

# 银行与金融服务业

## 银行成本透明度概要

此应用简报演示了银行业基于Web的规划和报告流程, 尤其着重讨论了成本透明度, 它使用的是IBMCognos® TM19.5版和IBM Cognos8Business Intelligence8.4版。

支持关键银行业务职能交付的成本每年以超过15%的速度不断上升。这导致银行迫切需要减少开支, 同时增加价值, 最终提高底线收入。使这一问题更为棘手的是, 人们认为无法对这些开支进行管理。

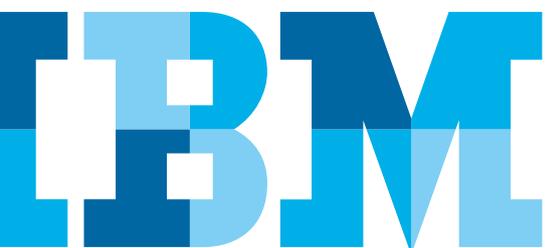
管理人员需要的是能够阐明技术成本驱动因素, 并提供运营的可视性, 以便与银行业务经理作为合作伙伴协同计划, 预测资产消耗和相关成本。

通过使成本透明, 银行能够从根本上改变业务单元消耗资源的方式, 降低企业总成本并专注于真正提供商业价值的开支。

要实现成本驱动因素以及财务透明度、价值演示和指标创造的有效性的可视化, 银行需要更严格的分析方法。IBM Cognos Banking and Financial Services:Cost Transparency Performance Blueprint Powered by TM1提供了这种方法。

IBM Cognos Performane Blueprints是预定义的数据、流程和策略模式, 帮助组织加快其软件部署, 并推动快速的投资回报。Cost Transparency Blueprint Powered by TM1有助于银行:

- 获得对成本驱动因素和技术资源消耗的连续可视性。
- 加强技术和企业之间的合作伙伴关系。
- 实现支持增长, 投资回报最大化以及维持快速成本节省的策略。



Cost Transparency Blueprint Powered by TM1在后面的章节进行了详细介绍。该解决方案主要由以下组件构成:

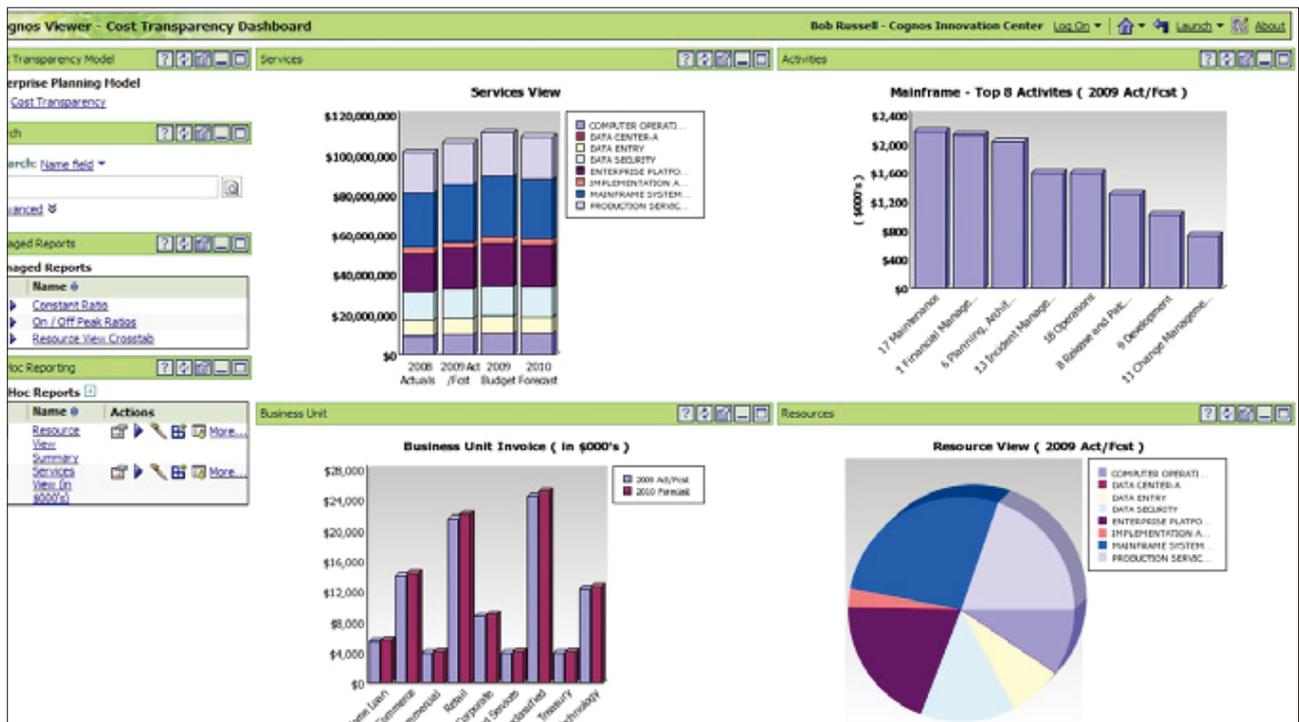
- 使用IBM Cognos8Business Intelligence的报告、分析、仪表板和记分卡。
- 使用IBM Cognos8TM1进行的规划和预测。

## 商业智能

Cost Transparency Blueprint Powered by TM1提供了分层结构的仪表板和报告, 指导用户进行层次逐渐深入的了解。蓝图的商业智能门户视图以高级画面开始。您可以对蓝图进行定制, 以提供基于用户的安全等级和/或职责视图。您还可以允许用户查看所有

产品和产品线, 或仅一个单一职责领域(如特定的产品线、产品或组合)的收入报告。

Cost Transparency Dashboard快速地提供大量信息。左上方的Services View提供了基于本年度每月在线高峰期和在线非高峰期服务美元的活动概况。Services View报告下方的图表是Business Unit Invoice报告, 其中显示与预算拨款相比, 每个业务单元如何使用资金用于开发。这个登录页面还包括前10大Mainframe Activities报告和显示2009年Act/Fcst报告(与所执行的活动相关)总开支百分比的Resource View。此外, 该页面还包括一个搜索引擎和Managed and Ad-Hoc报告的链接以及TM1模型的启动链接。



主页:Cost Transparency Dashboard

## Resource View

借助Resource View报告, 您能够确定要对哪些措施和维度进行“切割”分析。

**Resource View**

**Time:** 2008 Actuals, 2009 Act/Fcst, 2009 Budget, 2010 Forecast

**Measure(s):** Communications & Desktop, Employee Base Compensation and Other, Employee Taxes & Benefits, Equipment Depreciation, GDS, Incentive Compensation & Awards, Lease/Maint/Equip Expense, Non-Employee Compensation, Occupancy Expense, Other Expense, Professional Fees

**Services Organization(s):** 40000001-DATA SECURITY, 40000002-IMPLEMENTATION AND INTEGRATION SVCS, 40000003-DATA ENTRY, 40000004-MAINFRAME SYSTEM SERVICES, 40000005-COMPUTER OPERATIONS, 40000006-PRODUCTION SERVICES & SUPPORT, 40000007-ENTERPRISE PLATFORM SERVICES, 40000008-DATA CENTER

	Communications & Desktop	Employee Base Compensation and Other	Employee Taxes & Benefits
	2009 Act/Fcst	2009 Act/Fcst	2009 Act/Fcst
<b>40000001-DATA SECURITY</b>	5,020	1,166,438	477,006
<b>40000002-IMPLEMENTATION AND INTEGRATION SVCS</b>	2,801	459,185	135,738
<b>40000003-DATA ENTRY</b>	-	1,615,160	355,097
<b>40000004-MAINFRAME SYSTEM SERVICES</b>	19,006	3,924,708	1,452,521
<b>Total</b>	<b>\$26,828</b>	<b>\$7,165,490</b>	<b>\$2,420,362</b>

## Services View(\$000' s)

使用Services View (\$000' s) Query Studio Analysis, 您可以从成本透明度数据模型中拖动和下拉项目来回答问题, 并分析数据, 以解决业务绩效问题。

**Services View ( \$000' s)**

Time	Finance Organization	101-Online Processing Peak	102-Online Processing Non Peak	103-Batch Processing Peak	104-Batch Processing Non Peak	105-DASD	106-Mainframe Tape Storage	109- * To Be Assigned	110- *One Time Event	111 Mainframe Security
2008 Actuals	Allocated Org Units	\$712	\$997	\$373	\$1,362	\$797	\$760	\$0	\$0	\$4,878
	40000006-PRODUCTION SERVICES & SUPPORT	\$710	\$994	\$372	\$1,359	\$795	\$758	\$0	\$0	\$0
	40000007-ENTERPRISE PLATFORM SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,878
	40000008-DATA CENTERS	\$2	\$2	\$1	\$3	\$2	\$2	\$0	\$0	\$0
	Total Services Org Units	\$2,262	\$3,168	\$1,170	\$4,273	\$2,068	\$1,969	-\$212	\$1,977	\$8,602
	40000001-DATA SECURITY	\$0	\$0	\$0	\$0	\$0	\$0	-\$212	\$0	\$3,691
	40000002-IMPLEMENTATION AND INTEGRATION SVCS	\$94	\$132	\$47	\$173	\$110	\$110	\$0	\$0	\$32
	40000003-DATA ENTRY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,977
	40000004-MAINFRAME SYSTEM SERVICES	\$1,102	\$1,843	\$871	\$2,083	\$812	\$770	\$0	\$0	\$0
	40000005-COMPUTER OPERATIONS	\$354	\$496	\$180	\$658	\$339	\$328	\$0	\$0	\$0
2009 Actuals	Allocated Org Units	\$747	\$1,046	\$392	\$1,430	\$837	\$798	\$0	\$0	\$5,122
	40000006-PRODUCTION SERVICES & SUPPORT	\$745	\$1,044	\$391	\$1,426	\$835	\$796	\$0	\$0	\$0
	40000007-ENTERPRISE PLATFORM SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$5,122
	40000008-DATA CENTERS	\$2	\$2	\$1	\$3	\$2	\$2	\$0	\$0	\$0
	Total Services Org Units	\$2,375	\$3,328	\$1,229	\$4,487	\$2,171	\$2,067	-\$223	\$2,078	\$9,022
	40000001-DATA SECURITY	\$0	\$0	\$0	\$0	\$0	\$0	-\$223	\$0	\$3,876
	40000002-IMPLEMENTATION AND INTEGRATION SVCS	\$99	\$139	\$50	\$181	\$118	\$118	\$0	\$0	\$34

## Cost Transparency Blueprint Powered by TM1应用

绩效管理系统使阐明目标变得简便, 并就相对于目标的绩效进行度量、跟踪并获取反馈。Cost Transparency Blueprint Powered by TM1是一个基于同类最佳的规划流程和技术的整合解决方案, 具有以下属性:

- 基于驱动的计算
- 建模灵活性
- 高度参与性
- 自上而下/自下而上的对账

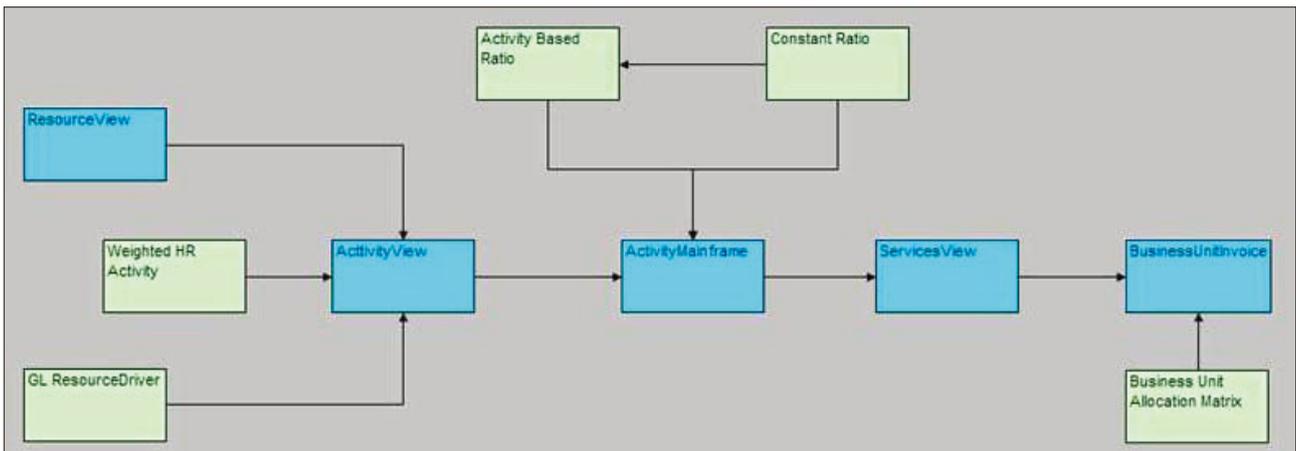
依靠这个蓝图, 银行和业务线管理员可以接收重要的成本透明度

信息和分析, 帮助降低成本, 体现他们的单元为企业增加的价值, 并确定绩效。

这一应用支持的重要活动包括报告、分析和数据。关于报告, 它根据需求提供月度和季度报告软件包。它还运行特定报告, 以支持分析、重新预测和预算流程并更新报告软件包。关于分析, 它开发并交付了标准的基于活动的管理(ABM)分析, 并支持特定速率和容量分析、预算和规划流程以及重新预测流程和分析。蓝图支持的数据活动包括管理和更新数据模型和ETL组件, 数据质量检测和数据纠错报告。

下图突出显示了通过蓝图的工作和信息流。绿色框表示可以编辑的数据录入屏幕; 蓝色框表示无法编辑的屏幕。

为了便于比较, 该模型是以时间和版本为基础的。它包含2008年



(推出蓝图的前一年)的年均实际数据, 本年度八个月的实际数据和四个月的预测数据, 代表本年度预算的2009年预算, 以及2010年年度预测。

该模型中的五个主要选项卡, ResourceView、ActivityView、Activity Mainframe、ServicesView和BusinessUnitInvoice, 都拥有最高级别上的相同数据容量。它们是对相同数据的不同表述。

## ResourceView

蓝图中的第一个选项卡是ResourceView。预测/预算流程在这里开始。ResourceView是在捕获生产流程的过程中产生花费的地方。它们作为服务机构的Operational Expense出现。您可以定位网格, 这样更方便查看。

	2008 Actuals	2009 Act/Fcst	2009 Actuals Jan	2009 Actuals Feb	2009 Actuals Mar	2009 Actuals Apr	2009 Actuals May	2009 Actuals Jun	2009 Actuals Jul
<b>Total Operational Expenses</b>	<b>25,276,448.26</b>	<b>26,540,270.67</b>	<b>1,990,520.30</b>	<b>2,043,600.84</b>	<b>2,468,200.00</b>	<b>2,468,200.00</b>	<b>2,468,200.00</b>	<b>2,468,200.00</b>	<b>2,468,200.00</b>
Communications & Desktop	57,504.06	60,379.26	4,528.44	4,649.20	5,649.20	5,649.20	5,649.20	5,649.20	5,649.20
Employee Base Compensation and Other	13,063,486.35	13,716,660.67	1,028,749.55	1,056,182.87	1,275,400.00	1,275,400.00	1,275,400.00	1,275,400.00	1,275,400.00
Employee Taxes & Benefits	4,442,223.87	4,664,335.06	349,825.13	359,153.80	433,700.00	433,700.00	433,700.00	433,700.00	433,700.00
Equipment Depreciation	1,436,386.02	1,508,205.32	113,115.40	116,131.81	140,200.00	140,200.00	140,200.00	140,200.00	140,200.00
GDS	456,263.94	479,077.14	35,930.79	36,888.94	44,500.00	44,500.00	44,500.00	44,500.00	44,500.00
Incentive Compensation & Awards	2,022,943.68	2,124,090.87	159,306.81	163,555.00	197,500.00	197,500.00	197,500.00	197,500.00	197,500.00
Lease/Maint/Equip Expense	-60,884.82	-63,929.06	-4,794.68	-4,922.54	-5,945.40	-5,945.40	-5,945.40	-5,945.40	-5,945.40
Non-Employee Compensation	343,673.87	360,857.57	27,064.32	27,786.03	33,559.75	33,559.75	33,559.75	33,559.75	33,559.75
Occupancy Expense	3,021,436.51	3,172,508.34	237,938.13	244,283.14	295,043.28	295,043.28	295,043.28	295,043.28	295,043.28
Other Expense	231,583.19	243,162.35	18,237.18	18,723.50	22,614.10	22,614.10	22,614.10	22,614.10	22,614.10
Professional Fees	261,831.58	274,923.16	20,619.24	21,169.08	25,567.85	25,567.85	25,567.85	25,567.85	25,567.85

Total Services Org Units	2009 Actuals Jun	2009 Actuals Jul
40000001-DATA SECURITY		
40000002-IMPLEMENTATION AND INTE	47,865.98	1,963,980.03
40000003-DATA ENTRY		
40000004-MAINFRAME SYSTEM SERVICE	5,796.41	4,468.07
40000005-COMPUTER OPERATIONS	16,799.42	1,015,032.85
40000006-PRODUCTION SERVICES & S	47,776.17	345,160.75
40000007-ENTERPRISE PLATFORM SER	44,787.71	111,607.15
40000008-DATA CENTER	45,991.41	35,451.71
	33,912.72	157,182.72
	-6,137.19	-4,730.75
	34,642.33	26,703.46
	304,560.80	234,765.67
	23,343.59	17,994.01
	26,392.62	20,344.31

您可以以不同方式观看该选项卡:根据整个服务组织维度的报告水平, 或根据您选择关注的任何运营费用的服务组织。

ServicesOrganizationalUnits	2008 Actuals	2009 Act/fcst	2009 Actuals Jan	2009 Actuals Feb	2009 Actuals	2009 Actuals
<b>Total Services Org Units</b>	<b>25,276,448.26</b>	<b>26,540,270.67</b>	<b>1,990,520.30</b>	<b>2,043,600.84</b>		
40000001-DATA SECURITY	3,478,907.90	3,652,853.30	273,964.00	281,269.70		
40000002-IMPLEMENTATION AND INTEGRATION SVCS	699,697.00	734,681.85	55,101.14	56,570.50		
40000003-DATA ENTRY	1,976,578.00	2,075,406.90	155,655.52	159,806.33		
40000004-MAINFRAME SYSTEM SERVICES	6,890,643.00	7,235,175.15	542,638.14	557,108.49		
40000005-COMPUTER OPERATIONS	2,352,579.32	2,470,208.29	185,265.62	190,206.04		
40000006-PRODUCTION SERVICES & SUPPORT	4,987,689.90	5,237,074.40	392,780.58	403,254.73		
40000007-ENTERPRISE PLATFORM SERVICES	4,878,097.89	5,122,002.78	384,150.21	394,394.21	476,346.26	389,272.21
40000008-DATA CENTER	12,255.25	12,868.01	965.10	990.84	1,196.73	977.97
					990.84	1,235.33

下面的视图将服务组织应用到运营开支维度, 并合并了时间维度, 使我们能够查看年度金额。

Services	2008 Actuals	2009 Actuals	2009 Actuals	2009 Actuals	2009 Actuals
<b>Total Services</b>	<b>25,276,448.26</b>	<b>3,478,907.90</b>	<b>699,697.00</b>	<b>1,976,578.00</b>	<b>6,890,643.00</b>
101-Online Processing Peak	2,262,077.94	0.00	94,489.27	0.00	1,101,686.12
102-Online Processing Non Peak	3,167,894.76	0.00	132,391.74	0.00	1,542,804.85
103-Batch Processing Peak	1,170,433.08	0.00	47,378.09	0.00	570,557.64
104-Batch Processing Non Peak	4,273,203.92	0.00	172,829.95	0.00	2,083,166.79
105-DASD	2,068,038.51	0.00	110,104.02	0.00	821,984.80
106-Mainframe Tape Storage	1,968,816.36	0.00	110,104.02	0.00	770,442.79
109-To Be Assigned	(212,424.44)	(212,424.44)	0.00	0.00	0.00
110-One Time Event	1,976,578.00	0.00	0.00	1,976,578.00	0.00
111-Mainframe Security	8,601,830.14	3,691,332.34	32,399.91	0.00	0.00

在整个应用中, 灰色区域不能编辑, 要么是锁定的历史数据, 即从其他选项卡链接的数据, 要么是根据在白色(或可编辑)区域输入的信息计算的项目。发生变化时, 它们与受到变化影响的单元格一起

以蓝色突出显示。对任何特定选项卡所做的更改都将流经后续选项卡, 对后续选项卡造成影响。

## ActivityView

第二个选项卡ActivityView通过活动对资源视图中产生的费用进行了细分。

资源根据GL ResourceDriver包含的资源定义(驱动因素)被分割或分配, 或根据加权员工配置文件进行分配。Weighted HR Activity选项卡包含涉及该流程的个人所使用的时间和工资信息, 这些信息被用作分配适当资源的基础。所有资源都基于以下两个图表所示的方法之一进行分配。

Service Activities	2008 Actuals	2009 Actual/Est	2009 Actuals Est							
<b>Total Service Activities</b>	<b>25,276,448.26</b>	<b>26,540,270.67</b>	<b>1,990,520.30</b>	<b>2,043,600.84</b>	<b>2,468,245.17</b>	<b>2,017,060.57</b>	<b>2,043,600.84</b>	<b>2,547,865.98</b>	<b>1,963,980.03</b>	<b>2,070,141.11</b>
<b>1 Financial Management</b>	<b>1,482,488.54</b>	<b>1,556,612.97</b>	<b>116,745.97</b>	<b>119,859.20</b>	<b>144,765.01</b>	<b>118,302.59</b>	<b>119,859.20</b>	<b>149,434.84</b>	<b>115,189.36</b>	<b>121,415.81</b>
1.1 Develop Financial Management Framework	482,345.01	506,462.26	37,984.67	38,997.59	47,100.99	38,491.13	38,997.59	48,620.38	37,478.21	39,504.06
1.2 Prioritize Within IT Budget	344,532.15	361,758.76	27,131.91	27,855.42	33,643.56	27,493.67	27,855.42	34,728.84	26,770.15	28,217.18
1.3 Budget, Plan and Forecast	655,611.38	688,391.95	51,629.40	53,006.18	64,020.45	52,317.79	53,006.18	66,085.63	50,941.00	53,694.57
<b>2 Vendor and Procurement Management</b>	<b>68,906.43</b>	<b>72,351.75</b>	<b>5,426.38</b>	<b>5,571.08</b>	<b>6,728.71</b>	<b>5,498.73</b>	<b>5,571.08</b>	<b>6,945.77</b>	<b>5,354.03</b>	<b>5,643.44</b>
2.3 Audit Vendor Invoices	68,906.43	72,351.75	5,426.38	5,571.08	6,728.71	5,498.73	5,571.08	6,945.77	5,354.03	5,643.44
<b>3 IT Service Continuity</b>	<b>261,092.45</b>	<b>274,147.07</b>	<b>20,561.03</b>	<b>21,109.32</b>	<b>25,495.68</b>	<b>20,835.18</b>	<b>21,109.32</b>	<b>26,318.12</b>	<b>20,286.88</b>	<b>21,383.47</b>
3.1 Develop IT Continuity Framework	118,783.33	124,722.50	9,354.19	9,603.63	11,599.19	9,478.91	9,603.63	11,973.36	9,229.46	9,728.35
3.2 Maintain Continuity Program	142,309.12	149,424.58	11,206.84	11,505.69	13,896.49	11,356.27	11,505.69	14,344.76	11,057.42	11,655.12
<b>4 Asset and Inventory Management</b>	<b>68,906.43</b>	<b>72,351.75</b>	<b>5,426.38</b>	<b>5,571.08</b>	<b>6,728.71</b>	<b>5,498.73</b>	<b>5,571.08</b>	<b>6,945.77</b>	<b>5,354.03</b>	<b>5,643.44</b>
4.1 Manage Hardware Inventory and Assets	68,906.43	72,351.75	5,426.38	5,571.08	6,728.71	5,498.73	5,571.08	6,945.77	5,354.03	5,643.44
<b>6 Planning, Architecture and Engineering</b>	<b>1,164,197.62</b>	<b>1,222,407.50</b>	<b>91,680.56</b>	<b>94,125.38</b>	<b>113,683.90</b>	<b>92,902.97</b>	<b>94,125.38</b>	<b>112,351.12</b>	<b>90,458.15</b>	<b>95,347.78</b>
6.1 Build an IT Strategic and Tactical Plan	118,783.33	124,722.50	9,354.19	9,603.63	11,599.19	9,478.91	9,603.63	11,973.36	9,229.46	9,728.35
6.4 Develop and Manage Software and Infrastructure	168,660.23	177,093.24	13,281.99	13,636.18	16,469.67	13,459.09	13,636.18	17,000.95	13,104.90	13,813.27
6.5 Develop reference architecture	68,906.43	72,351.75	5,426.38	5,571.08	6,728.71	5,498.73	5,571.08	6,945.77	5,354.03	5,643.44
6.6 Perform engineering services	807,847.63	848,240.01	63,618.00	65,314.48	78,886.32	64,466.24	65,314.48	81,431.04	62,769.76	66,162.72
<b>8 Release and Patch Management</b>	<b>819,665.47</b>	<b>860,648.74</b>	<b>64,548.66</b>	<b>66,269.95</b>	<b>80,040.33</b>	<b>65,409.30</b>	<b>66,269.95</b>	<b>82,622.28</b>	<b>63,688.01</b>	<b>67,130.60</b>
8.1 Release Applications	494,162.85	518,870.99	38,915.32	39,953.07	48,255.00	39,434.20	39,953.07	49,811.61	38,396.45	40,471.94
8.2 Patch Management	325,502.62	341,777.75	25,633.33	26,316.89	31,785.33	25,975.11	26,316.89	32,810.66	25,291.55	26,658.66
<b>9 Development</b>	<b>904,886.00</b>	<b>950,130.29</b>	<b>71,259.77</b>	<b>73,160.03</b>	<b>88,362.12</b>	<b>72,209.90</b>	<b>73,160.03</b>	<b>91,212.51</b>	<b>70,309.64</b>	<b>74,110.16</b>

Service Activities	Total Operational Expenses	Communications & Desktop	Employee Base Compensation and Other	Employee Taxes & Benefits	Equipment Depreciation	GDS
<b>Total Service Activities</b>	<b>6,890,643.00</b>	<b>18101.26</b>	<b>3737816.78</b>	<b>1383353.79</b>	<b>102939.36</b>	<b>0.00</b>
<b>1 Financial Management</b>	<b>1,033,596.45</b>	<b>2715.19</b>	<b>560672.52</b>	<b>207503.07</b>	<b>15440.90</b>	<b>0.00</b>
1.1 Develop Financial Management Framework	482,345.01	1267.09	261647.17	96834.77	7205.75	0.00
1.2 Prioritize Within IT Budget	344,532.15	905.06	186890.84	69167.69	5146.97	0.00
1.3 Budget, Plan and Forecast	206,719.29	543.04	112134.50	41500.61	3088.18	0.00
<b>2 Vendor and Procurement Management</b>	<b>68,906.43</b>	<b>181.01</b>	<b>37378.17</b>	<b>13833.54</b>	<b>1029.39</b>	<b>0.00</b>
2.3 Audit Vendor Invoices	68,906.43	181.01	37378.17	13833.54	1029.39	0.00
<b>3 IT Service Continuity</b>	<b>137,812.86</b>	<b>362.03</b>	<b>74756.34</b>	<b>27667.08</b>	<b>2058.79</b>	<b>0.00</b>
3.1 Develop IT Continuity Framework	68,906.43	181.01	37378.17	13833.54	1029.39	0.00
3.2 Maintain Continuity Program	68,906.43	181.01	37378.17	13833.54	1029.39	0.00
<b>4 Asset and Inventory Management</b>	<b>68,906.43</b>	<b>181.01</b>	<b>37378.17</b>	<b>13833.54</b>	<b>1029.39</b>	<b>0.00</b>
4.1 Manage Hardware Inventory and Assets	68,906.43	181.01	37378.17	13833.54	1029.39	0.00
<b>6 Planning, Architecture and Engineering</b>	<b>964,690.02</b>	<b>2534.18</b>	<b>523294.35</b>	<b>193669.53</b>	<b>14411.51</b>	<b>0.00</b>

## Activity Mainframe

当从基于活动的视图迁移到服务视图时, 大多数工作在第三个选项卡Activity Mainframe上执行。这个多维数据集的规则被分割为一些小部分, 定义正在被处理的服务和服务类型。所执行的分配包括:

- 针对所有服务的大型机产品驱动程序。
- 针对所有服务的大型机维护。

- 针对所有服务的大型机维护变更单。
- 直接分配给DASD和大型机磁带存储的项目。

一个时间事件, 直接分配给大型机安全的项目, 与“要分配的”服务相关的项目被直接从ActivityView选项卡映射。与蓝图中的大多数相同, 该多维数据集是零抑制的。因此, 如果没有使用某个活动或服务, 它便不会出现。如果后来该项目的数据可用, 它将出现在视图中。

Service Activities	Total Services	101-Online Processing Fees	102-Online Processing Non-Fees	103-Batch Processing Fees	104-Batch Processing Non-Fees	105-DASD	106-Mainframe Tape Storage
<b>Total Service Activities</b>	<b>25,276,448.26</b>	<b>2262077.94</b>	<b>3167894.76</b>	<b>1170433.08</b>	<b>4273203.92</b>	<b>2068038.51</b>	<b>1968816.34</b>
<b>1 Financial Management</b>	<b>1,482,488.54</b>	<b>209985.61</b>	<b>294068.50</b>	<b>105182.56</b>	<b>384038.66</b>	<b>244610.61</b>	<b>244610.61</b>
1.1 Develop Financial Management Framework	482,345.01	68321.28	95676.03	34222.38	124951.47	79586.93	79586.93
1.2 Prioritize Within IT Budget	344,532.15	48800.91	68340.02	24444.56	89251.05	56847.80	56847.80
1.3 Budget, Plan and Forecast	555,611.38	92863.42	130044.45	46515.63	169836.13	108175.88	108175.88
<b>2 Vendor and Procurement Management</b>	<b>68,906.43</b>	<b>11482.57</b>	<b>16080.00</b>	<b>5925.95</b>	<b>21636.62</b>	<b>6890.64</b>	<b>6890.64</b>
2.3 Audit Vendor Invoices	68,906.43	11482.57	16080.00	5925.95	21636.62	6890.64	6890.64
<b>3 IT Service Continuity</b>	<b>261,092.45</b>	<b>36982.18</b>	<b>51789.25</b>	<b>18524.51</b>	<b>67636.00</b>	<b>43080.25</b>	<b>43080.25</b>
3.1 Develop IT Continuity Framework	118,783.33	16824.95	23561.39	8427.68	30770.82	19599.25	19599.25
3.2 Maintain Continuity Program	142,309.12	20157.23	28227.87	10096.83	36865.18	23481.01	23481.01
<b>4 Asset and Inventory Management</b>	<b>68,906.43</b>	<b>9760.18</b>	<b>13668.00</b>	<b>4888.91</b>	<b>17850.21</b>	<b>11369.56</b>	<b>11369.56</b>
4.1 Manage Hardware Inventory and Assets	68,906.43	9760.18	13668.00	4888.91	17850.21	11369.56	11369.56
<b>6 Planning, Architecture and Engineering</b>	<b>1,164,197.62</b>	<b>164901.61</b>	<b>230925.58</b>	<b>82599.82</b>	<b>301585.39</b>	<b>192092.61</b>	<b>192092.61</b>
6.2 Build an IT Strategic and Tactical Plan	118,783.33	16824.95	23561.39	8427.68	30770.82	19599.25	19599.25
6.4 Develop and Manage Software and Infrastructure	168,660.23	23889.71	33454.77	11966.44	43691.43	27828.94	27828.94
6.5 Develop reference architecture	68,906.43	9760.18	13668.00	4888.91	17850.21	11369.56	11369.56
6.6 Perform engineering services	807,847.63	114426.77	160241.42	57316.79	209272.93	133294.86	133294.86
<b>8 Release and Patch Management</b>	<b>819,665.47</b>	<b>136589.05</b>	<b>191277.13</b>	<b>70491.23</b>	<b>257374.96</b>	<b>81966.55</b>	<b>81966.55</b>
8.1 Release Applications	494,162.85	82347.30	115317.84	42498.00	155167.13	49416.28	49416.28
8.2 Patch Management	325,502.62	54241.76	75959.29	27993.23	102207.82	32550.26	32550.26
<b>9 Development</b>	<b>904,886.00</b>	<b>128171.67</b>	<b>179489.57</b>	<b>64201.66</b>	<b>234410.72</b>	<b>149306.19</b>	<b>149306.19</b>

## ServicesView

第四个选项卡ServicesView使用活动驱动程序开发。使用的信息来自两个多维数据集。Activity Based Ratio保存关于高峰时段和非高峰时段批处理的信息、在线高峰时段和非高峰时段DASD以及每个驱动程序活动连续的磁带存储的信息。Constant Ratio保存比率和变更以及根据驱动程序活动指示不发生变化的故障单比率。这些信息被拖到

Activity Mainframe。这两个不同的比率多维数据集被用作把某些活动分配给特定服务账户的特定服务基础(参见Activity Mainframe)。该信息然后从Activity Mainframe移动到ServicesView选项卡。ServicesView选项卡引入应用的维度。在我们的模型中,我们有App1、App2和Total Apps。将对这个维度加以修改,以适应最终用户的需求。下图展示了ServicesView(按组织的服务)。

Business Unit Allocation Matrix							
Rows:	Columns:	Context:					
Services (Service)	ServicesOrganizationalUnits (ServicesOrganizationalUnits)	Business Analyst (Hierarchy)	Total Applications (TotalApplications)	2008 Actuals (Version-Time)			
	<b>Total Services Org Units</b>	<u>40000001-DATA SECURITY</u>	<u>40000002-IMPLEMENTATION AND INTEGRATION SVCS</u>	<u>40000003-DATA ENTRY</u>	<u>40000004-MAINFRAME SYSTEM SERVICES</u>	<u>40000005-COMPUTER OPERATIONS</u>	
<b>Total Services</b>	<b>25,276,448.26</b>	<b>3,478,907.90</b>	<b>699,697.00</b>	<b>1,976,578.00</b>	<b>6,890,643.00</b>	<b>2,352,571.00</b>	
101-Online Processing Peak	2,262,077.94	0.00	94,489.27	0.00	1,101,686.12	354,241.00	
102-Online Processing Non Peak	3,167,894.76	0.00	132,391.74	0.00	1,542,804.85	496,091.00	
103-Batch Processing Peak	1,170,433.08	0.00	47,378.09	0.00	570,557.64	179,541.00	
104-Batch Processing Non Peak	4,273,203.92	0.00	172,829.95	0.00	2,083,166.79	655,521.00	
105-DASD	2,068,038.51	0.00	110,104.02	0.00	821,984.80	338,951.00	
106-Mainframe Tape Storage	1,968,816.36	0.00	110,104.02	0.00	770,442.79	328,201.00	
109-**To Be Assigned	(212,424.44)		0.00	0.00	0.00	0.00	
110-**One Time Event	1,976,578.00	0.00	0.00	1,976,578.00	0.00	0.00	
111-Mainframe Security	8,601,830.14	3,691,332.34	32,399.91	0.00	0.00	0.00	

下图显示了有时间维度的视图。

		2008 Actuals	2009 Act/Fcst	2009 Budget	2010 Forecast
<b>Total Services</b>		<b>25,276,448.26</b>	<b>26,540,270.67</b>	<b>27,804,093.09</b>	<b>27,298,564.12</b>
101-Online Processing Peak		2,262,077.94	2,375,181.83	2,488,285.73	2,443,044.17
102-Online Processing Non Peak		3,167,894.76	3,326,289.49	3,484,684.23	3,421,326.34
103-Batch Processing Peak		1,170,433.08	1,228,954.73	1,287,476.39	1,264,067.73
104-Batch Processing Non Peak		4,273,203.92	4,486,864.12	4,700,524.31	4,615,060.23
105-DASD		2,068,038.51	2,171,440.44	2,274,842.36	2,233,481.59
106-Mainframe Tape Storage		1,968,816.36	2,067,257.17	2,165,697.99	2,126,321.67
109-*To Be Assigned		(212,424.44)	(223,045.66)	(233,666.88)	(229,418.39)
110-*One Time Event		1,976,578.00	2,075,406.90	2,174,235.80	2,134,704.24
111-Mainframe Security		8,601,830.14	9,031,921.65	9,462,013.16	9,289,976.55
<b>Total Services</b>		<b>3,478,907.90</b>	<b>3,652,853.30</b>	<b>3,826,798.69</b>	<b>3,757,220.53</b>
40000001-DATA SECURITY					
109-*To Be Assigned		(212,424.44)	(223,045.66)	(233,666.88)	(229,418.39)
111-Mainframe Security		3,691,332.34	3,875,898.96	4,060,465.57	3,986,638.93
<b>Total Services</b>		<b>699,697.00</b>	<b>734,681.85</b>	<b>769,666.70</b>	<b>755,672.76</b>
101-Online Processing Peak		94,489.27	99,213.73	103,938.19	102,048.41
102-Online Processing Non Peak		132,391.74	139,011.33	145,630.92	142,983.08
103-Batch Processing Peak		47,378.09	49,477.00	52,115.90	51,168.34
104-Batch Processing Non Peak		172,829.95	181,471.44	190,112.94	186,656.34
105-DASD		110,104.02	115,609.22	121,114.42	118,912.34
106-Mainframe Tape Storage		110,104.02	115,609.22	121,114.42	118,912.34
111-Mainframe Security		32,399.91	34,019.91	35,639.90	34,991.91
<b>Total Services</b>		<b>1,976,578.00</b>	<b>2,075,406.90</b>	<b>2,174,235.80</b>	<b>2,134,704.24</b>

### BusinessUnitInvoice

第五个选项卡BusinessUnitInvoice根据服务的使用率将ServicesView分配给业务单元。该使用率基础保存在业务单元分配矩阵中。如果需要, 该选项卡可用来生成特定业务单元的发票。

下图显示了所有的业务单元。

		101-Online Processing Peak	102-Online Processing Non Peak	103-Batch Processing Peak	104-Batch Processing Non Peak	105-DASD	106-Mainframe Tape Storage	109-*To Be Assigned
<b>Total Services</b>		<b>25,276,448.26</b>	<b>2,262,077.94</b>	<b>3,167,894.76</b>	<b>1,170,433.08</b>	<b>4,273,203.92</b>	<b>2,068,038.51</b>	<b>(212,424.44)</b>
<b>Total Business Units</b>		<b>25,276,448.26</b>	<b>2,262,077.94</b>	<b>3,167,894.76</b>	<b>1,170,433.08</b>	<b>4,273,203.92</b>	<b>2,068,038.51</b>	<b>(212,424.44)</b>
Home Loan		1,749,532.21	156,571.77	219,268.70	81,012.58	295,773.67	143,141.15	136,273.40
ECommerce		4,023,750.16	360,099.50	504,296.21	186,320.89	680,250.04	329,210.43	313,415.28
Commercial		3,551,498.78	317,836.07	445,108.99	164,453.15	600,411.83	290,572.32	276,630.99
Retail		3,011,634.85	269,521.76	377,447.90	139,454.60	509,143.12	246,402.37	234,580.27
Corporate		4,456,218.41	398,802.60	558,497.41	206,346.45	753,362.57	364,593.60	347,100.81
Card Services		2,882,820.79	257,993.74	361,303.64	133,489.83	487,365.98	235,863.22	224,546.77
Reclassified		496,254.77	44,411.58	62,195.56	22,979.22	83,896.20	40,601.99	38,653.95
One Time Event		343,754.39	30,763.78	43,082.70	15,917.64	58,114.68	28,124.89	26,775.49
Treasury		358,187.70	32,055.47	44,891.63	16,585.98	60,554.75	29,305.78	27,899.72
Technology		4,134,034.91	369,969.27	518,118.19	191,427.65	698,894.64	338,233.57	322,005.51
One Time Adjustments and Credits		268,761.29	24,052.39	33,683.83	12,445.07	45,436.44	21,989.19	20,934.18

下图显示了特定的业务单元, 在本示例中为电子商务业务单元。

The screenshot shows a software interface with a menu bar at the top containing options like ResourceView, ActivityView, Activity Mainframe, ServicesView, Business Unit Invoice, GL ResourceDriver, Weighted HR Activity, Activity Based Ratio, and Constant Ratio. Below the menu is the 'Business Unit Allocation Matrix' window. The window has a 'Rows' dropdown set to 'Services (Services)', a 'Columns' dropdown set to 'Versions-Time (Versions-Time)', and a 'Context' dropdown set to 'Business Analyst (Hierarchy)'. There are also two additional dropdowns: 'Total Applications (TotalApplications)' and 'ECommerce (BusinessUnits)'. The main data area is a table with the following columns: '2009 Actuals', '2009 Act/Fcst', '2009 Budget', and '2010 Forecast'. The rows list various services and their corresponding values for each of these four categories.

	2009 Actuals	2009 Act/Fcst	2009 Budget	2010 Forecast
<b>Total Services</b>	<b>4,023,750.16</b>	<b>4,224,937.67</b>	<b>4,426,125.17</b>	<b>4,345,650.17</b>
101-Online Processing Peak	360,099.50	378,104.48	396,109.45	388,907.46
102-Online Processing Non Peak	504,296.21	529,511.02	554,725.83	544,639.91
103-Batch Processing Peak	186,320.89	195,636.93	204,952.98	201,226.56
104-Batch Processing Non Peak	680,250.04	714,262.54	748,275.04	734,670.04
105-DASD	329,210.43	345,670.95	362,131.47	355,547.26
106-Mainframe Tape Storage	313,415.28	329,086.04	344,756.81	338,488.50
109-To Be Assigned	(33,815.78)	(35,506.57)	(37,197.36)	(36,521.04)
110-One Time Event	314,650.85	330,383.40	346,115.94	339,822.92
111-Mainframe Security	1,369,722.74	1,427,288.88	1,506,255.01	1,478,868.56

## GL ResourceDriver

第六个蓝图选项卡GL ResourceDriver保存定义资源驱动账户和所有活动(由金融机构为每个运营支出进行)之间关系的信息。它被用作分配ResourcesView中数据的基础, 不基于加权员工配置文件。

The screenshot shows the same software interface as above, but with the 'Context' dropdown set to 'Total Activities (ActivityNumbers)' and the 'Total Services Org Units' dropdown set to 'Total Services Org Units (ServiceOrganizationalUnits)'. The main data area is a table with columns for 'Operational Expenses (OperationalExpenses)', 'Communications & Desktop', and 'Employee B'. The rows list various resource driver accounts and their corresponding values for these three categories. A pop-up window titled 'Total Activities' is visible on the right side of the screen, showing a list of activities with their respective values for 'Management Allocation', 'GDS', and 'Incentive/Compens Analysis'.

	Operational Expenses (OperationalExpenses)	Communications & Desktop	Employee B
<b>Total Resource Driver Accounts</b>	<b>88.00000</b>	<b>8.00000</b>	
1-10003601-Communications & Desktop	1.00000	1.00000	
1-10003601-Employee Base Compensation and Other	1.00000	0.00000	
1-10003601-Employee Taxes & Benefits	1.00000	0.00000	
1-10003601-Equipment Depreciation	1.00000	0.00000	
1-10003601-GDS	1.00000	0.00000	
1-10003601-Incentive Compensation & Awards	1.00000	0.00000	
1-10003601-Lease/Maint/Equip Expense	1.00000	0.00000	
1-10003601-Non-Employee Compensation	1.00000	0.00000	
1-10003601-Occupancy Expense	1.00000	0.00000	
1-10003601-Other Expense	1.00000	0.00000	
1-10003601-Professional Fees	1.00000	0.00000	
1-10003616-Communications & Desktop	1.00000	1.00000	
1-10003616-Employee Base Compensation and Other	1.00000	0.00000	
1-10003616-Employee Taxes & Benefits	1.00000	0.00000	
1-10003616-Equipment Depreciation	1.00000	0.00000	
1-10003616-GDS	1.00000	0.00000	
1-10003616-Incentive Compensation & Awards	1.00000	0.00000	
1-10003616-Lease/Maint/Equip Expense	1.00000	0.00000	
1-10003616-Non-Employee Compensation	1.00000	0.00000	
1-10003616-Occupancy Expense	1.00000	0.00000	

## Weighted HR Activity

第七个蓝图选项卡Weighted HR Activity包含工资、人数和按每项活动对应工作职位的时间使用情况。这些信息被用作分配ResourcesView选项卡中的数据的基础，而ResourcesView选项卡中的数据根据员工在流程中付出的努力被分配给ActivityView。

Service Activities	Salary	BU Percentage	Headcount	Weighting in dollars	Allocated Base
<b>Total Service Activities</b>	<b>1855836080.00</b>	<b>32.00</b>	<b>2254.00</b>	<b>2640872.80</b>	<b>33.48</b>
<b>1 Financial Management</b>	<b>71838816.00</b>	<b>0.29</b>	<b>40.00</b>	<b>34621.40</b>	<b>0.44</b>
1.1 Develop Financial Management Framework	11973136.00	0.04	8.00	4491.45	0.06
1.2 Prioritize Within IT Budget	11973136.00	0.04	8.00	4491.45	0.06
1.3 Budget, Plan and Forecast	11973136.00	0.13	9.00	16655.60	0.21
1.4 Support Appropriate Cost Allocations	11973136.00	0.04	7.00	4491.45	0.06
1.5 Process Finance And Accounting Transactions	11973136.00	0.00	0.00	0.00	0.00
1.6 Report Financial Information	11973136.00	0.04	8.00	4491.45	0.06
<b>2 Vendor and Procurement Management</b>	<b>47892544.00</b>	<b>0.99</b>	<b>76.00</b>	<b>108734.49</b>	<b>1.38</b>
2.1 Perform Vendor / Service Provider Assessments	11973136.00	0.54	38.00	62805.43	0.80
2.2 Perform Vendor Management	11973136.00	0.23	10.00	22644.20	0.29
2.3 Audit Vendor Invoices	11973136.00	0.12	17.00	13925.94	0.18
2.4 Perform and Manage Procurement Functions	11973136.00	0.10	11.00	9358.92	0.12
<b>3 IT Service Continuity</b>	<b>23946272.00</b>	<b>0.44</b>	<b>102.00</b>	<b>40817.02</b>	<b>0.52</b>
3.1 Develop IT Continuity Framework	11973136.00	0.18	47.00	16501.03	0.21
3.2 Maintain Continuity Program	11973136.00	0.26	55.00	24315.99	0.31
<b>4 Asset and Inventory Management</b>	<b>35919408.00</b>	<b>0.34</b>	<b>15.00</b>	<b>37312.66</b>	<b>0.47</b>
4.1 Manage Hardware Inventory and Assets	11973136.00	0.32	9.00	35997.15	0.46
4.2 Manage Software Assets	11973136.00	0.00	1.00	0.00	0.00
4.3 Perform Software License Management and Compli	11973136.00	0.02	5.00	1315.51	0.02
<b>5 Quality Management</b>	<b>23946272.00</b>	<b>0.01</b>	<b>4.00</b>	<b>103.49</b>	<b>0.00</b>
5.1 Define a Quality Management System	11973136.00	0.01	1.00	0.00	0.00

- Total Job Titles**
- Admin Assistant
  - Business Analyst-Sr-L5
  - Business Systems Analyst-Sr
  - Computer Operator I
  - Computer Operator II
  - Computer Operator III
  - IT Group Manager I
  - Mgr-Technology I
  - Mgr-Technology II
  - Mgr-Technology III
  - Project Manager
  - Project Manager-Sr
  - Super-person
  - Systems Analyst-Sr
  - Technical Specialist I
  - Technical Specialist II
  - Technical Specialist-Sr
  - Technology Analyst I
  - Technology Analyst II
  - Technology Analyst III
  - Technology Consultant
  - Technology Operations Tech
  - Technology Supervisor I
  - Technology Supervisor II
  - Technology Supervisor III

## Activity Based Ratio

Activity Based Ratio是第八个选项卡, 用于将ActivityView信息转换成Services View信息。它拥有定义服务活动如何根据服务进行细分的数据。这些数据由驱动程序类保存。下面我们来看大型机处理的细分。

	Total	Total Batch	Batch-Peak	Batch-Off Peak	Total Online	Online-Peak	Online-Off Peak	total storage	DASD	Tape
<b>Total Service Activities</b>	<b>310.0000</b>	<b>155.0000</b>	<b>33.3250</b>	<b>121.6750</b>	<b>155.0000</b>	<b>64.5730</b>	<b>90.4270</b>	<b>0.0000</b>	<b>0.0000</b>	<b>0.0000</b>
<b>1 Financial Management</b>	<b>12.0000</b>	<b>6.0000</b>	<b>1.2900</b>	<b>4.7100</b>	<b>6.0000</b>	<b>2.4996</b>	<b>3.5004</b>	<b>0.0000</b>	<b>0.0000</b>	<b>0.0000</b>
1.1 Develop Financial Management Framework	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
1.2 Prioritize Within IT Budget	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
1.3 Budget, Plan and Forecast	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
1.4 Support Appropriate Cost Allocations	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
1.5 Process Finance And Accounting Transactions	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
1.6 Report Financial Information	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
<b>2 Vendor and Procurement Management</b>	<b>8.0000</b>	<b>4.0000</b>	<b>0.8600</b>	<b>3.1400</b>	<b>4.0000</b>	<b>1.6664</b>	<b>2.3336</b>	<b>0.0000</b>	<b>0.0000</b>	<b>0.0000</b>
2.1 Perform Vendor / Service Provider Assessments	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
2.2 Perform Vendor Management	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
2.3 Audit Vendor Invoices	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
2.4 Perform and Manage Procurement Functions	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
<b>3 IT Service Continuity</b>	<b>4.0000</b>	<b>2.0000</b>	<b>0.4300</b>	<b>1.5700</b>	<b>2.0000</b>	<b>0.8332</b>	<b>1.1668</b>	<b>0.0000</b>	<b>0.0000</b>	<b>0.0000</b>
3.1 Develop IT Continuity Framework	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
3.2 Maintain Continuity Program	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
<b>4 Asset and Inventory Management</b>	<b>6.0000</b>	<b>3.0000</b>	<b>0.6450</b>	<b>2.3550</b>	<b>3.0000</b>	<b>1.2498</b>	<b>1.7502</b>	<b>0.0000</b>	<b>0.0000</b>	<b>0.0000</b>
4.1 Manage Hardware Inventory and Assets	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
4.2 Manage Software Assets	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000
4.3 Perform Software License Management and Compli	2.0000	1.0000	0.2150	0.7850	1.0000	0.4166	0.5834	0.0000	0.0000	0.0000

## Constant Ratio

Constant Ratio选项卡包含当分配取决于驱动程序的类型或服务活动时用于把ActivityView数据分配给ServicesView选项卡的比率。这些比率用于Activity Mainframe多维数据集中的规则。

Rows:	ratio	Trouble ticket	Change ticket
<b>total</b>	<b>3.0000</b>	<b>1.0000</b>	<b>1.0000</b>
<b>Total Batch</b>	<b>1.0000</b>	<b>0.5340</b>	<b>0.4744</b>
Batch- Peak	0.2150	0.1148	0.1020
Batch- Off Peak	0.7850	0.4192	0.3724
<b>Total Online</b>	<b>1.0000</b>	<b>0.3980</b>	<b>0.5050</b>
Online- Peak	0.4166	0.1658	0.2104
Online- Off Peak	0.5834	0.2322	0.2946
<b>total storage</b>	<b>1.0000</b>	<b>0.0680</b>	<b>0.0206</b>
DASD	0.5000	0.0500	0.0202
Tape	0.5000	0.0180	0.0004

## Business Unit Allocation Matrix

蓝图的第十个也是最后一个选项卡是Business Unit Allocation Matrix, 保存用于把ServicesView数据转换为BusinessUnitInvoice选项卡的基础和分配模式。

Business Units	Total Applications	App1	App2
<b>Total Business Units</b>	<b>2.00</b>	<b>1.00</b>	<b>1.00</b>
Home Loan	0.18	0.016754247	0.06664695
ECommerce	0.34	0.131688929	0.21026208
Commercial	0.26	0.16615782	0.0928676
Retail	0.28	0.073384369	0.2041335
Corporate	0.37	0.161311549	0.2041335
Card Services	0.19	0.161311549	0.026383084
Reclassified	0.04	0.020769728	0.01752219
One Time Event	0.03	0.013846485	0.013141641
Treasury	0.03	0.00384863	0.021201849
Technology	0.26	0.237467217	0.026383084
One Time Adjustments and Credits	0.02	0.006923243	0.01752219

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- 简化流程
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- 实现快速响应机遇
- 增加管理可视性

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