

IBM Software



Business Analytics **Forum** 2010

See The Future Of Decision Making

November 3-5, 2010

Gold Coast – QLD – Australia

IBM Business Analytics Session 1267C

Coordinating Business Dimensions in a
Dynamic Environment – An Inside Look
at IBM Cognos 10 Business Viewpoint

Zack Finer, Product Manager
James Garty, FPM Pre-Sales
jamesgarty@au1.ibm.com



Dimensions Change Constantly

“I need different product hierarchies for programs and revenue.”

Marketing Manager

“I wish the sales hierarchy reflected the latest re-organization.”

Operations Manager

“I want to realign my cost centers so I have plan and actual views.”

Financial Analyst

“When will the data warehouse reflect the customer loyalty index?”

Brand Manager

**Every department in every organization manages dimensions –
How can your organization do it more efficiently and timely?**



Classic Business Challenges

Cost Centers

Cost center roll-ups changing daily, weekly, monthly.
Out of sync with core finance systems.
Different cost center hierarchies and accounting for plan, and for future years.
Knowledge base in finance team.

Product Hierarchies

Product hierarchies changing constantly by brand, family, geography.
Out of sync with reporting & planning systems
Scenario and planning hierarchies differ by product, brand
Knowledge base in product management

Sales Hierarchies

Sales teams, account ownership and geographic/product responsibility changing frequently
Out of sync with most systems due to the dynamic nature of sales organizations
Many unique and different sales structures and methodologies
Knowledge base in sales organization

Account Standardization

Many views of measures and accounts across different systems.
Account relationships different for planning and actuals, as well as management reporting
Many measures and ratios “outside” standard systems
Knowledge base in accounting



Sample Business Case Problem



Cost Center Management & Accountability



Cost center rules and accountability change in business ecosystem weekly



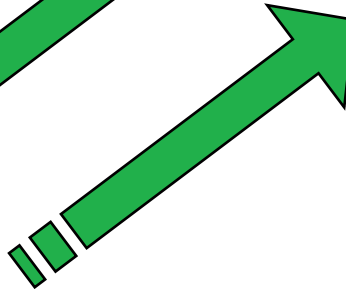
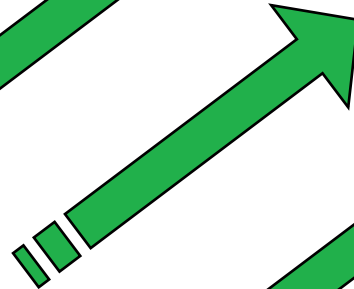
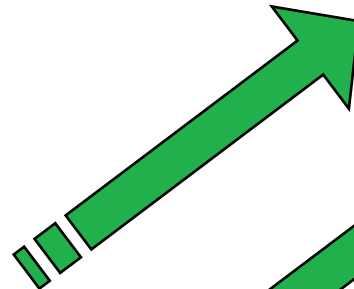
Finance stewards manage discrepancy between source systems and new rules in spreadsheets



Finance stewards and IT analysts manipulate processed information to support new cost center alignment



Cost centre structures and hierarchy established in source systems



Master definition supported by IT controls



Infrequent updates from business users reflected in source systems



Sample Business Case Resolution



Cost Center Management & Accountability



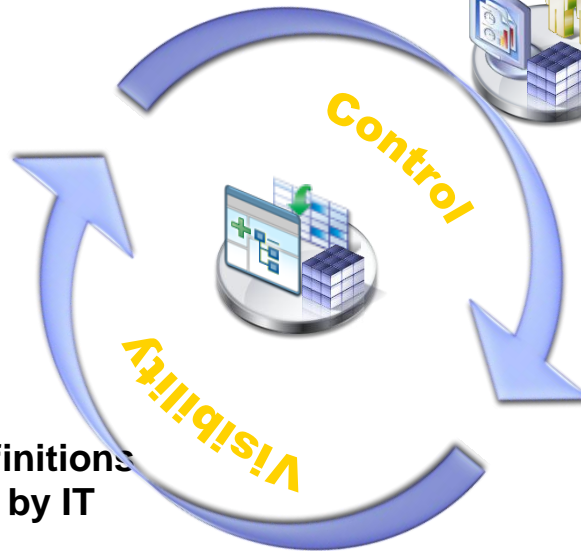
Cost center rules and accountability change in business ecosystem *managed in coordinated system*



Finance stewards and business users manage cost center alignment directly



Cost centre structures *coordinated from user community*



Finance stewards and IT analysts feed processed information to support transaction systems & controls



Master definitions supported by IT controls



Timely updates from business users reflected in source systems



Business and IT Partnership



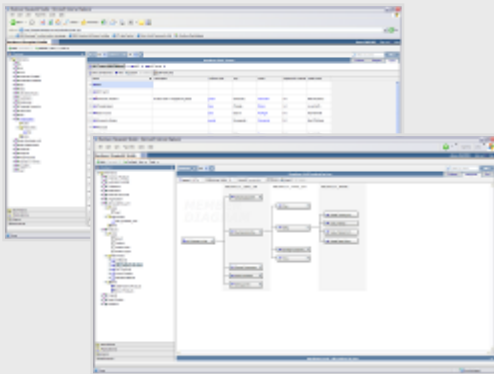
- **Freedom to own dimension structures**, relationships and attributes in a shared view
- **Replacement of manual, error-prone efforts** with fully transparent, automated and auditable processes
- **Approved shared viewpoints** for use across BI and Performance Management, and provide those approved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



Business Viewpoint

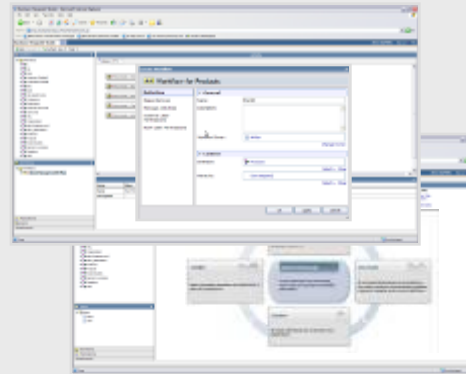
Create and Maintain

Enable the business to capture their own current and future viewpoints



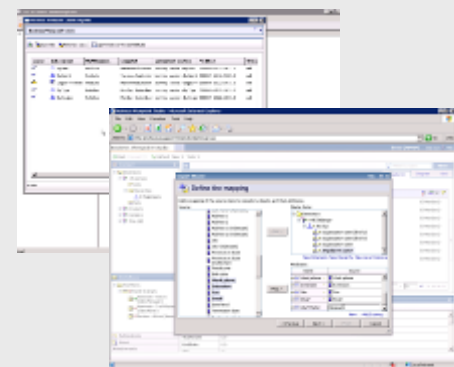
Govern and Collaborate

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



Share and Synchronize

Share approved viewpoints across the decision-making process and systems



Business Viewpoint Impact

Cost Centers

Cost center roll-ups changing daily, weekly, monthly.
Out of sync with core finance systems.
Different cost center hierarchies and accounting for plan, and for future years.
Knowledge base in finance team.

Product Hierarchies

Product hierarchies changing constantly by brand, family, geography.
Out of sync with reporting & planning systems
Scenario and planning hierarchies differ by product, brand
Knowledge base in product management

Sales Hierarchies

Sales teams, account ownership and geographic/product responsibility changing frequently
Out of sync with most systems due to the dynamic nature of sales organizations
Many unique and different sales structures and methodologies
Knowledge base in sales organization

Account Standardization

Many views of measures and accounts across different systems.
Account relationships different for planning and actuals, as well as management reporting
Many measures and ratios “outside” standard systems
Knowledge base in accounting



Business Viewpoint Impact

Cost Centers

- Manage dimension member attributes, aggregation and security.
- Manage changing rollups and additions/subtractions.

Product Hierarchies

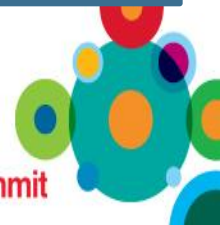
- Maintain unique versions for history, actual, plan.

Sales Hierarchies

- Maintain unique ownership by month, year, quarter.
- Assign ownership to business managers.

Account Standardization

- Coordinate different views for planning, reporting, consolidations.



The Many Faces of Business Viewpoint

Pension Investment Plan

- **Problem:** Had a core problem to manage different versions of key structures from Oracle Financials, needed to revert to previous versions, needed history of change for audit and compliance.
- **Products:** TM1, Oracle Financials
- **Solution:** Used Business Viewpoint to manage all updated to TM1 dimensions

Financial Services

- **Problem:** Manage rapidly changing business, regulatory controls and provide transparency, map business structures across acquired entities.
- **Products:** TM1, Enterprise Planning, BI Reporting
- **Solution:** Needed Business Viewpoint to create standardized and versioned hierarchies that update their plans, analysis cubes and reporting databases.

Pharmaceutical Manufacturer

- **Problem:** Needed to provide flexibility for business users to manage brands and consumer packaging business structures
- **Products:** Business Intelligence
- **Solution:** Provided Business Viewpoint to their business user to create hierarchies from managed / golden lists of products and customers

Multiple Customers with Excel

- **Problem:** Manage and update important business dimensions in Excel, circulate spreadsheets for update by multiple people, correct errors.
- **Products:** Using spreadsheets to manage constantly changing sales territories, customers and business units structures.
- **Solution:** Needed Business Viewpoint to reorganize dimensions based on business need and change



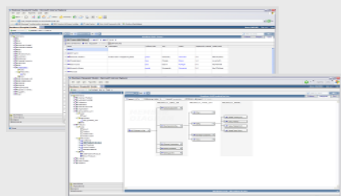




DEMO

Create and Maintain

Enable the business to capture their own current and future viewpoints



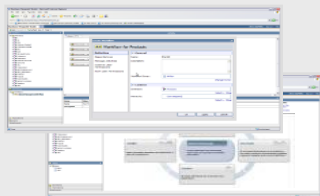
- ✓ Build dimensions from various data sources
- ✓ Demonstrate the use of List as reference data
- ✓ Creating multiple hierarchies the reference data
- ✓ Maintaining reference data, attributes and validation
- ✓ Advanced features – relationship table, key management
- ✓ Build dimensions from various data sources



DEMO

Govern and Collaborate

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



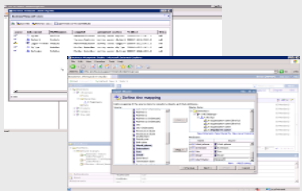
- ✓ Business users updating hierarchies
- ✓ Workflow review – nominate, review, approve
- ✓ Version management
- ✓ Track and report history



DEMO

Share and Synchronize

Share approved viewpoints across the decision-making process and systems

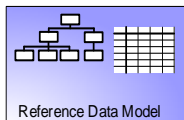


Sharing dimension information across systems

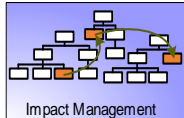


Report structure update

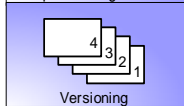
Business Viewpoint Overview



Model master chart of accounts, measures, cost centers, legal entities and other performance management dimensions including product, customer, channel, geography.



Synchronize dimensional views and attributes with source systems.



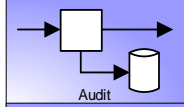
Provide version control for current and future states.



Distribute responsibility to business leaders and managers.



Manage the change process through all stages of request, approval, implementation and release.



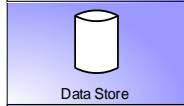
Assuring end-to-end integrity of financial reference data used across multiple systems.



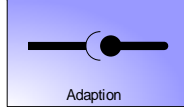
Auditing, report and alert all changes to ensure traceability and compliance.



Provide appropriate access control for viewing, changing, authorising and publishing changes to reference data.

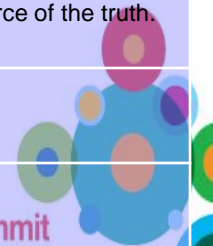


Provide a centralised repository for reference data that allows visibility of impact of change across the enterprise and a single source of the truth.



Manage multiple formats of the same financial reference data for different systems.

Seamlessly integrate with IBM Cognos reporting, planning and consolidation systems.



Business Viewpoint 10,1

Advanced
hierarchy
modeling and
collaboration

New **Relationship Tables** allow business modelers to create advanced hierarchies using simple tables and even other hierarchies

Improved
coordination with
enterprise
reporting

Streamlined wizard and guided user interface for **importing and updating dimensions** in databases and reporting datamarts.

Enhanced TM1
Dimension
Management

Manage alternate hierarchies in TM1 by subscribing to multiple Business Viewpoint hierarchies in a single TM1 dimension



Business Viewpoint 10.1

Business user
data management

Coordinate the data flow of business information in Performance Management system

Packaged
Dimension
Templates

Save dimension structures (lists, hierarchies, sets, and optionally members) as a template and **package key dimensions for re-use** by others

Governing
through Business
Rules

Establish important **validation rules**, including flexibility to enforce business rules including default values and custom messages





For further information

Business Viewpoint whitepaper, demo, fact sheet on IBM.com

<http://www-01.ibm.com/software/data/cognos/products/cognos-8-business-viewpoint/>

Visit our Business Viewpoint Booth

<http://w3-103.ibm.com/software/xl/download/ticket.do>

Attend additional sessions on Business Viewpoint

WHAT: CFP 1267 – Coordinating Business Dimensions in a Dynamic Environment - An inside look at IBM Cognos Business Viewpoint

WHEN: Friday November 5th at 1400



Zack Finer, Product Manager
zfiner@us.ibm.com



James Garty, Pre-Sales
jamesgarty@au1.ibm.com

Disclaimer

© Copyright IBM Corporation 2010. All rights reserved.

U.S. Government Users Restricted Rights - Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

THE INFORMATION CONTAINED IN THIS PRESENTATION IS PROVIDED FOR INFORMATIONAL PURPOSES ONLY. WHILE EFFORTS WERE MADE TO VERIFY THE COMPLETENESS AND ACCURACY OF THE INFORMATION CONTAINED IN THIS PRESENTATION, IT IS PROVIDED “AS IS” WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. IN ADDITION, THIS INFORMATION IS BASED ON IBM’S CURRENT PRODUCT PLANS AND STRATEGY, WHICH ARE SUBJECT TO CHANGE BY IBM WITHOUT NOTICE. IBM SHALL NOT BE RESPONSIBLE FOR ANY DAMAGES ARISING OUT OF THE USE OF, OR OTHERWISE RELATED TO, THIS PRESENTATION OR ANY OTHER DOCUMENTATION. NOTHING CONTAINED IN THIS PRESENTATION IS INTENDED TO, NOR SHALL HAVE THE EFFECT OF, CREATING ANY WARRANTIES OR REPRESENTATIONS FROM IBM (OR ITS SUPPLIERS OR LICENSORS), OR ALTERING THE TERMS AND CONDITIONS OF ANY AGREEMENT OR LICENSE GOVERNING THE USE OF IBM PRODUCTS AND/OR SOFTWARE.

IBM, the IBM logo, ibm.com, and IBM Business Analytics are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries, or both. If these and other IBM trademarked terms are marked on their first occurrence in this information with a trademark symbol (® or ™), these symbols indicate U.S. registered or common law trademarks owned by IBM at the time this information was published. Such trademarks may also be registered or common law trademarks in other countries. A current list of IBM trademarks is available on the Web at “Copyright and trademark information” at www.ibm.com/legal/copytrade.shtml





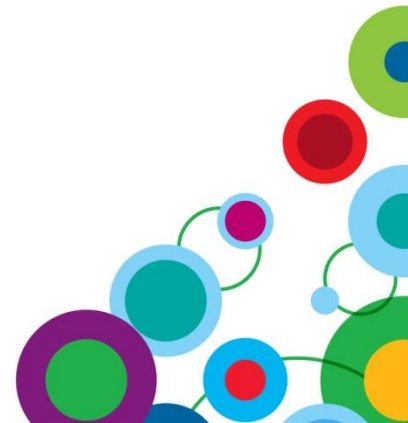
WIN *an Apple® iPad*

Please remember to complete your session evaluation online at the Communication Station or point your Smart Phone browser to:

www.spss.com/goldcoast



For a chance to win an Apple® iPad



Thank
YOU

© Copyright IBM Corporation 2008 All rights reserved. The information contained in these materials is provided for informational purposes only, and is provided AS IS without warranty of any kind, express or implied. IBM shall not be responsible for any damages arising out of the use of, or otherwise related to, these materials. Nothing contained in these materials is intended to, nor shall have the effect of, creating any warranties or representations from IBM or its suppliers or licensors, or altering the terms and conditions of the applicable license agreement governing the use of IBM software. References in these materials to IBM products, programs, or services do not imply that they will be available in all countries in which IBM operates. Product release dates and/or capabilities referenced in these materials may change at any time at IBM's sole discretion based on market opportunities or other factors, and are not intended to be a commitment to future product or feature availability in any way. IBM, the IBM logo, Cognos, the Cognos logo, and other IBM products and services are trademarks of the International Business Machines Corporation, in the United States, other countries or both. Other company, product, or service names may be trademarks or service marks of others.

