Tech Talk: Collaborative Report Authoring for Business and Professional Authors

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Mary Windeshar: Good afternoon and welcome to today's webinar, "Collaborative Report Authoring for Business and Professional Authors." During this seminar you will see intuitive report authoring in a user interface, supporting more than 10+ languages.

I'm Mary [Windeshar]. Before we begin, here are a few brief announcements. First, this webinar is being recorded and will be available at www.ibm.com/cognos/techtalk. Second, for an enhanced view of our presentation, please disable any popup blockers you may have installed, then click the Enlarge Slides button located just underneath the slide window at the bottom of your screen.

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Today's seminar includes extensive demonstrations which may limit the amount of time we have for answering your live questions. However, today's speakers, Jane Farquhar and Andrew Popp, both product managers within the IBM Information Management Software Group will answer your questions via follow-up emails if we don't address them during this webcast.

So without further adieu, let's get started learning how business analysts can easily create statement style reports in the Express Authoring mode of IBM Cognos 8 BI Report Studio. You will also see how Report Author can add insightful charts and powerful prompts in the professional authoring mode of IBM Cognos 8 BI Report Studio. Here is Andrew. Welcome.

Andrew Popp: Thanks Mary and thank you everyone for joining us today. As Mary said, my name is Andrew Popp; I'm part of the product marketing team at IB Cognos. I will also be joined by Jane Farquhar who is a colleague of mine, part of the product marketing team as well.

In terms of the context for today's session, we really have four main sections that we wanted to cover. I wanted to do a little bit of context setting, just give you sort of a view of the landscape in terms of some of the challenges that your organization may be facing. I want to talk to you about business users; they pose a particularly unique challenge. Then we really want to focus, and really want to spend most of today's webinar talking to you about the specific capabilities and also demonstrating those capabilities in action. So we have a number of demos that go through the technology and show you exactly how you can build reports and leverage them throughout your organization.

I want to talk to you now about the BI Performance Management Objective. This is an objective that most organizations have today and that is really to get their consumers to make fact-based decisions. In order to make fact-based decisions it really implies that you have a single version of the truth. We have all been part of meetings where we come to talk about a specific issue and there was an individual who shows up with different data. Then the meeting is quickly hijacked as we spend all of that time or all of that energy determining where that rogue piece of information came from.

If you take a look at BI implementations today, even in the Cognos world with our best customers, we probably only have a penetration rate approximately between 25% and 30%. That means that probably between 60% to 70% of most people within organizations are not leveraging BI – very difficult to achieve the performance management objective if those folks aren't subscribing to a BI solution.

Who are these folks who typically are laggards or who are not necessarily on-board with respect to BI? They are typically business users. Business users present a number of unique challenges and they are difficult to get engaged with respect to BI.

I want to just hand it over to Mary now who is going to talk to us about our polling question.

Mary Windeshar: That's right. Today's first polling question is: What is the biggest challenge you face with your current reporting solution. And your choices are right there on the slide itself; we are asking you to choose just one. The first is: We have too many reporting solutions. The second is: IT can't keep up with requests from the business, or unable to access all of our data sources. And finally your last choice: Not flexible enough to grow and change with the business.

So please choose just one. Click your answer right there on the slide itself and then hit the submit answer button.

Andrew is this question pretty straight-forward? What should our viewers keep in mind when they are answering it?

Andrew Popp: Yes, Mary, I think on paper this question is relatively straight-forward, but I think if you begin to talk to some of our customers you will quickly realize that most organizations actually suffer from multiple reporting solutions. There are a number of reasons why they have multiple reporting solutions – either it is through mergers and acquisitions or they have bought a unique reporting solution tied to a specific data source. So I am really interested to see what the answers are here because I think it is actually a bit more of a difficult question than it looks on first blush.

Mary Windeshar: I like it when you say that they are suffering from multiple reporting solutions.

Andrew Popp: Yes, well a lot of our customers are suffering.

Mary Windeshar: Beautiful empathy there. Once again the question is: What is the biggest challenge you face with your current reporting solution? And taking a look at our results, well, the big winner is not flexible enough to grow and change with the business. About 31% of people reporting that that is the situation. But we have a tie between we have too many reporting solutions and we are unable to access our data source or at least all of our data sources.

Did you want to react to the results there?

Andrew Popp: Yes, and I mean I think it is not much of a surprise that not flexible enough to grow and change with the business – I think this really talks to the business BI objective and it is really trying to get this elusive business user on-board. Gone are the days where people just want to simply consume BI – they want to actually become an active participant in BI. And I think these business users are really stretching the boundaries for traditional BI solutions and really looking for personalized content. I think we are going to see a lot of that in some of the demos that Jane is going to cover.

I think the other thing is answer B which is "IT can't keep up with requests." We consistently hear that IT is completely oversubscribed. So IT is looking for a solution that is going to scale with the on-boarding of these new users and I think the audience today is going to learn some interesting stuff in terms of how Cognos reporting can address that.

Mary Windeshar: And you can tell I wasn't a math major – I was completely wrong. The two that tied weren't the second place winners at all; it was what you just mentioned, the IT can't keep up with requests from the business.

Andrew Popp: Yes, I tried to keep it smooth there for your Mary, but that's okay.

Mary Windeshar: It's alright. We will go ahead and have you go on with your presentation. Thank you.

Andrew Popp: Okay, so thank you for responding there. I think it gives us some great context. I want to quickly get into talking to you about IBM Cognos 8 BI Reporting. I mean reporting is a great place to start because that is how most of our customers start a relationship with BI. It is a great way to establish a beach head. Reporting is critical because it answers the why – why is a particular product set, a particular set of customers – why are they reacting this way? The ability to be able to do reporting on that is critical. So a lot of people use reporting as a foundation piece in order to begin their BI journey.

IBM Cognos 8 BI Reporting delivers a single environment built on an open SOA based enterprise platform to address all of the reporting requirements. And there are a number of things that IBM Cognos Reporting does special which really differentiates us from the market and I want to spend some time talking to you about it.

The first one is universal data access. Now, most organizations are – I would be almost as bold to say all organizations have disparate data sources. And there are a number of reasons why that is the case – historical reasons, or just the number of different applications in motion with most organizations. To be able to get a holistic reporting solution in place, that reporting solution needs to be able to report on all disparate data sources so that it can give the end user a unified view and you can get to this one version of the truth.

Full breadth of report coverage. If we go back to the BI and PM objective, we talked about the fact that power users are on-board with respect to BI, but it is these business users who aren't. And if you look into the detail, business users need different types of interaction and different styles of reports. They want dashboards; they want to be able to consume their reports on mobile devices. So you need to be able to standardize on a reporting solution that can really deliver that breadth of reporting styles.

"Author once, access anywhere" is an IBM Cognos concept. And we are going to get into more details around it, but it is really for the IT audience out there. And it enables you to scale the business. As you on-board more business users, so you can imagine in the best case scenario you are potentially doubling, almost tripling your user community if you manage to get all of those business users on-board.

You have to introduce some sort of scaling mechanism so that you are not engaging one IT person for every 10 business users because you are going to quickly get oversubscribed. And as we heard from the poll earlier, today IT organizations are completely maxed out. So "author once, access anywhere" is a great model to address that problem where you can standardize on a report and then you can basically repurpose it.

Holistic support for global deployments – as we are competing in these turbulent times, more and more organizations are looking to figure out how they can become competitive. Part of that competitive nature involves branching out to different locales and in many cases that involves different native tongues. If you can deliver a reporting solution that can translate content on the fly without having to do some massive recoding, that again gets you a step further to your BI or your PM objective.

Secure reporting environment – it is very similar to data sources. There are all sorts of different security models or profiles in play. We have a great story in the sense that we come with our own security infrastructure, but we are also completely open standard in the sense that we can integrate with any sort of security process or infrastructure in place to deliver a single sign-on capability.

And finally integration with enterprise applications. So we have a number of integration points, whether it is northbound to portals or whether it is integrating with your existing data sources, or whether it is a complete turnkey solution that you are looking for – we have different deployment capabilities.

I just want to spend some time because it is very important, is to talk to you about "author once and access anywhere." So there is a diagram that you should see in front of you that really talks to you about the typical workflow that something goes from sitting as a raw data source to something that on the very right hand side you could consume in a usable format.

So if you begin on the left there is, again, disparate data sources sitting within an organization. Cognos enables you to standardize on a modeling infrastructure to model those disparate data sources so that you can give an end user a consistent view of that data.

As you bring that model data into our reporting environment and again you are going to see more of that shortly. You can begin to build meaningful reports leveraging that model.

At that point there, there is a report specification that is created. And really what happens there is that report specification is more or less frozen, so you can imagine that a business user, an IT author, has created a report outside or what is created out of that is a report specification. Through the wonders of our open-based platform, you can now repurpose that report specification so that you can basically deliver that report in any language, any format, whether it is PDF, whether it is Excel, whether it is XML – any mode. So whether you want on online or an offline mode, whether you want Flash-enabled mode or in any location.

And the beauty of it is that the report does not have to be or does not necessarily need to be touched at all. So you can imagine when we are trying to go after this elusive business user, you can now begin to deliver different styles of reports without re-engaging IT. IT builds the reports based on the model data, so you have the one version of the truth, but then you use the platform to basically repurpose those report specifications or reports.

At this point I wanted to turn it over to Jane Farquhar who is going to get into a bit more detail around the products and also get into some demos.

Jane Farquhar: Thanks Andrew. So I guess we will dive right into kind of the product portion of today's presentation. IBM Cognos 8 BI Report Studio is the capability for authoring report content in Cognos 8 BI. It provides a really flexible interface that satisfies the needs of both your business and financial analysts and professional report authors.

This is achieved through two distinct authoring modes that we offer. We introduced Express Authoring Mode about 18 months ago when we launched IBM Cognos 8 BI Version 3. It is meant primarily for business and financial analysts who need to create statement style reports. Users are presented with a simplified interface and work with live data versus the wire hanger mode that professional authors would be using in Professional Authoring Mode of Report Studio. Users can easily apply financial style formats through really simplified gestures.

By switching authoring modes the professional report author or BI professional can use that report specification as Andrew talked about to apply more production style, pixel-perfect formatting, add more meaningful charts, as well as further personalization through a broad range of prompt options and can distribute the report by taking advantage of advanced scheduling features.

There is also a wide variety of report distribution options to ensure that the report consumer downstream is really getting the most relevant and timely information.

So this is probably best explained by seeing Report Studio in action. In the demos that follow, I will start the demo in the Express Authoring Mode of Report Studio and then Andrew will inherit that report that I have created in the Professional Authoring Mode and build it up for use by a larger audience.

Okay so for the purpose of this demo I am going to pretend that I am a business analyst who would work directly with the sales organization, likely a sales executive. And I have been asked to provide a report on how the sales force has been tracking according to their sales quotas.

So I am going to begin this report in the Express Authoring Mode of Report Studio. Now for those familiar with Report Studio, you are used to it being the Professional Authoring Mode. About 18 months ago we introduced the Express Authoring Mode for Report Studio which is a much more business friendly report authoring environment for the purpose of authoring statement style reports.

You will notice immediately that the tool box has been simplified to provide information and insert-able objects and tools that a business analyst would find useful and not overly cluttered with additional professional authoring tools.

The other thing I would like to turn your attention to is the fact that we are thinking in a member's view which again is a much more business friendly view of information.

So to the right side of the screen in the kind of desktop area, if you will, the work space, you will notice that we have pre-defined cross tab. And I am able to drag and drop information into the report. And again, for those of you familiar with Report Studio, you will know that you are typically working with wireframe and not live data. With the Express Authoring Mode we are working with live data here; so what you see is what you get.

I have just dragged in geographic dimension and I have now dragged in the revenue measure. I will drag in the sales targets.

So I have been able to create a very simplified statement style report in Express Authoring Mode. And one nice little feature is my ability to drag and drop columns to re-sort. And the fact that the information is dimensionally modeled, so I am able to drill down on each geography to get more information on the underlying districts and regions.

So I am going to insert a calculation here. You will notice from the menu that there is a number of pre-defined, pre-built calculations but for the purpose of this demonstration I am going to add a custom calculation, percentage difference and give it its own name.

Again, very simplified Windows-like functionality. So I have now inserted the calculation; I can put in my own title to give it some additional meaning. And I can also apply some formatting. Now with the handy eye-drop feature I am able to apply that format to each of the other rows. And now I will run this report in the report viewer.

As you can see we have got a very nice kind of financial statement style report and I am able to drill up and drill down because this information is dimensionally modeled.

Okay, I'm going to add a couple of different measures here. I will get the gross margin and gross profit put in here as well. This is additional information that maybe my sales executive hasn't asked for but probably would find very valuable. And I will drag my calculation that I inserted so that it is with the appropriate measures.

Now another bonus I might want to provide here for my sales management is the ability to see how the geographies have performed over time. So I can quickly drag a context filter or a slicer into the drop zone here and I am able to filter on the time dimension and I can go down to whatever time dimension I want and I can demonstrate to my sales executive exactly how the regions have been performing over time.

So as a business analyst I am probably part of a larger team and I know that other sales executives in the organization probably could benefit from this information. IBM Cognos 8 BI Report Studio allows the option to pass that report specification that I have built in the Express Authoring Mode onto the Professional Report Author if he or she wanted to add additional value to this report. This would save time that would normally have been spent going back and forth between the analyst and the professional author trying to define the report requirements.

Andrew Popp: I'm going to play the role today of a professional report author. What I am looking at now is a report, a statement style report, that was generated likely by a business manager in Report Studio Express. So that business manager has notified me and feels that this particular report would benefit other people within his organization. So he or she has asked me to top it up to make it ready for mass consumption. So what I am going to do is I am going to pick up this report and I am going to change the authoring environment, so I am going to move from the Express Authoring environment into the Professional Authoring environment.

One of the things that you notice immediately about Report Studio Professional is that we have got this concept of wire hanger frame mode, so you notice on the right hand side that we have lost the ability to see live data; rather we simply just see data elements now. The advantage of this approach is that it is significantly faster. We don't necessarily have to load up all the data every time we need to do an edit. And it enables us to do pixel-perfect modifications.

So the other thing that you see is that as I go through the various tabs there are actually additional tabs. We have a data element tab. We also have a query tab. So in Report Studio Express you could only have one query per report. Here you have the ability to have multiple queries. The other thing that is significantly more robust is the tool box. You will see that there are many more objects that you can grab from the toolbox.

Now what I want to focus on is the original author has created a filter. I want to actually delete that filter and I want to add a prompt. Prompts in general are significantly more relevant for a large audience because people can use prompts to quickly filter in their specific information and make that report more relevant to them.

So the first thing I want to add is I want to add a table – a table is a great way to start to begin to lay out or professionally lay out this particular report. I want to now grab that cross tab – you will notice that there is a pick chooser that I can grab the whole cross tab for specific elements. In this case here I grab the whole cross tab. The other thing that I have done is I have selected the lock and unlock button which is located in the top. Basically what that allows you to do is if you select the unlock, any other element that I now drop onto the canvas will not automatically pick up the characteristics of this cross tab, a great way to add additional data.

So for example now I want to be able to quickly drop a chart onto this canvas. So it is asking me what type of chart – I will just go for the default today. But you will notice that none of the elements are actually picked up in terms of from the cross tabs. So let's quickly add some elements into this chart.

Go back to my data element page. And you will notice here that we actually see the data – it is no longer in a member-base view. I am actually seeing significantly more information than I did in the Report Studio Express Mode. So I am going to quickly grab the revenue which is in the sales fact, quickly grab that measure and apply it to the Y-axis.

I'm also now going to grab a time dimension. I'm going to focus on months, drop it in the X-axis and then finally for my series I am going to grab [hid] the region.

Now you are going to notice in this case here, the time dimension, I'm actually going to inherit all of the time dimension. So we probably want to filter that a little bit and we use the powerful prompting capabilities in Report Studio to actually allow the user to pre-select a particular time aspect they want to be able to see the report in.

Now what I want to do is I want to quickly grab or setup a prompt. Now prompting can be very difficult to actually set up but the way that Report Studio Professional has it arranged you can quickly add a prompt by using our powerful wizard-driven interface. So what I am going to do is I just want to filter this toolbox here and just me basic prompting items. So I am going to grab a value prompt and I am going to drop it on to the canvas. Immediately I walk through a series of wizard screens which asks me what is the particular element that I want to be able to prompt on.

For simplicity sake today I am going to prompt on the time dimension and we are going to focus on year. Now here, again, back to this lock and unlock, because I have actually selected the unlock – when I drop that chart onto my canvas it has actually created a second query. So I now want this prompt to drive both of my elements on this report.

So I select yes for that. And I now select finish. So basically what I have now is a prompt; I just want to make some modifications to that prompt. I want to be able to select the Auto Submit. This allows a user once they have selected a value to then change that value so that the whole report will be re-prompted.

So let's take a look at what we have now. So the first thing you will notice is we have this built-in prompt. So in this case I will choose 2007. And it is now going to render my chart based on 2007 so the chart on the left is now filtered for 2007; and my cross tab, my original cross tab that I inherited from my business manager also only shows 2007 information.

So one of the things that might be nice to do is to be able to actually filter based on, for example, the regions. There seem to be regions in both the left and on the right hand side.

So let's continue to make more modifications. One of the nice things that people like to be able to see is they like to be able to see how particular values are trending – so how is a particular value trending in terms of over the course of time. A great way to be able to do that is the ability to add micro-charts. So that actually [embeds] charts within a cross tab. So what I want to do here is work to building that. So as I select the regions I can do a right mouse click and you will see that I have the ability to insert micro-charts. So I will pick a particular micro-chart and for this micro-chart here I want to focus in on gross profit, so just get rid of the rest of the stuff here for now. Add gross profit as the Y-axis; we will add months again to the X-axis. So I will go back to my data tree, pick up months, and I will pick up region.

So let's just run that and see how that looks. Again, it is asking me for a prompt so again I will choose a particular year, hit okay. It does a little thinking. And you will see that now what has happened here is I now have the actual, again the chart on the left hand side, but on the right hand side I now have the original cross tab, they have both been filtered for 2007, but I now have a trend view sort of embedded in the cross tab. And it now kind of shows what is the trend for those particular elements.

So I now want to focus on just cleaning things up. One of the things that I talked about before was the ability to synchronize drill paths – so if I actually select Americas, it would be nice that I, both the left and right side of this report, respect America and actually then drill in rather than me selecting it twice.

So let's go back to the authoring mode here and let's focus on, I'm going to just quickly minimize those micro-charts just to sort of clean things up. So I'm going to go into the drop-down menu for data and I'm going to go down into drill behaviors.

So basically what this allows you to do is it gives you complete control on exactly what users can drill on and drill to. So in this case here because of our measures, there is no dimension or there is no depth to any of our measures, I'm going to actually turn off the ability to do any drilling on our measures. And the only element that I want people to be able to drill on is region.

I now want to flip over to the data item linking tab and here is where I basically setup the common property for both the left and the right hand side. So in this case they both have region, and that is in fact what I want to be able to have synchronized drilling on. So I am going to select okay to that.

Now what I want to focus on is I just want to focus on making some pixel-perfect modifications. The first thing I want to do is on the left hand side with the chart I want to go down to generate background image. This is a great way to sort of spice up that particular chart. I want to focus on adding some particular border characteristics. You will see that there are a number of different options here. I want to choose, rather than a single value for a fill, I want to actually do a gradient fill across two color elements; in this case I will choose a blue and also a white. And you will see I have complete control in terms of the starting angle for the particular fill and the colors.

Now what I want to do is I want to actually, now that I have invested time on the left hand side in choosing a particular background style, it would be really great if I could sort of carry this style all the way through the rest of the report. And I don't necessarily want to go through each of the micro-charts and now select the exact same elements that I just baked into the larger chart.

If I could somehow grab the elements from the chart and then just apply them to the micro-charts, that would be significantly easier. And we can actually do that with our eye-dropper functionality. The only thing that I want to keep in mind is that by nature micro-charts are smaller so I just want to actually pick up the default size of the micro-chart, so I have just gone down, picked up the characteristics and just go to the size and overflow and I will notice that it is 35 x 80 pixels. So I just want to sort of commit that to memory. For the larger chart I want to just check what the size and overflow is. And I actually want to set it at 300 x 400 pixels. Now I have got a number of options in terms of tweaking that, but just for simplicity sake that's what I want to do.

So now what I want to do is I want to select the chart, go up to the top right hand toolbar and pick up the eye-dropper, pick up those data elements or the characteristics and then apply them with the drop of the eye-dropper.

Now you will notice by default the micro-charts have now sort of grown in size and that is really because it has picked up the size of the original left hand chart and now applied it to the micro-chart. So I just want to make that modification. So I will move that back to 35 x 80. Quickly apply that. The other thing that I noticed is when I ran the report last time I noticed that some of the micro-charts were a little bit close to one of the, sort of the region data elements. So I may want to just sort of adjust the pixel padding. So I am just going to go down there and just give myself a little bit of a buffer on the right hand side. So let's do that; we are going to set it at 4 pixels for now, just to give it a bit more of a professional look.

So let's take a look at this now and see what it looks like. So I run the report – it's going to ask me for a prompt. I'm going to select a particular year, more or less like we have done all the way along. In this case I will choose 2008 versus 2007. The report is going to be generated. And the first thing you will notice is that obviously from a look and feel perspective the left hand side has obviously inherited this white to blue gradient that we baked in. And, which is very pleasing to the eye, is that the micro-chart has also inherited that. And again, I invested the time to build the style for the larger chart and then I simply applied it to the micro-charts.

The other thing that you will notice here is that I can now drill into any of the elements here. So in this case here I am going to go up and select Americas. I'm going to do a right mouse click and drill down into it. So what will happen is basically the report is going to now be re-queried and it is going to come back and you will see that it is actually broken down into the elements within North America. And, not only has the left hand chart followed the drill path, but also the right hand side as well. So this is really useful from a user perspective because you are always getting relevant data. So this particular user, if he or she is interested in revenue by region for 2008 and they are responsible for a particular geo-region, with a couple of mouse clicks they can now quickly at their fingertips get their relevant data and make some quick decisions.

So what you have seen in today's demo is a report that I inherited from Report Studio Express, likely built by a business manager, and myself as a professional report author have simply topped it up with a number of features to make it ready for primetime. We have covered off prompting, drill paths and pixel perfect manipulations to make that report ready for consumption by a number of different users.

At no time did I make any significant modifications to the original report and in fact I inherited all of the goodness that the original business author had baked into their report and I simply added on to that report. That is the power of –

Jane Farquhar: Thanks Andrew. So once a report is created in Report Studio there are a number of options that a business user has to be able to consume that information. The report author maintains full control over the content and users have the flexibility of how to access it.

So imagine being able to offer your mobile user community the ability to access and interact with the same reports that they had traditionally only been able to receive on their desktop on their smart phone. And the best part is that it won't cause IT any extra work.

So without any additional authoring or report re-design, those users can access that same report on their BlackBerry, Windows Mobile or Symbian device through either a scheduling or what we call a push option or allow the user to browse the folder structure and run the report directly from the Go! Mobile application.

The reports are compressed and optimized for mobile consumption and are fully interactive, unlike static renditions like PDFs or other email attachments. Of course, security is the number one concern for IT and Go! Mobile leverages IBM Cognos 8 platform security as well as encrypting the data both in transmission and on the device.

In addition, you have the ability to set the lifespan of a report where after a specified time period the report will no longer be able to be opened on the device.

Go! Mobile also leverages the enterprise device management capabilities like the BlackBerry Enterprise Server to remotely install or wipe the application from the mobile device.

So in the demonstration that follows I will show you how that same report that you saw Andrew and I create in Report Studio, how you can access it on the BlackBerry without any additional authoring.

So for the purpose of this demonstration I am going to pretend that I am a sales executive. So I am busy, I am on the road quite frequently or I am in meetings. And I don't have access to my laptop computer to be able to access that really important Cognos 8 content while I am on the move.

So what I have done now is I have opened up IBM Cognos 8 Go! Mobile on my BlackBerry. There would have been an icon on the desktop of the device and I have launched it. And we are looking now at the report inbox. And as you can see there are no reports currently in my inbox but I could have actually had a report pushed to the device. But in this demonstration I am going to show you how we can navigate to a report very similar to the folder structure in Cognos Connection. I can scroll to a report that I need to run and also call your attention to the fact that I have been presented with a prompt. So I am able to respond to the prompt. I need the information for the sales report for 2008 and I will run this report directly onto my device.

As you can see now I have now run this report and I have a chart and a table. So a nice little dashboard. And this report was only authored once and now without any additional authoring I can consume this on my device. Each one of the objects within this dashboard is selectable. And I can interact with this chart by scrolling around and as you can see in the bottom right corner of the screen the BlackBerry tool tips are presented. So I can see the values behind each one of the sections on the chart.

I will now navigate to the table and I will focus in on the table. So unlike a static PDF, I am able to interact with this table by now focusing in on a value within the chart. As you can see from the triangle on the right hand corner, what I have just done is basically say keep this column in view at all times. And I am able to navigate through the chart by looking at each individual column and keeping that revenue column in view at all times.

Again, no additional authoring was done for this report. I could have just as easily consumed this report on my desktop, but being a very busy executive I have the flexibility to be able to consume this on my mobile device. It could have been a BlackBerry –

So the same way that whole reports can be consumed on a mobile device, business users can gain additional value from that trusted Cognos content with IBM Cognos 8 Go! Dashboard. Through simple drag and drop gestures users can assemble their own personalized dashboard by adding entire reports or the most relevant parts of reports from pre-authored IBM Cognos content.

Through the use of Flash technology, additional interactive functionality is enabled. Users can change the chart type on the fly. Charts will build in front of your eyes and users can move or re-sort columns. All of this without impacting the underlying report specification, so IT still maintains full control.

So in the next demo Andrew will illustrate the features of Go! Dashboard and then show you how as a business user he was able to assemble that content into his own personalized dashboard.

Andrew Popp: Great. Now I want to spend some time talking to you about our latest dashboarding technology, IBM Go! Dashboard. IBM Go! Dashboard is a dashboarding technology which is built for business users to enable them to quickly assemble and personalize their own dashboard and it leverages flash as a technology so it delivers almost near-time results. And you build these dashboard elements based on the trusted Cognos dataset.

What we are looking at here is an IBM Go! Dashboard dashboard that has been built for me and I am now playing the role of a business user and I am simply going to show you how you can quickly consume and personalize a pre-authored dashboard. So the first thing you are going to notice about this dashboard is it is made up of a number of different elements. All of these elements come from the trusted Cognos content store and have been assembled for me.

So the first item on the top you see is that we have a report with an embedded prompt. It looks like there is a chart and also a cross tab. As we begin to head down you will see that there are a number of other elements that make up this particular dashboard.

What I want to show you is how you can quickly interact with this dashboard and create a personalized dashboard to suit your particular needs.

The first thing you are going to see is you are going to have the ability to filter information based on a check box. You will notice that revenue by retailer quickly shows an updated view based on the check boxes that I select and thanks to Flash as a technology, the chart repaints itself or animates itself in almost near time. The other thing that you can do in IBM Go! Dashboard is change your palette type. So I want to change a particular palette type – doesn't matter how the original report part was authored – I have the ability in IBM Go! Dashboard to personalize my palette or colors depending on, I guess, the mood I am in or what particular information I am looking for.

As we begin to head up you will see that there is a horizontal bar chart. As I do mouse-over's I am given additional information about the particular value, whether it is revenue or gross profit. I can, within IBM Go! Dashboard, change the actual display type. So although it was originally brought in as a horizontal bar chart, I as a user of IBM Go! Dashboard, have the ability to change that display type. So in this case here I would like to change it as a pie chart. And immediately the data elements are recast as a pie, and you will see as I begin to hopscotch through the various measures that the pie begins to repaint itself.

And then finally if the report or report part has any sort of animation or manipulation built in, in this case a prompt, I have full control over those prompts within IBM Go! Dashboard. So I have selected a particular prompt value, that report now reflects that prompt value. If the report has been built based on dimensional data I can drill up or drill down and again within IBM Go! Dashboard that information is rendered to me.

So what you have seen in this demo is a very quick over of IBM Go! Dashboard in terms of the consumption capabilities. We had a dashboard that was likely authored for us but through a series of simple mouse clicks I have begun to personalize that information and likely make it more relevant for my decision making.

Great. Now what I want to focus on is the second half of the demo and this is really where we assemble the Go! Dashboard dashboard. I use the word assembly on purpose as opposed to build because that is really what you are doing in Go! Dashboard; you are assembling previously authored parts or full reports and putting them onto your dashboard. And this is the big differentiator with Go! Dashboard in the sense that we are grabbing previously authored reports, whole reports, or report parts. So for example on the left hand side we have got two reports, we have a number of reports, but I really want to focus in on revenue product report and the RSP1 report. Revenue product is really made up of two parts, a revenue model cross tab and a revenue chart. I have within the power of Go! Dashboard the ability to grab that whole report, so revenue product report, or I can just grab a particular cross tab or a particular chart.

The great news about this is this really opens up the power of Cognos Go! Dashboard in the sense that you can now grab all or any part of a previously authored report. So you no longer necessarily have to have a report with all of the elements that you need. You can just simple cherry pick different report parts and assemble them on your Go! Dashboard dashboard.

So let's start to see some of that stuff in action.

The first thing I want to show you is just the ability to change templates. So there are a number of sort of styling templates that you have within Go! Dashboard. And this is just the ability to sort of lay out your dashboard. Let's grab the RSP1 report as a whole. And the first thing that we see is that particular report is prompt-driven, so there is a prompt that drives that report. So we are asked to prompt for that value. So we select 2006 and immediately that information is displayed to us; so it is exactly like you would see it in Report Viewer and likely designed in Report Studio.

Now what I want to do is I want to grab that cross tab within revenue product and just grab the revenue model cross tab. So I have just grabbed a part of a report in this case. So it now renders that as a cross tab, probably not the nicest cross tab that we have seen, but we will get to that in a second.

The last element that I want to go into is within the retailer. And again I want to grab the revenue by retailer cross tab and drop that down onto my dashboard.

And you will see that it is rendered, again, as a cross tab and there are a number of sort of elements that we can change here. Finally what I want to do is I want to go into the objects or the tool box and grab sort of a number of pre-canned objects. So in this case I want to grab a search element, just the ability to give users the capability to search for content.

And then finally give them the ability to use a checked box as a filter. So as I drop that check box object basically what happens is it shows me all of the elements that are contained on the dashboard and asks me which element would you like to be able to filter on. Camping equipment probably makes the most sense because it is actually representative in both of the cross tabs. So as I select that it gives me the option to say which elements do we want to be able to give users the ability to filter in and out. In this case I will choose all of them.

And just for another element, I actually want only one of the cross tabs to be driven by this check box. So I have the ability to go into the blue dot and select "listen to" and say I don't want you to listen to this particular filter. So that means that this filter revenue model will not be governed by that check box.

The other thing that you can do is you can actually, you have complete control over the individual portlets. So in this case I can say, what are the title bar names, what are the colors, what are some of the heights, the style for these individual portlets. In this case I probably want to make it a little bit more informative so I have chosen to say "choose product line."

Now what I want to do is, cross tabs are interesting but a lot of times people get more value by seeing something visually. So I am going to change that particular display type and I am going to turn it into a vertical chart. So it is immediately rendered as a Flash chart. So it has taken that cross tab and translated it into a vertical chart.

I'm going to do the same thing with this particular cross tab. And the real special thing that is happening here is that you know that as I started this demonstration those elements were not originally built in report studio as charts. They were actually built as cross tabs. So the real power that we are exposing here is that you can grab complete reports or parts of reports and then you can make modifications on those parts of reports depending on how you want to view the information.

Now what I want to focus on is I want to rearrange some of these charts. So you will notice that I can pick up any of the portlets and drag them wherever I want, depending on the particular templates that I have chosen. So within a few quick mouse gestures I have quickly assembled a pretty good looking dashboard made up of elements that are relevant to me. And I have really drawn on the trusted Cognos content source. So from an IT perspective I am always building this dashboard based on one version of the truth. And from a business user perspective I have injected a lot of my own personal tastes into this dashboard, whether I have grabbed complete reports or parts of reports and I have actually changed some of the elements of those report parts by changing the display type and also applying filters. And I am quickly getting a very personalized dashboard that will be very, very relevant and useful for me.

Jane Farquhar: So through the demonstrations that you saw today, a business analyst kicked off a report in Report Studio Express Authoring Mode. And the report author was able to pick up that report and in a very short time was able to add value to that report for a much broader audience. Once completed, any user is able to decide which way they will access and interact with the reports. Valuable time was saved by not having to re-author for each individual user and report assets were reused in a multitude of ways. This ensures that everyone is aligned and singing from the same song sheet and contributing to improving the overall performance of their organization.

So that concludes the slide presentation and demonstrations. I'm going to turn it back to Mary where we can maybe have time for a couple of quick questions today.

Mary Windeshar: Thank you, Jane. We have covered a lot of great material with today's demo and if you would like to ask a question please do so by typing it in the box located at the bottom left of your console and then hit the submit button.

Here is a question from Eric: For generating a report is there a way to create a template and apply that to each new report? This is a question for your Andrew.

Andrew Popp: Hi. Okay, thanks Mary and thanks Eric; that's a great question. So yes there is a way to create templates in Report Studio Professional. And probably the best way to actually demonstrate that to Eric is we can follow up with an email and get you some additional information. But yes, there is a way to create a template and it really gets rid of some of the front end loading where you can standardize on a template, etc, etc.

Mary Windeshar: And speaking of email follow up, you will get to everybody we don't get to during the broadcast today with an email answer as well?

Andrew Popp: Yes, I will.

Mary Windeshar: Okay Andrew. Also here's one: Does Report Studio Express only work with OLAP data sources?

Andrew Popp: Right, so I saw this question come up a couple of times. So Report Studio Express, so that was the first reporting environment that we saw in our use case scenario, somebody built a simple cross tab. So that just supports dimensionally modeled data. So that can be DMR, [a cube] or TM1 data source.

Mary Windeshar: Alright thank you. I think we might have time for one more. Can you handle this one? Does all of this require version 8.4?

Andrew Popp: Right, so everything accept for the Go! Dashboard component was actually available in 8v3, so that is something that we released 18 months ago. Go! Dashboard is the only component that requires 8v4 which is something that we released about 10 months ago. So it is only Go! Dashboard that requires 8v4.

Mary Windeshar: Thank you very much and Jane and Andrew we have reached the top of the hour so it is time to close this Tech Talk. Thank you so much to both of you for your informative presentations. And to our audience, please visit www.ibm.com/cognos/techtalk for more information about today's topic and to see our calendar of upcoming events.

And I would like to say to all of you before logging out, please complete the popup satisfaction survey. And also thank you for joining us and good day.