IBM Planning Analytics Express

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Performance management and business intelligence for midsize organisations

IBM® Planning Analytics Express is a performance management (PM) and business intelligence (BI) solution for midsize organisations. It delivers the essential planning, budgeting, forecasting, analysis and reporting capabilities that midsize organizations and workgroups require, at a price they can afford. All of the tools you need to get started are included in a solution that is easy to use and easy to buy.

IBM Planning Analytics Express, powered by IBM TM1®, provides organizations with consistent, reliable information to answer three critical business questions: How are we doing? Why?

IBM Planning Analytics provides an interactive experience that enables you to explore and analyse your data within a single, personalised workspace.

And what should we be doing? With insights drawn from answering these questions, organisations can make better, faster decisions to drive efficiency, reduce costs and identify new growth opportunities.

For organizations of any size that are embarking on or expanding an analytics strategy, IBM Planning Analytics Express offers powerful yet easy-to-use capabilities that provide self-service access to the tools and data users need to make timely, accurate decisions.

Planning, analysis and reporting

You can purchase the full solution with its planning, budgeting, forecasting, analysis, reporting, visualization, dashboard and scorecard capabilities, or start with the specific capability you need today, securing an easy path for growth in the future. This flexible approach gives you the freedom to "think big, but start small" — an effective strategy to match project and business needs with budget and resource constraints.

The following user licenses can be purchased separately or together:

IBM Planning Analytics Express User

- Provides the complete set of PM and BI capabilities*
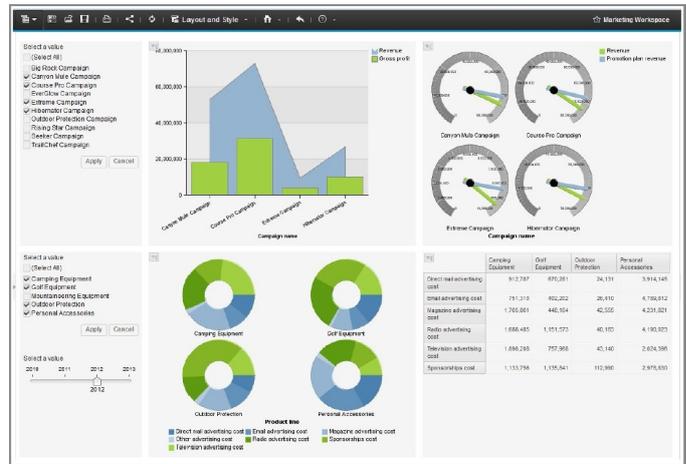
IBM Planning Analytics Express Performance Management User:

- IBM Planning Analytics* for planning, budgeting and forecasting

IBM Planning Analytics Express Business Intelligence User

- IBM Cognos Analytics* for reporting and query

Limited license version. (The appropriate Planning Analytics Express Connector license must also be purchased in combination with the Authorized User licenses.)

IBM®
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Business Partner
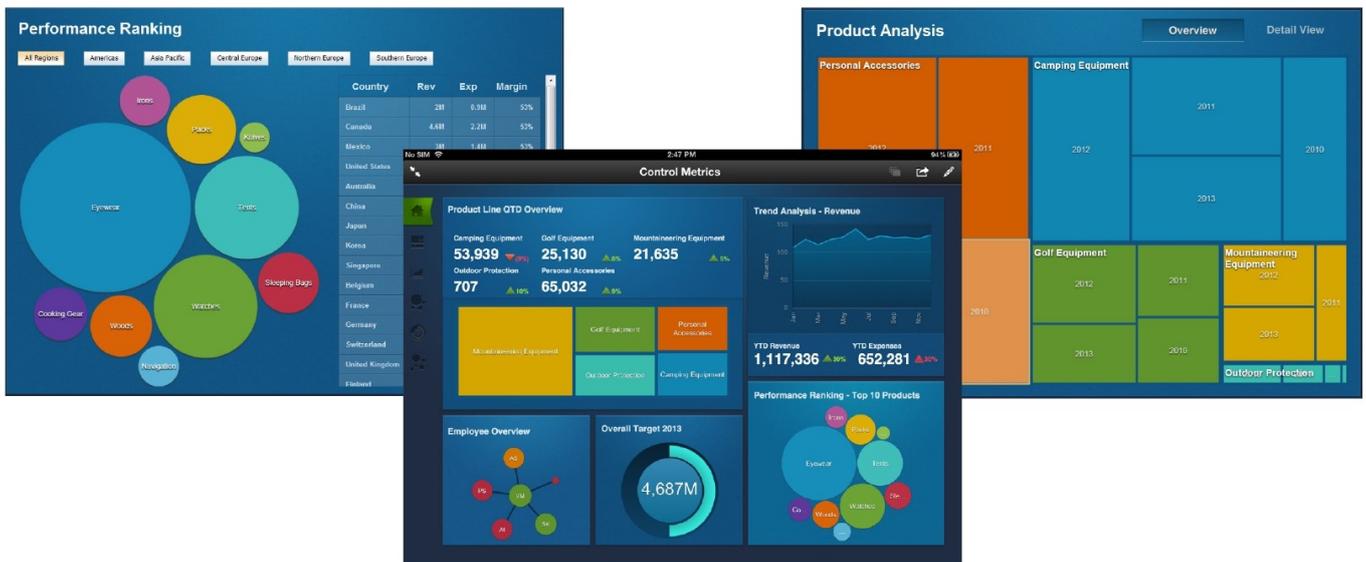™

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Figure 2: An intuitive interface provides self-service access to reports and analysis. Users can receive and interact with business insights on their PCs and mobile devices for greater mobility and flexibility.

IBM Planning Analytics Express Performance Management User

IBM Planning Analytics Express Performance Management User provides midsize businesses with the tools to streamline and automate planning and analysis. This solution includes IBM Planning Analytics Analysis for Microsoft Excel, for Excel-based business analysis and optimization, and IBM Planning Analytics, an intuitive planning, budgeting and forecasting solution.

Many financial and business analysts are skilled spreadsheet users. However, there is a significant risk of error in spreadsheet-only business processes. With spreadsheets, it is difficult to control access to key financial and operational data and to audit changes. Information is locked in silos and different people can modify it using inconsistent calculations and rules. In addition, spreadsheets lack the ability to slice and dice large sets of data across multiple dimensions.

IBM Planning Analytics Express extends and transforms common spreadsheets for real-time business analysis and optimization. Users can work in the standard web interface or within an Excel environment to create custom analysis and build their own "what-if" business scenarios. This approach allows business users to leverage their existing Excel skills while overcoming the risks and limitations of manual, spreadsheet-only processes. Centrally managed data, business hierarchies, rules and calculations eliminate data silos and inconsistencies. A powerful in-memory analytics engine based on IBM TM1 delivers fast, multidimensional analysis that can lead to new levels of insight and faster action.

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Business users can build and test scenarios and quickly update plans with the latest data, using write-back capabilities to align the right resources in order to capitalize on new opportunities. This closed-loop process enables midsize companies to take full advantage of insights gained through analysis and apply those insights to critical areas such as expense planning, inventory management and workforce management.

Optimize plans with in-depth "what-if" analysis

To fully understand your business, you need to go beyond historical data. "What-if" scenario modelling lets you analyse and optimize your plans based on different assumptions about the future that take into account ever-changing market conditions. IBM Planning Analytics Express, powered by IBM TM1, enables you to model best-case, worst-case and most-likely outcomes based on your key business drivers. It includes a set of advanced rules and provides the flexibility to create custom rules to help you make comparisons or perform calculations automatically.

IBM Planning Analytics Express streamlines information gathering, aggregation and analysis for continuous planning, budgeting and forecasting. A managed contribution model is used to collect input from systems and stakeholders. Administrators can build planning and analysis models using a graphical user interface that makes modelling more efficient and intuitive. No programming skills or IT support are required.

IBM Planning Analytics Express also blends managed workflow with personalized analysis for improved business agility. Users can contribute their own data into planning templates and create personalized hierarchies and dimensions. They can roll up data to suit their own business needs, such as adding a new department structure, modifying a product mix or removing a territory. Because

they can create and test a variety of scenarios and write ad hoc changes back to operational systems or data warehouses, teams can realize immediate business impacts. Complete audit trails are included to satisfy regulatory compliance requirements.

IBM Planning Analytics Express for Performance Management provides:

- Streamlined and continuous planning, budgeting and forecasting to respond quickly to changing business conditions

- An easy-to-use interface that allows both finance and non-finance users to view current plans, create new plans and contribute plan data and with no coding skills required

- An Excel and web-based interface that allows business users to easily contribute data using familiar tools

- Centrally managed data, business hierarchies, rules and calculations to eliminate data silos and inconsistencies — all powered by an in-memory analytics server

- Continuous integration and aggregation of data for fast information retrieval and analysis

- Structured, managed workflows and clear audit trails to improve accountability and accuracy

- Write-back capabilities that link "what-if" models to specific actions

- Improved access to key performance metrics and the underlying data, so users can build and deploy scorecards more easily, and improve user confidence through a common source for plan, actual and metrics data that syncs in real time

- Role-based security to ensure that users see only those portions of a plan that are relevant to them

- Advanced filtering features, such as hierarchy levelling, attribute values, element names (with aliases) and spelling patterns, for more finely grained simulations

- Driver-based planning support with features such as pick lists, undo/redo, multi-pane docking and color-coded data changes to focus on key business drivers

- Complex analysis on the fly, with the ability to drill down, sort, link and chart data

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Business intelligence goes beyond the canned reports included with most corporate applications. You need the ability to build different types of reports with easy-to-access visualizations that support the diverse needs of users, companywide.

IBM Planning Analytics Business Intelligence User includes IBM Cognos Analytics, the self-service reporting and query tool that enables business users to access, modify or author reports quickly and easily. It provides a consistent view of information for users in different areas of the business. The self-service design helps reduce the cost and time needed to share information and reduced demand on IT helps eliminate reporting backlogs that often frustrate business users. The result is better decisions, companywide.

Visualize your analysis for maximum insight

When you need maximum insight into your business, IBM Planning Analytics Express helps translate data into sophisticated analysis displayed in rich visualizations. In minutes, you can use simple and intuitive tools to create high-impact dashboards, scorecards and presentations that communicate analysis results in the most meaningful way for decision-makers. An intuitive web interface makes it easy to explore and customize data with interactive visuals that enable users to drill up or drill down for quick analysis of key areas. You can control the appearance of your presentation and add visual appeal by choosing from a rich set of visualizations and pre-defined design themes. You can also combine multiple views within a single screen or dashboard for interactive overviews of important business metrics.

IBM Planning Analytics Express for Business Intelligence provides:

- Access to a rich set of the most commonly used visualizations, such as pie charts, bar graphs and trend lines, with a library of additional visualizations available for download

- Native and web applications for Apple iOS and Android to support a broad range of mobile devices

- Intuitive drag-and-drop authoring capabilities accessible from a web browser for self-service reporting by any user, from novice to expert

- A common metadata model that presents information in common business terms that users understand, so they can be productive right away

- Access to corporate data in any combination, including relational, analytical OLAP or even desktop files for comprehensive, accurate reporting

- Broad report coverage to meet the needs of different users, including financial, operational, production, transactional, managed or ad hoc reports

- Flexible report delivery that includes the ability to write once and immediately publish reports to the web, PDF files, Excel spreadsheets, email messages and the IBM Planning Analytics Express web portal

- Interactive dashboards that can be shared companywide to support collaborative decision making

- The ability to easily maintain and update a report throughout its lifecycle using a common interface that can be shared by all business users

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Think BIG. Start small.

You have a vision for a data-driven business culture. And you want to tie insight to action in all areas of your company — from sales and marketing to finance, operations and human resources. IBM Planning Analytics Express links the insights gained from your performance management and business intelligence processes to help you advance the analytics agenda, fuel business optimization and drive growth. It gives midsize organizations like yours the opportunity to 'think big but start small,' expanding capabilities as your organization and business needs grow.

About LAKE

Based just north of Leeds, LAKE is a software and services company that provides integrated Financial Management, Spend Control, Performance Management and ERP solutions to organisations around the UK, and in some cases around Europe. Our innovative solutions help our customers control and streamline their business processes, and ultimately improve their bottom line performance.

The business applications we sell are deployed on the cloud or on premise and come from some of the world's most highly regarded software vendors including SAP, IBM, and Infor.
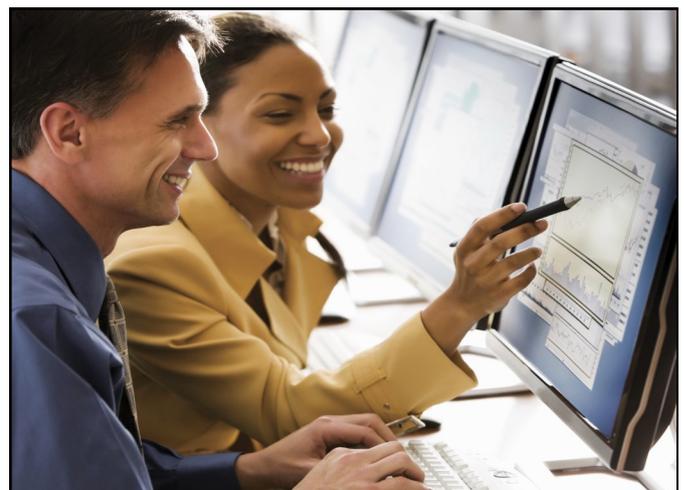
Our customer list includes many household names and focuses on a range of markets, including Social Housing, Financial Services, Charities, Corporate Head Office, Leisure, and others for our Financials solutions; and Manufacturing, Engineering, and Distribution for our SAP Business One solution.

Our Service Promise:

- A solution that does what was promised

- A project that completes on time and on budget

- Support services you can count on

- Expertise to help you adapt when things change

- Professional advice to help you plan for the future

Request a call

To request a call or to ask a question, go to www.lake.co.uk or call now on 0113 237 7788

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