very easily spot the good and bad performers. You even have this ability to have an in context bars underneath the data. So for this particular view, 6,000 is a big number, so it takes up the whole column. It’s the largest one in this column of numbers. 900 is about half the figures that are actually less than it and 355 is actually quite a small one in this, compared to this data. In another column the bars would have different sizes.

Over on the right again, you can just click through various charts, and of course anywhere you can also have notes on the various charts and things. You can even update that on the fly if you so choose, let me say something like, "I, the CFO, think this was good too." The CFO, there we go, and so I’m able to change that and you can add those in and update annotations on different charts and graphs and things. So those are the new analysis capabilities in IBM Cognos Express Version 9.5.

Now, let’s turn to reporting. This is not particularly new functionality, but it is very powerful. You’re able to have different kinds of views of reports, you can have them be interactive. There’s financial reporting capabilities, ad-hoc reporting that users can do for themselves.

Let me show you. So here’s another dashboard and we an take a look at some of the different kinds of reports that we can create. Of course we have gauge charts and a number of different plays, you could have background graphics there and there’s bar charts, 3D bars, just to give you a sense of the range of kinds of charting that we do have available in the solution.

And very easily you can scroll through, so if you have lots of reports you can put them together in a way that it’s easy for people to navigate. There’s a detailed sales rep report. We can choose from other kinds of reports. Here’s a particularly prompted report, so a given user can run it in different ways to focus in on different information.

Here’s a nice way to prompt for date through a calendar, that’s kind of a nice way to do it. You can make a choice for what kind of information did you want to see in the report et cetera. You get nice reports and even after you run it. You can scroll through it to see different kinds of pages in the report, and if you wish you can even change the selection, which I know, on the fly dynamically. So great, great capability to have prompted reports that interact in a number of interesting ways.

Here’s an annual report just out to PDF, so you could print it out and distribute it if you wanted with multiple pages and the likes. You can go through different formats, have different kinds of information and actually again, in PDF, you can print this out or burst it out to different users across your organization. Maybe even email it to them.

Here’s a financial style report, you can have a table of content that interacts in this particular way. So, you can see, and also still scrolls through, so your performance in different kind of regions and the like. So that's financial reporting.

You have printable reports, interactive reports, let me show you an ad hoc query, here’s where you might have something, there’s no pre-defined report, so a user could go in for themselves and just very simply drag and drop some information to create a view that is useful to them. So in this case we'll just take something very simple, like we'll take the different car types and maybe just say the margin ranges, or just something like how many did we sell, order quantity, and then you might say let's put the different cars.

So, okay that's no, that's not the way I want that. Let's take that back out. So it's okay if you make a -- you don't have to worry. You can always just change something, put it back in. There we go we have that, different car ranges. Now, let's group that information perhaps, that's nice we get automatic subtotaling on the fly. We can -- you can have that -- we can control the amount of detail in it. And, even if we put a chart in, in fact, just a simple bar chart, and look at this, if we change the level of detail the chart will interact as well in a nice way for us.

So, that's really very powerful. So, this is an ad hoc environment, drag and drop, I can save this report, put it into the portal for myself or do whatever I wanted as I need -- and I'm able to service myself. I can have score cards as you see in the upper left as well, all through IBM Cognos Express, the reporter module.

In this last sequence, I just want to show you a different way of using information. We're going to embed information live into a PowerPoint. A lot of organizations use PowerPoint, and in this case we'll show you how the very same PowerPoint report can display different information to different users across the organization, because the security controls what information they're allowed to have access to. So it's a very small little PowerPoint, but you'll get the idea I hope. Let's have a look.

So, here on my dashboard, so here on my dashboard, you know this might be on a LAN or a SharePoint or what have you, but in this case there's a PowerPoint here and I'm going to open it up and when I do I'll be prompted to produce my credentials. So, if I log on here as the CFO, I'm going to see information from all across the organization. This is just a very quick little PowerPoint, there's only like two pages in it or something, but so you'll see. We now go to slideshow mode, that's just the way people typically look at it, and when I go to this second page, this is actually live. I'm logged on as the CFO, so I see all the regions, but if I now actually interact with the information, I could say for example actual versus plan, the charts change, and go back and look at actual again, and again the numbers change. We can select a particular kind of -- or just choose here, just Hybrids here. So the reports are totally interactive, but I'm seeing information from the perspective of the CFO, so I have access to all the different regions or what have you. So, I can choose any particular region and have a look at it.

Let's now exit and have a look at this very same PowerPoint, but this time we'll log on as Sean the manager of Ireland. So when we log on here, and now the very same report is actually going to come up, but now the information will be slightly different. We'll go to slideshow mode, and look, I see only Ireland. All the rest of the organization is masked from me, because my security class doesn't give me permission to see that, but now within Ireland, I'm now able to interact in any way that I wanted and do whatever kinds of analysis. It's live, I can change the measures that I'm looking at or what have you, but it's all relevant to Ireland. Very same PowerPoint, providing different information, securely to different parts of the organization.

So, you don't have to have multiple copies of the spreadsheet or of a PowerPoint, you can have just a single object and let the security in the system control what users see, so a nice kind of capability in IBM Cognos Express.

So, I hope this brief rapid-fire demonstration has helped give you some idea of some of the powerful new capabilities that we have, and if you'd like to go to our www.ibm.com/cognos/express/demospage, you actually can see quite a few more segments as well. Thanks very much.