



# IBM

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Process Book

This process book consist of various selected pieces that I worked on while I interned at IBM in terms of my objectives, processes, take aways and what I provided for the company.

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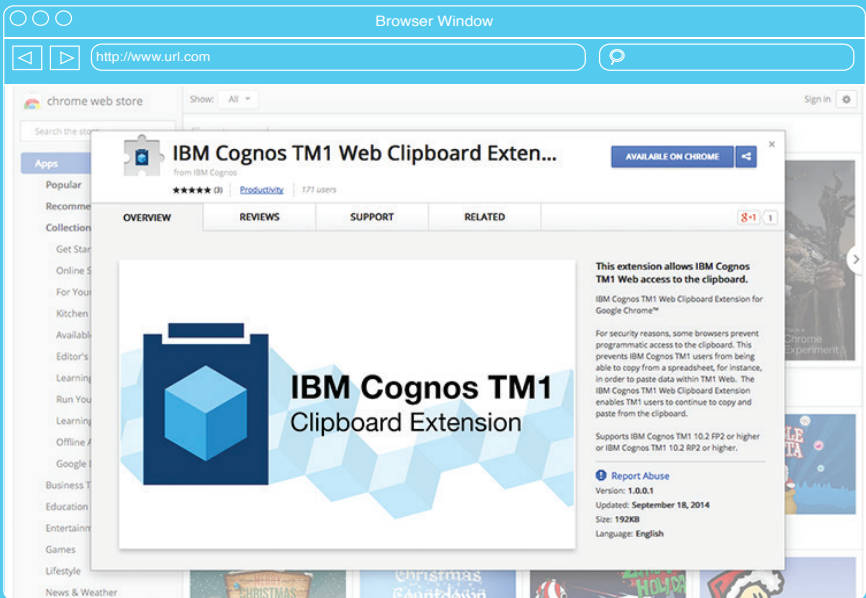
## Overview

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For my second and third Co-op term (May 2014 to December 2014), I had the privilege to intern at IBM located in Ottawa, Canada. In the first term, I worked mainly as a User Experience Designer for the Business Analytics User Experience Team, followed by getting hired as a Visual Designer on the Business Analytics Samples Team in the second term. However, I worked interchangeably between my two roles and teams upon project requests, since having visually appealing design software products is the basis of a cohesive and enjoyable user experience.

By heavily exposed and practiced UX and Visual design through graphical user interface elements for software products, various learning outcomes were acquired, as well as provided new insights for the teams. With a new design language introduced at IBM, I was responsible in directing design approaches for projects given to align with the company's new design language. Additionally, I learned to communicate across peers internally and worldwide, programming to build reports, and designing for accessibility. Furthermore, I managed to apply high visuals to plain business intelligence reports by taking considerations of graphic design principals and interactions, as well as influencing the teams in responsive web design.

# TM1 Chrome Extension Plugin

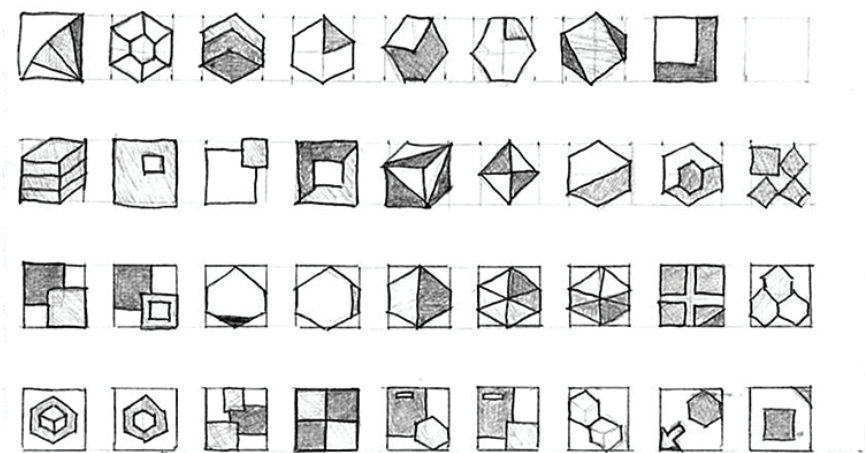


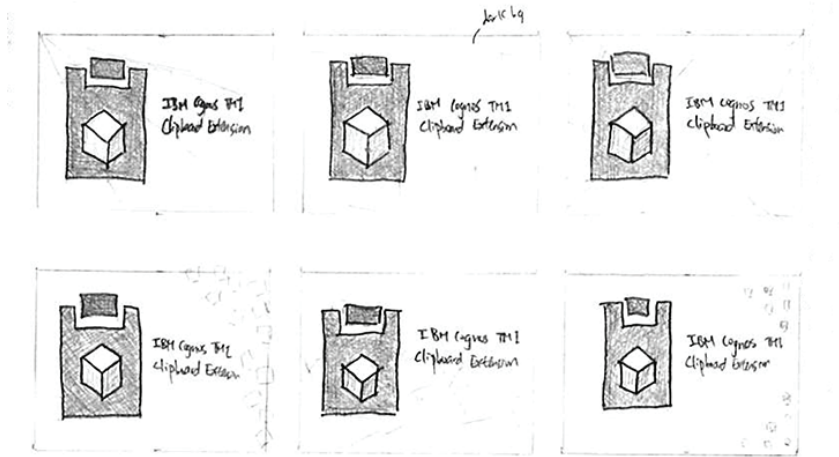
## Objective

With security issues for some browsers (such as Google Chrome) that blocks programmatic access to the clipboard for the IBM Cognos TM1 product to copy spreadsheets and paste the data to the TM1 web version, this feature was created where I was in charge of designing an icon and title page for users to download on the Google Play Store.

## Process

The project started with a request by the TM1 team where background information were given about the product and the new feature required. Afterwards, I began to do some research based on the information given, as well as questioning the product for clarification. Once everything was understood, my brainstorming stage consisted of discovering competitor means of visual representation of their feature and doing sketches. As seen in the two sketches below, I tried to abstract out the idea of cube modelling used in the IBM Cognos TM1 product with the addition of a clipboard. Then, I showed my sketches for the team to pick, polished the favourable ones using Adobe Illustrator, followed by various iterations until the final result.





## Result

In this project, I learned to communicate with team members spread across the world, where I provided visuals and concise explanations to execute the icons at a feasible manner. Since it was the first time the team had to face this problem, many did not know about the necessary deliverables, but I exceeded clients' needs by not only designing a small icon, but showing them that they needed a title page as well.

## Link

<https://chrome.google.com/webstore/detail/ibm-cognos-tm1-web-clipbo/hifjegnejppkpnikhppoafdgphpgcjpj?hl=en>

# Report Samples

Browser Window

http://www.url.com


IBM

Sign Up | Sign In

Catalog

AnalyticsZone the leading community on Business Analytics.

Home Communities Blogs Catalog



**IBM Cognos Report Samples using Visualizations**  
by IBM

SAMPLE Business Intelligence 10.2.2 Active Reports Reports Deployment

Download


DESCRIPTION

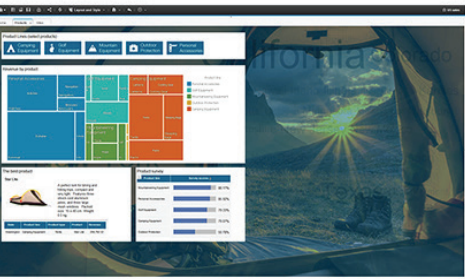
Import this deployment for IBM Cognos Business Intelligence to explore reports that use new visualizations. Include the visualization library when you import the deployment to make these visualizations ready to use. Most of the visualizations used are available on Analytics Zone, but there are a few that are specific to the sample reports here.

To use this deployment, you need IBM Cognos Business Intelligence and must have restored the GOSALES database and set up the data source connections great\_outdoors\_sales and great\_outdoors\_warehouse with JDBC connections. Steps for these tasks are described in Samples for IBM Business Intelligence. This deployment was created with IBM Cognos Business Intelligence version 10.2.2.

Also included are a few additional files used by the samples. Copy the rss and image folders to [install location] /webcontent/samples/ to use them in the sample reports.

DOCUMENTATION

 **Sample Guide**  
Last updated 01-09-2014



COMMERCIAL TERMS

Use of this sample is subject to License terms:  
**IBM License Information document**



## Objective

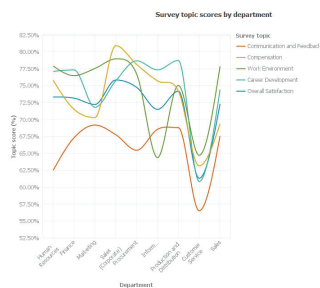
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A release took place under the project name of Danube where various report samples are now accessible for the public community to download on IBM Analytics Zone. Due to a new release that involved the publicity of numerous samples, I was responsible in giving a cosmetic redesign for all the reports by taking considerations of the visual and content layout.

## Process

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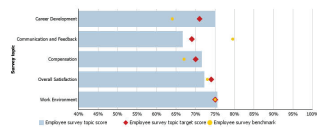
It was quite challenging at the beginning phases of the project because I was not proficient in using IBM products (which was necessary to build my visuals using IBM Report Studio and Cognos Workspace for customers to download and modify). However, after playing more with the products by applying visual graphics and colours, as well as getting help from colleagues, I managed to turn reports into something more visually appealing. To begin my task for each report, such as the Employee Satisfaction report seen below, I started with hand sketched wireframes (image 2) to determine the visual and content flow based on the original (image 1), followed by implementing a mockup in Adobe Illustrator. Then, I would run it with the team member who is responsible for the report to make sure the content is correct and I would follow my mockup to build the visuals on the report. Additionally, the Employee Satisfaction report is an accessibility report where the accessibility feature can be turned on for certain impairments. But for those who do not have a high degree of visual disability, I decided to section off the content in blocks with a large title block for readability.



Customer Service average score is **-12.1%** compared to the company average



Survey topic scores, targets and industry standard



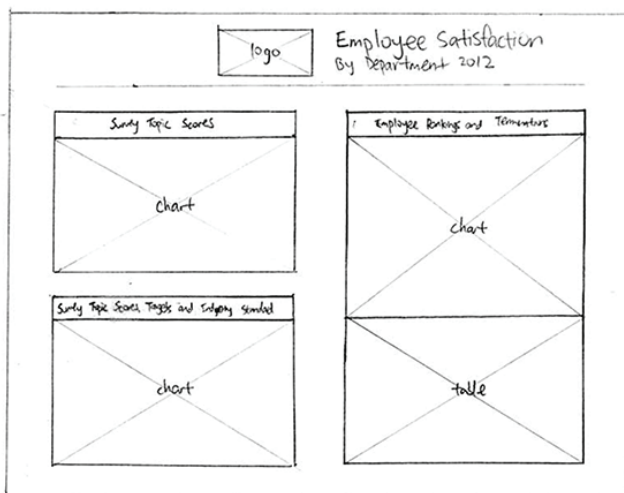
Dec 8, 2014

Employee rankings and terminations by department

	Employee ranking					Terminations
	Poor	Satisfactory	Good	Very Good	Excellent	
Customer Service	5.8%	27.3%	35.1%	31.2%	1.9%	23.4%
Human Resources	2.8%	21.1%	37.9%	38.9%	0.5%	1.8%
Human Resources	2.1%	21.5%	24.6%	15.4%	6.2%	31.1%
Administrative Services and Technology	2.8%	36.1%	31.1%	25.9%	6.1%	2.4%
Marketing	6.4%	15.7%	31.1%	48.8%	3.1%	6.4%
Procurement	23.9%	39.1%	48.8%	23.9%	6.0%	0.0%
Production and Distribution	1.2%	25.1%	38.6%	28.0%	5.3%	6.0%
Finance	6.1%	27.3%	44.2%	19.5%	3.1%	4.1%
Legal Counsel	1.2%	25.8%	26.1%	48.6%	0.0%	9.2%

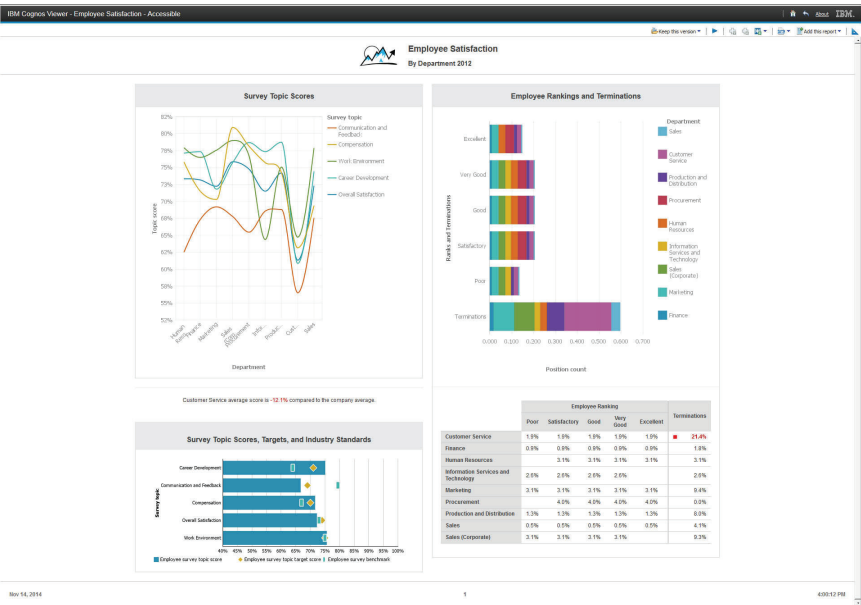
3

2:55:42 AM



# Result

By doing this project, I had the chance to try new softwares which were IBM Report Studio and Cognos Workspace, and gaining more knowledge in the field of designing for accessibility and data driven content. For instance, I learned that dash lines or dotted items across the screen can cause some people to feel nauseated and how visual data is displayed in correspondence to audio.



# Link

[https://www.analyticszone.com/homepage/web/displayMarketplacePage.action#catalog/assets\\_activereport\\_visreport](https://www.analyticszone.com/homepage/web/displayMarketplacePage.action#catalog/assets_activereport_visreport)

# Infographic Reports



## Objective

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With my skills in visual and user experience design, I assisted in introducing a new chapter of reporting through infographics for the Samples Team. As seen, visuals have more power to compel stories, where the manager did not want to simply have reports that spits out data with visualizations, but for users to read through their data at an immersive flow.

*(Due to confidential concerns, images will be release as soon as the product is release)*

## Process

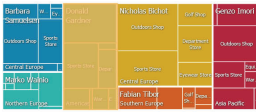
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Similarly to designing report samples for the Danube project, I started by choosing a report that had enough data to drive a story. In the example below, it is an Employee Network report from the Danube release where I based my design off. Next, research was done on static and dynamic infographics in terms of how the content is laid out and how interaction take place. Then, I would sketch up some wireframes to see how content can be laid out. Afterwards, I would run my ideas with the developer and other team members, followed by bringing the ideas to a mockup in Adobe Illustrator and edited images from Think Stock using Adobe Photoshop, as well as revising the design in an iterative cycle. Once everything was agreed upon, I sent the mockup, instructions of the visuals and the GUI elements for the developer to make the infographic functional. Since we were required to develop using IBM Report Studio, as the infographic reports would be release to the public as well, we had to take in consideration of the product's capabilities by first testing an interactive feature or layout in normal HTML and CSS before bringing it to Report Studio.



## EMPLOYEE NETWORK - TOP PERFORMERS BY REVENUE AND REGIONAL MANAGER

REVENUE BY REGION: American



REVENUE BY PRODUCT LINE: American



MANAGER NETWORK: American  
SALARY (COLOR OF NODES) AND BONUS (SIZE OF NODES)



TOP 5 SALES EMPLOYEES BY REVENUE  
REGIONAL MANAGER: Donald Gardner

Name	Revenue	Rank
Charles Laurel	\$18,835,732	1
Eric Carlson	\$16,138,528	2
George Holmes	\$14,360,682	3
Michael Latul	\$12,875,572	4
Edwards Garmes	\$12,024,590	5

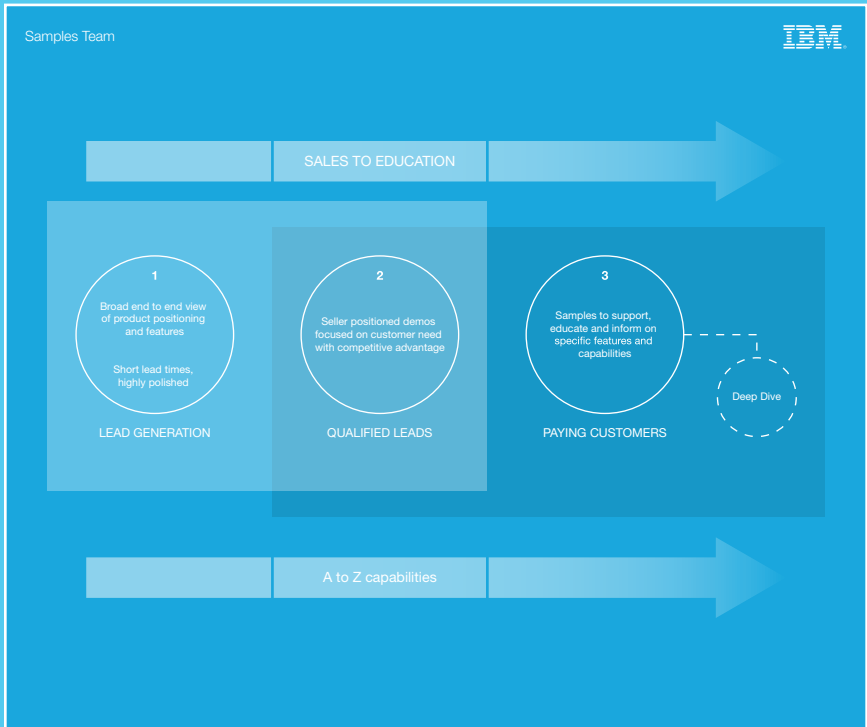
coming  
soon

## Result

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This experimental project is still underway, but examples were shown internally where positive feedbacks were received and that the team hope to provide business clients with nice and enjoyable product to look and use. On the other hand, I was thrilled to work in a more typical design environment where I was taking the role as a designer to make everything look pretty and making sense, while working with a developer to make the features functional and producing a working product. By making workable infographic reports, I also had the chance to learn more programming skills such as HTML5, CSS3 and a little on Javascript. As of now, the team is eager to publish these reports once they are ready.

# Samples Model



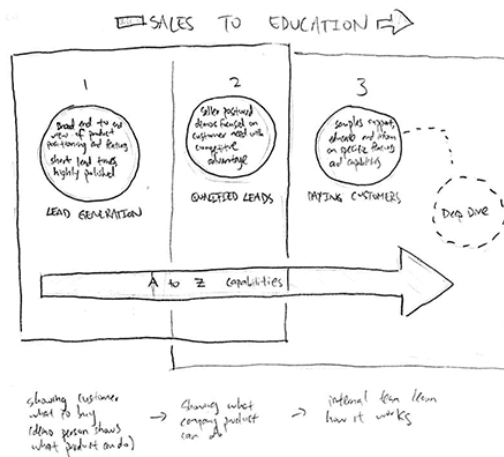


## Objective

For Product Day at IBM (where teams would show off projects that they have been working on), I contributed my visual skills in creating presentation slides for the Samples Team. Furthermore, I had the opportunity to design an info model to display the cycle process of works done by the Samples Team.

## Process

The content were first given by my manager where I organized the flow of content and sketched out an info model as seen below. Then, I showed it to my manager and we iterated the information to visually represent how products of report samples are used that are produced by the Samples Team. When all the content were arranged properly, I made the end result using Adobe Illustrator.



## Result

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After obtaining some practice in creating infographics and info models in my classes, I felt a sense of accomplishment when making one for an audience in the industry to allow them to have an understanding of the efforts done by the Samples Team and the importance that they contributed to the company.