IBM®
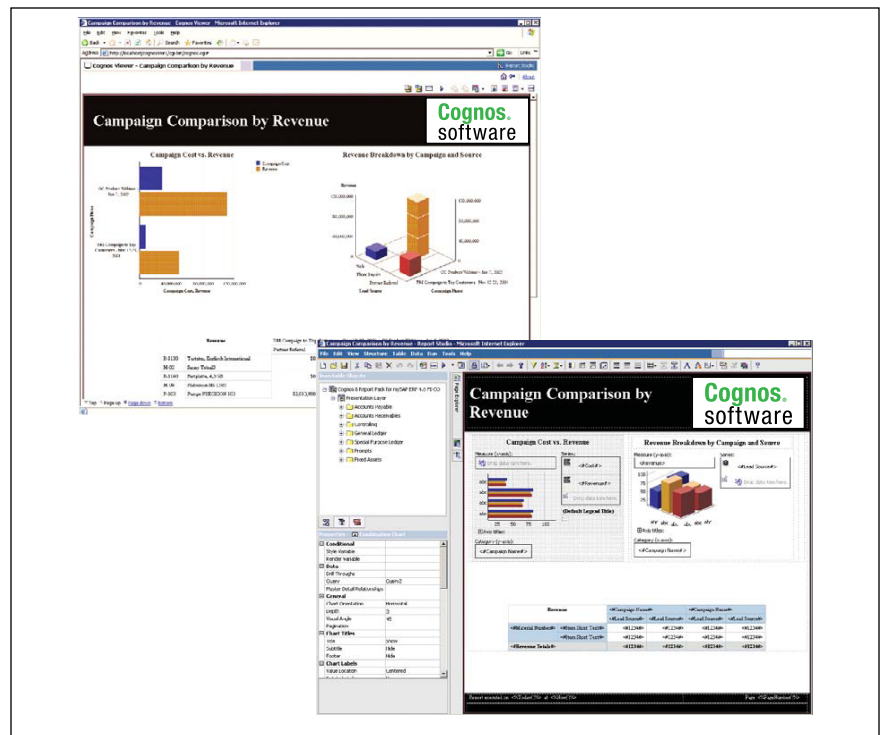
IBM Cognos 8 Business Intelligence for salesforce.com

Overview

IBM Cognos® 8 Business Intelligence (BI) for salesforce.com brings the power of IBM Cognos reporting, analysis, scorecarding, dashboards, and business event management to the salesforce.com CRM solution. IBM Cognos 8 BI for salesforce.com allows business users to access data in salesforce.com and combine it with current and historical data from other transactional systems and data warehouses. The result: a complete, consistent view of information and solid foundation for improved decision-making.

IBM Cognos 8 BI is easier to deploy, reduces IT costs by avoiding specialized resources, presents the same interface as salesforce.com, simplifies changes, balances providing on-line data with off-line data, presents salesforce.com data in business terms without special coding, reduces system impact through caching of frequently requested queries, effective security, and faster distribution with reports being published is several formats.

Technical Specifications

- Can be used to access all salesforce.com CRM applications— Sales Force Automation, Marketing Automation, Customer Service & Support, Partner Relationship Management, Analytics—and custom applications built on the AppExchange platform

- Leverages only salesforce.com -approved interfaces and Web interfaces with no need for IT to make any request modifications to existing salesforce.com environment

- A single, modern Web services architecture with a common zero footprint, browser-based environment that requires no desktop installs, plug-ins, or applets

- No coding required, eliminating the need for expensive, specialized resources

- The same technology for BI query and extraction of salesforce.com and non-salesforce.com data

- A data adaptor optimized for query performance, using specialized query algorithms

Cognos.
software

- Auto-generation of Sforce Object Query Language (SOQL) calls to SObjects that enables business users to self-service
- Security features that provide one controlled access method for salesforce.com that leverages web services and the business logic of the salesforce.com environment
- Ability to publish in formats such as HTML, Microsoft® Excel®, Adobe® PDF, CSV, XML, and more
- Access modes that let users interact with reports, analyses, and other BI content using familiar applications or devices

Features and Benefits

IBM Cognos 8 BI for salesforce.com is the ideal solution for users who:

- Want a single BI solution that incorporates all of their critical information.
- Need to combine salesforce.com data with other data sources.
- Want to see current and historical data about customers side-by-side.
- Need to reconcile data across systems to gain a complete view of customers.
- Want to capture snapshots of salesforce.com data for time-period analysis.
- Need to supplement data warehouse data with up-to-the-minute information.
- Want to supplement salesforce.com reporting with a full breadth of BI capabilities not otherwise available.

Through the IBM Cognos 8 BI for salesforce.com data adaptor, users can connect directly to salesforce.com for up-to-the-minute BI needs. Or, alternatively, capture data snapshots of salesforce.com to enable BI on historical data and time-period analysis. With either approach, business users can quickly and easily use IBM Cognos software to create a rich variety of reports and dashboards that feature cascading prompts, conditional highlighting, interactive visuals, and other robust functionality. The IBM Cognos 8 BI for salesforce.com also enables business users to answer new questions by providing salesforce.com data in context with their other enterprise business information, without the need for IT intervention.

With IBM Cognos 8 BI for salesforce.com, users can derive fresh perspectives by creating new views of salesforce.com data that cross module boundaries, combine data from disparate tables, and derive calculations to gain new insights not possible through standard salesforce.com reporting. By combining salesforce.com data with IBM Cognos 8 BI, organizations can finally gain a complete, consistent enterprise view across all information and all data sources. Users can capture snapshots of current salesforce.com data to build historical data sets for time period trending, historical analysis, and forecasting beyond the traditional salesforce.com reporting capabilities.

IBM Cognos 8 BI for salesforce.com can be used to access all salesforce.com CRM applications, including Sales Force Automation, Marketing Automation, Customer Service & Support, Partner Relationship Management, Analytics, and custom applications built on the AppExchange platform. IBM Cognos 8 BI for salesforce.com leverages only salesforce.com-approved interfaces and Web interfaces so there is no need for IT to make any request modifications to your existing salesforce.com environment.

Business Benefits of IBM Cognos 8 Business Intelligence For salesforce.com
IBM Cognos 8 BI for salesforce.com offers your business users the following key advantages:

- Create reports and dashboards on any salesforce.com objects. Generate reports on as many salesforce.com metrics as you require: opportunities, accounts, leads, contacts, campaigns, and more. You can also add your own custom objects to dashboards and reports.
- Integrate multiple data sources. Combine salesforce.com data with your other financial, product, and other enterprise data sources, whether inside or outside your company's firewall.
- Powerful drill-down analytics. Examine metrics in the finest detail for root-cause analysis and historical trending. Track performance across multiple dimensions: for example,
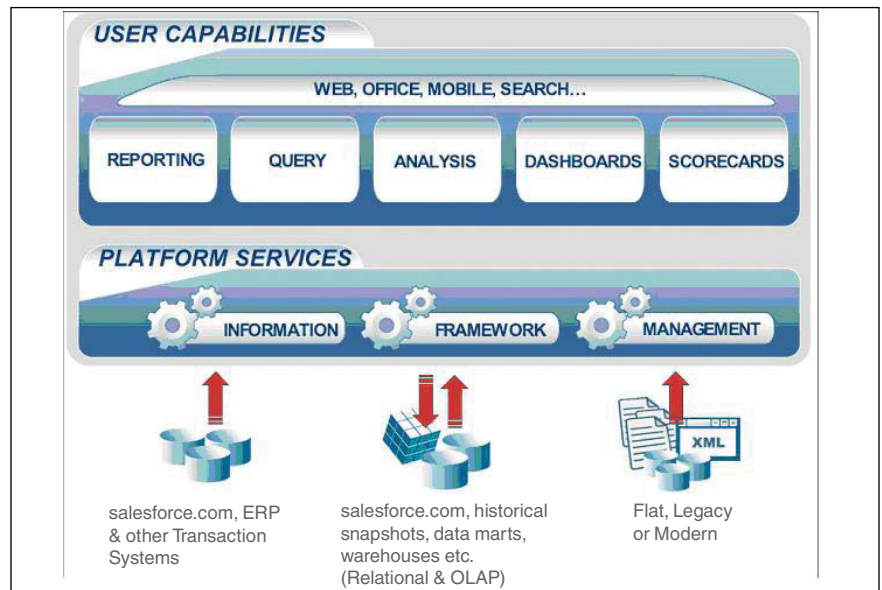
product sales across multiple regions, multiple quarters, and multiple sales reps.

- Exception management. Set up custom alerts, so you can receive immediate notification when a key metric crosses a critical threshold.
- Mobile Support. View rich, interactive reports delivered on your PDA using the IBM Cognos 8 Go! Mobile capability.

IT Benefits of IBM Cognos 8 Business Intelligence For salesforce.com

IBM Cognos 8 BI for salesforce.com offers the following key advantages for IT:

- **Easier deployment:** IBM Cognos 8 BI is built with a single, modern Web services architecture. The common zero footprint, browser-based environment requires no desktop installs, plug-ins, or applets – minimizing the resources required for development, deployment, and maintenance.
- **Lower IT costs:** With no coding required, IT can eliminate the need for expensive, specialized resources. With IBM Cognos 8 BI, IT can lower the time, cost, and risk associated with software development, customization, and maintenance.
- **Reduced complexity:** Uses the same technology for BI query and extraction of salesforce.com and non-salesforce.com data. One skill set, one interface to manage.

USER CAPABILITIES

WEB, OFFICE, MOBILE, SEARCH…

REPORTING · QUERY · ANALYSIS · DASHBOARDS · SCORECARDS

PLATFORM SERVICES

INFORMATION · FRAMEWORK · MANAGEMENT

salesforce.com, ERP & other Transaction Systems

salesforce.com, historical snapshots, data marts, warehouses etc. (Relational & OLAP)

Flat, Legacy or Modern

- **Adaptability to changing conditions:** IBM Cognos 8 BI lets IT insulate the business from changes and control the rollout of new customizations and data source access.
- **Optimized end-user performance:** Create an intelligent balance between providing access to on-line data and downloaded off-line data to satisfy all business users' operational reporting and historical analysis needs within a single environment. The IBM Cognos 8 BI for salesforce.com data adaptor is optimized for query performance, using specialized query algorithms.
- **A simplified business model:** IBM Cognos 8 BI enables business users to self-service by representing the salesforce.com data in terms the business understands. No coding is required with the auto-generation of Sforce Object Query Language (SOQL) calls to SObjects.

- **Reduced system impact:** With IBM Cognos 8 BI, IT can leverage table and file caching for on-line access to mitigate the impact of frequently requested queries. IT can also leverage incremental data capture to optimize the capture of snapshots for historical trend analysis.
- **Effective access control:** IBM Cognos security features provide one controlled access method for salesforce.com that leverages web services and the business logic of the salesforce.com environment.
- **Faster distribution:** Reports can be published in formats such as HTML, Excel, PDF, CSV, XML, and more. In addition, IBM Cognos 8 Go! access modes help you increase business intelligence user adoption rates within your organization by letting users interact with reports, analyses, and other BI content using familiar applications or devices, such as a BlackBerry enterprise search engine, Microsoft Office® applications, or Web browsers.

salesforce.com Objects

The following is a partial list of salesforce.com objects available through IBM Cognos 8 BI for salesforce.com:

Accounts
Account Details
All Accounts
My Accounts
New Last Week
New This Week

Campaigns
All Active Campaigns
Campaign Details
My Active Campaigns

Cases
All Closed Cases
All Open Cases
Case Details
International - Escalations
International - Platinum, Gold
International - Silver, Bronze
My Cases
My Open Cases
Partner Relations
US - Escalations
US - Platinum, Gold
US - Silver, Bronze

Contacts
All Contacts
Birthdays This Month
Contact Details
My Contacts
New Last Week
New This Week

Contracts
All Activated Contracts
All Contracts
All Draft Contracts
All In Approval Contracts
Contract Details
My Activated Contracts
My Draft Contracts
My In Approval Contracts

Leads
All Open Leads
International Leads
Lead Details
My Unread Leads
Today's Leads
US Leads

Opportunities
All Opportunities
Closing Next Month
Closing This Month
My Opportunities
New Last Week
New This Week
Opportunity Details
Private
Won

Products
All Products
Product Details

Solutions
All Reviewed Solutions
All Unreviewed Solutions

IBM Cognos 8 BI provides an ideal way to provide access to salesforce.com data to all users and decision-makers. IBM Cognos 8 BI delivers a rich set of BI capabilities and enables business users to gain fresh perspectives by providing on-demand data together with captured snapshots for time-series analysis. IBM Cognos 8 BI's powerful capabilities will help salesforce.com customers gain a complete, consistent, and timely view of information across all the systems. With the right data from salesforce.com and the right BI platform, IT can enable the organization to make faster, more effective business decisions.

Feature Overview

IBM Cognos 8 Business Intelligence (BI) for salesforce.com :

- Provides access all salesforce.com CRM and custom applications built on the AppExchange platform
- Leverages salesforce.com-approved interfaces and Web interfaces with no need for request modifications
- Uses a single, modern Web services architecture that requires no desktop installs, plug-ins, or applets
- Requires no coding, eliminating the need for expensive, specialized resources

- Has the same technology for BI query and extraction of salesforce.com and non-salesforce.com data
- Contains a data adaptor optimized for query performance
- Auto-generates Sforce Object Query Language (SOQL) calls to SObjects
- Features security that provides controlled access that leverages web services and the business logic of the salesforce.com environment
- Ability to publish in several formats
- Access modes that let users interact with reports, analyses, and other BI content using familiar applications or devices

**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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your enquiry within two business days.