

# IBM Cognos 8 Planning – Contributor for Microsoft Excel

## *Increase flexibility, participation, and buy-in with new Excel interface*

### Overview

Spreadsheets have been first-choice business and personal productivity tools for decades. They're familiar, comfortable, easy-to-use, and are readily formatted and customized. They can manipulate a variety of data, can perform reasonably complex calculations, and can be used for planning, budgeting, and forecasting at individual or departmental levels.

But as businesses grow larger and more complex, so do business plans and analyses. Despite the general-purpose utility of spreadsheets, they're inadequate as a sole solution for cross-enterprise planning, budgeting, and forecasting – not to mention high-level corporate performance management.

For enterprise applications, spreadsheets are severely limited. They

- Lack workflow and approval mechanisms
- Can't aggregate data from thousands of users
- Offer minimal security
- Inhibit data integrity and accuracy
- Prolong planning, budgeting, and forecasting cycles

The image shows two overlapping Excel spreadsheets. The top spreadsheet is a large financial model with columns for months (Jan to Dec) and rows for various categories. A red oval highlights a row of data in the 'Marketing' section, with values: 3,587, 3,587, 3,027, 3,587, 3,587, 4,145, 4,145, 4,405, 4,405, 4,654, 4,654, 4,923. A red arrow points from this oval to a smaller spreadsheet below titled 'New York Event Equipment'. This smaller spreadsheet also has columns for months and a row of data with the same values: 3,587, 3,587, 3,027, 3,587, 3,587, 4,145, 4,145, 4,405, 4,405, 4,654, 4,654, 4,923.

Linking personal spreadsheets into enterprise plans (see description on Page 2)

— all the sorts of things that only a dedicated enterprise planning solution can offer.

A dedicated enterprise planning solution provides the power to model, forecast, analyze, and report on a company's key operational processes, manage asynchronous business cycles, and reliably translate plans and forecasts into a single, cohesive, accurate view of financial performance. An enterprise planning solution enables every organizational level to contribute vital information to strategic and operational plans

quickly and accurately, and makes it easy to review key performance metrics, explore options for taking action, and revise plans and forecasts with power and speed.

The clear need is to combine all the advantages of a dedicated enterprise solution with the familiarity and convenience of a spreadsheet—and for individuals and departments to seamlessly link the information they have on their desktop spreadsheets with organization-wide plans, budgets, and forecasts.

### Technical specifications

IBM Cognos® 8 Planning – Contributor for Microsoft® Excel® delivers broad functionality and enhancements:

- **Enterprise management and control with spreadsheets.**

Contributor for Excel brings process and data integrity to an often cumbersome, yet critical business activity. Like the familiar Contributor browser, the new Contributor for Excel interface alternative enables highly scalable and flexible planning, including managed workflow and collaboration, data management and version control, and modeling flexibility to support a wide range of integrated enterprise planning applications.

- **Integrating IBM Cognos 8 Planning functionality within spreadsheets.**

Users can perform *what-if* analyses in Excel by directly entering commands into cells, rows, and columns. Additional planning capabilities—such as annotations and unique IBM Cognos breakback that readily facilitate top-down planning—are now directly available from within Excel, extending its flexibility and broad range of native features and functions.

- **Linking personal spreadsheets to enterprise plans.**

Contributor for Excel lets spreadsheet users link personal models and supporting detail directly into the enterprise plan. The plan is synchronized as information in spreadsheets

change, linking sophisticated spreadsheet models and easing migration to an enterprise-wide standard for planning and forecasting and reducing risk.

- **Full scorecard and report integration.**

Contributor for Excel is tightly integrated with IBM Cognos 8 Business Intelligence. Users can perform instant analysis against plan in real time, leveraging market-leading solutions for production reporting, analysis, scorecarding, event detection, and notification.

- **Leveraging IBM Cognos enterprise security with Excel.**

Single sign-on user authentication allows administrators to control security across all IBM Cognos solutions. This means shared security across IBM Cognos products with a single set of common users, user class definitions, and appropriate control of individual user ability to view and or modify data. A single log-on permits user access to all applications. Access to all planning information in Excel is integrated with the IBM Cognos security model—providing an optimum level of data access to valid users.

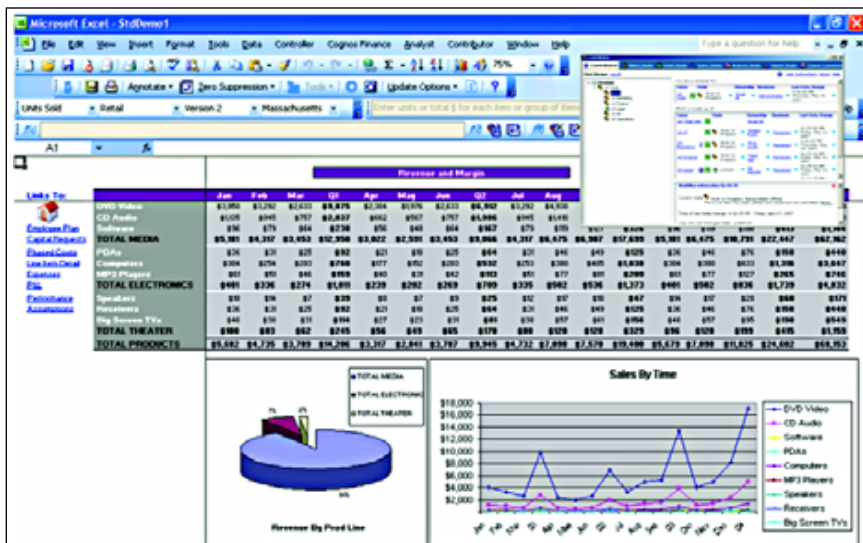
### Features and benefits

IBM Cognos 8 Planning – Contributor for Microsoft Excel combines the power of a purpose-built planning solution with the flexibility and familiarity of the spreadsheet. It offers line managers and staff simple,

controlled participation in planning, budgeting, and forecasting with minimal disruption, enabling them to focus on what they do best—running their area of the business. And it offers finance personnel and others with sophisticated needs the flexibility to integrate greatly detailed personal or shadow systems with enterprise plans, budgets, and forecasts.

Industry-leading Web-based IBM Cognos 8 Planning Contributor for Excel offers users a familiar, convenient alternative to the well-known IBM Cognos browser interface. Contributor for Excel delivers powerful, flexible planning, budgeting, and forecasting with enterprise scalability, collaborative work flow, and high user acceptance.

Contributor for Excel enables users to dramatically boost accuracy by using a proven, familiar tool to create well-formatted, high-value spreadsheets for enterprise planning, budgeting, and forecasting. Because IBM Cognos 8 Planning also enhances and extends the strategic value of current ERP and operational systems such as SAP, Oracle, or PeopleSoft, companies can optimize existing investments while benefiting from all the power of a proven planning solution—high frequency, high participation, automated workflow and approval, maximal control, and a single, up-to-the-minute view of the enterprise.



The Microsoft Excel interface offers both power and extensibility to users with complex needs

**Feature overview**

IBM Cognos 8 Planning – Contributor for Microsoft Excel is an interface alternative to the regular Contributor browser. It combines all the advantages of a dedicated enterprise solution with the familiarity and convenience of spreadsheets. Individuals and departments can seamlessly link the information on their desktop spreadsheets with organization-wide plans, budgets, and forecasts.

Contributor for Excel:

- Utilizes spreadsheets already kept by line managers and staff, allowing them to participate in planning, budgeting, and forecasting with minimal disruption
- Enables scalable and flexible planning, including managed workflow and collaboration, data management and version control
- Lets users to perform what-if analyses in Excel simply by entering direct commands into cells, rows, and columns
- Features tight integration with IBM Cognos 8 Business Intelligence, so users perform instant analysis against plan in real time
- Exploits the security benefits of single sign-on user authentication

**About IBM Cognos BI  
and Performance Management:**

IBM Cognos business intelligence (BI) and performance management solutions deliver world-leading enterprise planning, consolidation and BI software, support and services to help companies plan, understand and manage financial and operational performance. IBM Cognos solutions bring together technology, analytical applications, best practices, and a broad network of partners to give customers an open, adaptive and complete performance solution. Over 23,000 customers in more than 135 countries around the world choose IBM Cognos solutions.

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