

# IBM Cognos Express

Performance Management for Mid Market Organisations



# Agenda

- Top challenges for Midsize Companies
- How many midsize companies do BI and Planning
- IBM Cognos Express
  - Solution Overview
- Customer Case Studies

# The Top Challenges of Midsize Companies



- Improve efficiency and reduce costs
- Strengthen customer relationships, new customer acquisition, and sell more to existing customers
- Predict and respond to trends, optimizing business models

*Companies that can best identify new opportunities and quickly align their resources will be the winners.*

A man in a dark suit and tie is looking down at a stack of blue binders. The binders are filled with papers and have metal rings. The background is a dark, slightly blurred office setting.

## Today's Reality

47%

47% of users don't have confidence in their information

42%

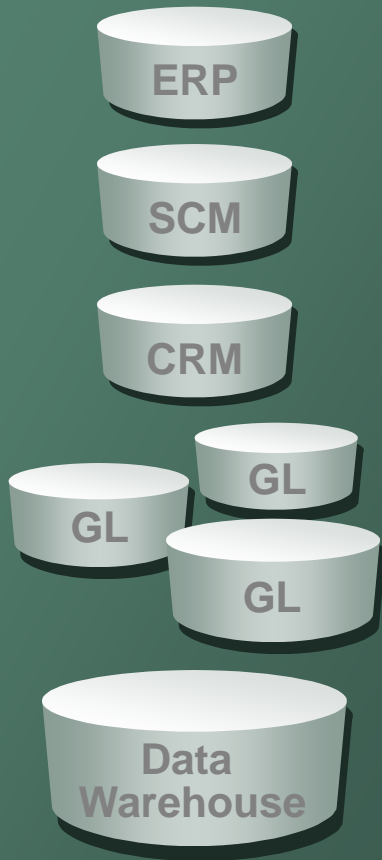
42% of managers use wrong information at least once a week

59%

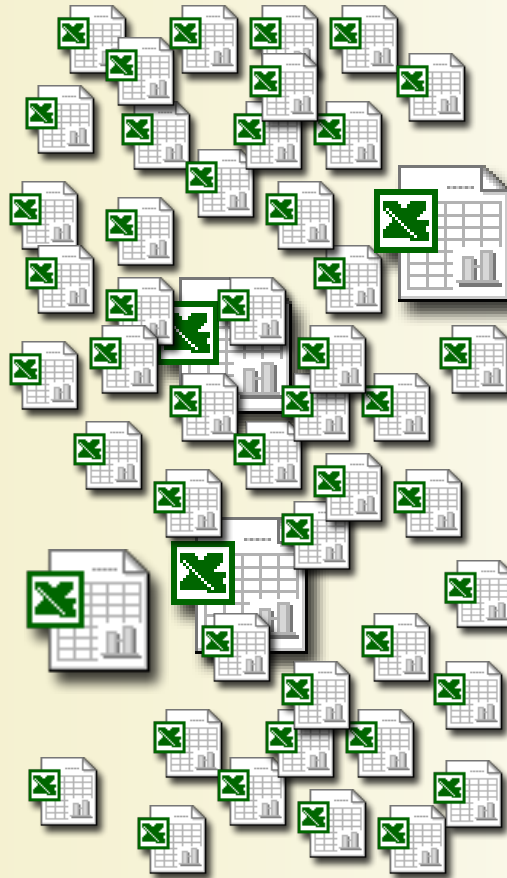
59% say they missed information they should have used

# How many midsize companies do BI and Planning

## Data Sources



## Reporting, Analysis, Planning



## Risks and Limitations

**Silos of data**

**No Data Integrity**

**Inaccurate and inconsistent**

**No Audit-ability**

**Poor efficiency and effectiveness**

**Competitive Advantage?**

**Institutional knowledge embedded into custom formulas**

***Inconsistent Information, Untrustworthy Analysis, Disconnected Planning***



Better  
Outcomes



Smarter  
Decisions



Actionable  
Insights



Relevant  
Information

# IBM Cognos Express

Can be purchased in its entirety or individually to meet specific buying agendas.



The only integrated Reporting, Analysis and Planning solution purpose built for midsize companies

# IBM Cognos Express Integrated Reporting, Analysis and Planning



*Information*

*Insight*

*Action*





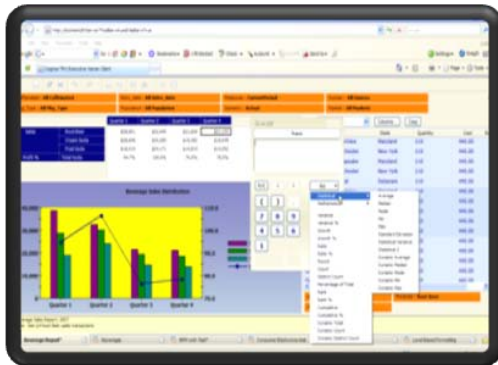
- **Self-service reporting and ad hoc query**
  - Simple, intuitive authoring for novice to experts
  - Reports and dashboards to meet the needs of different users
  - Breadth of report coverage – operational, transactional, managed, dashboards, ad hoc
  - Connect to any type of data and in any combination – relational, OLAP, desktop files
  - Flexible report delivery via web interface, PDF, Excel, email or Portal





## Freeform Analysis and Visualization

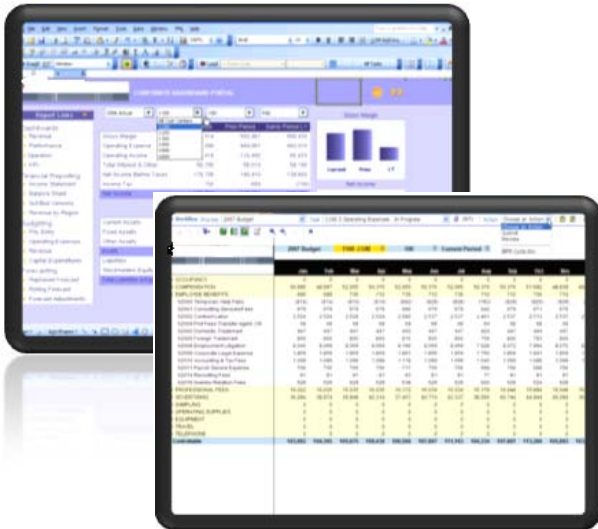
- Real-time analysis with in-memory multidimensional capability
- Slice and dice, drill down/through capabilities
- High impact data visualizations
- Simplified business view creation and building
- On-the-fly business view changes
- 'What if' scenarios with write-back
- Embed live content into MS Office applications





## Excel-based Business Analysis and Optimization

- Extends and transforms common spreadsheets for real-time business analysis and optimization
- Centrally managed data, business hierarchies, rules, calculations
- “What if” scenario modeling & write-back to analytic server
- Role-based security and clear audit trails



## Express Planner

Planning,  
Budgeting, Forecasting



## Web-based Planning, Budgeting, Forecasting

- Streamlines information gathering, aggregation and analysis for continuous planning
- Rich Web-based contribution client
- Managed workflow process from creation through contribution, review and approval
- Centrally managed data, business hierarchies, rules, calculations
- Role-based security and clear audit trails



**Express Reporter***Query & Reporting*

- Self-service reporting and ad hoc query
  - Breadth of report coverage – operational, transactional, dashboards, ad hoc

**Express Advisor***Analysis & Visualization*

- Freeform analysis and visualization
  - Real-time analysis with in-memory multidimensional capability

**Express Xcelerator***Excel-based business analysis*

- Excel-based planning and business analysis
  - Extends the familiar Excel front-end with a powerful in-memory analytics engine for multi-dimensional analysis, reporting and planning

**Express Planner***Planning, Budgeting, Forecasting*

- Automated planning, budgeting & forecasting
  - Finance-managed solution (Available later)

# IBM Cognos Express

**Express Reporter**



*Query & Reporting*

**Express Advisor**



*Analysis & Visualization*

**Express Xcelerator**



*Excel-based Analysis & Optimization*

**Express Planner**

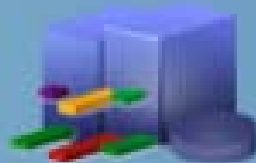


*Planning, Budgeting, Forecasting*

## Centralized Administration & Data Management



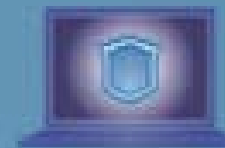
**In-Memory Analytic Server**



**Metadata & Content Repository**



**Data Integration & Movement**

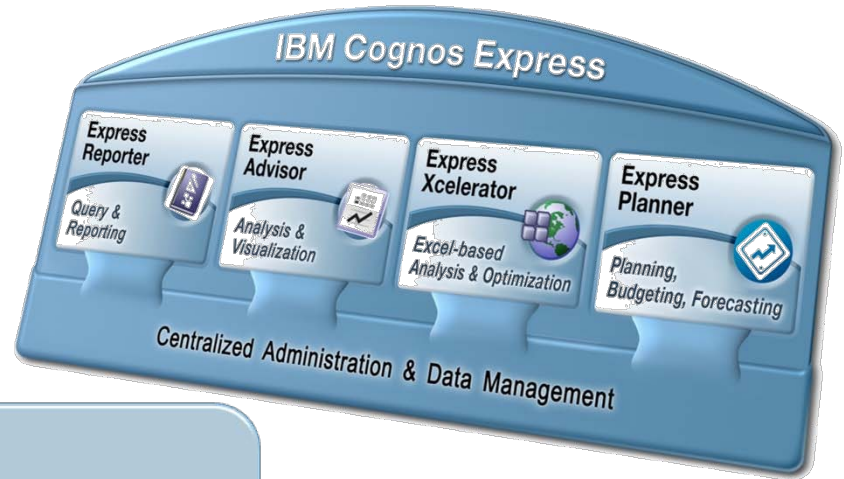


**Security**



**Portal & Application Server**

# Overcoming the Barriers



## Easy to Install

Pre-configured solution includes everything required for simple deployment and management

## Easy to Use

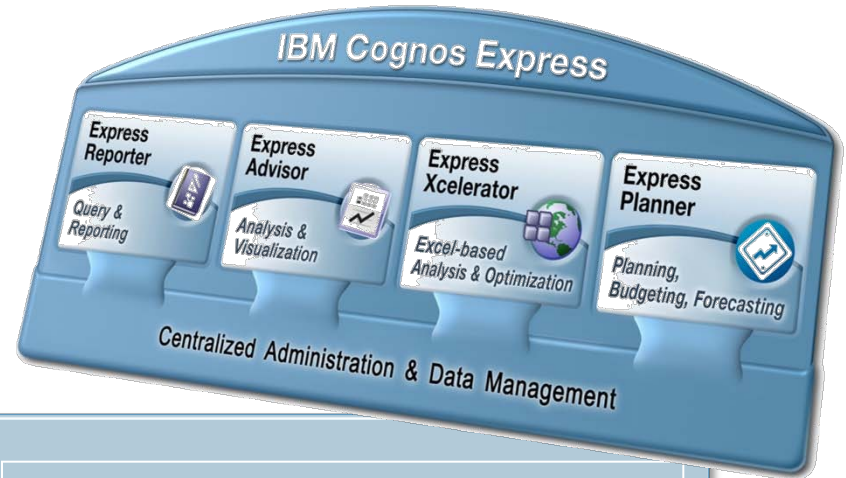
Self-service access empowers business users and removes the burden from IT

## Easy to Buy

Packaged and priced right... Start small, start anywhere, deliver immediate value, and grow

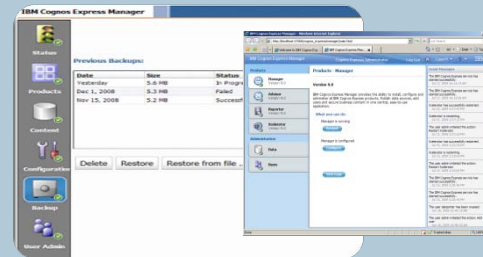
## Easy to Install

- Preconfigured “No assembly required”
- All you need - Embedded
  - OLAP, Security, Content store, Web server, Data integration
- Central management console for content, security, licensing and administration



## ■ Benefits

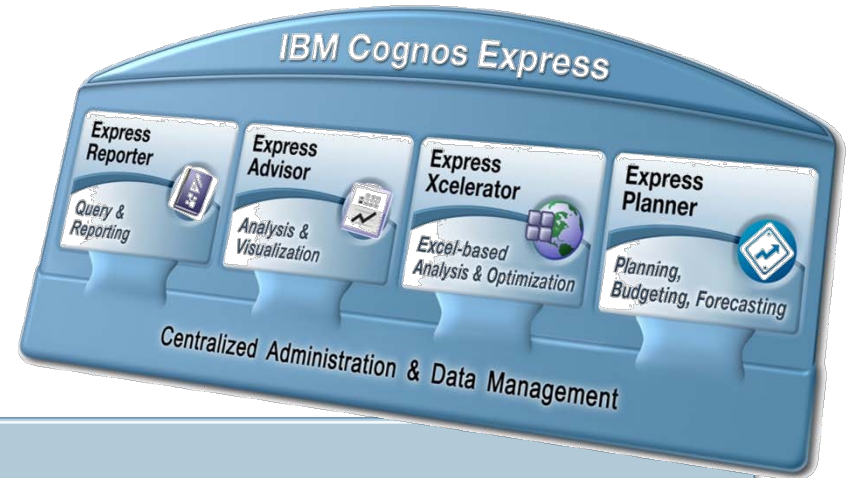
- No hidden costs
- Minimum resource needed
- Quick time to value





## Easy to Use

- Novice to advanced Users
- Simple business view creation
- Data viewed in business context
- Right interface for the right user
- Flexible delivery model

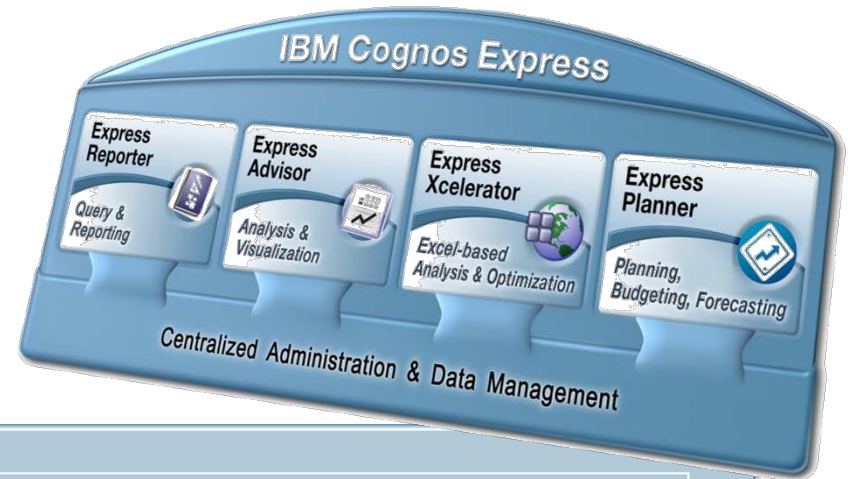


## ▪ Benefits

- Reduce IT Backlog
- Reduce burden on IT
- Business empowered
- Minimum resource needed
- Quick time to value

## Easy to Buy

- Buy what you need and when you need it
- Low entry price point
- No hidden costs
- Room to grow
- Affordable



## Benefits

- Start small, start anywhere
- Match projects to match resource and budget constraints
- Quick time to business value
- Low risk

# Think Big. Start Small.

*A smart approach for a midsize company*

## Think Big

- Connect BI and Planning – to drive action from insight
- Build an information driven culture
- Provide a glide path to future enterprise-class requirements

## Start Small

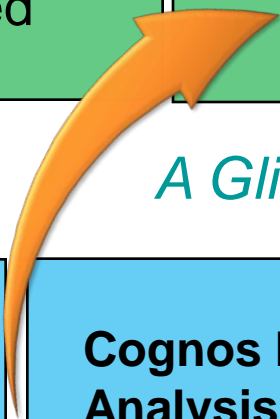
- Start anywhere (Reporting, Analysis... etc)
- Create a roadmap that builds on small successes
- Modular and incremental strategy
- Deploy tactically yet ensure initiatives are connected

## Benefits

- ✓ ***Enables project rollout to match resource capacity and budget***
- ✓ ***Realize business benefit quickly***
- ✓ ***Provides justification for further investment***
- ✓ ***Allows adjustments to respond to changes in business objectives***

# Choosing what's right for you.....

<p>Larger organizations and/or greater capabilities required</p>	<p><b>Cognos 10 and TM1 - Enterprise BI and Performance Management</b></p> <ul style="list-style-type: none"><li>• Superset of capabilities - adds Analytic Apps, Mobile, Search, Metrics, ERP connectivity, etc.</li><li>• Multi-platform, distributed enterprise deployments</li></ul>
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*A Glide Path for the Future*

<p>Midsized organizations or departments just getting started</p>	<p><b>Cognos Express - Breakthrough Reporting, Analysis and Planning</b></p> <ul style="list-style-type: none"><li>▪ Up to 100 Users per Module</li><li>▪ Single host Windows Server</li></ul>
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# Customer Case Studies



- **Key Business Requirement**
  - With the company’s growth, the spreadsheet system they used for budgeting had become too complex
- **Approach**
  - To find an easy-to-use, single-platform tool for budgeting and forecasting

Challenge	Solution	Results
<ul style="list-style-type: none"> <li>▪ To complex and unwieldy spreadsheet system</li> <li>▪ To improve time-consuming budgeting and forecasting processes that produced inaccurate results</li> <li>▪ To accurately compare actuals against budgets at various levels</li> </ul>	<ul style="list-style-type: none"> <li>▪ IBM Cognos Express</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides a single version of the truth</li> <li>▪ Fast time to value with quick implementation and ease of use</li> <li>▪ Alignment with budgets, P&amp;L and distribution resource management</li> <li>▪ Allows remote access to more accurate and detailed information than before</li> </ul>



**Central National-Gottesman Inc.**

Lindenmeyr Book Publishing  
 Lindenmeyr Central  
 Lindenmeyr Munroe  
 CNG Specialty Papers  
 CN Division



- **Key Business Requirement**
  - Needed a low-cost, easily installed solution that was integrated, easy to use and accessed by the Web.
- **Approach**
  - To implement a solution that could consolidate data, streamline reporting and improve business performance.

Challenge	Solution	Results
<ul style="list-style-type: none"> <li>▪ All reporting from ERP or spreadsheets, with limited reporting capabilities</li> <li>▪ Data was pushed to users (e.g., sales force ) via spreadsheet and email</li> <li>▪ IT had backlog of reporting requests</li> </ul>	<ul style="list-style-type: none"> <li>▪ IBM Cognos Express</li> </ul>	<ul style="list-style-type: none"> <li>▪ Process improvement efficiencies in the comptrollers office (time, gained three days every month)</li> <li>▪ Ease of use over the Web</li> <li>▪ Improved structure and format of data</li> <li>▪ One data set – one version of the truth</li> <li>▪ Ease of deployment</li> <li>▪ Structured formats for data entry and reporting</li> </ul>



- **Key Business Requirement**
  - Needed a scalable system to control purchasing through better information, without losing plant independence or requiring extensive IT resources.
- **Approach**
  - To purchase an all-in-one solution to consolidate data from disparate sources and facilitate consistency in vendor and spending information.

Challenge	Solution	Results
<ul style="list-style-type: none"> <li>▪ Gain control over company purchasing</li> <li>▪ Improve visibility into vendor information</li> <li>▪ Facilitate company growth and expansion</li> <li>▪ Improve data quality</li> <li>▪ Promote better standards adoption</li> <li>▪ Eliminate cumbersome data transfers to Excel</li> </ul>	<ul style="list-style-type: none"> <li>▪ IBM Cognos Express</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides central source for supplier pricing and delivery review</li> <li>▪ Provides comparative supplier information</li> <li>▪ Increases productivity and identifies cost savings opportunities</li> <li>▪ Automated notifications and reporting</li> </ul>



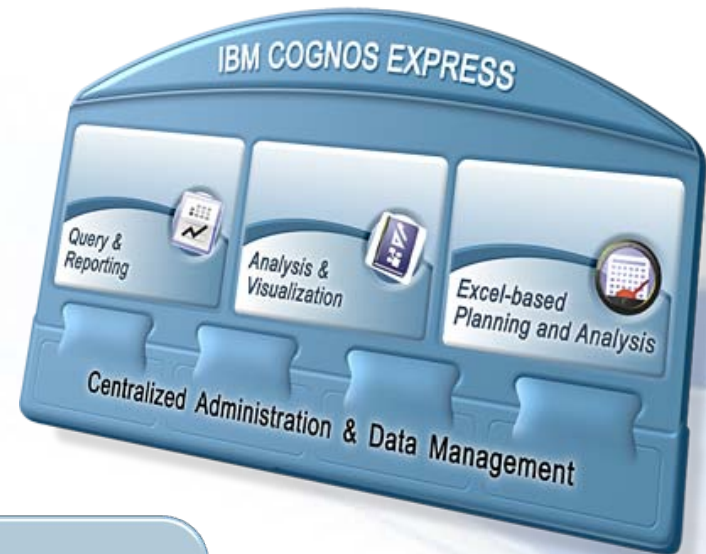
## Park Retail Group



- **Key Business Requirement:** Improved revenue forecasting for the company's high volume business  
**Approach:** Purchase a system to handle a large volume of data, and perform accurate forecasts  
**ROI:** Earlier and more accurate forecasts will help the company plan better and improve their bottom line

Challenge	Solution	Results
<ul style="list-style-type: none"><li>▪ To improve forecasting</li><li>▪ To gain a better understanding of current and future revenues</li><li>▪ To manage extremely large amounts of data with a single application.</li><li>▪ To replace ineffective spreadsheet system</li></ul>	<ul style="list-style-type: none"><li>▪ IBM Cognos Express</li></ul>	<ul style="list-style-type: none"><li>▪ Consolidated 62 million rows of data on a single platform</li><li>▪ Improved forecasting, by allowing them to predict their voucher redemption rates</li><li>▪ Fast implementation and quick user adoption</li></ul>

# IBM Cognos Express Value Proposition



## Easy to Install

**Pre-configured solution includes everything required for simple deployment and management**

## Easy to Use

**Self-service access empowers business users and removes the burden from IT**

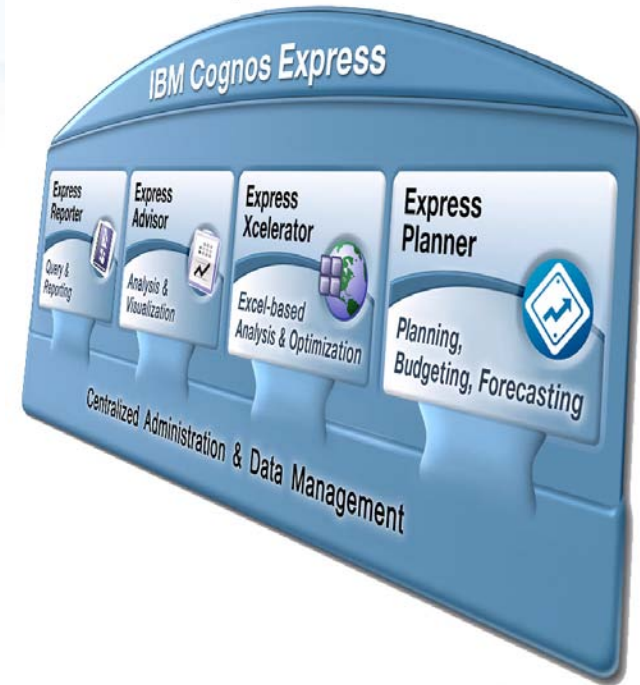
## Easy to Buy

**Packaged and priced right... Start small, start anywhere, deliver immediate value, and grow**

# IBM Cognos Express Value Proposition

Cognos Express is the only mid-market product that delivers integrated Reporting, Analysis and Planning

- Purpose-built for mid-market requirements
- Prepackaged – requiring no assembly
- Modular and provides complete growth path
- Empowers all users with self-service
- Easy to install, use and buy!



IBM Cognos Express - Windows Internet Explorer

http://localhost:19300/cognos\_express/manager/main.html?task=IBM\_CX\_Advisor&lar

Edit View Favorites Tools Help

IBM Cognos Express

IBM Cognos Express Cognos Express Administrator Log Out Launch ? IBM

### Products - Reporter

**Version 9.0**

IBM Cognos Express Reporter empowers users to access, modify and author reports with data from a wide range of data sources. It provides service reporting and ad hoc query capabilities for a wide type of data - relational, analytical OLAP, or desktop files - and deliver your reports via the web, PDF, Excel, email, or portal.

[Uninstall](#)

**What you can do:**

Reporter is running

[Stop](#) [Restart](#)

Framework Manager is available for download

[Disable](#)

Reporter is configured

[Configure](#)

- Xcelerator
- Report Studio
- Query Studio
- Advisor
- IBM Cognos Connection
- IBM Cognos Administration

The user administrator has downloaded Framework Manager. Jun 3, 2009 5:26:49 PM  
 Reporter has been successfully installed. Jun 3, 2009 4:26:52 PM  
 The installation of Advisor is in progress. Jun 3, 2009 5:31:57 PM  
 The user administrator initiated the action: Install Advisor Jun 3, 2009 5:31:56 PM  
 Advisor Core is installing Jun 3, 2009 5:32:01 PM  
 Data Advisor is installing Jun 3, 2009 5:32:36 PM  
 The IBM Cognos Express service is restarting. Jun 3, 2009 5:32:44 PM  
 Jun 3, 2009 5:33:24 PM

Manager Version 9.0  
 Advisor Version 9.0  
 Reporter Version 9.0  
 Xcelerator Version 9.0

Administration

Data

Users

Welcome to IBM Cognos Express - Windows Internet Explorer

http://localhost:19300/cognos\_express/mar

Edit View Favorites Tools Help

Welcome to IBM Cognos Express

IBM Cognos Express Cognos Express Administrator Log Out ?

**My Content**

- [My Home](#)
- [IBM Cognos Content](#)

**My Actions**

- [Explore my data with Advisor](#)
- [Administer the system](#)
- [Query my data](#)
- [Create professional reports](#)
- [Manage the business](#)

**Daily News**

All IBM Cognos Express components are healthy. (Jun 3,

Trusted sites

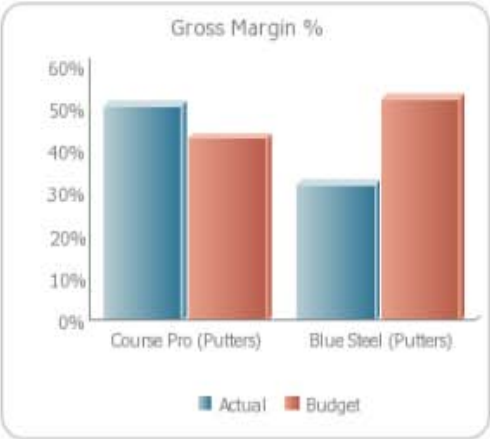
**Memory:** 2664 MB  
**Volumes:** C:\ 59.99 GB NTFS  
**Free Space:** C:\ 47.88 GB NTFS

IBM Cognos Connection

Cognos Express Administrator Log On

- Public Folders
- My Folders
- Start of My Day (GOx)**
- Xcelerator Budget Entry

Sales and GM% Analysis



Top Five Customers

Past 12 Months	Revenue	Customer	Growth Rank
	\$20,895,285.06	<a href="#">Grand choix</a>	46% 1
	\$13,219,610.69	<a href="#">VIP Department Stores</a>	(12%) 3
	\$20,271,870.30	<a href="#">Chen Yu Enterprise Co.,</a>	6% 2
	\$11,498,744.23	<a href="#">Leisure Land</a>	(34%) 5
	\$11,743,190.76	<a href="#">Artículos de Campismo El Aquila, S.A. de C.V.</a>	565% 4

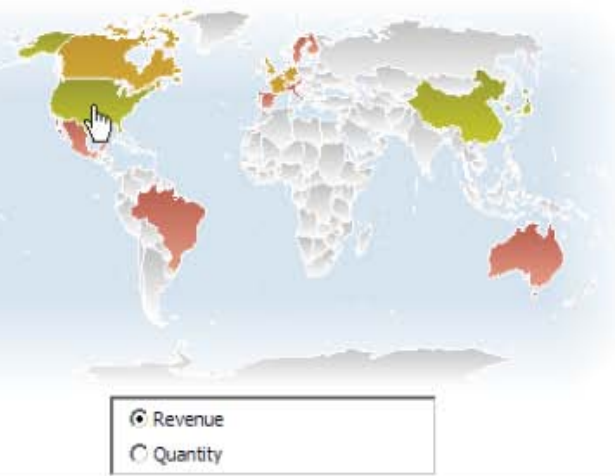
Target (Millions)

Key Performance Indicators

Time-Months March 2007  
Currencies USD

KPI	Actual	Target	Variance	Comment
<b>Asset Utilization Ratios</b>				
Sales to Account Receivable	2.40	2.20	0.20	...owner: J. Reyes (Finance)
Sales to Inventories	0.97	0.97	0.00	
Sales to Working Capital	0.58	0.55	0.03	...last review: December 15th by C. Beltran
<b>Liquidity Ratios</b>				
Current Ratio	2.73	2.40	0.33	
Days to Sell Inventory	215	175	-40	...
Accounts Receivable Turnover	2.28	2.25	-0.03	
Inventory Turnover	0.60	0.59	-0.01	...upcoming review scheduled for April 1st
Accounts Receivable to Total Assets	0.08	0.08	0.00	

Location Analysis



## Menu

## Insert Data

[Edit Data](#)[Change Layout](#)[Run Report](#)[Manage File](#)

## GOx\_Demo

- [-] GO\_Data\_Warehouse
  - [+] HR (analysis)
  - [+] Sales and Marketing (analysis)
  - [+] Finance (analysis)
  - [+] HR (query)
  - [+] Sales and Marketing (query)
  - [+] Finance (query)
  - [+] Filters
  - [+] Database view
  - [+] Business view
  - [+] Dimensional view
  - [-] Sales and Marketing (conformed)
    - [+] Products
    - [+] Product brand
    - [+] Retailers
    - [+] Order method
    - [+] Promotions
    - [+] Measures
- [+] GO\_OLAP

Insert 

Font

Size

**B***I*U

## Title

 [Retailer country: United States](#)

### Retailer country: United States

Campaign	Promotion plan revenue	Promotion plan quantity
<a href="#">Big Rock Campaign</a>	\$641,482	24,567
<a href="#">Canyon Mule Campaign</a>	\$9,017,908	88,297
<a href="#">Course Pro Campaign</a>	\$12,239,055	195,394
<a href="#">EverGlow Campaign</a>	\$1,863,961	88,689
<a href="#">Extreme Campaign</a>	\$1,579,679	7,248
<a href="#">Hibernator Campaign</a>	\$4,469,984	85,075
<a href="#">Outdoor Protection Campaign</a>	\$268,881	12,864
<a href="#">Rising Star Campaign</a>	\$5,803,763	24,633
<a href="#">Seeker Campaign</a>	\$888,763	52,221
<a href="#">TrailChef Campaign</a>	\$3,898,843	593,840
United States	<b>\$40,672,320</b>	<b>1,172,828</b>
<b>Summary</b>	<b>\$40,672,320</b>	<b>1,172,828</b>

Menu

[Insert Data](#)

[Edit Data](#)

[Change Layout](#)

[Run Report](#)

[Manage File](#)

GOx\_Demo

GO\_Data\_Warehouse

- HR (analysis)
- Sales and Marketing (analysis)
- Finance (analysis)
- HR (query)
- Sales and Marketing (query)
- Finance (query)
- Filters
- Database view
- Business view
- Dimensional view
- Sales and Marketing (conformed)
  - Products
  - Product brand
  - Retailers
    - Retailers
    - Region
    - Retailer country
    - Retailer name
    - Retailer site
  - Order method
  - Promotions
  - Measures

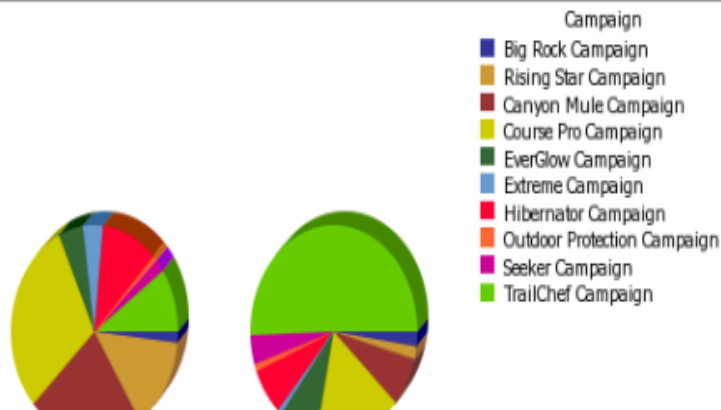
Insert

Information

# Title

[Retailer country: United States](#)

## Retailer country: United States



[Top](#) [Page up](#) [Page down](#) [Bottom](#)

Specify what will appear at the top of the report and on the first page of printed copies.

**Title:**

**Subtitle:**

- Show filters
- Show sorts
- Show suppression

OK

Cancel

D10    fx =DBRW(\$B\$1,\$B\$2,\$B\$4,\$B\$5,\$B\$5,\$B\$3,\$D\$9,\$A10,\$B\$6)

	A	B	C	D	H	I	J	K	L
		January	February	March	FIRST HALF	July	August	September	October
8									
10	Quantity	9,000	18,200	86,610	310,039	133,468	64,387	147,773	115,987
11	Price per Unit	\$ 35.00	\$ 35.00	\$ 40.1	\$ 42.00	\$ 38.00	\$ 35.00	\$ 35.00	\$ 35.00
12	Total Sales	\$ 315,000	\$ 637,000	\$ 3,464,3	\$ 12,254,910	\$ 5,605,644	\$ 2,446,700	\$ 5,172,065	\$ 4,059,548
13	Discounted Price per Unit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	Discounts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Net Sales	\$ 315,000	\$ 637,000	\$ 3,464,3	\$ 12,254,910	\$ 5,605,644	\$ 2,446,700	\$ 5,172,065	\$ 4,059,548
16	Cost per Unit	\$ 21.14	\$ 21.14	\$ 21.14	\$ 21.14	\$ 21.14	\$ 21.14	\$ 21.14	\$ 21.14
17	Cost of Sales	\$ 190,260	\$ 384,748	\$ 1,830,9	\$ 2,821,508	\$ 1,361,138	\$ 3,123,927	\$ 2,451,967	\$ 2,451,967
18	Gross Margin	\$ 124,740	\$ 252,252	\$ 1,633,4	\$ 2,784,137	\$ 1,085,562	\$ 2,048,138	\$ 1,607,581	\$ 1,607,581
19	Gross Margin %	40%	40%	40%	44%	50%	44%	40%	40%

Tahoma - 8

Cut  
Copy  
Paste  
Paste Special...  
Insert...  
Delete...  
Clear Contents  
Filter  
Sort  
Insert Comment  
Format Cells...  
Pick From Drop-down List...  
Name a Range...  
Hyperlink...

Data Spread  
Holds  
Active Form

Proportional Spread...  
Equal Spread...  
Repeat...  
Clear...  
Percent Change...  
Straight Line...  
Growth %...  
Relative Proportional Spread...  
Relative Percent Adjustment...  
Repeat Leaves...

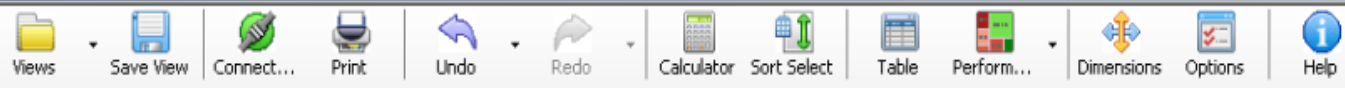




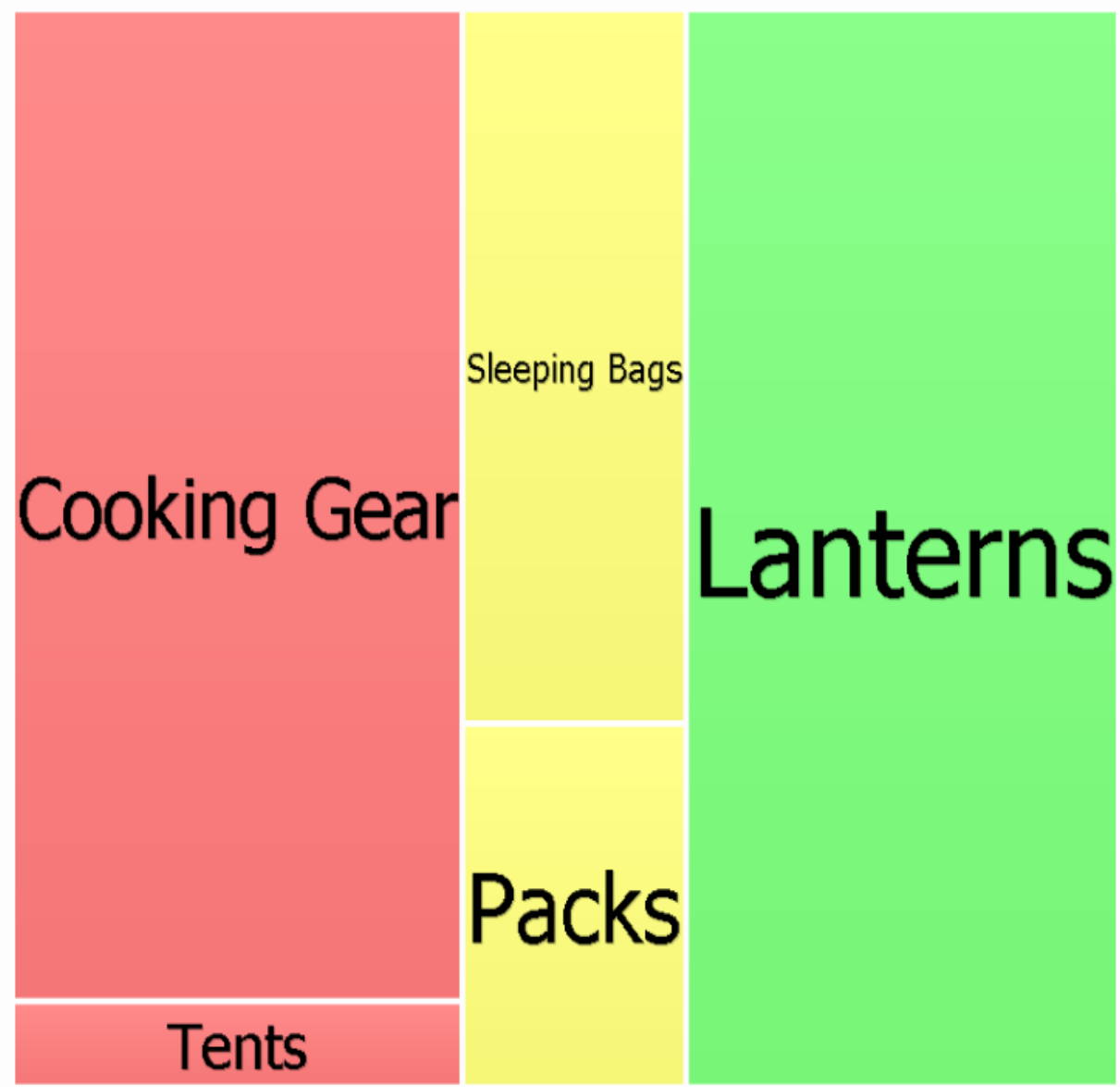
Views Save View Connect... Print Undo Redo Calculator Sort Select Both Bar Dimensions Options Help

Organization : **Total Go Sales** Sales Employees : **Penelope Tamrine** Versions : **Actual**

		April 2007			May 2007			June 2007		
		United States	Canada	Mexico	United States	Canada	Mexico	United States	Canada	Mexico
Camping Equipment	Quantity	1,470,643.00	155,182.00	377,317.00	2,238,192.00	684,333.00	92,537.00	2,342,581.00	650,755.00	458,854.00
	Net Sales	60,901,270.46	9,305,259.02	12,524,202.70	72,904,879.30	26,916,788.32	3,499,291.90	79,955,317.69	25,823,976.70	15,785,520.10
	Cost of Sales	37,912,995.51	5,707,362.29	7,634,825.03	44,794,953.94	16,786,043.07	2,044,074.76	48,128,165.47	15,450,628.36	9,704,749.51
	Gross Margin	22,988,274.95	3,597,896.73	4,889,377.67	28,109,925.36	10,130,745.25	1,455,217.14	31,827,152.22	10,373,348.34	6,080,770.59
	Gross Margin %	0.38	0.39	0.39	0.39	0.38	0.42	0.40	0.40	0.39
Personal Accessories	Quantity	383,994.00	73,990.00	61,095.00	296,109.00	137,327.00	21,278.00	695,078.00	144,437.00	91,938.00
	Net Sales	18,119,967.06	6,681,879.31	5,120,868.86	19,531,535.09	8,455,952.16	2,166,186.44	37,285,519.91	9,813,191.11	7,097,948.14
	Cost of Sales	10,305,706.36	3,576,406.00	2,981,744.36	11,050,154.31	4,975,560.37	1,167,461.03	21,225,839.52	5,387,618.99	4,073,746.35
	Gross Margin	7,814,260.70	3,105,473.31	2,139,124.50	8,481,380.78	3,480,391.79	998,725.41	16,059,680.39	4,425,572.12	3,024,201.79
	Gross Margin %	0.43	0.46	0.42	0.43	0.41	0.46	0.43	0.45	0.43
All Products	Gross Margin	49,634,781.34	13,378,283.03	10,632,434.77	62,067,304.22	21,435,333.70	6,734,373.49	78,296,119.07	25,243,522.75	13,720,200.53
	Gross Margin %	0.42	0.43	0.41	0.42	0.41	0.44	0.42	0.42	0.41



	Quantity	Gross Mar...
Cooking Gear	866,153.00	0.36
Tents	73,019.00	0.33
Sleeping Bags	313,249.00	0.39
Packs	157,869.00	0.39
Lanterns	902,063.00	0.42



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