IBM

BI for business users

How IT can make business
intelligence easy for everyone

Cognos.
software

Contents

Abstract

BI isn't just for "power users" anymore. The latest BI solutions put the power of advanced business intelligence into the hands of more people throughout the organization — improving the speed and accuracy of decision-making from top to bottom. This broader access to BI tools and data — together with flexible, easy-to-customize reporting tools and dashboards — empowers users at all levels to perform their critical business analytics without relying on other departments. Today's BI solutions are more than just toolsets. They equip the entire organization for success.

Overview

Knowing your business, market, customers, and competition is critical for any organization. And IT departments have made huge investments in BI solutions to gather and analyze this information. However, until now, BI solutions have made this information available mostly to top-level executives and decision-makers.

Yet others within an organization need comprehensive, current and accurate BI information, too. Critical business decisions are made at all levels. Business managers and others below the top executive ranks complain that they often lack access to *all* the information they need, *when* they need it, and *how* they need it.

The answer lies in expanded and improved BI solutions that can deliver effective business intelligence not just to the board room, but to the front lines as well. By integrating information, technology, and people, decision-makers at all levels can become *performance managers*— dedicated to using the metrics, plans, and reports for their functional areas to make firm, fact-based decisions.

That's where the latest BI solutions enter the picture. At their core are three factors considered critical to the success of any organization-wide BI initiative:

- Simplicity

- Personalization

- Context

Consider a recent Consumer Electronics Association poll in which 87 percent of respondents cited "ease of use" as the most important factor in adopting new technologies. When you think about it, some of the biggest new tools of the past two decades— Internet search, point and shoot digital cameras, iPods and instant messaging— achieved their success, in large part, by delivering sophisticated functionality in a way people wanted to see, hear and experience it.

Effective business intelligence should be no different. Even when deployed across the enterprise.

Business problems

Spreading the wealth

Business intelligence solutions have always been just out of reach of the average business user. Earlier generations of BI tools typically targeted specific, high-level roles within the organization, so most business users never had occasion to use them. Instead, they performed their analyses—and continue to perform them—using conventional office productivity tools such as spreadsheets and desktop databases.

The impact on the organization is significant. Business users have grown adept at using the basic tools available to them, but this ad hoc strategy is insufficient to satisfy their multiple data management needs. They still can't self-serve the kind of detailed reports that would truly aid them in their jobs, and they often lack timely access to certain critical information.

So they submit requests to overloaded IT help desk queues and then wait while report authors with relatively limited business knowledge do their best to create static results—which might still fail to hit the mark. This virtually guarantees the business users' continued disconnection from organizational strategies and processes, and prevents them from using their unique skills to enhance the company.

Externally, everything may seem OK. IT departments have learned to respond to business user requests for data, analysis, and reporting. And business users leverage these inefficient processes with little, if any, complaint. From this perspective, conventional wisdom seems to indicate that BI isn't really intended for this audience.

Conventional wisdom, however, is wrong. As long as business users are forced to do end runs around the organization for even the most basic needs, their potential will continue to be stymied. Organizations interested in reaping the benefits of every member of the team must consider the quantum impact of extending BI capability to every level of the org chart.

Business drivers

Bringing power to the people

The newest, most powerful BI solutions recognize that the average business user isn't average at all. In fact, business users are the unsung heroes of virtually every organization. As the business evolves around them, they're expected to seamlessly adapt and rise to the occasion.

Yet because they're the typical low employees on the totem pole, business users are often the last to receive new tools — if they get them at all. Fortunately, this view of the average business user is changing.

Front-line users are increasingly seen as the eyes and ears of the firm, and as such, ideally situated to provide meaningful insight. So forcing them to use suboptimal tools to turn their insight into action merely increases the potential for that insight to be lost.

Today's best BI solutions put the right information into the right hands throughout the organization. These solutions — and the companies that invest in them-- understand that you can't simply deploy BI to specific departments or teams. You need to scale it across the entire organization. And you need to align the tools to the day-to-day workflow of those who will use them.

The advanced dashboards of today's BI solutions help make this promise a reality. Like earlier generations, the newest BI dashboards can consolidate data from multiple sources into useful, interactive views. But they go beyond traditional dashboards in their innate usability. Now, anyone can build a dashboard and anyone can make on-the-fly changes to reflect evolving business goals.

Advanced scorecards take this even further by linking individual performance to organizational strategies and goals. Because earlier BI solutions targeted only specific individuals and teams, the majority of business users remained disconnected from the company's strategic vision. Improved scorecarding tools put BI capabilities squarely on business users' desktops, giving them more power to influence organizational direction.

The solution

Performance Imperative #1: Role-based simplicity

As stated, traditional BI software targets the professional author or power user. Yet this group accounts for just five percent of employees in a typical organization. For BI to truly drive better performance, organization-wide, it must engage the other 90-plus percent, including casual business users, managers, and executives — all of whom need the best information to make the best decisions.

The enterprise
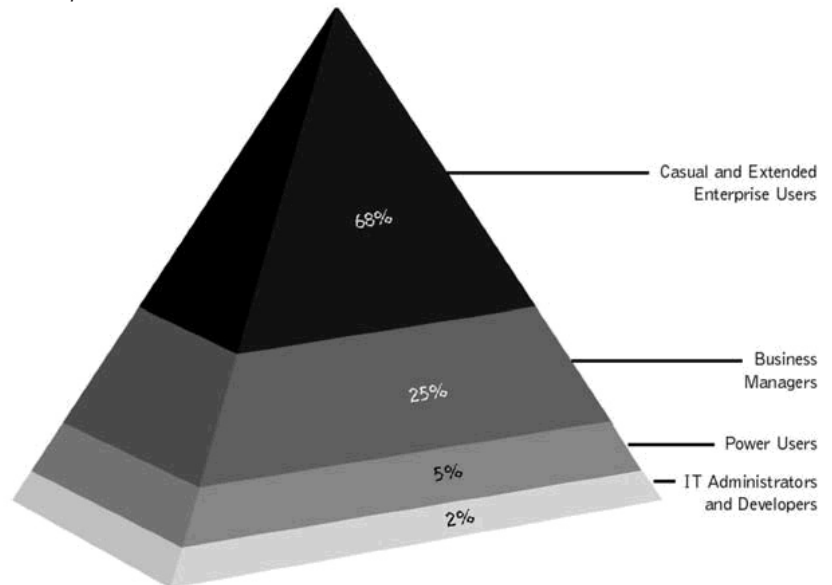
But there's a challenge. The rich functionality and interactivity provided by advanced BI applications can prove overwhelming. Most casual users need little of this functionality; they just need easy access to regularly distributed reports and other BI content. So rather than force such casual users to struggle with complex data hierarchies, today's best BI solutions present information clearly, using simple business terms that ensure casual users can understand — and act upon — whatever is happening within their sphere of responsibility.

Here's how today's most advanced BI solutions can help companies transform their growing community of users into genuine performance management experts:

Executives

Executives demand information that is highly summarized and bears direct relevance to their key initiatives. However, dashboards and scorecards that are custom-coded for executives are expensive to build and maintain.

Today's best BI solutions provide a better alternative with managed dashboards that provide at-a-glance views of business performance. They provide a summarized view of key metrics, key reports, alerts and more, with drill-through to associated reports for deeper insights. Executives particularly appreciate the new capabilities to transmit vital BI reports and dashboards to mobile devices such as PDAs. And briefing books — also part of the most advanced BI systems — give executives the ability to compile easy-to-navigate, multi-style, multi-page reports for fast, easy consumption of the most critical BI information.
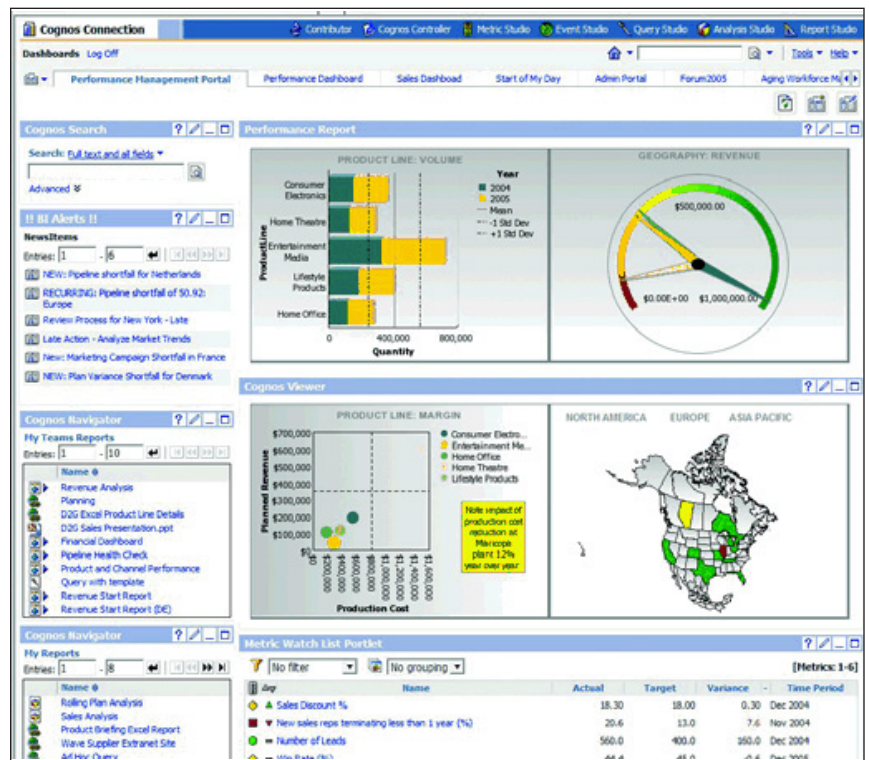
Advanced, easy-to-use BI dashboards provide executives with information-rich, visually appealing displays of the metrics that matter most.

Business managers

With accountability for the success of key initiatives and profitability, business managers need both a high-level view and an ability to delve into operational details. The best BI tools offer a full range of enterprise reports that meet these diverse needs. This includes:

- Managed reports that are specific to an area of business and can be automatically scheduled and sent to managers, who can see summarized views of information pertaining to their area of accountability

- Analytical reports that enable users to see trends at the macro level and drill into information from various sources. For example, a sales manager interested in revenue by geography, date, and salesperson can drill into the data to determine why the particular results were achieved.

Business managers also require continuous and immediate visibility into data with operational or transactional reporting capabilities. To help, advanced BI solutions offer briefing books with easy-to-navigate reports that provide fast insight.

And when business managers come up with new questions—ad hoc inquiries aimed at building new business, for instance—they can get answers quickly thanks to new self-service reporting capabilities. Today's best BI tools allow users to drag-and-drop business dimensions and measures from centrally modeled metadata to create their own custom reports and distribute them to their colleagues. They can even add simple calculations and formatting, or use corporate templates for a professional look-and-feel.

Product managers and business analysts

Product managers, business analysts, and many managers with P&L responsibility will need to go beyond basic reporting. They must explore the data to find correlations between the various factors that affect business performance.

Advanced BI solutions provide such deep, comparative analytic capabilities and enable users to perform both simple and complex analysis quickly. They provide top-down exploration and analysis by key business drivers, and are designed for large data volumes.

Despite all this, analysts who are already comfortable working in Microsoft® Excel® might resist adopting new products for analysis. Yet they would still like to take advantage of centralized and secure BI information. For these users, today's best BI solutions provide special utilities that allow them to continue to use their favorite spreadsheet application. Analysts can conduct self-service drag-and-drop exploration against the sanctioned data sets while leveraging full Excel interaction to support analysis, calculations, data, and formatting.

Financial analysts and advanced users

Financial analysts need to centrally author and distribute statement-style reports. But while they may find professional authoring tools too complex for their needs, they consider most consumer tools too basic. In response, many of today's new BI solutions include "express authoring" capabilities. And when more is needed, these systems enable professional report authors to create sophisticated reports and analyses such as crosstabs.

Working with live
data to accelerate
report production

Pre-defined financial
calculations

Statement style
formatting

Optimized toolbox for
crosstab functionality

Analysts can also take advantage of new analytics that can leverage user-defined sets of data across the organization for improved workgroup productivity and collaboration. And for users familiar with Microsoft Office, many solutions can even link prompted reports together using saved report outputs within the Office environment.

Casual users

Casual users, in particular, benefit from the easy accessibility and familiarity of the Web-based interfaces used in today's advanced BI solutions. They get the information they need in a format that is easy to consume and fits with their everyday activities.

Integration with enterprise search engines lets even non-BI users leverage simple search techniques to find strategic BI content relevant to their business function — regardless of any inexperience using the standard BI interfaces. In addition, the Web-based interfaces are customizable, so both the portal and the information being sent can be tailored to a user's specific needs. With today's best BI tools, casual users no longer face confusion from an overload of reports and information; rather, they receive targeted information and reports that are pertinent to their roles.

Today's most advanced BI solutions enable more users across the entire organization to profit from the BI investment. Casual business users receive regularly scheduled and preformatted reports that provide only the information they need — and present it in their working language. Business managers can author basic reports and queries using drag-and-drop functionality. Executives can view interactive dashboards and scorecards and subscribe to alerts that notify them of key events.

For IT, this means that true self-service reporting is at hand. Self-service reporting allows IT to reduce the resources it commits to providing reports, analysis, and data visualizations, all while giving the end user faster results overall. It makes BI simple for even novice users and lets IT focus on its core role — delivering technological value rather — rather than simply writing report after report after report.

Better workflow… Because I need it now

The accelerated pace of business poses a significant challenge. On the one hand, business users must spend more time accessing data, analyzing it, and making decisions based on it. On the other hand, the world won't slow down just because someone has to run a quantitative analysis on an upcoming business case.

So business users need speed as well as depth and breadth. And today's advanced BI solutions enable this. They make BI more widely available than ever before, and they eliminate inefficient workflows that force business users to ask other departments, such as IT, for the data and reports they require.

Enhanced Web portal capabilities let business users interact with their data through a rich interface that is easily customized. Instead of relying on someone else to piece everything together on their behalf, business users can shape their experience independently. In addition, advanced search capabilities let business users find key data wherever it resides. Google searches that target both internal and external sources widen the scope for business users and give them confidence they've got the right data for a thorough analysis.

Performance Imperative #2: Easy, flexible access to information

Today's workforce is increasingly diverse and distributed. You can't count on business users having the same platform or working in the same place. So advanced BI solutions must deliver the same quality of content and capabilities regardless of location or environment. The best BI solutions give users:

Information their way

Business users will only use BI if it is presented in a format they can understand. Some people are more visual, others prefer text. Some need summaries, others want details.

To cater to this variety of user needs, the best BI tools offer a broad range of information display styles including briefing books, dashboards, scorecards, static reports, Microsoft Excel spreadsheets, and Adobe® PDF files. Users can move seamlessly from one reporting style to the next without needing multiple products. And they don't need to spend time importing and exporting information into personal productivity applications because these tools are made available within the BI environment.

When information is targeted to user preference and role, IT can drive higher user adoption rates, faster time to insight, and greater satisfaction in the business intelligence program.

Right-time BI

Business users can't be performance management experts if reports and analysis arrive too late to be useful. Personal subscriptions and alerts — included in most advanced BI systems — help meet this challenge by letting users set the system to automatically e-mail updated versions of a scheduled report, or alert them whenever a specific watch rule they have set on a report is met.

Event management functionality enables IT to trigger a variety of actions (from e-mail notification to publishing a portal news item) based on a pre-defined condition in the data or whether the event is new, continuing, or has stopped occurring. Event management delivers information in context to the user, by role, based on the lifecycle of the event.

Access to BI anywhere

When providing information to employees, partners, or customers, IT needs to support them wherever they live and however they work. Advanced BI solutions are able to present information to users in different environments, locales, and applications.

Today's best BI tools help IT reach its user base with various consumer modes and capabilities, such as:

- A zero-footprint Web-based interface that supports extranet and intranet users. Users access reports presented in their language (and local currency) based on the language settings of their browser.

- E-mail capability that provides a convenient way to deliver reports to many recipients automatically.

- Connectivity to mobile devices, with report styles optimized for viewing and interactivity on a variety of devices including the BlackBerry, Microsoft Windows Mobile®, and Symbian.

- Wide search capabilities including browser-based search bars and search-in-context capabilities within the BI environment or broader enterprise engines.

- Integration with popular office productivity suites, allowing users to view and consume refreshable BI content within Microsoft Office, Microsoft PowerPoint®, Microsoft Word, and Microsoft Excel.

- Seamless third-party portal access that can deliver select BI content to users across your organization within their standard enterprise portal.
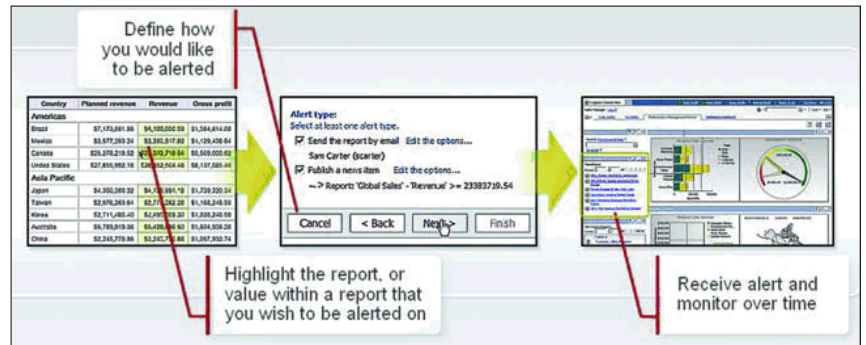
End user self-service

Users can get frustrated by software and often turn to IT when they can't get fast answers to their business questions. This frustration builds when IT, which can't anticipate every need, is unable to respond to their requests in a timely way. So for today's next-generation BI solutions to succeed, they must provide new ways for users to help themselves — with minimal IT involvement.

Ad-hoc query capabilities let business users query any data source, regardless of where it is stored across relational or OLAP sources, to build their own reports and answer their own questions. Web-based analysis enables users to perform simple or complex analyses in a zero-footprint, Web environment, and provides top down exploration and analysis by key business drivers. Finally, special helper applications give financial and business analysts self-service, drag-and-drop exploration capabilities that leverage full Microsoft Excel functionality.

With capabilities like this, the most advanced BI tools make users more self-sufficient. They empower users and make them accountable for answering their own business questions. These new tools allow users to access data via a common business model that delivers information in terms they understand, while masking the complexity of multiple underlying data sources. And in doing this, they free IT to spend its man hours on more strategic initiatives.

Wide adoption… It needs to be easy

If you build it, they won't necessarily come. The tools you deploy to your users must be relatively simple and straightforward or they'll never be used. Simple doesn't mean feature-limited, either. Best-of-breed BI solutions incorporate streamlined user interfaces to make it easy for end users to leverage the true power beneath the hood.

Today's best BI solutions are engineered for these challenges. Their intuitive front ends, in particular, set them apart by promoting adoption by the widest possible audience.

The Web-based interface is immediately familiar and accessible. Business users receive information in an easy-to-consume format that integrates cleanly into their everyday roles—whatever they may be. The best systems even include enhanced interaction with common office applications such as Microsoft Excel or Microsoft Access®, so users can view and in some cases manipulate critical BI data using the productivity tools that are already on their desks and they know how to use.

These improvements ensure business users can continue to leverage software they know and are comfortable with. At the same time, the solution improves data robustness by bringing everything under a consistent, managed BI umbrella.

Today's business users should no longer have to be BI wizards to access and analyze BI information. Best-of-breed BI portals are easily customized and allow workflows to be tailored specifically to each user's requirements. No unnecessary complexity, no information overload: Just focused tools that deliver answers and add bottom-line business value.

Performance Imperative #3: A guided experience with information in context

Business people demand fast access to information, but might not have the skills or the time needed to pull it all together on their own without IT assistance. They need a BI solution that guides them to the most relevant information. They need easy to use, context-sensitive BI. Central to creating performance management experts is the need to help users:

Find information faster

Recent analyst reports state that the average person spends about 25 percent of their day searching for information. Not only is this a waste of valuable time, at the end of an unsuccessful search they often turn to IT for the answer.

Today's most advanced BI solutions help eliminate this by helping users find — in other words, by leading them to — related information that can give them the complete picture of organizational performance. This frees up time for strategic analysis and problem-solving, versus collating data, and increases productivity, participation, and user satisfaction.
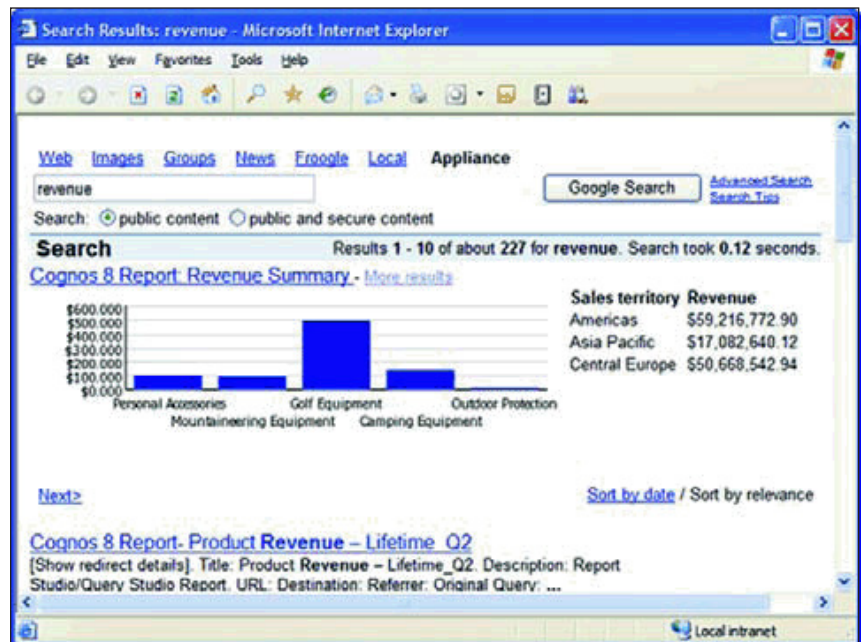
Advanced BI solutions enable companies to unite their BI knowledge with unstructured search results, providing an easy, fast, and cost-effective way to give users the information they need.

The best BI tools help users find the right information faster through the follow key capabilities:

• Guided analysis that provides controlled navigation with pre-determined report prompts and drill-down paths.

• Event management and alerts that deliver information specific to each user, at the right time, and in context of the business process when significant data conditions arise.

• Integrated search that makes users aware of related content associated with the business issue (finds related content in context of the current query) without any prior knowledge.

Share information easily
Business users put a great deal of time and effort into developing reports and analysis. The ability to share these reports with colleagues, peers, and partners can connect workgroups and drive consensus. So today's advanced BI tools give users a collaborative environment, including with the following critical functionality:

• A Web portal that acts as a central hub for users to publish and share reports.

• Reports distribution through file sharing, the BI portal, other enterprise portals or e-mail.

• Web-authored reports of the same file type (XML) and a content repository that facilitates workflow and collaboration.

• Integration with enterprise portals to provide easy access to relevant information.

• Report lifecycle and workflow that are facilitated by a single, sharable report specification and centralized repository, enabling professional authors to reuse, refine, and distribute queries and analyses already created by business users.

By enabling users to share information among their peers, IT promotes shared insight based on a consistent and complete version of the truth. With today's best BI solutions, users get a collaborative environment that makes business and professional report authoring more efficient, and reports better match the business need. Users have access to more relevant information that has been vetted by other business users. And users can assist one another—a critical factor for understaffed IT departments.

Save time with user self-service

The vast majority of decision-makers are not well served by traditional BI point solutions. Instead they need interfaces with easy, intuitive navigation. Next-generation BI solutions offer such ease-of-use, including one-click capabilities that make many answers more readily available than ever before. Typical one-click functions include automated undo, top 10, bottom 10, year-to-date, and quarter-to-date metrics.

For user self-service to thrive it must also mask users from the underlying data and system complexities. So today's best BI tools provide one-click access to all key data sources through a common business model that can access and combine data from multiple systems. This includes transactional applications like SAP, relational databases, data warehouses, OLAP data, and newer sources like XML. And, with a simple task-based Web interface and seamless flow between capabilities, users get access to all data through a simplified and productive BI experience.

Improved decision-making… A single version of the truth
By extending access to centralized, validated, and timely organizational data beyond the traditional higher-end stakeholders — namely power users, executives, and analysts — today's most advanced BI tools put greater power in the hands of more people.

The new systems put business-optimized tools directly into the hands of these users and allow them to proactively manage the entire process in a manner that tightly aligns with their needs.

Advanced reporting capabilities allow any business user to build detailed reports based on consistent, centralized data — not cobbled together by a disconnected individual hand-entering data into a spreadsheet. And since these capabilities are available across-the-board, everyone can work from the latest data, and delays from submitting report requests to the Help Desk increasingly become a thing of the past.

Regardless of role, decisions become stronger, more robust, and more defensible. Compliance issues snap into focus as operational transparency is realized at all levels. Opportunities are no longer missed. Organizational capability grows because the majority of its people are firing on all cylinders and not just winging it.

Conclusion

It's an exciting time to be a business user. Advanced BI solutions are finally moving BI out of the hands of the relatively few and into the hands of nearly everyone within the organization who can benefit.

BI is no longer the tool of the power user. Rather, it is everyone's tool, an infinitely customizable means of giving everyone in the organization the ability to get answers quickly, thoroughly, consistently and independently. Instead of relying on others to do their analysis for them, business users can now do it themselves. It's a sea change in how organizations empower their people at all levels of the org chart, and how these same organizations are transforming themselves in the process.

Today's best-of-breed BI tools unleash the organization's unsung heroes – the business users. They can finally do their jobs without the traditional access-to-information obstacles imposed by standalone solutions that don't align with the needs of today's businesses. Meanwhile, the rest of the organization, no longer required to support inefficient – and frankly, ineffective – decision-making processes, is similarly freed to grow into its formidable potential.

In this and so many other respects, today's most advanced BI tools are more than just toolsets. They are an entirely new way of equipping employees at all levels to drive long-term organizational competitiveness and success.

About IBM Cognos 8 Business Intelligence

IBM Cognos® 8 Business Intelligence delivers exactly this kind of broad access to BI. It is sophisticated technology that both BI experts and end users can easily understand and employ.

IBM Cognos 8 BI is the industry's first Web services-based solution that provides the complete range of BI functionality on a single, proven platform. It includes the full set of capabilities necessary to improve decision-making: broad reporting, deep comparative analytics, active dashboards, actionable scorecards, and more. And it delivers all this in a timely fashion to where it makes most sense – the Web, mobile devices, Microsoft Office or search technologies.

IBM Cognos 8 BI gives IT multiple new ways to expand the community of users consuming and interacting with information. It supports:

- Automated delivery of relevant information

- Freedom and flexibility for users independently explore, analyze, and share information

- Role-based interfaces that match capabilities to distinct user communities to maximize user adoption and success

- Adaptability to the users' chosen environment so IT can deliver the same quality content and key capabilities regardless of location or environment.

At the end of the day, with IBM Cognos 8 BI, more users have access the information they need—where, when, and how they need it—so they can make the quickest, best decisions for the organization.

About IBM Cognos BI and Performance Management

IBM Cognos business intelligence (BI) and performance management solutions deliver world-leading enterprise planning, consolidation and BI software, support and services to help companies plan, understand and manage financial and operational performance. IBM Cognos solutions bring together technology, analytical applications, best practices, and a broad network of partners to give customers an open, adaptive and complete performance solution. Over 23,000 customers in more than 135 countries around the world choose IBM Cognos solutions.

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