

## **IBM Cognos Software Demo Transcript**

### **IBM Cognos TM1 Executive Viewer**

In the following demonstration, we will highlight the features and benefits of the Applix Executive Viewer Reporting and Analysis Solution. Executive Viewer is designed to give business users and analysts alike the ability to gain insight into their business with on the fly answers to critical questions through interactive analysis and report generation.

With no programming or training needed, users are provided with an out of the box solution that gives them the level of information they need with unbeatable response times.

Applix Executive Viewer works in conjunction with leading OLAP databases like Hyperion SBase, Microsoft Analysis Services and Applix TM1 to deliver broad business analytics capabilities. These include self-service analytics, formatted reporting, dashboarding and Microsoft Office integration.

Let's start by taking a look at the self-service analytics capabilities of Executive Viewer. In this example, you will first notice that we are working within a standard Web browser. Executive Viewer is a Web-based application that allows end users to easily access critical business information no matter where they are.

We start by looking at a simple product profitability report with product information on the rows, time periods shown across the columns, and additional dimension filters such as sales regions, scenario and measures displayed in the off-spread area of the report.

In this case, we are focused on margin percent and have applied traffic lighting to highlight areas with particularly strong or weak performance. A bar chart is shown in the lower section of the screen graphically representing product line performance by quarter.

Starting the analysis, I can see based on the traffic lighting that has been applied there is some particular areas of concern. The first thing I might want to do would be some simple drilling into specific areas to see lower levels of detail.

With a single click, I can drill into Q3 to see the months that make up that quarter. Doing so changes both the cross-tab report on top as well as the graph down below.

Graphs in Executive Viewer are also fully interactive, allowing me to drill up and down and also pivot my information. By simply dragging and dropping the product dimension on to my quarters, the report now displays the product across the columns and the quarters on the rows. Pressing the undo button returns me to previous iterations of the report.

At this point, I will focus my attention of the cross-tab section of the report to begin some deeper analysis. I am interested in further exploration into lower levels of detail, both in terms of the time periods and product information.

You can see how I can easily expand the quarters to show monthly detail. I can also open the member selection dialogue box to choose specific time periods I would like to see displayed. In this case I am interested in looking at the 12 months that make up the year.

By selecting the lowest member of the hierarchy, I am now presented with a report showing monthly detail across the columns. I'm immediately drawn to the cream soda product line as an area of particular concern. To understand more completely what's going on in this area, I can expand to see the products that make up that product line. Vanilla cream jumps out as doing particularly poorly, and I would like to focus my attention on that product for further analysis.

By choosing the keep only option, I have narrowed the report to focus exclusively on that product. From here, I now want to see if the performance is isolated in any specific sales regions. By dragging vanilla cream on top of my region dimension, I can now see how that product is doing across my different markets. Drilling into each region, I can see performance at the state level.

Based on this analysis, I would like to view the east region and start to look at some additional information. Here I will nest my measures dimension with my regions and use the member selection dialogue box to also include sales and cost of goods sold in the analysis.

I would like the east total to appear at the bottom of the report, so I simply drag and drop it where I want it positioned. I also want to just see margin percent for my total row. So with a few clicks, the report now displays an asymmetrical nesting where east is shown at a more summary level.

I can also perform some formatting at this point as well. As you can see, there are a variety of formatting options available, such as font, font size, text colors, decimal precision, scaling and alignment.

In this case, I simply want to make that final row of the report appear in bold text. From here, I can add a graph to the report to aid in identifying problem areas. Since I'm looking at both dollar sales and cost of goods sold along with margin percent, it will be helpful to add another axis to the graph with a different scaling factor. At this point, I would like to share this report with some colleagues. To do so I can choose to print the report. You see here a preview of how the print-out will look. The single report understands the dimensionality of the data and will run for each of the sales regions included.

Instead of printing the report directly, I can also choose to save it as a PDF report and e-mail it to the appropriate team members. Executive Viewer automatically creates a PDF file and adds it as an attachment to my Outlook message. Clicking on the attachment, you see how the report will look when viewing the Adobe Reader.

Returning to the report, I am further along in my analysis and would now like to see how the New York region sales are performing versus plan for Q3 and Q4. To do that, I can isolate the report on New York and then nest my scenario dimension under the quarters and select both actual and budget to display.

Now I will use Executive Viewer's built-in calculator to create a variance calculation. Using one of the 27 built-in functions, I choose variance percents and Executive Viewer will automatically create the calculation for me.

Lastly, I can apply traffic lighting to the report to help identify areas to focus on. I can now see New York is coming in above plan in terms of revenue performance with the cream soda line doing particularly well. At this point, I might want to further analyze the price/volume relationship to see if that may be impacting margins.

We will now shift gears and look at how Executive Viewer can be embedded into dashboards and portals. Executive Viewer provides native integration to Microsoft Sharepoint and other leading portals. Executive Viewer objects can also be easily embedded into corporate intranets and custom applications.

This sample intranet portal includes a variety of information such as news headlines, stock quotes, and Executive Viewer report objects presented on a single page. You see there are actually three different Executive Viewer reports shown, each of which could be coming from a different database. These reports can be set up to be fully interactive, or as in this case, limited to simple drop-down selections. As I change the month selection, the date in the reports all change simultaneously.

The dashboarding capability of Executive Viewer allows executives and decision-makers to assess the health of their business at a glance. Here you see an example showing five different reports on a single page.

Lastly, Executive Viewer can also present information via maps or other shape files. Here we see global sales performance presented graphically on a world map. As with the other charts, maps are fully interactive, allowing me to drill down into a particular area, in this case, the U.S.

As mentioned earlier, Executive Viewer is fully integrated with the Microsoft Office suite. We will now look at how you can interact with Executive Viewer via Outlook and PowerPoint.

Here you see an Executive Viewer report embedded within Microsoft Outlook. Like the previous example, this report is fully interactive, allowing me to perform additional

analysis such as drilling down, swapping rows and columns, and changing the report presentation from chart to cross-tab and back to chart again. Using this capability, Executive Viewer can be easily accessed by business users within a common desktop application that they are already using on a regular basis.

Here we see the same report embedded in a PowerPoint slide. Presentations can now come alive with slides that are connected live to the OLAP server. The same level of interaction we've seen so far is also available within a presentation slide. With a live connection to the database, numbers are always up to date with supporting detail a click away.

As you've seen, Applix Executive Viewer provides business users with real-time Web-based access to information via an easy to use interface delivering self-service analytics, formatted reporting, dashboarding and Microsoft Office integration.

For more information on Executive Viewer or to schedule a full demonstration of the product, please call 1-800-827-7549, or visit our Web site at the address shown on the screen.

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