



Highlights

- Establishes a foundation for best-in-class performance by helping you define goals and create a clear-cut strategy for excellence
 - Integrates operational and financial planning in on demand for immediate visibility into resource requirements and future business performance
 - Helps you build enterprise-wide budgets and forecasts faster and more efficiently for true predictability and accountability in your enterprise
 - Makes it easy for Finance to devise, compare and assess alternative business scenarios, conditions, cases and assumptions in minutes and without IT intervention
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IBM Cognos Planning: Performance begins with enterprise planning

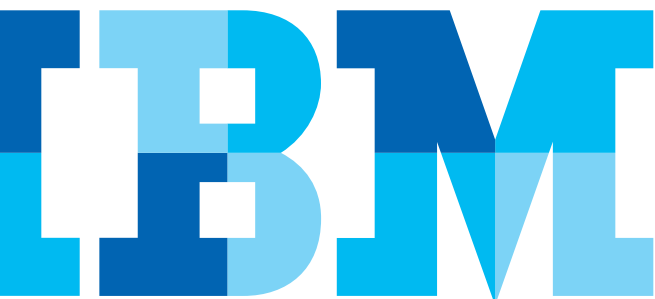
Overview

IBM Cognos® Planning offers everything you need to establish a foundation for best in-class performance. Owned by Finance, it helps define goals and creates a clear-cut strategy for excellence.

Designed for companies with even the most complex business models, Cognos Planning is a fully integrated, state-of-the-art, highly scalable solution for planning, budgeting, and forecasting. It integrates operational and financial planning in on demand for immediate visibility into resource requirements and future business performance.

With Cognos Planning you can access current actual data to assess fiscal performance, and proceed from what-is to evaluate the what-if scenarios critical to forecasting future performance.

And Cognos Planning helps you build enterprise-wide budgets and forecasts faster and more efficiently. The result: True predictability and accountability across the enterprise.



**IBM Cognos 10: Intelligence Unleashed
Smarter Decisions. Better Results**

Cognos 10 delivers a revolutionary new user experience and expands traditional business intelligence (BI) with planning, scenario modeling, real-time monitoring and predictive analytics. With the ability to interact, search and assemble all perspectives of your business, Cognos 10 provides a limitless BI workspace to support how people think and work.

Cognos 10 enables organizations to outperform by providing:

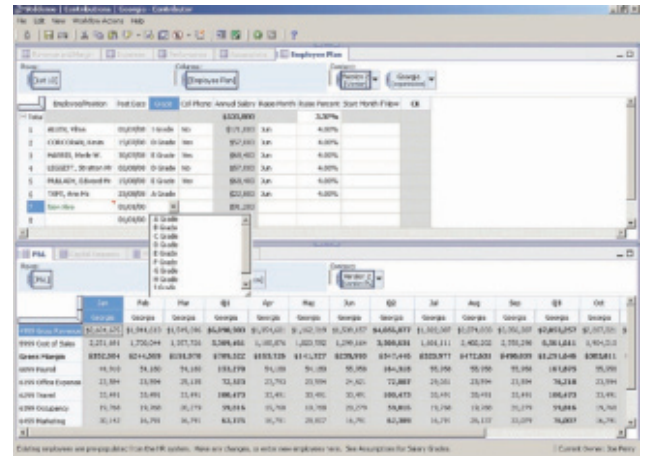
- **Analytics** that everyone can use in a BI workspace that sharpens individual skills to answer key business questions
- **Collective intelligence** with built-in collaboration and social networking to connect people and insights to gain alignment
- **Actionable insight** everywhere in mobile, real-time and business processes to instantly respond at the point of impact

Built on a proven technology platform, Cognos 10 is designed to upgrade seamlessly and to cost-effectively scale for the broadest of deployments. Cognos 10 provides you and your organization the freedom to see more, do more—and make the smart decisions that drive better business results.

Technical specifications

Powerful business modeling, calculation

Rather than forcing you into a solution that may not fit your business model, Cognos Planning readily adapts to suit your organization and environment. Your financial analysts can easily create business rules and structures in the Cognos Planning architecture and modify the model as your organization evolves. Cognos Planning easily accommodates changes such as added locations, new or discontinued product lines, and restructured cost centers. As your business grows, Cognos Planning grows with it. Its powerful modeling capabilities provide flexibility to devise, compare and assess alternative business scenarios, conditions, cases, and assumptions. And since Cognos Planning is designed for finance professionals, you won't need IT to manage changes to your model or assumptions.



The browser-based grid interface enables easy access and use.

Features and benefits

Cognos Planning provides unprecedented power and flexibility to create, compare and evaluate business scenarios, conditions, drivers, rates, and assumptions. It enables you to build consistent, interconnected business models for organizations of any size:

- **Rapid development.** Cognos Planning lets you build a model in days—not months. And you can import data from sources like ERP applications to further accelerate the process.
- **Sophisticated modeling.** Cross-functional planning processes rely on complex logic and dependencies. Cognos Planning quickly delivers sophisticated linked models that accurately reflect your business in all its complexity and detail.
- **Flexibility.** No other enterprise planning solution provides the modeling flexibility of Cognos Planning. You can revise underlying business logic and principles quickly and easily and then see the impact of the change.
- **Finance friendliness.** With Cognos Planning, you don't need to master arcane programming languages or scripting. Control of the application remains with financial planning professionals—not IT, as other solutions require.
- **Less time on process, more on analysis.** The proprietary high-speed, bi-directional calculation engine in Cognos Planning lets you evaluate models and test assumptions in minutes to support truly informed business decisions. Cognos Planning eliminates unproductive spreadsheet activities like tracking down numbers, fixing broken links, and debugging macros. Instead, Cognos Planning offers sophisticated features like break-back, multidimensional slicing-and-dicing, and drill-down to help you explore data fully and efficiently. Cognos Planning enables on-demand information flows for flexible rolling forecasts and greater visibility into future operating performance.

- **Break-back.** This unique capability automatically spreads high-level, top-down targets over any profile—like previous period actuals or projected seasonality—and over multiple dimensions such as products, customers, territories, or time periods without anyone needing to define special business rules.
- **Multi-dimensional analysis.** Cognos Planning makes it easy to compare and manipulate data in multiple dimensions, perspectives, or versions. For example, you can compare targets among teams and individuals with current and historical actuals and with external benchmarks to quickly establish targets' viability and consistency.
- **Unified view.** Cognos Planning provides a unified view of your plan with key metrics and essential underlying information. With a single version of corporate reality you can spend your time making business decisions, rather than debating data definitions and accuracy.

For added flexibility, Cognos Planning offers a Microsoft® Excel® interface, a familiar, convenient alternative to the well-known Cognos Web-browser. The browser 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 the Microsoft Excel interface offers finance personnel and others with more sophisticated needs the flexibility to integrate detailed personal or shadow systems with enterprise plans, budgets, and forecasts.

To use Cognos Planning, users simply launch Microsoft Excel or a web browser for immediate access to a complete, secure set of linked, role-specific planning templates. Users can quickly tab through them, enter data where required, and evaluate calculated results and summaries prior to submission.

Bridge the finance-to-business language gap

Cognos Planning users enter operational data—either numerical or text values—in their own business language, rather than unfamiliar financial terms. A user might enter the number of units sold, purchased, or needed. Cognos Planning uses predefined formulas to translate information into financial data such as gross revenue, net income, or earnings per share. The result is enhanced clarity and accuracy.

Flexible data entry

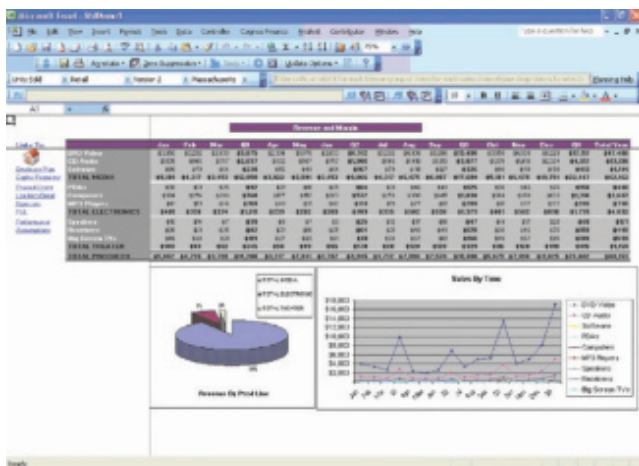
Cognos Planning templates are both easy to deploy and easy to use. Users only enter data that is relevant to their functional areas. Enforcement of corporate policies is facilitated with validation rules that review data entry values prior to submission. Templates are easily customized by reorienting columns and rows and displaying or hiding empty or zero-filled fields.

Minimal training

Because Cognos Planning is intuitive and supports either a Web browser or Microsoft Excel interface, little or no training is required to take advantage of its robust functionality.

Advanced personalization

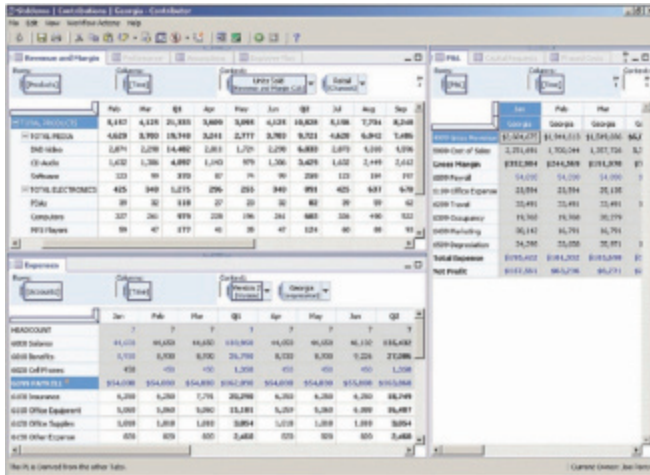
Cognos Planning blends enhanced planning and analysis features to improve productivity and accuracy, and to empower users to take greater control of their view of the planning process. These enhanced features include: hierarchy support, sorting and hiding, freeze panes, user tab management, calendar selector, zoom, and word wrap. Such capabilities enable planners to build consistent, sophisticated views of the organization and provide broader context for forecast data entry.



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

High participation for the enterprise

With Cognos Planning, organizations can easily engage thousands in the planning process, collecting data from managers and staff from divisions and geographies. Users work simultaneously, yet retain rapid server response, because Cognos Planning is optimized for user performance. The client requests data from the server only as needed and saves only data that has changed. Complex calculations are performed at the client, giving users instantaneous response and sparing the server unnecessary traffic during periods of high use.



Advanced personalization for more accurate planning contribution.

Streamlined workflow management

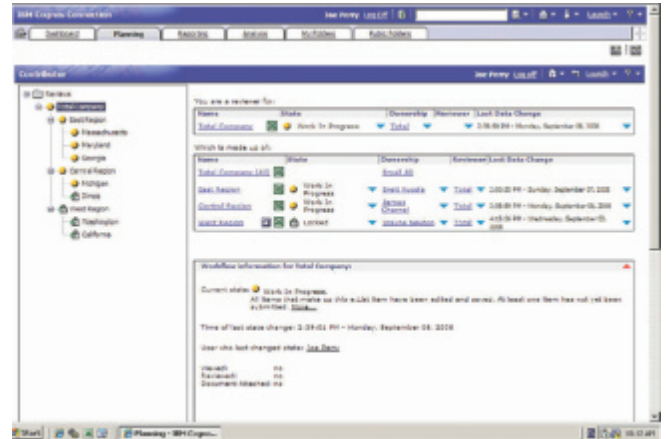
After entering required information, Cognos Planning users either save their work to return to later or submit it for review. At any point, designated reviewers can quickly monitor workflow status—not started, in progress, or ready for review—with intuitive, color-coded icons. Reviewers can send e-mail to groups based on hierarchy or workflow status, enabling quick, easy communication. After work is submitted, a customizable interface displays the details of individual submissions, an overview of all submissions, or a combination of both. Aggregate totals are shown to help pinpoint areas that need revision. Reviewers can request modifications; and if last-minute revisions are needed, totals may be adjusted without compromising accuracy.

Web client or rich Microsoft Excel client

Cognos Planning lets users instantly choose the interface that best meets their needs. The web client offers ease-of-use and minimal maintenance, while the Microsoft Excel client gives users a familiar, convenient alternative. Either way, users enjoy powerful, flexible planning, budgeting and forecasting with enterprise scalability, collaborative work flow, and high rate of acceptance.

Track participation—easily

Cognos Planning automatically monitors the entire planning process and gives you the status of every participant, so the planning cycle proceeds at the speed of the fastest plan contributor, not the slowest. It also promotes helpful dialogue among participants, streamlining cycles even further.



Streamlined workflow management tracks participation quickly and easily.

Mobile planning

You can plan wherever and whenever you want without a network connection. Cognos Planning knows when users check out plans to work offline, and automatically synchronizes plans and forecasts when they check back in.

On-demand aggregation

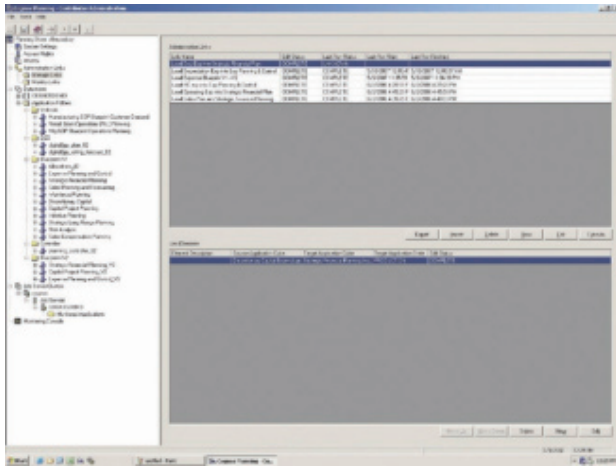
Cognos Planning instantly aggregates updates to plans and results and lets you see the impact of new forecasts and plan contributions in on demand, with no overnight batch processing and no user lock-outs.

Localized planning ownership

Cognos Planning puts capability and control in the hands of financial or operational plan administrators who support an enterprise-wide planning process. A key component in planning and forecasting is speed. The ability to turn around a planning cycle—from executives, to the front-line planners, and back—is critical to maintaining accuracy and accountability. So why build into your planning process a 24-hour turn-around of key activities such as adding users, moving data, or creating reports? If you operate in a global environment, why should Tokyo have to wait for New York to kick off a process? Distributed administration and localized planning process ownership eliminate material delay—while the overall plan administrator still retains control.

Online administration

Cognos Planning lets you change data structures, user access rights, model parameters, and much more—without taking the system offline. You have the 24x7 availability that is a “non-negotiable” for global enterprises.



Distributed administration

Cognos Planning empowers multiple administrators in your organization or across the globe to control their part of the plan to ensure timely and accurate plan creation. No 24-hour turnaround for basic processing requirements.

Right-sized planning

Cognos Planning manages security with complete flexibility. Advanced pre-defined selection options ensure that users see only those templates or portions of templates that they need to. Viewing options can be set for entire business units, workgroups, even individuals. Detailed instructions—including customized headlines and dropdown boxes with optional web-page links—can be tailored for each template, so relevant information and expectations are always communicated.

Single-sign-on user authentication allows administrators to control and share security for all Cognos solutions with a single set of common users, user class definitions, and appropriate control of single-user ability to view and modify data. A single log-on can enable user access to all applications. Access to planning information is integrated with the Cognos security model—providing optimal data access to valid users.

Feature overview

Plan to perform

Cognos Planning enhances and extends applications from Oracle and SAP® with certified integration to SAP NetWeaver®. It lets companies optimize existing strategic investments while enjoying all the benefits 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. Cognos Planning delivers broad functionality and ease of use.

Enterprise management and control

Cognos Planning brings process and data integrity to critical, but often cumbersome, business processes. It enables highly scalable and flexible planning, including managed workflow and collaboration, data management, version control, and modeling flexibility to support a wide range of integrated enterprise planning applications.

Broad planning functionality

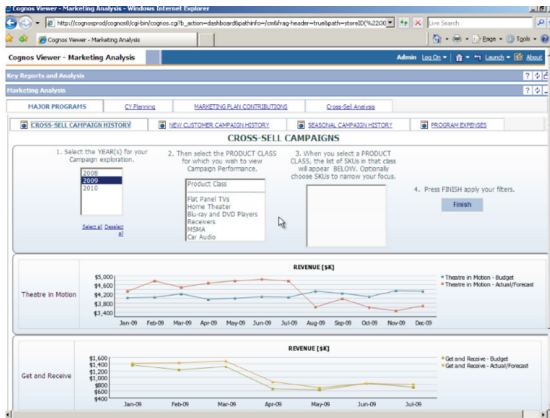
Cognos Planning offers amazing flexibility, a broad range of native features, and unique functions like annotations and break-back. Top-down planning is effortless: Users can even perform complex what-if analyses by entering commands directly into cells, rows, and columns.

Linking personal spreadsheets with enterprise plans

Cognos Planning lets spreadsheet users link personal models and desktop detail directly to the enterprise plan. The plan is synchronized as spreadsheet information changes, linking sophisticated models, reducing risk, and easing migration to an enterprise-wide planning and forecasting standard.

Full scorecard and report integration

Cognos Planning also links to other Cognos solutions for management and financial reporting, analysis, scorecards and dashboards, event detection, and notification.



Cross-sell campaigns

About IBM Business Analytics

IBM Business Analytics software delivers complete, consistent and accurate information that decision-makers trust to improve business performance. A comprehensive portfolio of business intelligence, advanced analytics, financial performance and strategy management and analytic applications gives you clear, immediate and actionable insights into current performance and the ability to predict future outcomes.

Combined with rich industry solutions, proven practices and professional services, organizations of every size can drive the highest IT productivity and deliver better results.

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To request a call or to ask a question, go to ibm.com/cognos/contactus.

An IBM Cognos representative will respond to your enquiry within two business days.



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