



Fundamentals of Rational Insight Tutorial



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1 An Introduction to Rational Insight

Rational Insight is basically a “Project Measurement” tool, through which you can get an “insight” of your project, you can monitor various parameters, measure status and progress, all in a single view. A user can define appropriate metrics based on an organization’s interest and through these metrics, Rational Insight can fetch relevant data into reports, and then those reports can be shown to project managers, customers and team members through dashboards to have a bird’s eye view of your project.

1.1 How Rational Insight is different from other Dashboard software?

Rational Insight provides a unique blend of “extraction” and “presentation” of business intelligence data. With the help of web sphere application server and integrated Cognos BI server, Rational Insight can automate the process of gathering real time, live data from data sources, it can transform that data to be presented in report format and then those reports can be accessed by a URL. This automated process greatly reduce the decision making time for program or project managers as they can access these URLs regardless of their location and condition.

Yes, there is no more need of sitting late in your office, with eyes on your PC monitor, waiting for important progress reports. All you need is a single URL, and you get complete picture of your project on your mobile. You can also set your Rational Insight to deliver you emails and alert messages regarding any updates in projects. This seriously improves your mobility and reduces time to make important decisions.



Fig 01 : View updated dashboards and reports on mobile

Rational Insight provides a user friendly web interface to generate project reports, which is quite easy to deploy and understand, thus reducing the learning curve for your employees.

Rational Insight can also manage and mitigate risks in software development life cycle through objective and consistent reporting about project health, which in turn also reduces time-to-market and improves product quality. Any reduction in time-to-market always helps product managers to have an edge over their competitors.

1.2 Key Terminologies:

1.2.1 Reports:

Remember, in Rational Insight by writing report we do not mean that we are actually “Writing” something, like writing manual reports in MS-Word , but rather Enterprise Reporting in Rational Insight is a kind of process which involves “querying data sources” with different logical models to produce a human readable report.



Fig 02: A sample report

So basically a report in Rational Insight is an interface to show the contents gathered from database queries.

We have different report generating tools in Rational Insight, e.g.; Simple reports can be generated with the help of “Query Studio”. For more professional reporting, RI offers you the facility of “Report Studio”. Guides and tutorials for report generation through these tools are easily available on internet.

1.2.2 Dashboards:

A management tool used to get a "bird's eye view" of your project .A dashboard may consists of different reports from different data sources , all in one screen. As reports can be updated with real time data , so as dashboards. A user simply has to define schedule or time intervals for report and dashboard update , and you get timely actionable information about your project.

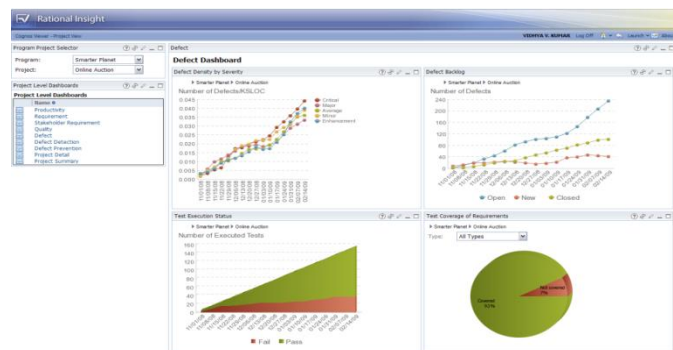


Fig 03: A sample dashboard

1.2.3 Data Warehouse:

An internal database of Rational Insight .A database which is used for reporting. The data is offloaded here from the operational systems for reporting. The data may pass through an operational data store for transformation phase before it is used in the DW for reporting. So we have “Ready to Use” data present in data warehouse, from where report generating tools like “Report Studio” or “Query Studio” can gather relevant information.

1.2.4 Metric:

A measure of an organization's activities and performance OR a measure of some property of a piece of software or its specifications.

For example, there can be a metric to measure program size, program execution time, program load time, average number of defects in unit testing and so on.

1.2.5 Scorecard:

Scorecard measures maturity of business intelligence programs and projects through different objectives which may have different scopes.

For example, improving quality, improving customer satisfaction etc

Project	Overall Health	Reducing Time-to-Value	Improving Quality	Improving Custom Satisfaction
ClassicsCD	Green square, Diamond	Green square, Upward triangle	Yellow square, Diamond	Green square, Diamond
Online Auction	Yellow square, Downward triangle	Yellow square, Upward triangle	Red square, Downward triangle	Yellow square, Diamond
Smarter-Living	Yellow square, Upward triangle	Yellow square, Downward triangle	Yellow square, Upward triangle	Yellow square, Upward triangle

Fig 04: A sample scorecard

1.2.6 Drill Through:

It's a basic terminology but often people confuse its functionality, It's an action in which we move horizontally between two items via a related link.

An example to drill through is in the case of two reports that are in a master /detail relation with each other, and by clicking a master item on the master report you reach the details of the clicked item on the details report.

1.3 Your potential role in using Rational Insight:

As we have already discussed, that Rational Insight has two faces, one is related to gathering business intelligence data and other related to “presenting” that gathered BI data. So similarly, primary roles for different Insight users usually fall in these two categories:

Report Viewer

Report Author, usually covering issues related to “presentation” side.

Metrics Engineer

Data Modeler and

Insight Administrator, covering “business intelligence database” side of this product.

So by analyzing your role you can easily get an idea of what sort of expertise you would need to work with this tool.

Role	Role Description	Goal
Report viewer	Director, project manager, program manager, or team lead	To run and view reports and dashboards.
Report author	Team lead or solution architect	To create and customize reports and dashboard as per organization requirements.
Metrics engineer	Process expert, team member, or consultant	To determine business metrics and specify reports and dashboards.
Data modeler	Development tools administrator, or IT administrator	To provide the data model for reports.
Administrator	System administrator or database administrator	installing, configuring, and deploying Rational Insight and managing and maintaining the ETL operations.

2 Product Architecture:

Rational Insight uses web architecture to extract data from distributed systems and generate both live and historical cross-product reports. It allows data retrieval from different data sources using either

1. REST architecture OR
2. Direct database access.

And then this data can be represented through reports and dashboards.

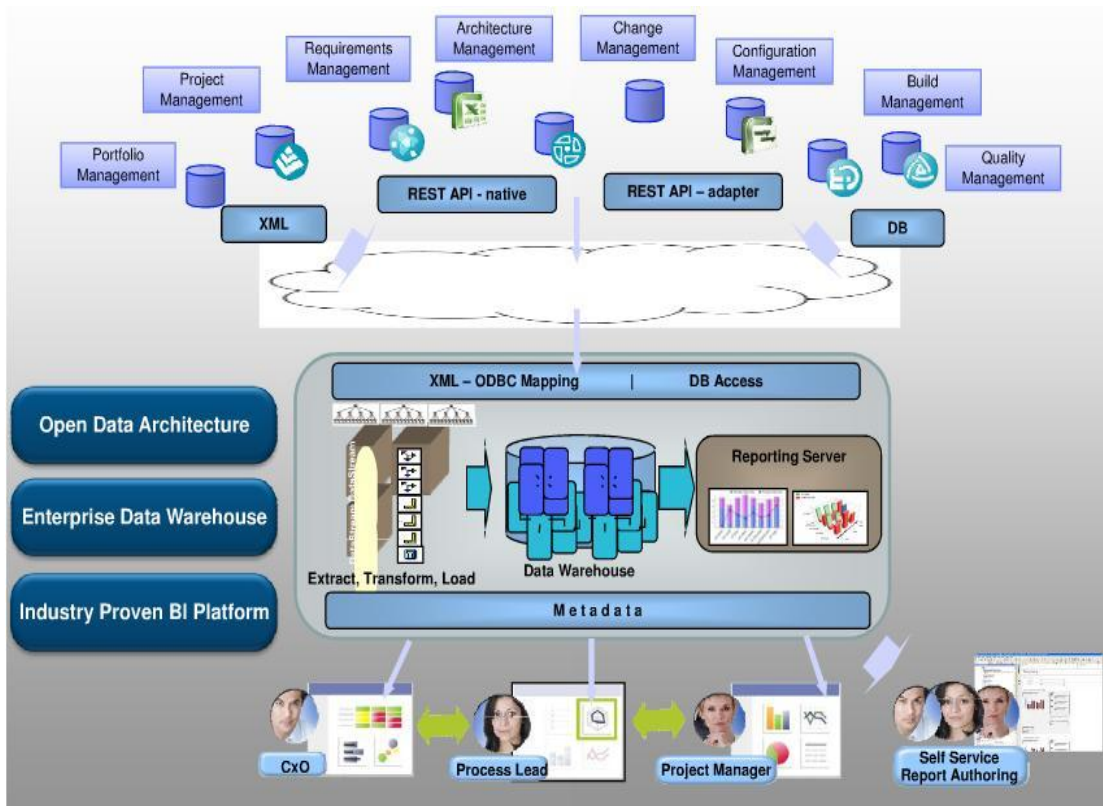


Fig 05: Rational Insight Architecture

2.1 Rational Insight Components:

Rational Insight has following components:

- Data Manager
- Data warehouse
- Framework Manager
- Report Server
- Business Intelligence Server
- XML data configuration
- Data services

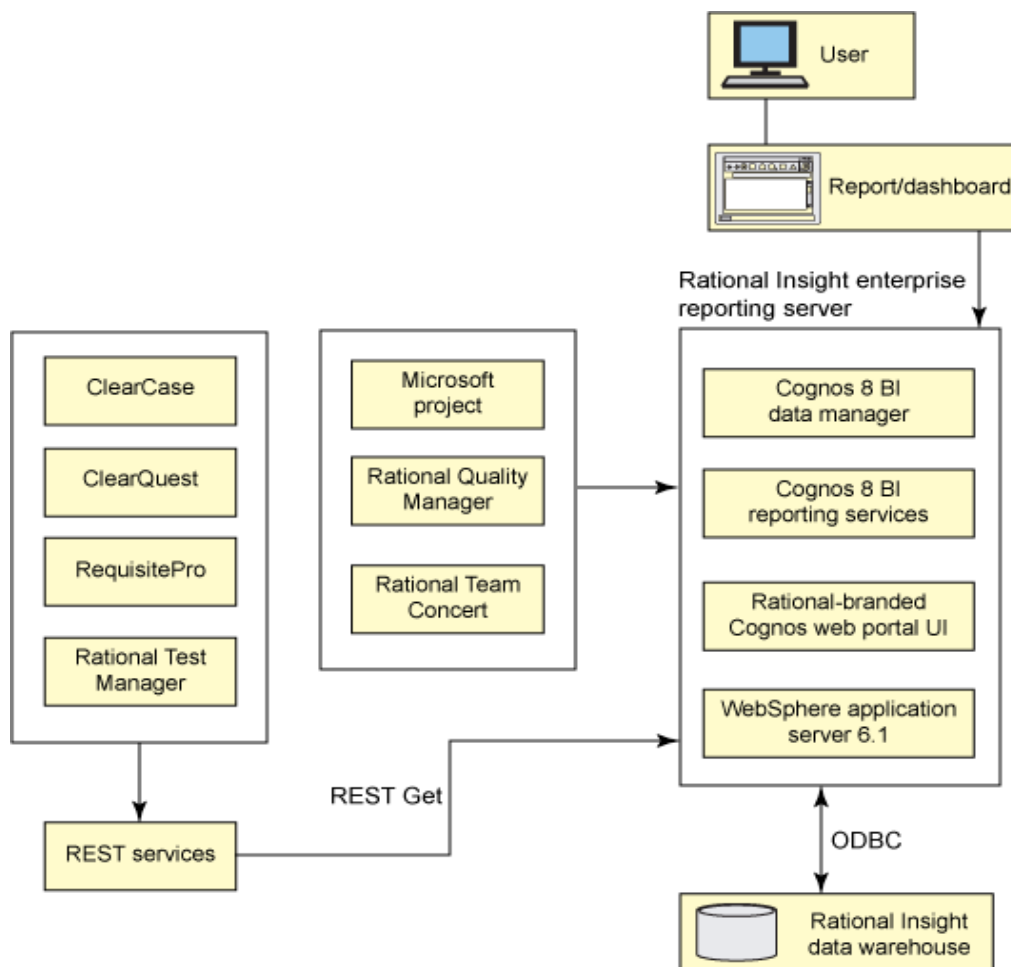


Fig 06: Basic architecture

2.2 (Extract, Transform and Load) ETL Process:

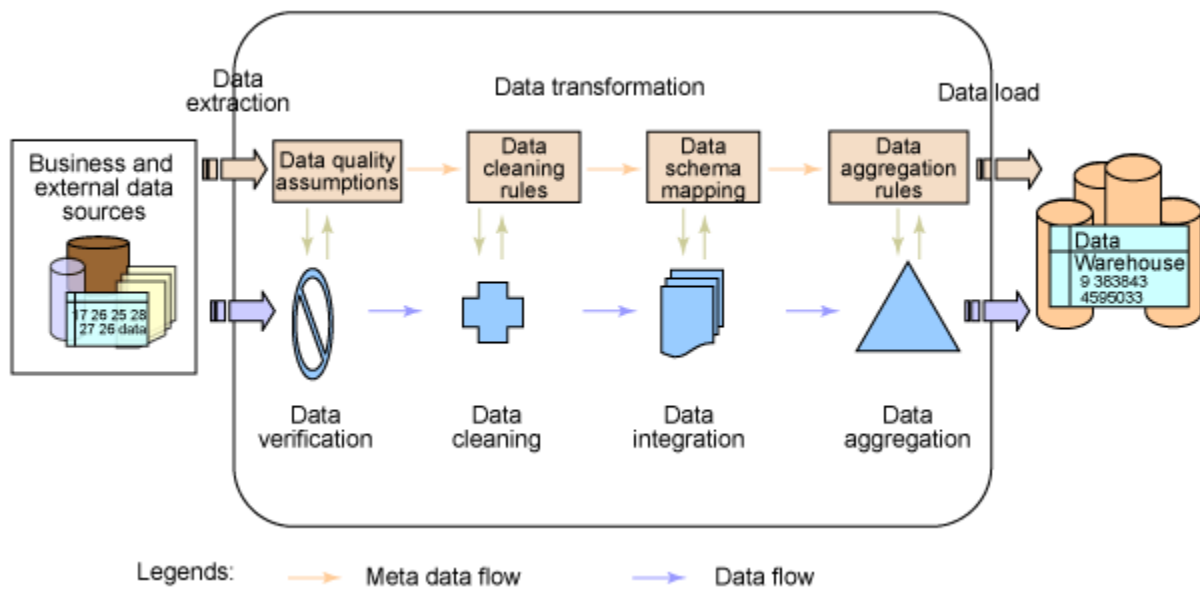


Fig 07: ETL workflow

Data is gathered from an outside data source. This process is known as extraction. Usually Data Manager performs the core extraction task, but it needs help of XML data configuration and data services while performing this task. Data is extracted from source and put into “operational data store” where transformation process occurs.

Data is transformed according to business rules, or in simpler words , RAW data is cleansed to convert into “Ready to Use” data for Report generating tools.

Transformed data is then loaded into data warehouse. Remember Report generating tools interact with data warehouse not with data sources directly.

Now business intelligence server takes care of all report generation activities with the help of framework manager. It has tools like “query studio” , “report studio” and “cognos connection” for generating reports and dashboards. Frame work manager is a metadata modeling tools which helps you in handling the generation of queries.

Report server is just an instance of BI server with additional facility of web sphere application server. So you can say that Report server actually houses cognos BI server. Now with the help of report server , we can use a simple web interface to communicate with our data warehouse , generate reports by querying data and present it with the help of cognos connection.

Remember , whenever report server interact with data warehouse . It does not “extract” anything , but rather just “load Ready to use data”.

3 Installation of Rational Insight:

Following installation process is for installation of Rational Insight on single system for proof-of-concept.

3.1 Pre-installation tasks:

Ensure that the following requirements have been met:

- Windows Server 2003 Standard Edition
- DB2 Enterprise Server Edition 9.5 is installed on the system.
- You have administrative rights to the system.
- You know the user name and password of the DB2 administrator.

3.2 Installation steps:

1. Set up the data warehouse server..
2. Install the Data Warehouse, Data Warehouse with Sample Data, and Content Store Database components on the data warehouse server.
3. Configure the data warehouse server.
4. Set up the report server.
5. Install the Insight Server - Reporting Server, Insight Server - Data Manager, Rational Insight Development Tools - Data Manager, Rational Insight Development Tools - Framework Manager, and XML Data Configuration components on the report server.
6. Configure the report server.

4 Rational Insight User Interface:

Rational Insight provides a very user friendly web interface to generate reports and dashboards.

This web page is called Cognos Connection. Cognos Connection provides a single access point to applications so you can view and analyze your data.

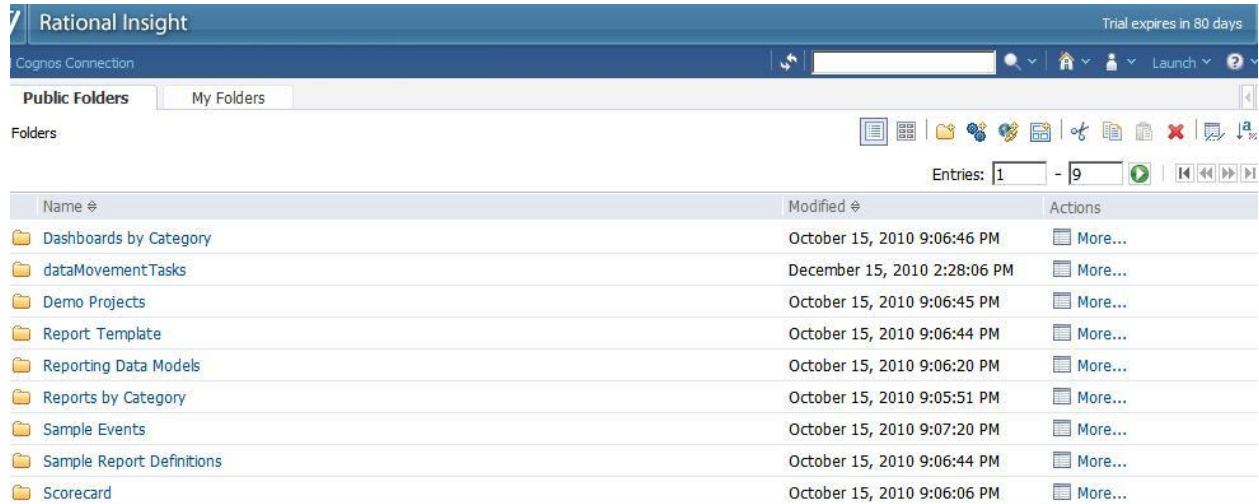


Fig 08 Rational Insight UI Cognos Connection

Metadata is published to Cognos Connection via packages, for example Sample Data Warehouse on the screen. Each package points to a different data source. Through the packages you can access reports (written in Report Studio) and queries (written in Query Studio). You can also access agents, which set up alerts for various conditions relating to your data. For example, when bugs during integration testing bypass a certain value.

Because Cognos Connection is a globally scalable you can set preferences to display your personal view of Cognos Connection in your own language. You can also customize your display by adding

- Shortcuts to items such as queries and reports.
- Links to files and web sites, and your own portal pages.
- Folders to organize entries neatly.

Cognos Connection adds valuable functionality to your reports and analyses. For example

- Reports can be scheduled and distributed by email if required
- Access to reports and packages can be restricted

You can also distribute output so that users from other areas of your organization can see them.

5 Exercises

5.1 Exercise : Create a report in Query Studio

Click the Query Studio link on the toolbar.

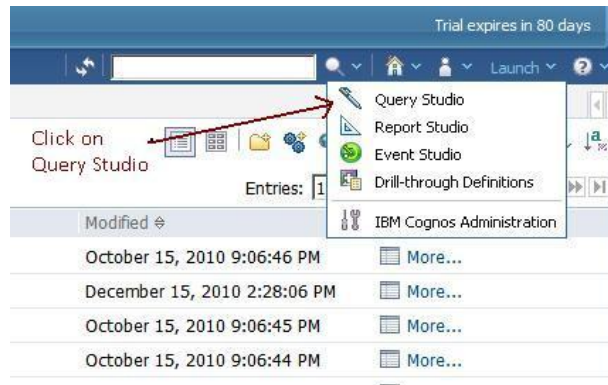


Fig 09: Launching Query Studio

Query Studio opens. The query items you can use are listed in the left pane. You can now add data and save the report. Yes, it's so easy. But it's an ad-hoc solution for report generation. Do not use it for generating highly professional reports, in fact you will not be able to generate highly professional reports due to lack of options in Query Studio.

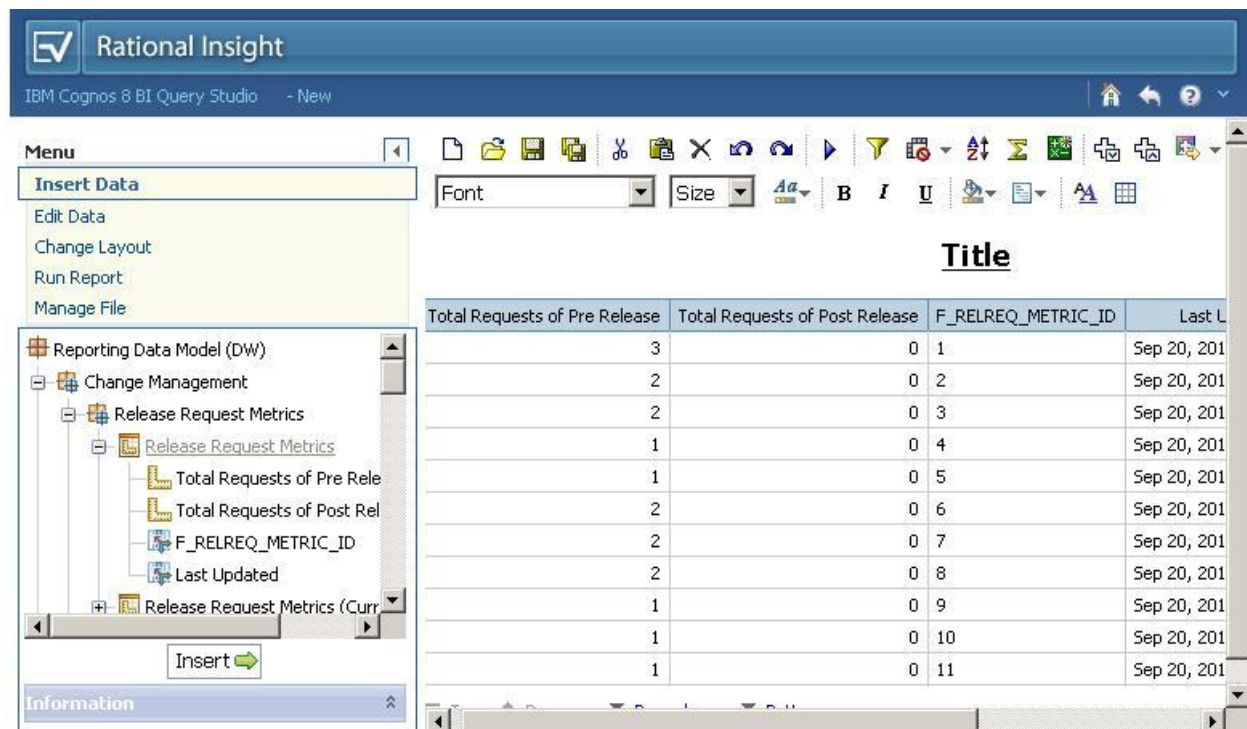


Fig 10: A sample report in Query Studio

5.2 Exercise : Create a report in Report Studio

Open Report Studio, in the upper-right corner of Cognos® Connection, click the Launch arrow, and then click Report Studio.

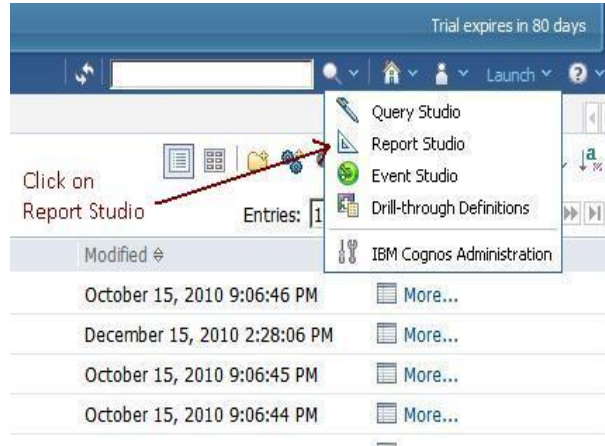


Fig 11: Launching Report Studio

- Specify a package for providing inputs to the report.
 - The package that you use to generate reports is based on models created in Framework Manager. Reporting Data Model (DW) supports authoring of reports based on IBM Rational Insight data warehouse, while the other six packages support reports that use live data from point products.

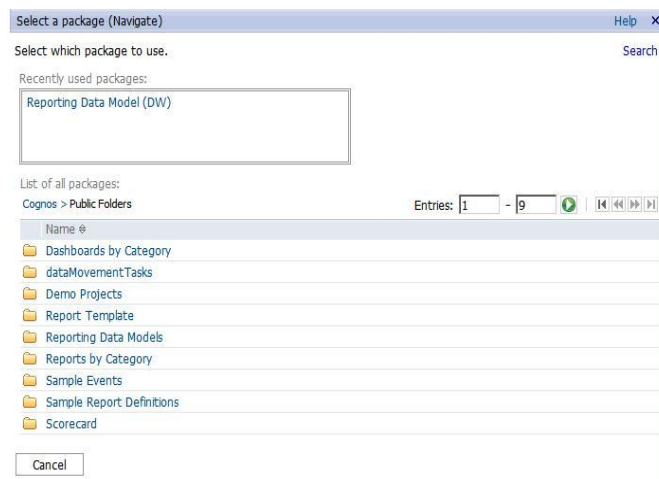


Fig 12: Choose data model

- If you want to create a new report , Click on “Create a new report or template”

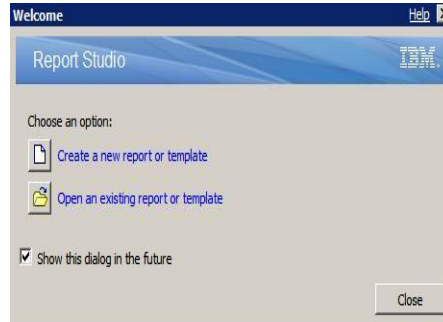


Fig 13: Choose report type

- Choose “Blank”.



Fig 14

- Add data to the report.
 - The data items that you can add to a report are displayed as objects in the Source tab in the Insertable Objects pane to the left.

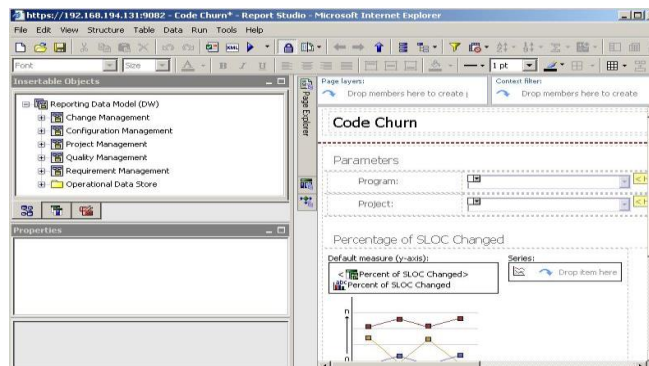


Fig 15: Edit report in report studio

- Validate the report before your run it.

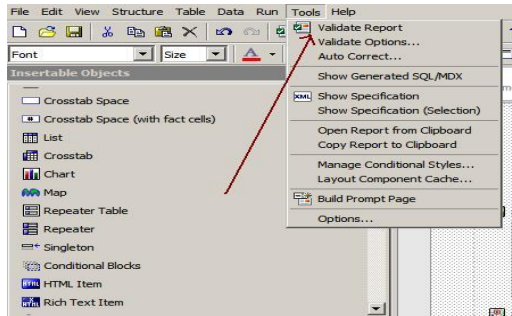


Fig 16: Validate report

- Save the report.
- Run the report.

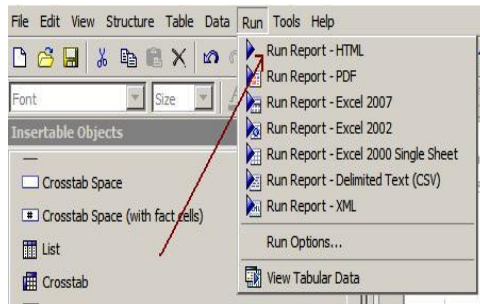


Fig 17: Run report

5.3 Exercise : Create a dashboard

- In IBM® Cognos® Connection, click the new page button.

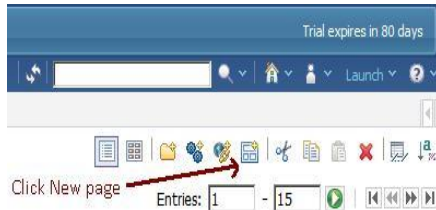


Fig 18

- Type the name, select a location for your page, and click Next.

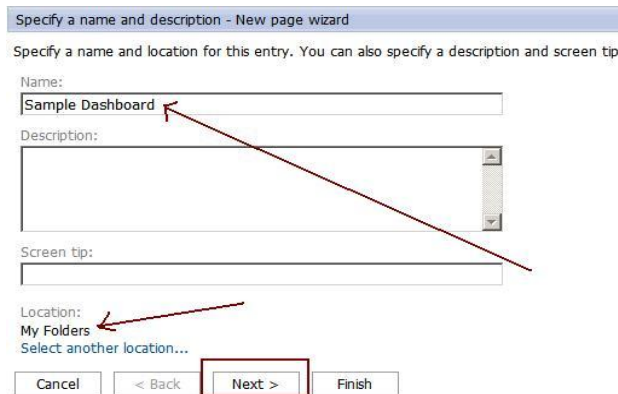


Fig 19

- In the Set columns and layout page, set the number of columns, and the column width.

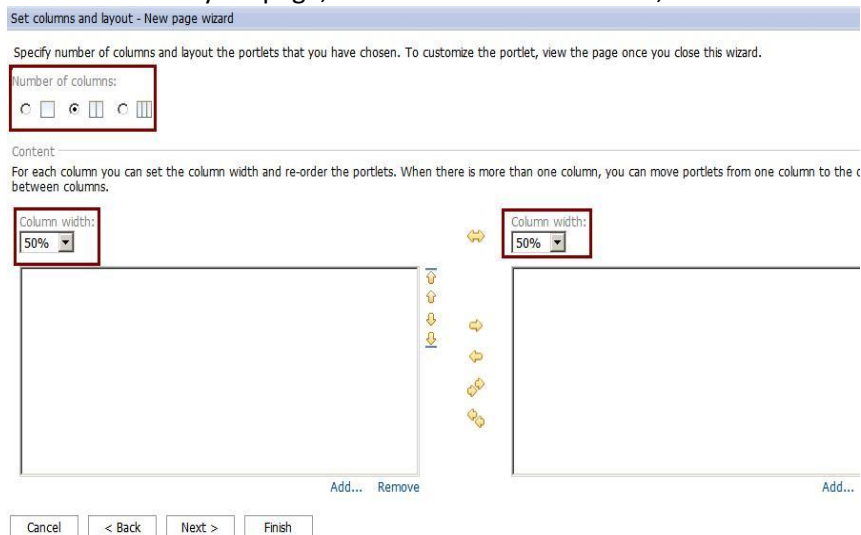


Fig 19

- Click Add at the bottom of the first column. A list of portlet groups opens. Navigate to the portlet that you want to include in the page.



Fig 20

- Select the checkbox against the portlet group that you want to include and click the right arrow. This creates an entry in the selected entries box.

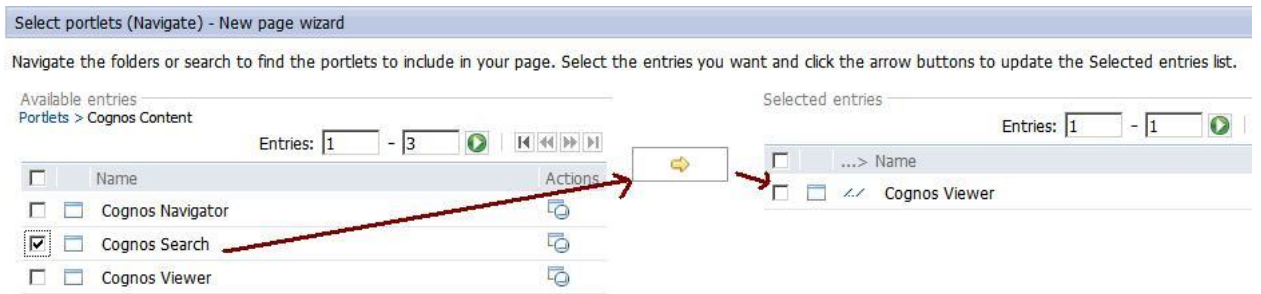


Fig 21

- Click OK, and repeat steps 4 and 5 for each column.
- In the Set page style page, specify a meaningful title for the page.

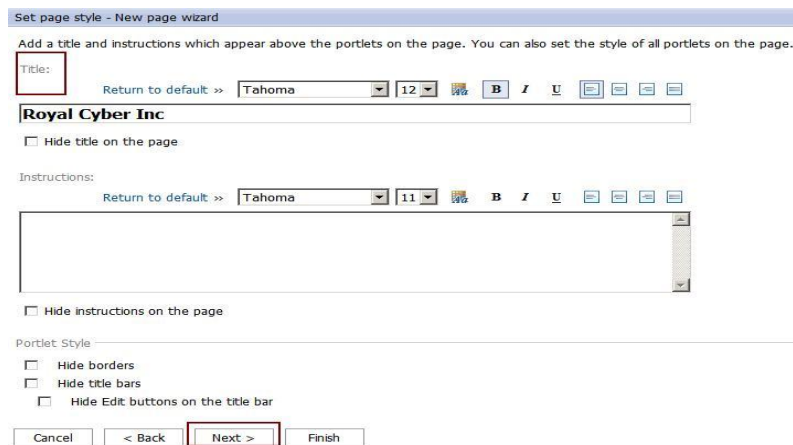


Fig 22

- Set the other properties, click OK, and then Next.
- Click Finish.
- The page that you see is the dashboard master page. Open this page



Fig 23

- Your sample dashboard is ready .You will see empty frames for each portlet added.

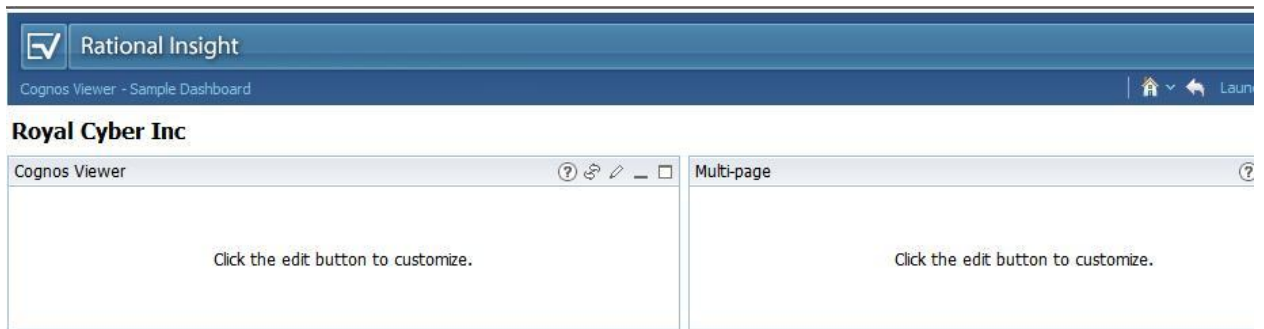


Fig 24

5.4 Exercise : Adding reports to dashboard

- Open the master page of the dashboard. You will see empty frames for each of the portlets included in the page.
- On any portlet toolbar, click the edit button. The Portlet properties page opens.
- In the Folder section, click Select an entry.

Set the properties - Cognos Viewer

Specify the entry to view. You can also specify a title, a channel and other view c

Title:

Use the entry name

Type the title:

Language:

English (United States) Remove values for this language

Title:

Entry:

Defect Arrival Rate Public Folders > Sample Report Definitions > Data Waref

Select an entry... Clear

Select desired report

Channel:

Specify a channel name for this portlet if you want to enable it to be a receiver

View Options

Height (pixels):

Advanced Options

Do not wait for this portlet content to show the page

OK Cancel

Fig 25

- Browse to the folder or package that contains the resources for the dashboard, such as shortcuts, pages, or bookmarks. Select an entry, and click OK.

5.5 Exercise : Add a multipage report to a dashboard

- The dashboard definition is available in the Public Folders > Sample Report Definitions > Dashboard Definitions > Project Level Dashboards folder.

Create a copy

- In Cognos® connection click the folder Public Folders > Sample Report Definitions > Dashboard Definitions > Project Level Dashboards > Defect Dashboards.
- To create a copy, click More... to the right of the Defect Dashboard.
- In the Perform an action page, click Copy .
- In the Save as a copy page, enter the name 'Defect Dashboard_1'.
- Under Location click My folders and then OK.

Select reports

- In IBM® Cognos Connection, in Public Folders > Sample Report Definitions > Data Warehouse Reports >, select the check boxes next to the reports: Defect Aging & Defect Arrival Rate
- Click Copy on the toolbar. Click the New folder icon, and enter the name 'Additional dashboard reports'.



Fig 26

- Click My folders and click Finish. The new folder is added under My folders. Browse to the 'Additional dashboard reports' link in My folders, to open the 'Additional dashboard reports' page, and on the toolbar, click Paste

Set properties of dashboard

- Select the Defect_1 dashboard in My Folders and click the Set Properties icon to the right of the page. The Set Properties page opens.
- Click the Layout and Content tab. Select the last instance of CognosViewer from the Selected entries list on the right, and click Remove. Note: If you cannot see the Layout and Content tab, click Source Properties
- Click Add. A list of portlet groups is displayed.
- In the Available Entries box, click Dashboard.
- To move the portlet to the Selected Entries box. click Multi-page and then the right arrow
- Click OK and then click OK again.
- Open the Defect Dashboard_1 link. An empty frame of the Multi-page portlet is displayed.
-



Fig 27

- In the portlet toolbar, click Edit .The portlet properties page opens.
- In the Folder section, click Select an entry. Browse to the 'Additional dashboard reports' folder, select the folder, and click OK.
- Click Defect Dashboard_1 link to view the customized dashboard. Verify that the two added reports are displayed.

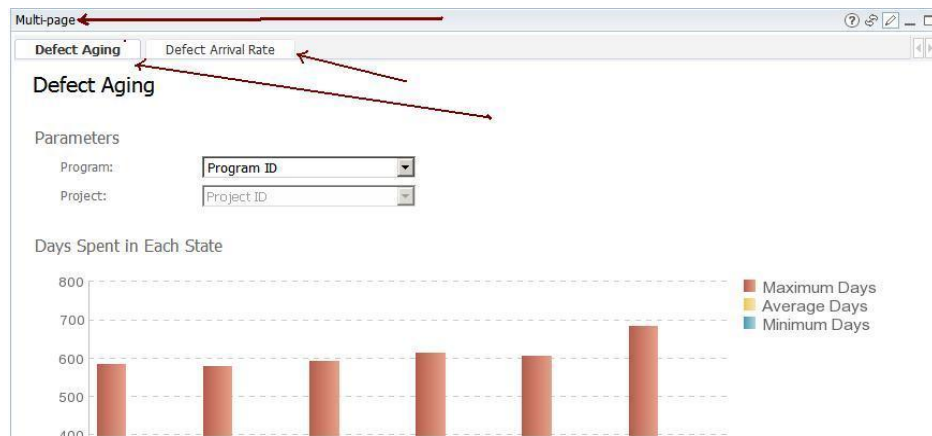


Fig 28

5.6 Exercise: Enable drill through in the sample report

Decide the source and target reports

The first step in creating drill-through reports is to decide the source and target reports. As mentioned, Defect aging report is the source and the Defect arrival rate report the target.

Identify the filter parameter

The drill-through feature works by passing one or more filter parameters from the source report to the target report. You, therefore, need to identify which parameters are common between the two reports.

- Make sure that you are in the Public Folders > Sample Report Definitions > Data Warehouse Reports folder reports folder in IBM® Cognos® Connection.
- Click on the Defect aging report link to view the report in IBM Cognos Viewer.
 - Note: The report has two selection prompts: Program and Project. The Project selection prompt confirms the existence of the project parameter.
- Close the report. You need to check if the target report also contains the project parameter.
- Click the Defect arrival rate report in IBM Cognos Connection.
 - Note: The report has two prompts: Project and Program. The Project selection prompt confirms the existence of the Project parameter.
 - You can therefore use this Project parameter as the drill-down parameter between the two reports.

Confirm the filter expression in the target report

Next, you need to confirm that the target report was configured to accept the Project parameter as a filter expression. For the drill-through feature to work, both the source and target reports must have a common filter expression as parameter.

- Copy both reports to My Folders. Follow the steps in the previous tutorial.
- In Report Studio, open the Defect arrival rate report.
- On the Explorer bar, click Query Explorer, and select Defect from the queries list.
- Confirm that the filter expression [Project]=?Project? exists.
- Click validate expression and then OK.
- Click the filter and in the Properties pane, set Usage to Optional. This specifies that you do not need to click a value in the source report.
- Save the report.

Create a drill-through link in the source report

In this step you create a link that you need to click for drilling through to the Defect arrival rate report.

- Open the source report and click the graph 'Days spent in each state' that will serve as the starting point for the drill-through link.

- On the Properties pane, double-click the Drill-Through Definitions property. This launches the Drill-through-definitions window. You can also click on the tool bar to open the window.
- In the Drill-through-definitions window, click the New drill-through definition icon at the bottom left of the window.
- On the Target Report tab, click the ellipsis (...) next to the Report box, and select the Defect arrival rate report.
- To edit the parameters that need to be passed to the target report, below the Parameters box, click Edit .
- In the Parameters window click the Methods list and select 'Pass parameter value'.
- Click the Value list and select Project.
- Click OK. You have now selected the Defect Arrival Rate report as the target report.
- Select the Open in New Window checkbox. This makes sure that the target report opens in a new window when you drill through to it.
- Click OK.
- To run the Defect aging report, click Run .
- When the report opens, select PPMP from the Program list, and Auction from the Project list.
- Click the 'Days spent in each state' graph. This opens the 'Defect arrival rate' report. View the report and notice that the Auction project is preselected. You can therefore view different data for the same project without having to select the project every time.
- Save the report.

6 Scorecards

Rational® Insight includes sample scorecards that show the status of a project. A scorecard contains metrics included in a project and is a visual snapshot of the health of the project.

Sample scorecards are located under Public Folders > Scorecards.

For defining an scorecard , we have to use Rational Insight Connection Manager.

6.1 Creating the scorecard connections

A scorecard needs at least data warehouse connection, ETL catalog connection, and report server connection, and, optionally, a data source connection for external data sources such as Microsoft® Excel spreadsheets or relational databases.

6.1.1 Creating a data warehouse connection

Create a connection to the database that stores the data warehouse. Specify the host name of the database server, the database alias, the logon credentials for the database, and the schemas to be used.

Procedure

- Start Rational® Insight Configuration Manager (in a Windows® environment, click Start > Programs > IBM Rational Insight > Insight Configuration Manager).
- Open the perspective (Customization or Scorecard) for which you are creating the connection. The perspective can be opened by clicking the icon near the top right corner.
- In the Configuration Artifacts view, right-click Data Warehouse Connections and click Add Data Warehouse Connection.
- Specify the connection details and click OK.
 - Special considerations if you want to use the data warehouse connection for configuring scorecards:
 - The name of the data warehouse connection must be the same as the one defined for the report server connection.
 - The physical database connection must be the same as the one defined in the report server connection.

6.1.2 Creating an ETL catalog connection

The ETL catalog contains the fact and dimension builds that define how the data is extracted, transformed, and loaded to the data warehouse. Create a connection between the ETL catalog and the database by specifying the alias and the login credentials of the database.

Before you begin

Make sure you have created a database to store the ETL catalog. For information on how to create databases, see the documentation for the database application that you use.

Procedure

- Start Rational Insight Configuration Manager (in a Windows environment, click Start > Programs > IBM Rational Insight > Insight Configuration Manager).
- Open the perspective (Customization or Scorecard) for which you are creating the connection. The perspective can be opened by clicking the icon near the top right corner.
- In the Configuration Artifacts view, right-click ETL Catalog Connections and click Add ETL Catalog Connection.
- Specify the details of the database you created for the ETL catalog and click OK.

6.1.3 Creating the report server connections

Define the connection for the report server where the scorecard will be deployed and viewed.

Procedure

- Start Rational Insight Configuration Manager (in a Windows environment, click Start > Programs > IBM Rational Insight > Insight Configuration Manager).
- Open the Scorecard perspective by clicking the icon near the top right corner.
- In the Configuration Artifacts view, right-click Report Server Connections and click Add Report Server Connection.
- Specify the connection details.
 - A name is essential while a description is optional.
 - Namespace is the authentication name in the Cognos® Configuration.
 - User name and password are the credentials for the report user which, by default, is *rptuser*.
 - An URL is essential. An example is `http://localhost:9080/insight`.
- Click OK.

6.1.4 Creating the data source connections

Create connections to the data sources, which can be IBM® Rational Insight Data Services data sources, a relational database, or a Microsoft Excel file.

Before you begin

If you plan to use IBM Rational ClearCase®, IBM Rational ClearQuest®, IBM Rational RequisitePro® or IBM Rational TestManager as a data source, make sure Rational Insight Data Service is installed.

Procedure

- Start Rational Insight Configuration Manager (in a Windows environment, click Start > Programs > IBM Rational Insight > Insight Configuration Manager).
- Open the perspective (Customization or Scorecard) for which you are creating the connection. The perspective can be opened by clicking the icon near the top right corner.
- In the Configuration Artifacts view, right-click Data Source Connections and click Add Data Source Connection.
- Specify the type of the data source and click Next. Your data source can be a Rational product, a relational database, or a named range in Microsoft Excel.

- If your data source is a Rational product, select Data Service. If the data source is Rational ClearQuest, Rational RequisitePro, Rational DOORS®, or Rational Focal Point™, an XML data configuration file is generated automatically. For the other supported Rational products, specify the XML data configuration file.
- If you are configuring a data source for scorecards, you can specify the data source type to be a relational database or a Microsoft Excel file.
- Specify the connection details.
 - A name is essential while a description is optional.
 - For a Rational Insight Data Service data source, the default URL is `http://host:port`; for example, `http://localhost:9080`. Specify the type of the data service connection.
 - For the type of authentication:
 1. If authentication is not needed to access the resource group, select None.
 2. If authentication is needed to access the resource group, select Basic, Form or OAuth, and specify the user name and password to use for the authentication.

Note: Make sure the data source itself is also configured to use authentication. For example, Rational Quality Manager must be configured to use form-based authentication.

- To specify the data service information, click Retrieve or manually type the following information:
 1. Rational ClearQuest: User DBSet name and User DB name
 2. Rational RequisitePro: Project name
 3. Rational Focal Point: Workspace name
 4. Rational DOORS: Project name and RIF definition name
- If your data source is Rational ClearQuest, Rational RequisitePro, or Rational Focal Point, select the option to create all data service connections on the server. Click Finish.

6.2 Defining scorecards

To define a scorecard, link the scopes and metrics to the scorecard.

Procedure

1. Start Rational Insight Configuration Manager (in a Windows environment, click Start > Programs > IBM Rational Insight > Insight Configuration Manager).
2. Open the Scorecard perspective (clicks the Open Perspective icon near the top right corner, click other, and click Scorecard).
3. Create the scorecard. Right-click Scorecards click Create Scorecard and specify the details. You can add a normal metric type or a metric type by an objective.
4. To create a scope, right-click Scopes, click Create Scope Type, and specify a unique ID as the scope type. To add the metric sources for the scope type, click the Create link and specify the details.
5. Deploy the scorecard. Click File > Deploy, select the scorecard, and click Next. Specify the target data warehouse, ETL catalog database, and report server connection, and click Finish.

7 Events:

An event is a situation that can affect the success of your business.

An event is identified when specific items in your data achieve significant values. Specify the event condition, or a change in data, that is important to you. When an agent detects an event, it can perform tasks, such as sending an email, adding information to the portal, and running reports. You Use Event Studio to notify decision-makers in your organization of events as they happen, so that they can make timely and effective decisions.

8 References:

- IBM Infocenter Rational Insight V_1.0.1
- User guide Report Studio Cognos 8 BI
- User guide Query Studio Cognos 8 BI
- User guide Event Studio Cognos 8 BI
- User guide Metric Studio Cognos 8 BI
- http://publib.boulder.ibm.com/infocenter/renrpt/v1r0m0/index.jsp?topic=/com.ibm.rational.r aer.relnotes.doc/topics/insight_relnotes_10_fixpack_1.html

The image features the Royal Cyber Rational logo at the top, which includes a green square with a white left-pointing arrow, the text 'Royal Cyber' in green, and 'Rational' in white on a yellow background. Below the logo is the text 'A division of Royal Cyber Inc.' and several IBM-related badges: 'IBM Premier Business Partner', 'Authorized IBM Training', and 'IBM'. The main content is on a yellow sticky note pinned with two red pushpins. The note contains contact information for modernization and IBM Rational products, including two URLs, an address in Naperville, Illinois, and a phone number. A handwritten 'Thank you!' is written in the bottom right corner of the note.

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