

IBM Cognos Express Reporter Demonstration

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Edwin Choi: Hello, and welcome to the IBM Cognos Express self-service reporting and ad hoc query session. My name is Edwin Choi, and I'm with IBM Business Analytics. I'll be providing a demo of some of the features and capabilities of the IBM Cognos Express Reporter product.

IBM Cognos Express is the first and only solution to deliver the essential reporting, analysis, and planning capabilities that have been purpose-built and priced for mid sized companies. We've taken the best of IBM Cognos' proven products and technology, focused on streamlining, simplifying, and integrating it into a breakthrough solution.

Today, I will focus on IBM Cognos Express Reporter. Express Reporter delivers complete self-service reporting and ad hoc query capabilities. It empowers the business user to be self-sufficient and access modifier author reports quickly and easily. Express Reporter offers simple intuitive drag-and-drop authoring capabilities enabling self-service from novice users to expert.

Broad report coverage, production, operational, transactional, dashboards, managed or ad hoc reports, delivering the right reports to meet the needs of the different users. Flexible report delivery via the web, PDF, XML, Excel, e-mail, or portal. And finally access to any type of data in any combination, whether relational or OLAP.

So, let's begin. When users log in, they start in a custom portal page that is provided with IBM Cognos Express. In this portal you have the ability to combine various dashboard and report objects to create a single interactive view into multiple underlying data sources, whether OLAP or relational.

I have the ability to interact and drill down into any of these charts, which were all created using Cognos Express Reporter. In the upper left hand corner, I have an analysis of sales by region and gross margin by product. So, if I wanted to drill down into the Americas and then into a particular country, and then into a particular state, I can easily do that. I can also compare my actual and target gross margin percentage by product lines and easily drill down my product hierarchy to further assess a particular issue or discrepancy I see.

To the right I'm keeping track of my top customers, incorporating best practice charts such as spark lines and micro charts, as well as best practice charts such as bullet charts with target information and actual comparisons. I can also incorporate calculations such as growth percentages as well as ranking capabilities.

In addition to that, I can also drill through to more detailed reports or dashboards. At this time, it opens up into a more detailed report, specifically additional retailers, as well as additional historical detail for the report that I just launched.

In the bottom right corner, we have an example of the map capabilities in Express Reporter. Each of the colors represents a threshold view the report author defines. There is also an example of in-body prompts to easily toggle between revenue and quantity, whatever measure or dimension that you may actually define as well.

When I select quantity, I notice that Canada is in the red, based on the thresholds that I have defined. I can then again drill through to more detail, but in this case, not only am I dynamically passing Canada as a parameter into a report and as a filter, I am launching into edit mode of an existing report, which I can further customize.

I can sort information if I wanted to. In this case, I'll sort descending instead of ascending. I can also add additional data elements. So, in this case I may want to focus on my promotional quantity information. I can easily drag and drop that information and it will be reflected in my report as well as in my chart, which I can then easily save and e-mail out to other people in my organization.

Let's explore ad hoc query capabilities a bit more by creating an ad hoc report from scratch. What I'm going to do is launch into Query Studio, one of the interfaces within Express Reporter that allows me to easily create ad hoc reports. At this point, I'm going to select a particular data source that I want to work with. Let's create a report of my top 10 retailers. First thing I'm going to do is quickly edit the title. I can easily navigate the metadata I'm authorized for. So, in this case I'm going to bring in retailer information. I can easily drag and drop.

In addition to that I could double click if I wanted to. And I can also select multiple elements at once and bring them in. So, in this case I'll bring in gross profit and revenue. I can also easily create calculations on the fly. So, in this case if I wanted to calculate gross margin percentage and I didn't have that already built into my metadata, I can actually build that in this report. So, for this case I'm going to actually select gross profit and revenue and select a percentage operation type.

Now my new data element is created based on the calculation I just defined. In addition to that I can easily rank my retailers. So, in this particular case I can rank them by revenue or by quantity. So, I'll just select revenue as a simple example. I highlight the revenue column and I can also select an analytical type. And I'll select rank as an option based on revenue. So, now I'll generate a ranking for each of my retailers based on revenue, as you could see over here.

At any point in time I can also delete columns that I don't need since I've created calculations based on these. I can easily remove them. In addition to that, let's say I want to only focus on my top 10 since this is a top 10 report. I can easily filter out anything greater than 10. So, now I have a top 10 report, which I can then sort in ranking order.

I also have the ability to easily create a scorecard-type report by doing some conditional highlighting. I can click on the column of choice. In this case it's my calculation, right mouse click and define a conditional style. And I can define a custom threshold. So, in this

particular case I want to analyze gross margin percentages that are above and below a particular threshold with this specific highlighting.

So, in this case anything below 40% will be considered poor and anything above 43% I'll consider excellent. And anything in between is just average, so, we'll have some yellow highlighting. Once I apply that you quickly see the results within the report you've built. In addition to that I can add some charting as a visual to help assess my top 10 retailers.

I have an option to pick from multiple chart types such as column, bar, pie, line charts. This case, I'll go with a column line chart, so I have quantity being measured in units and I have a percentage. As you can see the chart quickly gets applied and you can quickly notice how you're doing in terms of volume sales and how it compares to gross margin percentage.

In addition to that, in order to maintain a standard look and feel, I have the ability to apply a template against my report. A template can be something that's predefined by you as an organization to adhere to certain standards in terms of look and feel, as well as standards in terms of legal disclaimers, headers, and footer type information. So, when I apply this template it will quickly change my banner information as well as add some additional footer notes that I'd like to maintain within all of my reports.

I also have the ability to easily run these reports in multiple formats or output types. As an example of a few, here's a PDF. Cell format. And when you notice in each of these output types, whether HTML, PDF, or Excel, I didn't need to re-create it based on output type. Cognos Express Reporter is intelligent enough to convert those for me based on the output type I selected. So, from a maintenance point of view, I create one report and it generates it accordingly based on the output style that's most appropriate for your recipients.

That covers our ad hoc query capabilities. Let's navigate back to the Cognos connection portal and look at some sample reports that cover the breadth of report coverage from IBM Cognos Express Reporter. So, in this case the first example I'm going to open up a prompted report and this prompted report has a tree prompt, which requires me to navigate within this prompt to a particular timeframe.

I also have the ability to select multiple quarters spanning multiple years, as I'm doing in this particular example. In addition to that we have an example of a cascading prompt. Within this cascading prompt I have the ability to select a particular region, which is a parent item, and then a sub-item below Northern Europe, I'll select Finland, and in this particular case, I can select several cities and run finish.

The power of this particular report is that it allows me to create one report with multiple prompts and multiple options, so you're still maintaining one report but allowing the users to have the power to run these reports based on the criteria that they select. You also give the option of not having to create a report from scratch like we did in our ad hoc query example, but you give the ability for the end user to still be able to interact with the data even if they don't create a report.

So, in this particular case if I wanted to focus on different quarters, I can do so as well. So, maybe I want to focus on Q1 for 2006 and 2007, and it re-queries that information. Another example of a prompted report are what we call dynamic prompting. In dynamic prompting I have the ability to select different measures and dimensions.

So, in this particular case we're looking at revenue information by year based on product line information, which I can easily drill down and navigate in. I also have the ability to change my measure to quantity and in this case instead of products, I'll look at regions and I'll still keep looking at it by year. And I can rerun this report and you'll see that the elements have actually changed. Now I'm looking at quantity trending year-over-year and now I'm looking at regions trending year-over-year as well, and I have the ability to drill down.

In addition to that I have other reports that can easily link into multiple types. So, in this particular case I'm launching the revenue by ghost subsidiary report. In this case I've launched the revenue by ghost subsidiary report, which allows me to easily navigate against multiple quarters, but you'll see elements change very quickly from Q3, Q4. And I have the ability to also drill through into other reports.

So, in this case I'm going to drill through into an HTML report or another dashboard within my browser. So, now let's take a look at some other sample report types. I'll open up a report that was created using a financial style template. So, in this case a simple example of a balance sheet type report. As you can see, it's got the financial statement style look and feel and can easily be created using Express Reporter.

In addition to that we have an example of an order invoice. Order invoices can also be broken down and segmented by users. In this case we call them bursted reports where it's broken down by the owner of a particular account, owner of a particular region or product line as well and all based on security. So, in this particular example we have highly formatted reports built in Express Reporter. This invoice item requires specific placement of information as well as grouping based on invoice number.

And that concludes our self-service reporting and ad hoc query session. As you saw in this brief overview, Express Reporter gives you a custom portal to manage and view your reports, powerful ad hoc and report authoring capabilities, and the ability to cover the full range of reporting needs in your organization. Thank you for your time.