

**ADVANCING  
BUSINESS  
PERFORMANCE**



# **Cognos 8 BI Customer Roadmap**

## **Why and how to move to Cognos 8**

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**COGNOS®**

# Agenda

- **What is Cognos 8 BI?**
- **Why would you want to move to Cognos 8 BI?**
- **How to get there?**

# What is Cognos 8 Business Intelligence

- The next major release of **Cognos ReportNet, PowerPlay, Cognos Metrics Manager and DecisionStream**
- Plus new functionality across all **BI capabilities**
- All on the single web services architecture, introduced with **Cognos ReportNet**



# Cognos 8 Business Intelligence

<b>Current Product</b>	<b>New Functionality</b>
<b>Cognos ReportNet</b>	<b>Dimensional reporting</b> <b>Dashboarding charts</b>
<b>Cognos PowerPlay Web</b>	<b>Deep web analysis</b> <b>Dimensionally modeled relational analysis</b>
<b>Cognos Metrics Manager</b>	<b>Advanced Initiatives Tracking</b> <b>Strategy Map Design Center</b>
<b>DecisionStream</b>	<b>New transformational functionality</b>

Single, unified architecture for all capabilities – one portal, one data service, one metadata, one content store, one security . . .

# Upgrade and Migration

- An **upgrade** refers to the next version of a product or role
- A **migration** refers to a change from a prior product to a new product designed for a similar purpose

UPGRADES	MIGRATIONS
ReportNet	IWR
PowerPlay Web	Visualizer (Web and Windows)
Metrics Manager	Cognos Query
Role-based Bundles (RN + S7)	Impromptu (Windows)
DecisionStream	NoticeCast

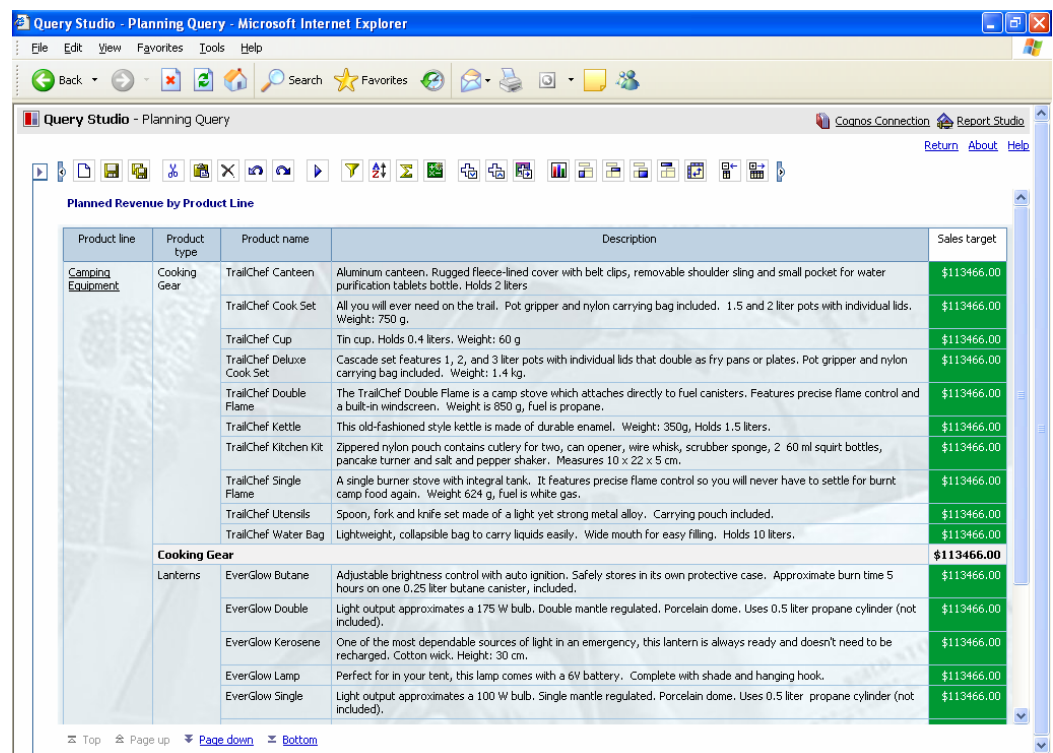
# Customer Upgrades

- **Cognos 8 BI package options:**
  - **Cognos 8 Business Intelligence – all BI capabilities**
  - **Cognos ReportNet 8 – Query, Reporting and Dashboarding**
  - **Cognos PowerPlay 8 - Analysis**
  - **Cognos Metrics Manager 8 – Scorecarding**
  - **Cognos DecisionStream 8 – Data Integration**
- **Supported ReportNet, PowerPlay, Metrics Manager, and DecisionStream licenses under user, role or CPU pricing are entitled to upgrade the Cognos 8 BI matching package**
- **Customers who purchased under seat+server model must go through a license model change prior to their upgrade**

# ReportNet – Why Upgrade?

## Extended Self Service Reporting – Query Studio

- **Templates & style formatting**
- **Conditional Formatting**
- **Multiple summaries in group and footer calculations**
- **Automatic drill up and down on hierarchies**
- **And/or filters**



The screenshot shows the Query Studio interface in a Microsoft Internet Explorer browser window. The main content area displays a table titled "Planned Revenue by Product Line". The table has five columns: Product line, Product type, Product name, Description, and Sales target. The data is organized into two main sections: "Camping Equipment" and "Cooking Gear".

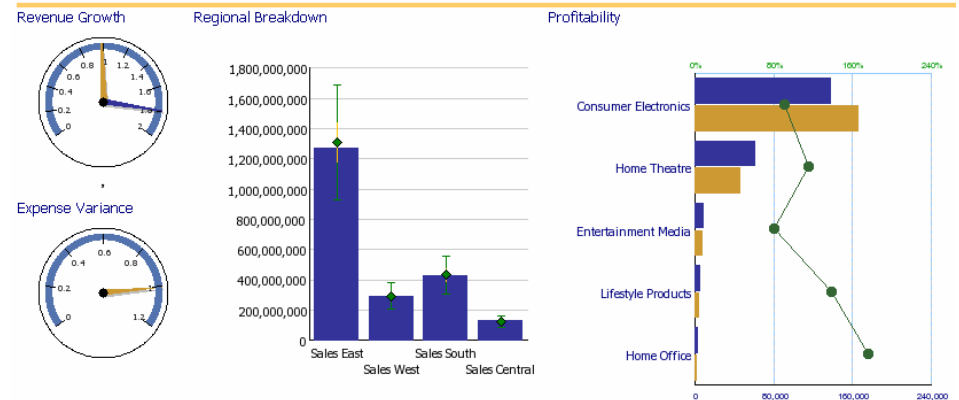
Product line	Product type	Product name	Description	Sales target
Camping Equipment	Cooking Gear	TrailChef Canteen	Aluminum canteen. Rugged fleece-lined cover with belt clips, removable shoulder sling and small pocket for water purification tablets bottle. Holds 2 liters	\$113466.00
		TrailChef Cook Set	All you will ever need on the trail. Pot gripper and nylon carrying bag included. 1.5 and 2 liter pots with individual lids. Weight: 750 g.	\$113466.00
		TrailChef Cup	Tin cup. Holds 0.4 liters. Weight: 60 g	\$113466.00
		TrailChef Deluxe Cook Set	Cascade set Features 1, 2, and 3 liter pots with individual lids that double as fry pans or plates. Pot gripper and nylon carrying bag included. Weight: 1.4 kg.	\$113466.00
		TrailChef Double Flame	The TrailChef Double Flame is a camp stove which attaches directly to fuel canisters. Features precise flame control and a built-in windscreen. Weight is 850 g, fuel is propane.	\$113466.00
		TrailChef Kettle	This old-fashioned style kettle is made of durable enamel. Weight: 350g, Holds 1.5 liters.	\$113466.00
		TrailChef Kitchen Kit	Zippered nylon pouch contains cutlery for two, can opener, wire whisk, scrubber sponge, 2 60 ml squirt bottles, pancake turner and salt and pepper shaker. Measures 10 x 22 x 5 cm.	\$113466.00
		TrailChef Single Flame	A single burner stove with integral tank. It features precise flame control so you will never have to settle for burnt camp food again. Weight 624 g, fuel is white gas.	\$113466.00
		TrailChef Utensils	Spoon, fork and knife set made of a light yet strong metal alloy. Carrying pouch included.	\$113466.00
		TrailChef Water Bag	Lightweight, collapsible bag to carry liquids easily. Wide mouth for easy filling. Holds 10 liters.	\$113466.00
		<b>Cooking Gear</b>		<b>\$113466.00</b>
Lanterns	EverGlow Butane	EverGlow Butane	Adjustable brightness control with auto ignition. Safely stores in its own protective case. Approximate burn time 5 hours on one 0.25 liter butane canister, included.	\$113466.00
		EverGlow Double	Light output approximates a 175 W bulb. Double mantle regulated. Porcelain dome. Uses 0.5 liter propane cylinder (not included).	\$113466.00
		EverGlow Kerosene	One of the most dependable sources of light in an emergency, this lantern is always ready and doesn't need to be recharged. Cotton wick. Height: 30 cm.	\$113466.00
		EverGlow Lamp	Perfect for in your tent, this lamp comes with a 6V battery. Complete with shade and hanging hook.	\$113466.00
		EverGlow Single	Light output approximates a 100 W bulb. Single mantle regulated. Porcelain dome. Uses 0.5 liter propane cylinder (not included).	\$113466.00

# ReportNet – Why Upgrade?

## Dimensional Reporting and Dashboarding

- Automatic drill capabilities & dimensional awareness
- Rich executive dashboards
  - Special chart styles, such as gauges and maps
  - Filter controls directly on report page
  - Multiple charts on single report; OLAP and relational data sources
  - Advanced graphics design control

Performance Dashboard



Financial Scorecard

Status	Trend	Metric	Actual	Target	Variance %
●	▲	Cost of Goods Sold	\$63,257	\$66,317	4.16%
●	▲	Operating Profit	\$59,679	\$53,333	11.9%
●	▲	Sales Margin	\$959	\$906	5.85%
●	▲	Sales Revenue	\$2,782,772	\$2,979,134	6.59%
■	▲	Supplier Costs	\$150,000	\$100,000	50%
●	▲	Sales Count	95,645	67,830	41.01%
■	-	Net Income	\$2,400,198	\$4,874,000	50.76%

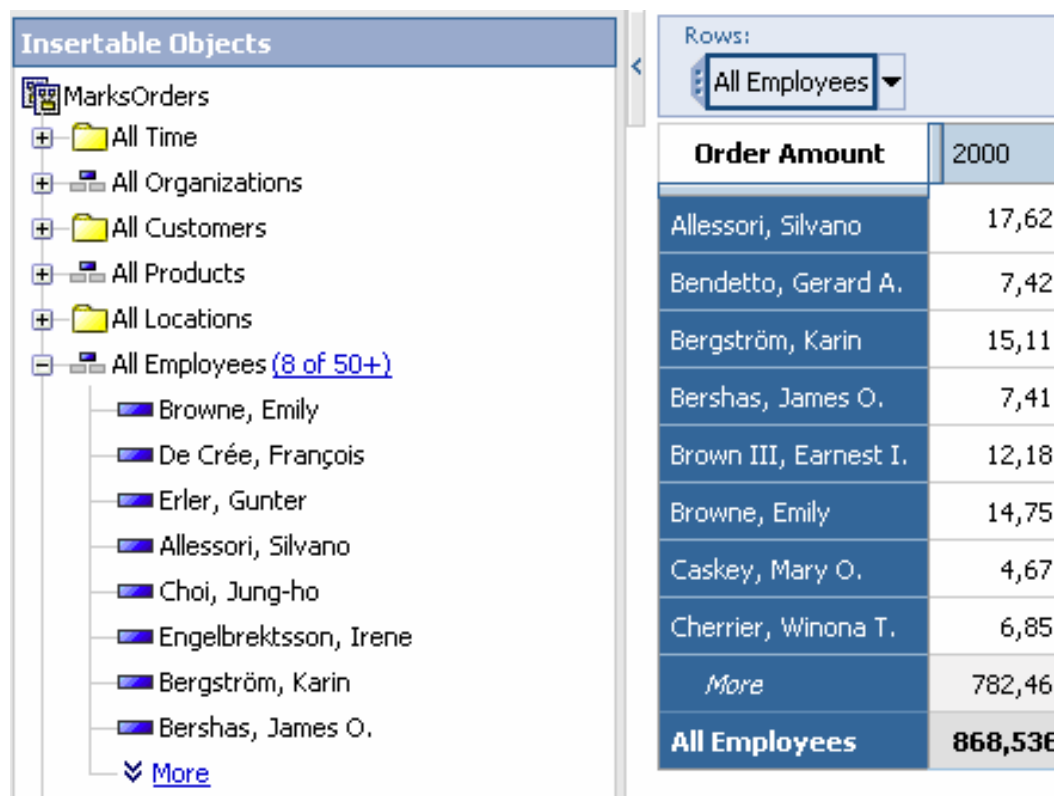
# ReportNet – How?

- **Automatic Upgrade**
  - Content store
  - Reports and queries
    - All, or by package/folder
- **SDK users**
  - Upgrade only non SDK accessed objects
  - Leave SDK accessed objects until applications updated

# PowerPlay Web – Why Upgrade?

## Large data volumes

- **Dimensionally modeled relational**
  - Dimensionally aware relational
  - Star and Snowflake schemas (slower)
- **Deep web analysis - Managing large data**
  - Summarizing
  - Data tree
  - Search



The screenshot displays the Cognos PowerPlay Web interface. On the left, the 'Insertable Objects' pane shows a hierarchical tree structure under 'MarksOrders'. The tree includes folders for 'All Time', 'All Organizations', 'All Customers', 'All Products', and 'All Locations'. The 'All Employees (8 of 50+)' folder is expanded, showing a list of employee names: Browne, Emily; De Créé, François; Erler, Gunter; Allessori, Silvano; Choi, Jung-ho; Engelbrektsson, Irene; Bergström, Karin; and Bershas, James O. A 'More' link is visible at the bottom of the list.

On the right, a summary table is displayed. The 'Rows:' dropdown is set to 'All Employees'. The table has two columns: 'Order Amount' and a numerical value. The table shows the following data:

Order Amount	2000
Allessori, Silvano	17,62
Bendetto, Gerard A.	7,42
Bergström, Karin	15,11
Bershas, James O.	7,41
Brown III, Earnest I.	12,18
Browne, Emily	14,75
Caskey, Mary O.	4,67
Cherrier, Winona T.	6,85
<i>More</i>	782,46
<b>All Employees</b>	<b>868,536</b>

# PowerPlay Web – Why Upgrade?

- Richer analysis
  - Asymmetric reports
  - Mixed dimensions in rows or columns
  - Mixed levels
- Reporting off OLAP sources
  - Schedule
  - Bursting

Revenue		2004	2005	2006	Years
Camping Equipment		20,471,328.88	31,373,606.46	37,869,055.58	89,713,990.92
Golf Equipment		5,597,980.86	9,598,268.88	10,709,215.84	25,905,465.58
Mountaineering Equipment			9,642,674.54	11,248,676.06	20,891,350.6
Outdoor Protection		1,536,456.24	988,230.64	646,428.04	3,171,114.92
Personal Accessories		7,144,797.52	10,955,708.04	13,793,960.3	31,894,465.86
<b>Products</b>		<b>34,750,563.5</b>	<b>62,558,488.56</b>	<b>74,267,335.82</b>	<b>171,576,387.88</b>
Americas	Fax	761,510.1	1,062,398.62	1,606,933.8	3,430,842.52
	Telephone	4,004,137.22	4,635,379.22	5,643,050.46	14,282,566.9
	Mail	1,547,712.84	1,116,285.68	486,098	3,150,096.52
	E-mail	3,077,193.28	2,936,003.84	4,022,584.68	10,035,781.8
	Web	2,019,580.62	3,847,616.36	7,792,845.1	13,660,042.08
	Sales visit	3,765,498.02	5,481,271.38	4,641,397.2	13,888,166.6
	Special	237,266.68	394,623.2	137,386.6	769,276.48
	<b>Order Method</b>	<b>15,412,898.76</b>	<b>19,473,578.3</b>	<b>24,330,295.84</b>	<b>59,216,772.9</b>
Asia Pacific	Fax	267,032.96	370,843.1	315,322.04	953,198.1
	Telephone	461,566.14	1,446,553.66	2,112,907.94	4,021,027.74

Insertable Objects

- Great Outdoors Company
  - Years
  - Products
    - Camping Equipment
    - Mountaineering Equipment
    - Personal Accessories
      - Watches
      - Eyewear
      - Knives
      - Binoculars
      - Navigation
    - Outdoor Protection
      - Insect Repellents
      - Sunscreen
        - Sun Blocker
        - Sun Shelter Stick
        - Sun Shelter 15
        - Sun Shelter 30

Rows: Products (list)

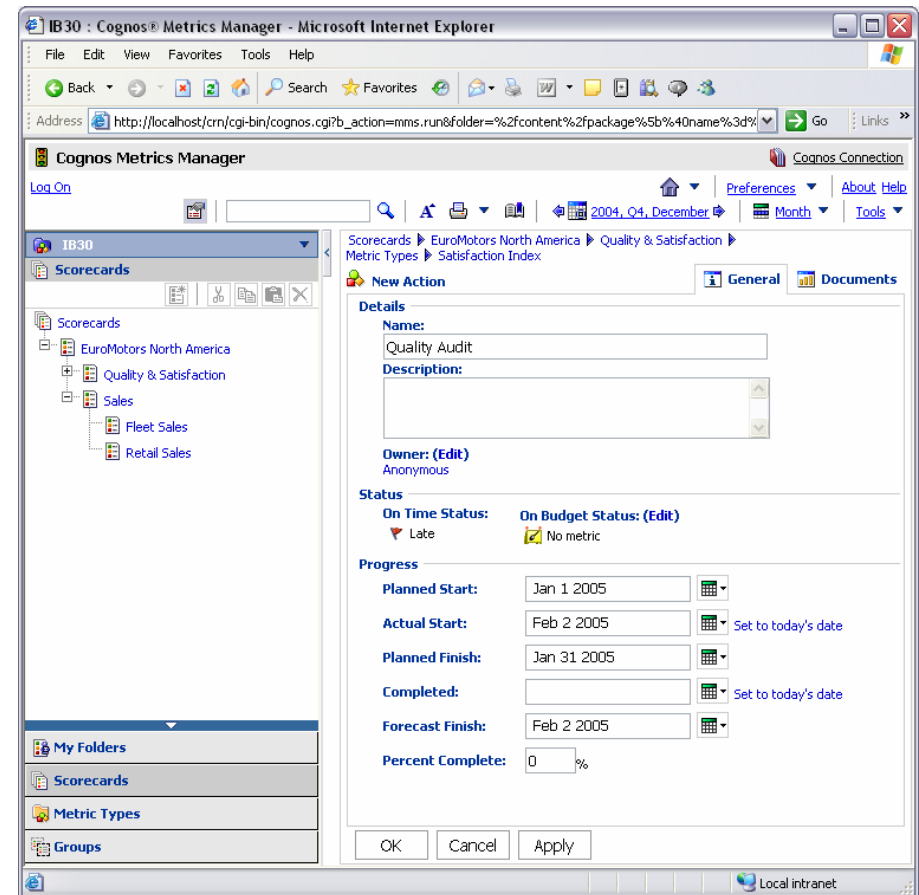
Revenue	2004	2005
Products	\$34,750,563.50	\$62,558,488.56
Eyewear	\$1,153,561.30	\$1,116,285.68
Sun Blocker	\$70,413.16	\$137,386.6
Sun Shelter 15	\$103,028.08	\$4,022,584.68
Sun Shelter 30	\$133,776.92	\$2,112,907.94
<b>Total</b>	<b>\$34,750,563.50</b>	<b>\$62,558,488.56</b>

## PowerPlay Web – How?

- **Cubes automatically transfer**
- **Series 7 security applies**
- **PP Web reports and Upfront content**
  - **Upgrade utilities**
  - **Available - end of the year**
- **Note: no need to upgrade PowerPlay Client or PowerPlay Excel**
  - **Mobile analysis**

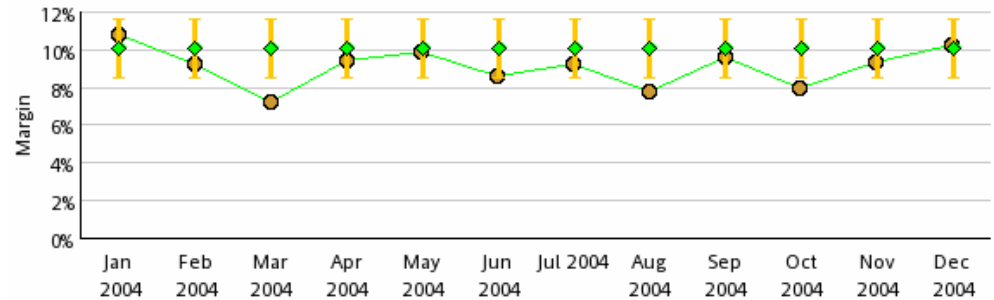
# Metrics Manager – Why Upgrade?

- **Advanced Initiative tracking through projects and actions**
- **Enhanced user personalization**
- **Strategy map design center**



# Metrics Manager – Why Upgrade?

- **Enhanced graphing & charting**
  - Advanced history
  - Cause & effect charts
  - Hover over graphs
- **Integration with Cognos 8**
  - Report selection
  - WatchList portlet
  - FM model – reporting, query, event management
  - Security model



# Metrics Manager – How?

- **Automatic upgrade**
  - Export data
  - Initialise empty database in Metrics studio
  - Import data
- **Data load**
  - ETL tool
  - Metrics Designer
- **Pathways to understanding**
  - ReportNet
  - Series 7 IWR and PP

# DecisionStream – Why Upgrade?

- **Unicode**
- **New transformations**
- **Folders in the designer environment**
- **Enhanced data type support**
- **Cognos 8 integration**
  - **Shares a single service**
  - **Query mechanism**

# DecisionStream – How?

- **Automatic Upgrade**
  - catalog(s) updated automatically
- **Post upgrade you may need to:**
  - **Modify command line scripts to new location of the Cognos 8 executables**
  - **Source control package to the New DS8 catalogs**
  - **Leverage Cognos 8 security**

# Availability

Available on demand on Cognos 8 GA

Automatically shipped to supported customers

<b>ReportNet</b>
<b>PowerPlay Web</b>
<b>Metrics Manager</b>
<b>DecisionStream</b>

Cognos 8 MR1

# Migration

- A **migration** refers to a change from a prior product to a new product designed for a similar purpose

UPGRADES	MIGRATIONS
ReportNet Role-based Bundles (RN + S7) PowerPlay Web DecisionStream Metrics Manager	<b>IWR</b> <b>Visualizer (Web and Windows)</b> <b>Cognos Query</b> <b>Impromptu (Windows)</b> <b>NoticeCast</b>

# Securing your Series 7 Investments

- **Series 7**
  - Series 7 version 4 planned
  - Enhancement and support – until at least December 2010
- **Commitment to your success**
  - Migration paths – services, licensing and tools
- **Cognos 8 – Series 7 interoperability**
  - Series 7 namespaces in Cognos 8
  - Upfront portal content in the Cognos 8 portal
  - PowerPlay 7.3 content published to Cognos 8
  - Drill through from PowerPlay to ReportNet reports

# Moving from Series 7 to Cognos 8

- **Business case for a move**
  - Is it necessary?
  - Interoperability – business needs change
- **Migration – ‘involves more than an upgrade’**
  - Planning
  - Move using utilities
  - Some authoring
  - Testing

# Licensing through the transition

- **Licensing**
  - **Dual use** refers to a user who is licensed and supported for both a prior product and a new product interchangeably for a period (e.g.: IWR / ReportNet consumer)
  - **License model change** refers to a switch from a prior licensing model to a current model, such as Server + User, to Per User (reasonable servers)

# Roadmap

- Metadata Migration
  - Available now
  - Impromptu Catalogs
  - Architect Models
- Impromptu Report Migration
  - Available now
  - Impromptu Reports
- Impromptu Web Reports and Upfront
  - Coming soon
- PowerPlay Web Reports
  - In development



## Example migration – Moving ‘IWR and Upfront’

- **Series 7 Deployment Manager – package up content**
  - Reports, metadata, security and Upfront content
- **Migration Tool - convert deployment package to Cognos 8 BI**
- **Import the deployment package to Cognos 8 BI**
- **Study logs**
  - Structural, functional or formatting Issues.
- **Refinement may be required in Report or Analysis Studio**
- **Test as if new**
- **Deploy to live Cognos 8 BI environment**

# Services

- **Get to Cognos 8 service**
  - Assessment (defined deliverables & timelines)
  - Migration/Upgrade Service (product dependant, version dependant, complexity of implementation dependant)

## Summary

- **Cognos 8 BI is the only choice for Standardisation**
- **Great reasons for going to Cognos 8 BI**
- **Commitment to your success**
  - **Interoperability, licensing, services and tools**