

Planner

With Planner your existing investment in being the “Master of Excel” is fully leveraged to help you create quicker, more accurate financial closes, streamline the budgeting and forecasting process and decrease fiscal errors. Planner is everything a financial executive needs to get their job done better.

Systems Integration

Planner enables users to work with information held in a variety of systems without the need to have multiple databases open at the same time. Users can establish direct connections to different data sources, directly in Excel.

Reporting and Analysis

Planner has built in business intelligence functionality, enabling users to get a birds-eye view of company performance and helping to improve the accuracy of forecasts, budgets and plans. With its flexible design, users can perform multiple financial and management functions where they are most comfortable, either the Web, Excel or in their mobile device.

Immediate Value

Because Performance Planner is deployed right in Excel; the time-to-productivity can be as fast as one week.

Improved Closing Times

Planner enables users to manage every aspect of the financial close right in Excel. Users are able to manage workflows, send out input schedules, automate controls, track adjustments, reconcile data, work with multiple systems and monitor the results as they come in.

Simplified Reconciliation

With the Business Modeler you can manage intercompany consolidations in a unified approach. In just one click users can perform currency conversion, data processing, matching, and collect missing data, making the reconciliation process quicker and easier than ever before.

General Ledger Made Easy

Planner can be deployed to automatically recognize revenue and match costs for in-depth analysis and create the appropriate account postings for various expenses.

Do you need Planner?

- Does your organization need to perform financial closing tasks quickly and efficiently across multiple organizations?
- Does your organization need to generate error-free financial reports?
- Does your organization want to automate more of its closing tasks?
- Does your organization want to implement a performance management solution that enables organizational alignment?

Features...

- Native Excel Add-In
- Unified financial reporting
- Interact with multiple hierarchies and dimensions
- Perform formula-based and matrix-based reporting
- Track account movement for cash flow analysis and forecasting
- Completely customizable approval structure
- Perform consolidation and inter-company eliminations
- Foreign currency translation and exchange
- Create and maintain dimensions and attributes, sets of cubes and alternative hierarchies
- Powerful administration tool making control and access easy. □ Extensive graphing capabilities including Sparklines, Heat maps and Quadrant Scatters.
- Mobile input schedules for iPad, iPhone, Android, Windows Phone and Blackberry
- Powerful support for MDX, SQL and SPARQL query languages for advanced solutions
- Pre-defined Business Models □ Ability to perform cross company spreading

Licensing Options

Planner is available in three different licenses packages: Standard w/ BASE Planner, Standard w/ PLUS Planner, and MAX Planner as an add-on for the Enterprise Server.

Old Documentation

- [Documentation](#)
- [Online Training](#)
- [Technical Pre-requisites](#)

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<https://www.docu-pc.com/pc2/> - **Performance Canvas**

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