Sugar Connector for Cognos BI

SUGARCRM

embedded
The value of Analytics for CRM

Organizations that make extensive use of analytics:

36%	15%	2x	57%
Growth in Revenues	Increase in ROIC	Growth in EBITDA	Increase in Competitive Advantage

Sources: Study done by IBM Institute for Business Value and MIT Sloan Management Review.

"CRM analytics … must be delivered with and as an **integral component** of the CRM software and deliver analytics **in context of CRM data**"

-crmsearch.com

SUGARCRM

Sugar Connector for Cognos BI

Allows customers to extend existing Cognos investment into their CRM environment


- **Integrated**: Quickly and easily extend your Cognos investment with pre-built integrations to Sugar

- **Market Leading**: Supports IBM's customer proven Cognos Business Intelligence offering

- **Extends Sugar**: Complements Sugar's out-of-box reporting geared for organizations that need advanced analytics

SUGARCRM

What's in the Product
Connector works with existing Cognos (purchased separately)

- Cognos "Bridge"
  - Security
  - User Management
  - Integrated administration
- Starter analytics tables and db for opportunity data
- Starter dashlets for individual sales rep scenario
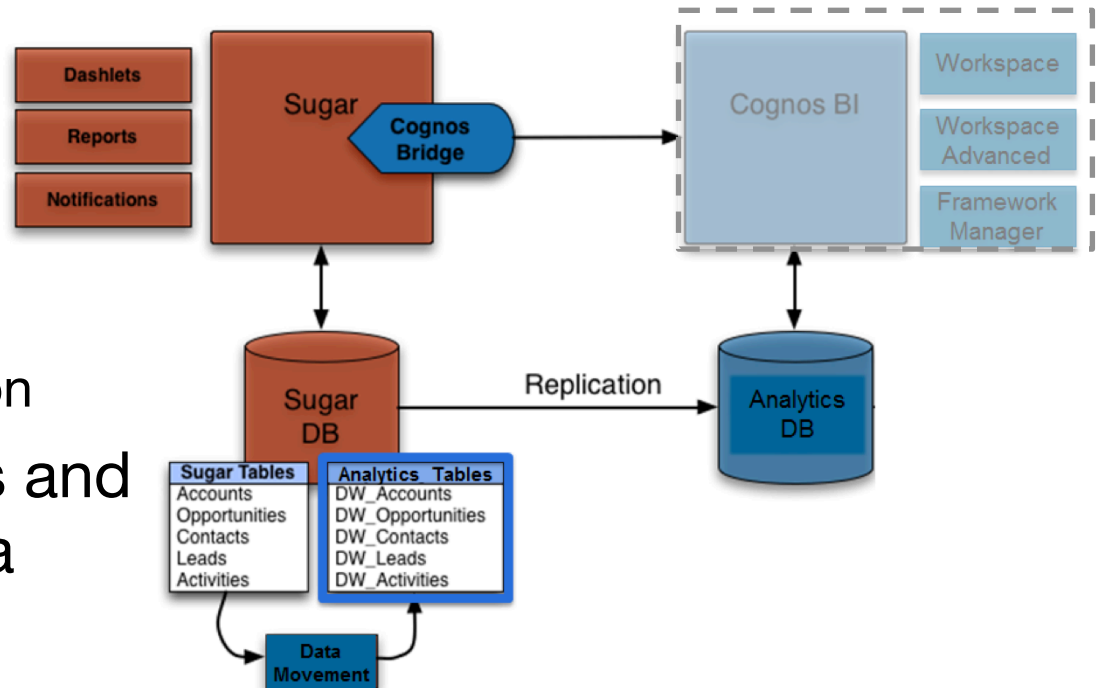
SUGARCRM

Value of Sugar Connector for Cognos BI

- Admin and management integration
  - Single sign on and integrated security between Cognos and Sugar
- UI integration
  - Place Cognos reports as dashlets in the Sugar window
  - Allows embedding Cognos analytics, in context, directly into Sugar
  - Sugar users do not need to spend energy looking up analytic information in another system
- Starter reporting database ("datamart")
  - Provides starter db with movement (ETL) scripts based on standard Sugar operational database model for a predefined set of reports
  - Can be customized

Key Takeaways: Sugar Connector for Cognos BI

- **What is it?**
  - A NEW! SugarCRM add-on product
  - Provides advanced analytics and business intelligence for Sugar
  - Powered by IBM Cognos Business Intelligence: proven, robust, market-leading

- **Positioning:**
  - Extends out-of-box Sugar reporting for organizations that need advanced analytics
  - Works for existing Cognos BI licenses (must be purchased separately)

- **If you answer YES to any of these, then Sugar Analytics is a fit :**
  - Do you want to leverage your existing Cognos investment for CRM data?
  - Do you have analytics and business intelligence needs that go beyond the capabilities of Sugar reporting?
  - Do you frequently export Sugar data to Excel or other tools?
  - Do you need to be able to perform any of the following with CRM data: e.g. dashboards, trending, drill up / down, create charts and graphs?

SUGARCRM

Product Notes

- Supports Sugar on-prem only – Not Sugar On-Demand
- Supports both Sugar 6 and Sugar 7
- Support LAMP stack (Linux, Apache, MySQL, PHP)
- Admin component is English only
- Supports Pro, Ultimate and Enterprise Editions.
  - However we expect most customers that need advanced BI capability, will be using Ultimate and Enterprise
- Pricing: Special bid, contact your Sugar sales specialist or partner representative

SUGARCRM

FAQ

- Q: Why is Sugar no longer selling Sugar Analytics?
- A: Sugar Analytics was an offering from Sugar consisting of embedded Cognos BI as well as the Sugar Connector for Cognos. Sugar Analytics was restricted for use only with the Sugar database. We received strong feedback from customers, partners and sellers that customers prefer to use advanced analytics with a wide variety of data – both Sugar and non-Sugar data. Therefore, we decided to discontinue Sugar Analytics. Customers wanting to use Cognos with Sugar can still purchase Cognos from IBM, and purchase the Sugar Connector for Cognos to integrate Cognos into their Sugar environment. This approach allows customers to use advanced analytics with both Sugar and non-Sugar data, as well as simplifying our portfolio and simplifying our sales and support model.

- Q: I have a Sugar customer interested in Cognos. What should I recommend to them?
- A: Recommend that they purchase Cognos from IBM, and purchase the Sugar Connector for Cognos to integrate Cognos into their Sugar environment.

- Q: How is the Sugar Connector for Cognos sold and priced?
- A: Contact Sugar for special bid pricing.

- Q: Is there any change to Sugar's direction with Sugar Reporting?
- A: No. Sugar Reporting will continue as a basic reporting capability built into, and included in, Sugar. Cognos is one option for Sugar customers that provides advanced analytics over and above the capabilities of Sugar Reporting.

- Q: What about other 3rd party analytics and BI offerings besides Cognos?
- A: We are investigating additional integrations and connectors with other leading analytics / BI offerings.

SUGARCRM

Thank You

SUGARCRM

Report creation overview

1. Metadata modelling step using Cognos Framework manager
   - Define desired business objects and mapping to Sugar operational database
   - Deliverable is published metadata model called a "package"

2. Report authoring step using Cognos Report Studio or Workspace Advanced
   - Using previously defined business objects, define desired reports, layouts, formatting

3. Viewing reports using Sugar with Sugar Connector for Cognos
   - Can be viewed from within Sugar UI
   - Can also be published/viewed separately
   - Can be scheduled

SUGARCRM
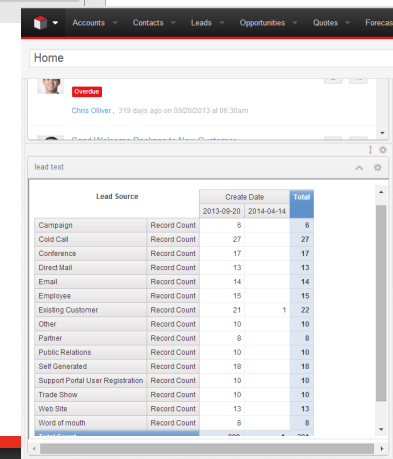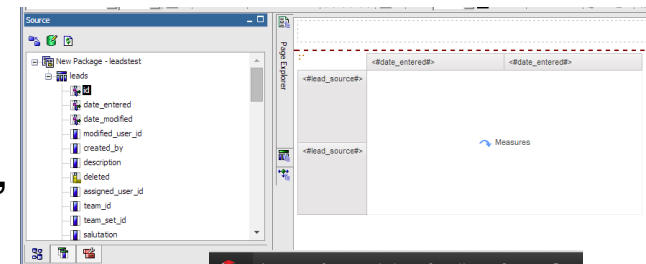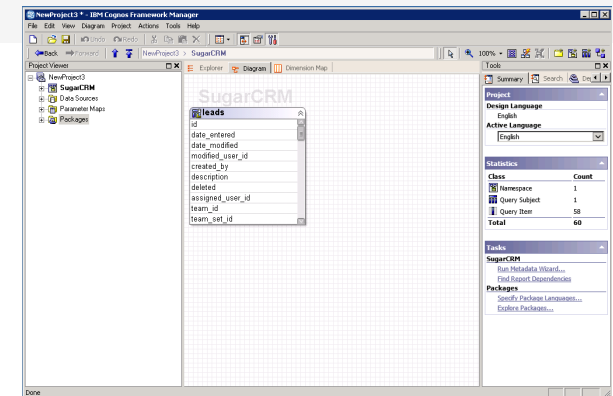
How dashlets get created in Sugar Analytics
Blue = Sugar skill; Green = Cognos skill

DEFINE

1. Define desired dashlets
- What data should appear, with which dimensions, and what if any is the drill down / drop down behavior

2. Define the underlying reporting db schema supporting those dashlets
- May need to include use of Sugar audit tables for history

3. Define the mapping from the Sugar operational db to the reporting db
- Requires knowledge of Sugar data model
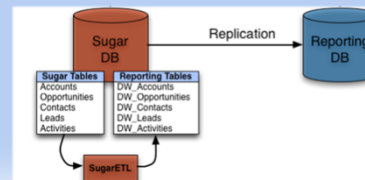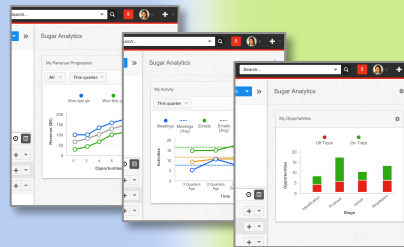
BUILD

6. . Build dashlets using Cognos authoring tools (eg Workspace Advanced)

5. Build analytics metadata model and business entities with Cognos Framework Manager

4. Implement the ETL from Sugar operational db to reporting db

SUGARCRM

Dashlet Guidance

Simpler ↑ / More complex ↓

Examples	Products	Work
Personalization Minor UI tweaks to existing dashlets **Change**: Chart types, colors, formats **Place**: Dashlets, drop downs **Select**: Rows and columns to display **Manipulate**: Filtering, sorting, grouping reordering or renaming columns or changing prompt values,	Sugar	Minutes Hours
Configuration Change or create dashlets (existing metadata model) **Create**: Widgets (lists, charts) from existing metadata **Add**: Data sources to widgets from existing metadata **Change**: chart types, content, calculations, summaries.	Sugar + Cognos Report Studio / Workspace Advanced	Hours / Days
Customization Create new or change metadata model **Create/Place**: Customized/New Sugar fields in dashlets	Sugar + Cognos Report Studio / Workspace Advanced + Cognos Framework Manager	Days / Weeks

SUGARCRM