

Introducing IBM Cognos 8 Business Viewpoint

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Cognos.
software



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Agenda

- 
- Define the problems with dimension management
 - Introducing Business Viewpoint
 - Walkthrough real-life BI and Planning scenarios
 - Provide demo and architecture overview
 - Recap best practices to get started
 - Q&A

Why the time is right.



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

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

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

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

CUSTOMER NEEDS

■ Key Drivers

- Embrace and respond to change
- Add business know-how
- Define future structures

■ Why Current Systems Fall Short

- IT speed lags business speed
- Inflexibility to capture what is needed

■ How Problem is Solved Today

- Individuals define their own views and structures in spreadsheets
- Business works disconnected from IT systems, governance and control
- Manual effort is time consuming, error-prone and ungoverned



Analysts Agree: Dimension Management Adds Value

Enterprise dimension management focuses on **correctly managing the dimensions used to roll up data, analyze it and report it**. Simply put, behind the clean-looking reports of many large corporations is a huge mess, which enterprise dimension management aims to fix.

*BPM and Enterprise Dimension Management
Maximize Business Performance
Craig Schiff
DM Review Magazine*

....by unifying the data management, it allows **company-wide views of performance that are so important to business performance management (BPM)**.

*Enterprise Dimension Management
Craig Schiff
DM Review*



Drivers for Business Viewpoint

- **BI and Performance Management**
 - Financial Performance Management
 - Merger and Acquisition
 - Strategic Account Management
 - Sales Operations
 - Marketing Efficiency
 - Profitability Analysis



3 Questions to Ask

- Financial Analyst
 - Asset Accounts
 - Petty Cash
 - Liability Accounts
 - Accounts Payable
 - Equity Accounts
 - Stated Capital
 - Revenue
 - Product #1 Sales
 - Cost of Goods Sold
 - Product #1 Cost



1. How can we create and maintain the dimensions that domain experts are responsible for?
2. How can we maintain transparency across any changes made?
3. How can we ensure a common shared view across the organization?



Dimension Management Business Problems

- Business users cannot manage their views of the business
- Domain experts cannot collaborate effectively in the dimension management process
- Changes to dimensional models can have significant downstream impacts (e.g. to existing reports)
- There is no consistent shared view of the hierarchical structures across the organization
- There is no accepted repository for future planned members and hierarchies for budgeting and forecasting



Introducing IBM Cognos 8 Business Viewpoint

■ Solution

- For business users to **easily maintain, govern and share the hierarchies for use** ... and reuse ... across Business Intelligence and Performance Management solutions

■ Result

- Capture the business viewpoint on **how to organize information to drive business performance**
- Save time spent on reconciling reports, plans, forecasts



Business Viewpoint Enables the Business

Create and Maintain

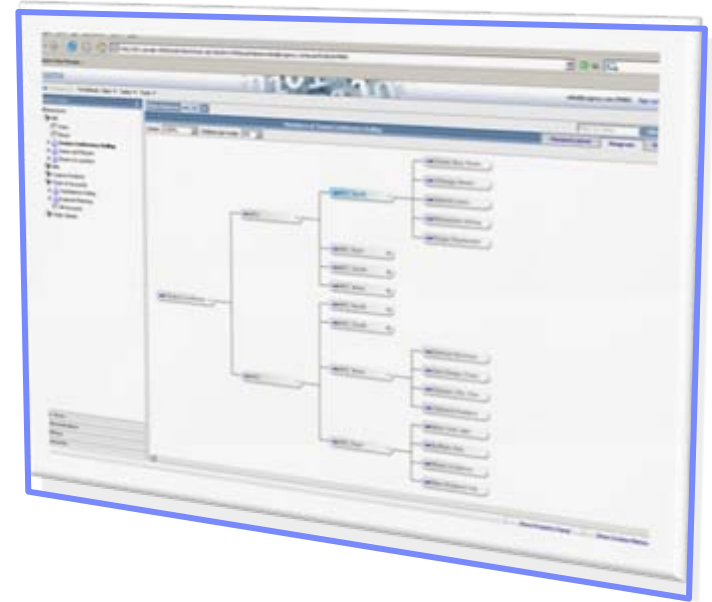
Enable the business to easily create their own perspectives with highly visual interface and fully flexible model

Govern and Collaborate

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

Share and Synchronize

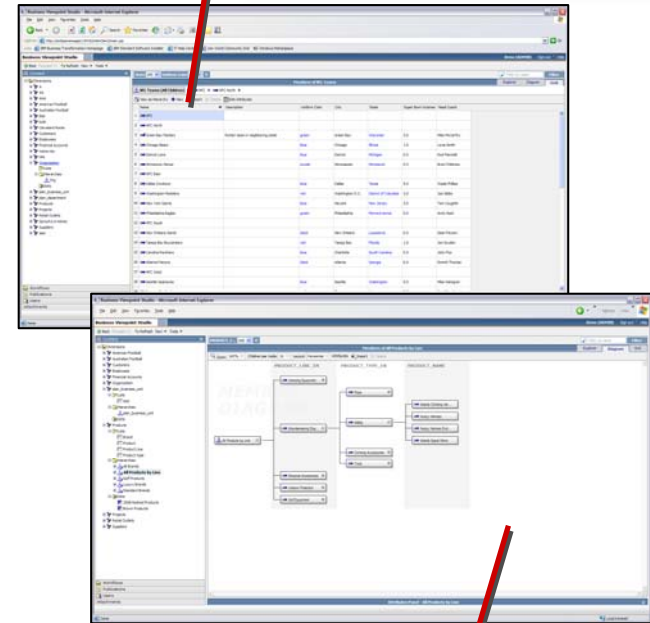
Deliver shared, approved viewpoints across Performance Management and provide bi-directional interfaces to external systems



Create and Maintain

- **Enable Business Definition of common Dimensions**
 - Create, edit, manage, compare, import
 - All line item dimensions required for PM (chart of accounts, cost center, product etc)
 - Assemble multiple hierarchies, views or versions to support the performance management process
 - Work within familiar tools such as Excel
 - Notifications by role as changes occur

Business users maintain any and all dimensions, attributes and hierarchies



Visualize create and relate dimensions and flexibly add any number of attributes

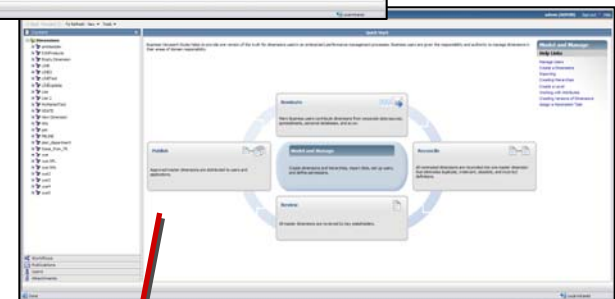
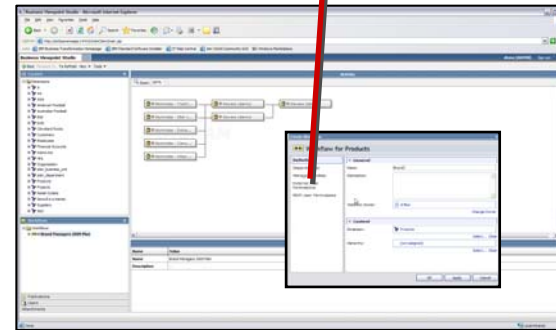


Govern and Collaborate

■ Enable Governance of common Dimensions

- Workflow collaboration, multi user contribution
- Audit who makes changes and what changes are made
- Version control and roll back
- Security for dimensions, users and user roles
- Lineage of maintenance history back to the source
- Central dimension store

Manage nominations, approvals and versions with business workflow



Assign specific roles and areas of responsibility across the business community

Share and Synchronize

- **Enable Consistent Use of common Dimensions Across PM**
 - Pre-built integration with Planning, TM1, BI, Transformer
 - Selectively publish changes to authorized applications
 - Subscribe and synchronize common dimensions
 - Impact analysis for downstream effects

Synchronize common dimensions for consistent performance management

Cognos 8 BI



Cognos 8 TM1



Cognos 8 Business Viewpoint



Cognos 8 Transformer



Cognos 8 Planning



Cognos 8 Framework Manager



End-to-end dimension management across the Cognos portfolio



Who Uses Business Viewpoint?

Who uses Business Viewpoint?

- Business Manager
- Financial/Business Analyst
- Product manager
- Brand/Category Manager
- Director/VP of FP&A

What are they working on?

- Mergers and acquisitions
- Launching new product lines
- Opening new markets
- Managing change to the business



What type of domain?

- Products
- Customers
- Channel
- Chart of accounts
- Cost centers
- ...any domain in BI and PM

End-To-End Dimension Management for Performance Management

Cognos 8 BI



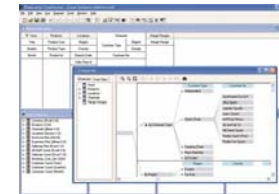
Cognos 8 TM1



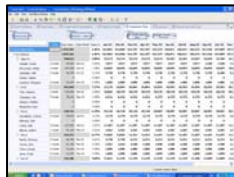
Cognos 8 Business Viewpoint



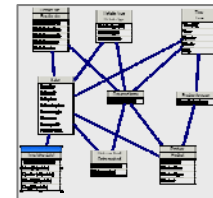
Cognos 8 Transformer



Cognos 8 Planning



Cognos 8 Framework Manager



Demonstration

Back Forward Refresh New Tasks Tools

Master Data

Data Sources (All) Filter by name Filter

Members of 2008 Budget MemberExplorer Diagram Grid

Zoom: 100% Children per node: 10 Layout: Horizontal

Horizontal
Vertical
Tree

ProductLine ProductType ProductName

MEMBER DIAGRAM

- 2008 Budget ...
 - Entertainment...
 - Software
 - Super D2G Ra...
 - Ultima D2G S...
 - D2G Blast Em
 - Space Quest ...
 - Kong Conquer...
 - Martial Art Sp...
 - CEO Scandal ...
 - School Tutor II
 - School Tutor I
 - D2G Art Studi...
 - Game Console
 - DVD Video
 - CD Audio
 - Entertainment...

My Area Administration Workflows Attachments

Show Property Panel Show System Metrics

Done Local intranet 100%

Top 4 Best Practices

- 1. This is a collaborative process with the business driving**
 - IT plays a supporting role
- 2. Start small with your biggest dimension pain**
 - 80/20 rule
 - Each project after this increases in value
- 3. Don't try to do everything at once**
 - Customer Accounts for Financial Services
 - Subscribers for Telecommunications
 - Products for Manufacturing
 - Stores or Products for Retail
- 4. Build a strong user community**
 - Get the right stakeholders involved in the process
 - Establish a reconciliation process for disagreement



Summary

■ With Business Viewpoint:

- Business users CAN: own the viewpoints, manage the structures, relationships and attributes, from anywhere, in a shared view
- Business users CAN: replace manual, error-prone efforts with fully transparent, automated and auditable processes
- Business users CAN: deliver common approved viewpoints across Performance Management and provide approved structures to other systems

