

# IBM Cognos 8 Planning – Contributor for Microsoft Excel®

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

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

—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

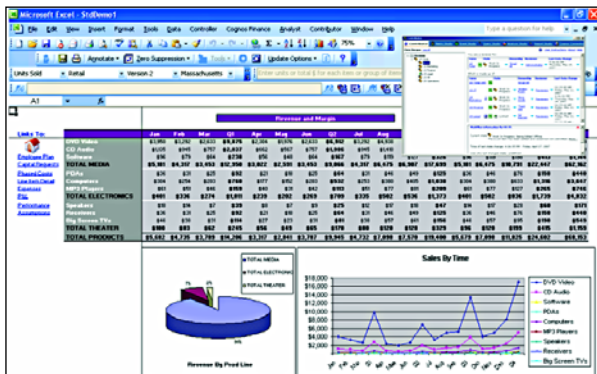
enables every organizational level to contribute vital information to strategic and operational plans quickly and accurately, and makes it easy to review key performance metrics, explore options for taking action, and revise plans and forecasts with power and speed.

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.

**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 Microsoft Excel® offers users a familiar, convenient alternative to the well-known 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 extendibility to users with complex needs*

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 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 Cognos *break-back* 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 Cognos enterprise security with excel.** Single sign-on user authentication allows administrators to control security across all Cognos solutions. This means shared security across 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 Cognos security model—providing an optimum level of data access to valid users.

The screenshot shows two Excel spreadsheets. The top spreadsheet is a financial model with columns for months (Jan to Dec) and rows for various categories. A red circle highlights a row of values: 3,887, 3,887, 3,887, 3,887, 4,148, 4,148, 4,405, 4,405, 4,684, 4,684, 4,922. A red arrow points from this row down to a similar row in the bottom spreadsheet, which is titled 'New York Event Equipment' and has columns for months (Jan to Dec). The same row of values is highlighted in red in the bottom spreadsheet.

Linking Personal Spreadsheets into Enterprise Plans

### About Cognos, an IBM company

Cognos, an IBM company, is the world leader in business intelligence and performance management solutions. It provides world-class enterprise planning and BI software and services to help companies plan, understand and manage financial and operational performance. Cognos was acquired by IBM in February 2008. For more information, visit <http://www.cognos.com>.



#### For more information

Visit the Cognos Web site at [www.cognos.com](http://www.cognos.com)



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