

Cognos Analytics: Dashboards v. Reports

“If dashboards and reports both show key findings, then why do we need them both?”

“What are the differentiators?”

“What best fits my company’s use case?”

Mixed messaging about dashboards and reports has led to these questions circulating around Business Intelligence platforms.

When first starting as a BI Tech Specialist, I found myself asking similar questions. I admit — I was another recent grad deferring to misleading Dashboard and Report descriptions. I thought of dashboards only as cool widgets and graphs and reports as detailed findings in column and row format.

How wrong was I? There is so much more to these features...

Below is my interpretation of dashboards vs. reports, which I use when explaining the differences to clients (i.e. Cognos Analytics).

Let me know in the comments what you would add or edit!

Dashboards

are for quickly visualizing your data, interaction with data, exploring data, and discovering key insights. A user has the ability to identify trends in seconds, which they may have not found without knowing SQL or other traditional report building concepts. Dashboards are ideal for end-users looking for an easy to use workspace to visualize data and dive deeper into their data at a certain aggregated level. This feature speaks to all experience levels by providing an AI assistant, drag and drop, and insights bulb.

Emily’s Top 4 Cognos Analytics Dashboarding Features:

[AI Assistant](#)

Utilize the Assistant panel to ask a question or create visualizations through a text-based conversational format, that can be added to your dashboard.

[Insights](#)

Detect and validate important relationships, outliers, and significant differences in your data visualizations.

[Explorations](#)

Explorations is a supplemental feature to dashboards. This area expands your dashboarding workspace to help the user further analyze data and derive patterns that are actually driving their data. By maintaining the same easy to use interface, users can receive additional written details about each visualization, identify patterns, and discover correlations in their data.

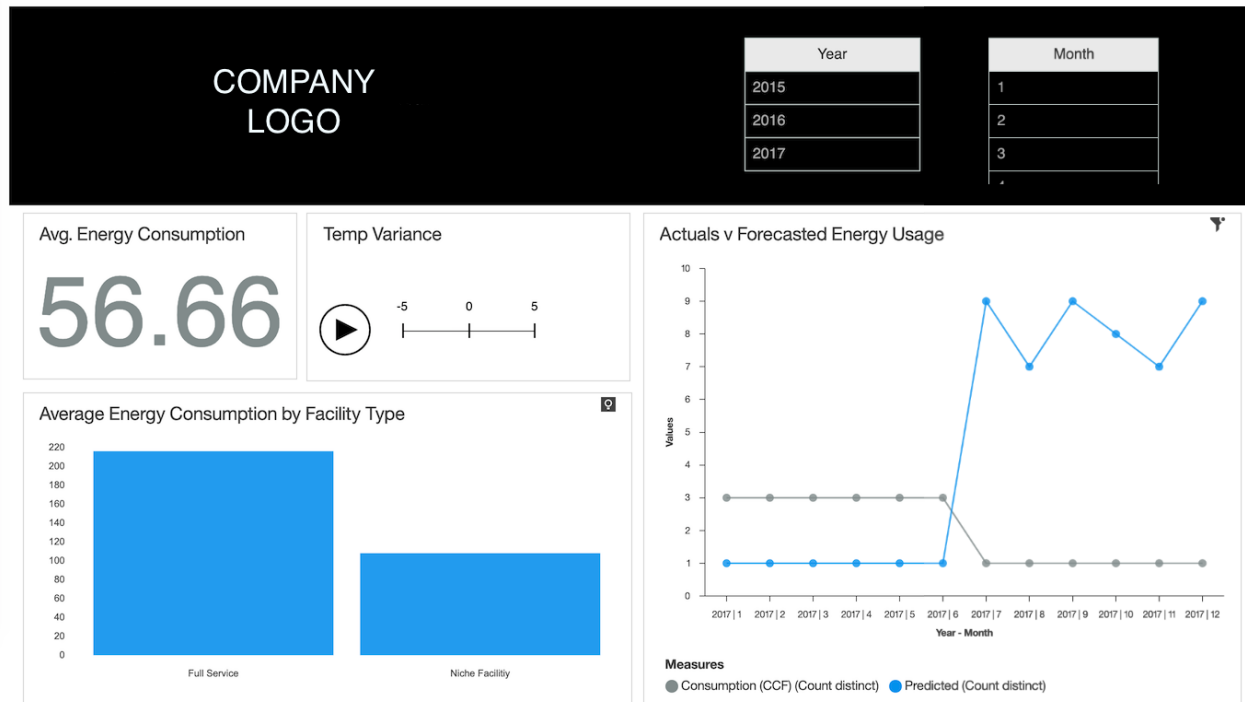
[Stories](#)

Integration between dashboards and stories allows for easy collaboration and presentation of key findings. This elevates your typical presentational slides by having interactive visuals and animation of widgets and objects. Plus you can drill-up/down and/or drill-through to the detailed transactions that make up your visualization without having to leave your browser, thus making it a one-stop-shop for all high-level and detailed business view of your organization. The best part is that this is all done through one UI, Cognos Analytics, but can be shared through PDF URL link or Email.

Potential uses for Dashboards:

1. Quickly visualize your data
2. Get to know your data, explore patterns — Exploration
3. Creating visually appealing views of Key Performance Indicators (updated in near-real-time)
4. Monitoring business insights at the department level and/or corporate level

Example Dashboard View



by: Brian Marti & Emily Rechan — Clear and Concise Dashboard

Reports

are used for pixel-perfect formatting, elevated customization, and consistent delivery of content/visualizations that need to be operationalized. This capability is ideal for sharing with those outside your organization or with large groups of individuals in your company with various security preferences. This is because one can run a report with predefined prompts, automatically filtering for an individual user. You could also build a report and have it distributed through bursting. This can be on a schedule and can be set to provide only the relevant slice of data pertaining to each recipient, without having to build a separate version of the same report for each recipient.

Reports are beneficial for detailed, consistent, and continuous deliverables of an organization. The vast amount of output formats and extensive customizable style / conditional formatting of report content creates an advanced workspace for creators and viewers.

Emily's Top 4 Cognos Analytics Reporting Capabilities:

Distribution

- PDF
- Publish to portal
- Print
- Attachment to e-mail
- Export to other format (HTML, CSV, XML, etc)
- Export of data (strips out the formatting in the report)

One has the option to burst reports (on-premise feature) to a large number of people. Build once, burst to multiple users, displaying only the content they are allowed to see.

Subscription

By subscribing to a report you have the option of choosing when the report executes (time, date, trigger), how the report is sent (format, email, saved within portal), or where it's saved (in portal, or file system).

Always be notified of reports

Versions

Identify the details behind a report — How many, by who, and when

Utilize 'Notify Me' to get updates every time there is a change

Prompting

Customized filtering reports for end-users

Compatibility with [IBM Cognos Microsoft Office](#)

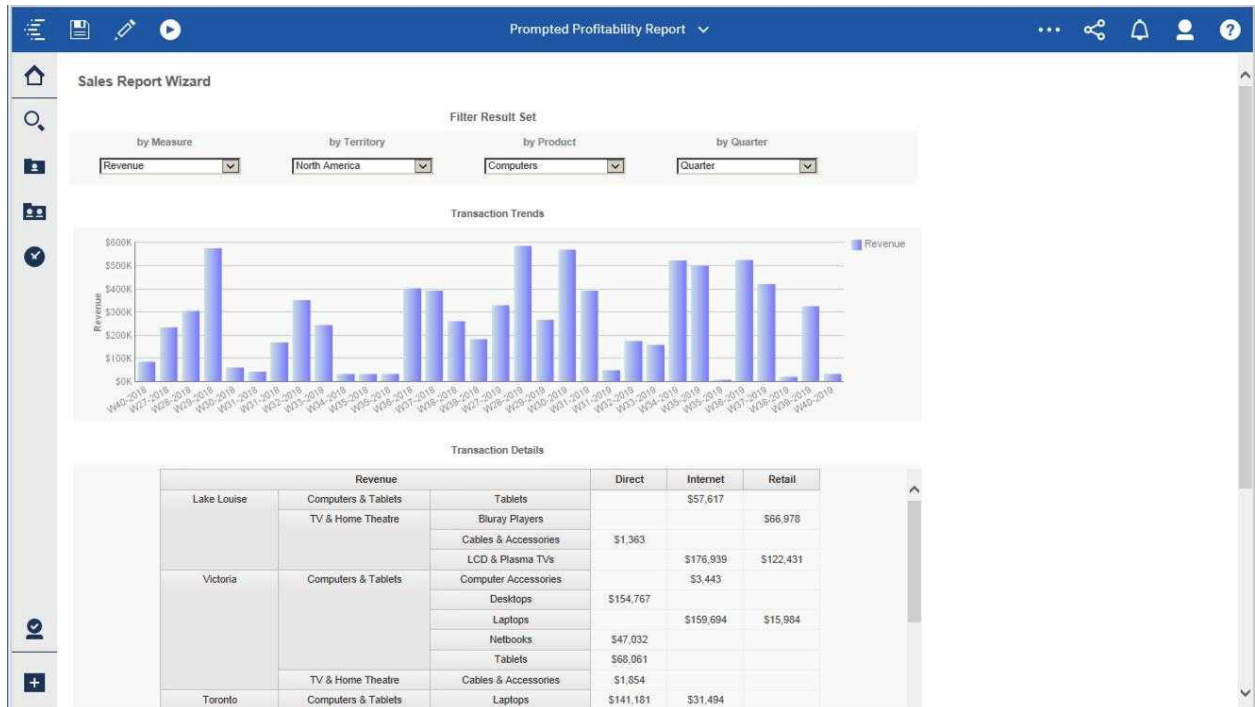
ex. User can answer prompts from imported report elements

Global parameters that can be pushed down to individual users, or groups

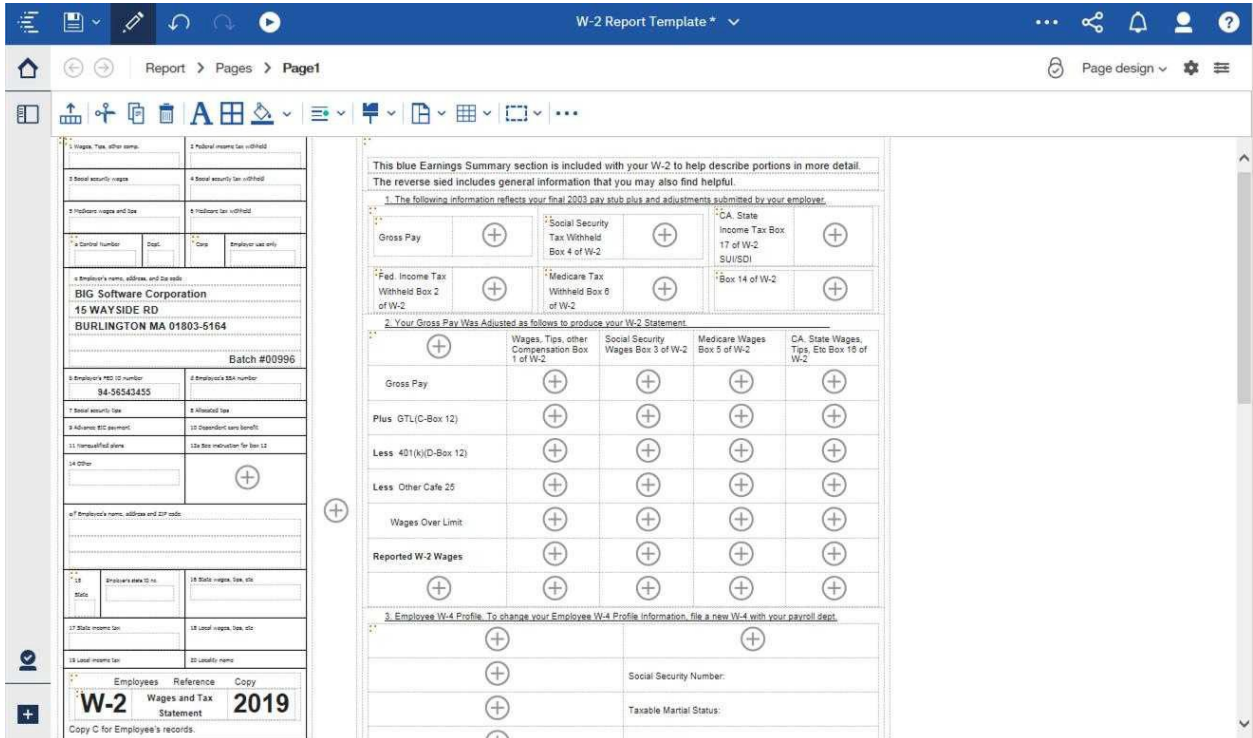
Potential uses for Reports:

1. Distribution of detailed information to an individual or a large number of people (subscription, scheduling, and bursting)
2. Consumption of highly customized pixel-perfect reports (prompts, templates, conditional formatting, etc)
3. Usage of advanced query modeling for building sophisticated reports or enterprise reporting

Example Report View



by: John Muckler — Prompted Report



by: John Muckler — This can be run in a single batch to create and deliver W2s for all your employees — all from trusted information and delivered securely

Both of these features in Cognos Analytics allow for users to gain extensive knowledge of their data. By utilizing the two together, a full workflow can be set in place for drill-up/down/through to sophisticated visualizations and insights.

My question to you is: How do you use your dashboards and reports?

Note: The value doesn't end here... there is great value in having dashboards and reports in the same user interface, especially when governance is the main concern. (Our next topic...coming soon...)

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