

CAmagazine

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Cognos Performance Management Solution	DynacTools	Exact Software	Macs Controlling
Additions				
Changes				
Product				
Product	Cognos Performance Management Solution	DynacTools	Exact Software	Macs Controlling
Vendor	Cognos	Dynac Inc.		Macs Controlling
Version	8	1.5	5	2.7
Release date (mmm-yy)	Jun-08	Jun-05	Jul-08	Dec-07
Contact				
Name		Gary MacFarlane	Sales	Chris Meyer
Telephone		519.571.3254	800-468-0834, ext 5940	1800 946 3160
E-mail		info@dynactools.ca	info@exactsoftware.ca	chris.meyer@macscontrolling.com
Website	www.cognos.com	www.dynactools.ca	www.exactba.com	www.macscontrolling.com
Cost (Canadian dollars)				
Licence based				
Average cost per user		\$575	\$700	\$3,500
Average no. of users		10	40	10
Average cost		\$5,750	\$28,000	\$35,000
Ratio - average Implementation cost/licence cost		1.00	0.50	
Average implementation cost		\$5,750	\$14,000	\$0
Total licence based		\$11,500	\$42,000	\$35,000
Annual maintenance %		20%	18%	18%
Annual maintenance dollars		\$1,150	\$5,040	\$6,300

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Additions				
Changes				
Product				
Support included in maintenance fee		Partly	Yes	
ASP (application service provider) based				
Average annual fee / user				
Average no. of users				
Average annual fees				
Average implementation costs / average fees - year One				
Average implementation costs				
Total ASP based - 1st year				
Support included in ASP fee				
Applications				
Business intelligence	Yes	Third party	Yes	Yes
Strategic planning	Yes	Yes	No	Yes
Budgeting and forecasting	Yes	Yes	No	Yes
Consolidation	Yes	Yes	Yes	No
Financial reporting	Yes	Yes	Yes	Yes
Scorecarding	Yes	Yes	Yes	Yes
Dashboard	Yes	Yes	Yes	Yes
Profile				
World head office	Ottawa, ON	Kitchener, ON	Delft, The Netherlands	Rottweil, Germany
Canadian head office	Ottawa, ON	Kitchener, ON	Cambridge, ON	None
No. of customers - worldwide - all products	23,000+			150
No. of customers - worldwide - this product		200		150
No. of customers - Canada - all products				2
No. of customers - Canada - this product		175		2
Revenue 2007 - all products (est.)			€ 252	

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Additions				
Changes				
Product				
Revenue 2007 - this product (est.)				
Revenue 2006 - all products			€ 242	
Revenue 2006 - this product				
Target market				
Average revenue/customer (CAD)	>\$200M	\$10M-\$49M	>\$200M	>\$200M
Average no. of employees/customer	>500	100-499	100-499	10-49
Industry classification based On The North American Industry Classification System (NAICS) - see http://www.naics.com/info.htm#Structure for more about NAICS (approximate % of Implementations)		DynacTools is applicable to all industry classifications		
11 Agriculture, forestry, fishing and hunting			1%	
21 Mining				
22 Utilities				
23 Construction			4%	
31-33 Manufacturing			80%	80%
42 Wholesale trade			15%	
44-45 Retail trade				
48-49 Transportation and warehousing				5%
51 Information				
52 Finance and insurance				5%
53 Real estate and rental and leasing				
54 Professional, scientific, and technical services				
55 Management of companies and enterprises				
56 Administrative and support and waste management and remediation services				
61 Education services				

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Question - Highlighted questions indicate a difference from the previous year:	Cognos Performance Management Solution	DynacTools	Exact Software	Macs Controlling
Additions				
Changes				
Product				
62 Health care and social assistance				5%
71 Arts, entertainment and recreation				
72 Accommodation and food services				
81 Other services (except public administration)				
92 Public administration				5%
Total			100%	100%
Technology				
Supported database (% of Implementations)				
Microsoft SQL Server		Supported	70%	70%
Oracle		Supported	3%	20%
Pervasive SQL		Supported	2%	
IBM DB2		Supported	25%	5%
Sybase		Supported		5%
Informix		Supported		
Access		Supported		
Btrieve		Supported		
Proprietary		Supported		
FoxPro		Supported		
Progress		Supported		
MySQL		Supported		
Other		Supported		
Total			100%	100%
Supported networks (% of Implementations)				
Microsoft		Supported	100%	80%
Linux		Supported		10%
Unix		Supported		10%

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Additions				
Changes				
Product				
AIX		Supported		
Novell Netware		Supported		
IBM AS/400 (OS/400)		Supported		
IBM S/390		Supported		
Other		Supported		
Total			100%	100%
Development tools used to build application	Yes	Borland Delphi, VBA	Delphi, C++, C# .Net	.net, C++, C#
Report writer used - which One(s)?	Yes	DynacViews	Own	macs Analyzer
Data Extract Transform Load (ETL) tools - which One(s)?	Yes	ODBC	Own	ODBC, SOA
Cubes supported - which one(s)?	Yes		Own, MS SQL	None, not cube based
Existing integration to accounting and ERP systems - which systems?	SAP Oracle	All systems from Simply Accounting to SAP and everything in between	Agilisys, BPCS, Macola, ProgressiOn, Globe Enterprise, JD Edwards, Infor, MAPICS, Penta Software, PRISM, Workwise,	SAP, Oracle 11i, JD Edwards, Mfg Pro and many more

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Additions				
Changes				
Product				
Existing integration to customer relationship management systems - which systems?	SAP Oracle	Custom	Exact Synergy	Siebel
Existing integration to payroll systems - which systems?	SAP Oracle	Custom		Ceridian, ADP
Existing integration to HRMS systems - which systems?	SAP Oracle	Custom	Exact Synergy	Custom
Available from Application Service Provider	Yes	No	No	No
Approx. no. of implementations			250+	150
2-tier, 3-tier or n-tier architecture	n-Tier	2-Tier	3-Tier	n-Tier
Metadata standard supported			Proprietary	XBRL
Maximum size of OLAP cube			Couple million records	Not cube based
Generic				
Integration of applications in Section D	Yes	Yes		
Share same database	Yes	Yes	Yes	Yes
Same user interface	Yes	Yes	Yes	Yes
Integrated	Yes	Yes	Yes	Yes
Dashboard	Yes	Yes	Yes	Yes
Role specific	Yes	Third party	Yes	Yes
Graphical	Yes	Third party	Yes	Yes
Drill down to:	Yes	Yes		Yes

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Additions				
Changes				
Product				
Business intelligence	Yes	Third party	Yes	Yes
Consolidation	Yes	Yes	Yes	No
Budgeting and forecasting	Yes	Yes	Customization	Yes
Scorecarding	Yes	Third party	Yes	Yes
Excel integration	Yes	Yes	Yes	
Formatting intact	Yes	No	Yes	Yes
Formulas intact	Yes	No	No	Yes
Business Intelligence		Yes		
Analytic functionality	Yes	Yes	Yes	
Bubble up exceptions	Yes	Yes	Yes	No
Drill down	Yes	Yes	Yes	Yes
Drill through to source data	Yes	Yes	Yes	No
Ranking	Yes	Yes	Yes	Yes
Sorting	Yes	Yes	Yes	Yes
Restrict results by date range	Yes	Yes	Yes	Yes
Includes dashboard	Yes	Yes	Yes	Yes
Time trending (for example, over 12 months)	Yes	Yes	Yes	Yes
Pareto filtering (automatically groups the categories that amount to less than 20% of a row or column total into "other")	Yes	Yes	Yes	Yes
Calculations	Yes	Yes	Yes	
Counts	Yes	Yes	Yes	Yes
Percentage of total	Yes	Yes	Yes	Yes
Allocations	Yes	Yes	Yes	Yes
Total and subtotal	Yes	Yes	Yes	Yes
Create OLAP cubes	Yes	Yes	Yes	No
Data extraction and transformation tools	Yes	Yes	Yes	
Incremental extraction	Yes	Yes	Yes	Yes
Impact analysis - objects impacted by change	Yes	Yes	Yes	Yes

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Additions				
Changes				
Product				
Can schedule process to run overnight	Yes	Yes	Yes	Yes
Formatting	Yes	Yes	Yes	
By dimension	Yes	Yes	Yes	Yes
By level	Yes	Yes	Yes	Yes
By cell	Yes	Yes	Yes	Yes
Zero-row suppression	Yes	Yes	Yes	Yes
Conditional formatting by cell, e.g., highlight cells below threshold	Yes	Yes	Yes	Yes
Returns text (e.g., if value > 90, returns "excellent")	Yes	Yes	Yes	Yes
French version	Yes	Yes	No	Yes
Screens	Yes	Yes	No	Yes
Reports	Yes	Yes	No	Yes
Documentation	Yes	Yes	No	Yes
Metadata	Yes	Yes	Yes	Yes
OLAP functionality	Yes	Yes	Yes	
Skip missing levels - support ragged dimensions	Yes	Yes	Yes	No
Write back	Yes	Yes	No	No
With audit trail	Yes	Yes	No	No
Includes charting tools	Yes	Yes	Yes	No
Access multiple cubes at a time	Yes	Yes	Yes	No
Excel client	Yes	Yes	Yes	No
Internet Explorer client	Yes	Yes	Yes	No
Netscape client	Yes	Yes	Yes	No
Geographical representation	Yes	Yes	Yes	No
Drag and drop	Yes	Yes	Yes	No
Attach notes to cube	Yes	Yes	Yes	No
Attach notes to cells	Yes	Yes	No	No
Attach files to cube	Yes	Yes	No	No
Attach files to cells	Yes	Yes	No	No
Password security	Yes	Yes	Yes	Yes

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Additions				
Changes				
Product				
By company	Yes	Yes	Yes	Yes
By department or division	Yes	Yes	Yes	Yes
By menu	Yes	Yes	Yes	Yes
By function (view, add, change, delete)	Yes	Yes	Yes	Yes
By dimension	Yes	Yes	Yes	Yes
By level	Yes	Yes	Yes	Yes
By cell	Yes	Yes	Yes	Yes
Respect active directory authentication	Yes	Yes	Yes	Yes
Respect database security	Yes	Yes	Yes	Yes
Portal generation that includes HTML reports	Yes	Yes	Yes	Yes
Report writer	Yes	Yes	Yes	Yes
Web-based	Yes	Yes	Yes	Yes
Generate cube	Yes	Yes	Yes	No
Drag and drop	Yes	Yes	Yes	Yes
WYSIWYG report design	Yes	Yes	Yes	Yes
Technology				
API-enabled (SDK provided)	Yes	No	No	
Web-based (Only need browser at client)	Yes	No	Yes	Yes
For entire application	Yes	No	No	No
Support for .NET web services	Yes	No	Yes	Yes
Support for Java web services	Yes	No	Partly	No
Transfer data to:				
Report writer	Yes	Yes	Yes	Yes
Excel	Yes	Yes	Yes	Yes
PivotTable	Yes	Yes	Yes	Yes
HTML	Yes	Yes	Yes	Yes
PDF	Yes	Yes	Yes	Yes
PowerPoint	Yes	Yes	Yes	No
XML	Yes	Yes	Yes	Yes
Views				
Crosstabs	Yes	Yes	Yes	

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Additions				
Changes				
Product				
Charts	Yes	Yes	Yes	
Both crosstabs and chart at the same time	Yes	Yes	Yes	
Work flow	Yes	Yes	Customization	
Alerts can be automatically triggered	Yes	Yes	Yes	Yes
Consolidation		Yes		
Journal entries	Yes	Yes	Yes	No
Manual	Yes	Yes	Yes	No
Recurring	Yes	Yes	N/A	No
Automated for currency translation gains/losses	Yes	Yes	N/A	No
Automated for Intercompany eliminations	Yes	Yes	N/A	No
Reclassification journal entry - e.g., used to generate cash flow report or balance sheet	Yes	Yes	No	No
Intercompany processing	Yes	Yes	Partly	No
Automated balancing	Yes	Yes	No	No
Consolidation processor	Yes	Yes	Yes	No
Consolidate actuals and budgets	Yes	Yes	Yes	No
Consolidate statistical ledgers such as headcounts	Yes	Yes	Partly	No
Incremental for entities that have changed	Yes	Yes	Yes	No
Different fiscal periods	Yes	Yes	Yes	No
Different fiscal calendars	Yes	Yes	Yes	No
Short year-ends	Yes	Yes	Yes	No
Multiple levels or tiers	Yes	Yes	Yes	No
Automated Intercompany eliminations to first common parent	Yes	Yes	No	No
Data collection	Yes	Yes	Yes	No
Online over the internet	Yes	No	Partly	No
Only a browser required (don't need Citrix or terminal services)	Yes	No	Yes	No
Work offline and synchronize	Yes	Yes	Yes	No
Parsing	Yes	No	Yes	No

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Additions				
Changes				
Product				
Mapping	Yes	Yes	Yes	No
Wildcards	Yes	Yes	Yes	No
Validation	Yes	Yes	Partly	No
Can proceed or stop depending on variance	Yes	Yes	Partly	No
Maintain status	Yes	Yes	N/A	No
Approvals	Yes	Yes	No	No
Escalations if late	Yes	Yes	Customization	No
Intercompany eliminations	Yes	Yes	Partly	No
Define intercompany accounts	Yes	Yes	Yes	No
Automated eliminations	Yes	Yes	Partly	No
Reporting tool to identify out of balance entities	Yes	Yes	Yes	No
Foreign currency translation	Yes	Yes	Yes	No
Support temporal method	Yes	Yes	Yes	No
Multiple rate types	Yes	Yes	Yes	No
Define which rate type by account	Yes	Yes	Yes	No
Maintain rate schedule that can be shared across all legal entities	Yes	Yes	Yes	No
Download daily rates automatically	Yes	Yes	Yes	No
Methods:	Yes	Yes	Yes	No
Proportional	Yes	Yes	Yes	No
Equity	Yes	Yes	Partly	No
Minority interest	Yes	Yes	No	No
Wholly owned	Yes	Yes	Yes	No
Multi tier Consolidation	Yes	Yes	Yes	No
On-line review and approval of consolidation process at each tier	Yes	Yes	Yes	No
Drill down to any tier	Yes	Yes	Yes	No
Multiple ledgers	Yes	Yes	Yes	No
Ownership	Yes	Yes	Yes	No
Date sensitive ownership - for changes during the month	Yes	Yes	Partly	No
Reorganizations	Yes	Yes	Yes	No

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Additions				
Changes				
Product				
Change account structure and replicate across system	Yes	Yes	No	No
Revaluations	Yes	Yes		No
			Partly	
Financial reporting		Yes		
Analysis codes	Yes	Yes		Yes
Attach to accounts or g/l segments	Yes	Yes		Yes
Can be used in any financial report for selection or ordering	Yes	Yes	Yes	Yes
Results in home or reporting currency	Yes	Yes	Yes	Yes
Rows can be defined	Yes	Yes	Yes	Yes
Columns can be defined	Yes	Yes	Yes	Yes
Cell override	Yes	Yes	Yes	Yes
Hierarchical reporting	Yes	Yes	Yes	Yes
Multiple hierarchies	Yes	Yes	Yes	Yes
Lead schedules	Yes	Yes	Yes	Yes
Ready for external reporting	Yes	Yes	Partly	Yes
Rounding to nearest 1,000 and allocation of rounding error to specified financial statement line	Yes	N/A	Yes	Yes
Trend analysis showing last 12 periods	Yes	Yes	Partly	Yes
Exception reporting	Yes	Yes	Yes	Yes
Highlight all accounts with a variance over a certain % or amount	Yes	Yes	Yes	Yes
Consolidate Accounts Receivable subledger	Yes	Third party	Yes	No
Compute daily sales opstanding	Yes	Third party	Yes	
Eliminate intercompany accounts	Yes	Third party	Yes	No
Budgeting		Yes		
Automatic % change of previous budget	Yes	Yes	No	Yes
Automatic based On actual	Yes	Yes	No	Yes
Excel like formulas	Yes	Yes	No	Yes
Seasonality allocations	Yes	Yes	No	Yes

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Additions				
Changes				
Product				
Budgeting process	Yes	Yes	No	Yes
Bottom up	Yes	Yes	No	Yes
Top down	Yes	Yes	No	Yes
Export to Excel	Yes	Yes	Yes	Yes
Import from Excel	Yes	Yes	Yes	Yes
Lockable	Yes	Yes	No	Yes
Maintain explanation of budget variances	Yes	Yes	No	Yes
Based on employee information in HR system	Yes	No	No	Yes
Multiple budgets	Yes	Yes	No	Yes
Rolling budget	Yes	Yes	No	Yes
Sign assumed	Yes	Yes	No	Yes
What if analysis	Yes	Yes	Customization	Yes
Ability to update assumptions which are used in the calculations	Yes	Yes	No	Yes
Rollup forecast to budget	Yes	Yes	No	Yes
Approval process	Yes	Yes	No	Yes
Forecasting		Yes		
Quotes and their probability	Yes	Yes	No	Yes
Outstanding orders	Yes	Yes	No	Yes
Customer forecasts	Yes	Yes	No	Yes
Historical trends	Yes	Yes	No	Yes
Average of 13 weeks volume	Yes	Yes	No	Yes
Can apply factors such as seasonality	Yes	Yes	No	Yes
Apply regression analysis	Yes	Yes	No	Yes
Apply faqctaors such as housing starts and market adjustment factor	Yes	Yes	No	Yes
Ability to accept input from multiple users	Yes	Yes	No	Yes
Approval process	Yes	Yes	No	Yes
What if Analysis	Yes	Yes	Customization	Yes

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Additions				
Changes				
Product				
Name One to five unique or very important features of your product (limit of 250 characters)				
Unique/important feature no.1	All features are designed to be owned by Finance	Create budgets and forecasts (at the Account or SKU level with an optional feature to drive MPS) in hours, not weeks or months complete with multi-user inputs	All benefits of data warehouse/data mart without the need to have one	Maintains accurate split between fixed and variable costs, enabling contribution margin decision making at customer and product level
Unique/important feature no. 2	Rich ecosystem of best-practice solutions surrounds core product capabilities	DynacViews outperforms most GL report writers complete with auto synchronization of row and column structure and dynamic filtering where reporting structure is user defined with a drag and drop interface called Dynac Account Manager	Prebuilt business analytics suite with analytic views, reports and supporting metadata	Driver based modeling, enabling accurate cost profit simulations of how a change in volume/mix influences your cost base
Unique/important feature no. 3	Rich global Consolidation capabilities to support currency, minority interest, intercompany - and multi-jurisdictional GAAP reporting	Cognos / Hyperion like Consolidation features at a fraction of the price	Online/offline analysis	Accurate Variance Analysis: Ability to flex the variable portion of budgeted cost for comparison against actual cost

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Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Product	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Vendor	Microsoft	PROPHIX Software	PROPHIX Software	QlikTech, Inc.
Version	2007	7	4.1	8.5
Release date (mmm-yy)	Sep-07	Mar-08	Aug-08	Jun-08
Contact				
Name		Susan LawsOn	Susan LawsOn	Neil Florio
Telephone	(877) 568-2495	(905) 279-8711 ext. 245	(905) 279-8711 ext. 245	888-828-9768
E-mail	bicanada@microsoft.com	slawsOn@prophix.com	slawsOn@prophix.com	infous@qliktech.com
Website	www.microsoft.ca/bi	www.prophix.com	www.prophix.com	www.qliktech.com
Cost (Canadian dollars)				
Licence based				
Average cost per user	\$261	\$1,500	\$2,000	\$2,000
Average no. of users	100	5	30	40
Average cost	\$26,100	\$7,500	\$60,000	\$80,000
Ratio - average Implementation cost/licence cost	3.00	0.75	0.75	
Average implementation cost	\$78,300	\$5,625	\$45,000	\$0
Total licence based	\$104,400	\$13,125	\$105,000	\$80,000
Annual maintenance %	25%	20%	20%	20%
Annual maintenance dollars	\$6,525	\$1,500	\$12,000	\$16,000

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Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Support included in maintenance fee	Yes	Yes	Yes	Yes
ASP (application service provider) based				
Average annual fee / user				
Average no. of users				
Average annual fees				
Average implementation costs / average fees - year One				
Average implementation costs				
Total ASP based - 1st year				
Support included in ASP fee				
Applications				
Business intelligence	Yes	No	Yes	Yes
Strategic planning	Yes	No	Yes	Yes
Budgeting and forecasting	Yes	Yes	Yes	Yes
Consolidation	Yes	Yes	Yes	Partly
Financial reporting	Yes	Yes	Yes	Yes
Scorecarding	Yes	Yes	Yes	No
Dashboard	Yes	Yes	Yes	Yes
Profile				
World head office	Redmond, WA	Mississauga, ON, Canada	Mississauga, ON, Canada	Radnor, PA
Canadian head office	Mississauga, ON	Mississauga, ON, Canada	Mississauga, ON, Canada	
No. of customers - worldwide - all products	> 1B	1,400	1,400	9,500
No. of customers - worldwide - this product	>500	1,250	150	9,500
No. of customers - Canada - all products	>20M	140	140	60
No. of customers - Canada - this product	>60	14	14	60
Revenue 2007 - all products (est.)		n/a	n/a	\$85,200,000

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Additions				
Changes				
Product				
Revenue 2007 - this product (est.)		n/a	n/a	\$85,200,000
Revenue 2006 - all products		n/a	n/a	\$46,860,000
Revenue 2006 - this product		n/a	n/a	\$46,860,000
Target market				
Average revenue/customer (CAD)	>\$200M	25M - 50M	25M - 50M	\$50M-\$200M
Average no. of employees/customer	>500	>500	>500	100-499
Industry classification based On The North American Industry Classification System (NAICS) - see http://www.naics.com/info.htm#Structure for more about NAICS (approximate % of Implementations)				
11 Agriculture, forestry, fishing and hunting		2%	2%	5%
21 Mining		3%	3%	
22 Utilities		2%	2%	5%
23 Construction		2%	2%	5%
31-33 Manufacturing		23%	23%	25%
42 Wholesale trade		5%	5%	10%
44-45 Retail trade		3%	3%	5%
48-49 Transportation and warehousing		3%	3%	5%
51 Information		5%	5%	
52 Finance and insurance		10%	10%	20%
53 Real estate and rental and leasing		2%	2%	
54 Professional, scientific, and technical services		10%	10%	5%
55 Management of companies and enterprises		1%	1%	
56 Administrative and support and waste management and remediation services				
61 Education services		5%	5%	

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Additions				
Changes				
Product				
62 Health care and social assistance		12%	12%	10%
71 Arts, entertainment and recreation		3%	3%	5%
72 Accommodation and food services		3%	3%	
81 Other services (except public administration)		5%	5%	
92 Public administration		1%	1%	
Total		100%	100%	100%
Technology				
Supported database (% of Implementations)				
Microsoft SQL Server	90%	Supported	Supported	Yes
Oracle	8%	Supported	Supported	Yes
Pervasive SQL		Supported	Supported	Yes
IBM DB2	2%	Supported	Supported	Yes
Sybase		Supported	Supported	Yes
Informix		Supported	Supported	Yes
Access		Supported	Supported	Yes
Btrieve		As long as it is ODBC compliant	As long as it is ODBC compliant	Yes
Proprietary		As long as it is ODBC compliant	As long as it is ODBC compliant	Yes
FoxPro		As long as it is ODBC compliant	As long as it is ODBC compliant	Yes
Progress		Supported	Supported	Yes
MySQL		As long as it is ODBC compliant	As long as it is ODBC compliant	Yes
Other		Pilot Software	Pilot Software	Yes - HP NeoView and any ODBC compliant database
Total	100%			
Supported networks (% of Implementations)				
Microsoft	100%	Supported	Supported	Yes
Linux		Supported	Supported	Partial (Database)
Unix		Supported	Supported	Partial (Database)

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Additions				
Changes				
Product				
AIX		Supported	Supported	Partial (Database)
Novell Netware		Supported	Supported	Partial (Database)
IBM AS/400 (OS/400)		Supported	Supported	Partial (Database)
IBM S/390		Supported	Supported	Partial (Database)
Other				Partial (Database)
Total	100%			
Development tools used to build application	BIDS, Dashboard Designer, Business Modeller	Visual Basic, HTML, Active X Controls, XML	Visual Basic, HTML, Active X Controls, XML	QlikView Developer
Report writer used - which One(s)?	Visual Studio, Report Builder, Office Writer	Embedded in product	Embedded in product	QlikView Developer
Data Extract Transform Load (ETL) tools - which One(s)?	SSIS	product	Embedded in product	QlikView Developer
Cubes supported - which one(s)?	SSAS	Pilot Software, Analysis Services	Pilot Software, Analysis Services	QlikView customers utilize ODBC to connect to and retrieve data from a wide range of OLAP data sources including Microsoft, SAP, Hyperion, Cognos, and BusinessObjects.
Existing integration to accounting and ERP systems - which systems?	Microsoft Dynamics	no limitations	no limitations	QlikView customers utilize ODBC to connect to and retrieve data from a wide range of Applications including SAP, Oracle, Sage, Intentiona, Baan, JD Edwards, Great Plains, NavisOn

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Additions				
Changes				
Product				
Existing integration to customer relationship management systems - which systems?	Microsoft Dynamics	no limitations	no limitations	QlikView customers utilize ODBC to connect to and retrieve data from a wide range of CRM data sources including Sage, LawsOn, Microsoft CRM, Salesforce, Peoplesoft
Existing integration to payroll systems - which systems?	Microsoft Dynamics	no limitations	no limitations	QlikView customers utilize ODBC to connect to and retrieve data from payroll systems such as ADP
Existing integration to HRMS systems - which systems?	Microsoft Dynamics	no limitations	no limitations	QlikView customers utilize ODBC to connect to and retrieve data from a wide range of OLAP data sources including Stratum, JD Edwards, Peoplesoft, Agresso
Available from Application Service Provider	Yes	No	No	Yes
Approx. no. of implementations		n/a	n/a	Partner Implementations
2-tier, 3-tier or n-tier architecture	n-Tier	2-Tier	3-Tier	n-Tier
Metadata standard supported	Yes			N/A
Maximum size of OLAP cube	4 TB	unlimited	unlimited	No limit
Generic				
Integration of applications in Section D	Yes	Yes	Yes	
Share same database	Yes	Yes	Yes	Yes
Same user interface	No	Yes	Yes	Yes
Integrated	Yes	Yes	Yes	Yes
Dashboard	Yes	Yes	Yes	
Role specific	Yes	Yes	Yes	Yes
Graphical	Yes	Yes	Yes	Yes
Drill down to:	Yes	Yes	Yes	

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Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Business intelligence	Yes	Yes	Yes	Yes
Consolidation	Yes	Yes	Yes	Yes
Budgeting and forecasting	Yes	Yes	Yes	Yes
Scorecarding	Yes	Yes	Yes	Yes
Excel integration	Yes	Yes	Yes	
Formatting intact	Yes	Yes	Yes	Yes
Formulas intact	No	Yes	Yes	No
Business Intelligence				
Analytic functionality	Yes	Yes	Yes	
Bubble up exceptions	Yes	No	Yes	Yes
Drill down	Yes	Yes	Yes	Yes
Drill through to source data	Yes	Yes	Yes	Yes
Ranking	Yes	No	Yes	Yes
Sorting	Yes	Yes	Yes	Yes
Restrict results by date range	Yes	Yes	Yes	Yes
Includes dashboard	Yes	Yes	Yes	Yes
Time trending (for example, over 12 months)	Yes	Yes	Yes	Yes
Pareto filtering (automatically groups the categories that amount to less than 20% of a row or column total into "other")	Yes	Yes	Yes	Yes
Calculations	Yes	Yes	Yes	Yes
Counts	Yes	Yes	Yes	Yes
Percentage of total	Yes	Yes	Yes	Yes
Allocations	Yes	Yes	Yes	Yes
Total and subtotal	Yes	Yes	Yes	Yes
Create OLAP cubes	Yes	Yes	Yes	Yes
Data extraction and transformation tools	Yes	Yes	Yes	Yes
Incremental extraction	Yes	Yes	Yes	Yes
Impact analysis - objects impacted by change	Yes	Yes	Yes	No

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Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Can schedule process to run overnight	Yes	Yes	Yes	Yes
Formatting	Yes	Yes	Yes	Yes
By dimension	Yes	Yes	Yes	Yes
By level	Yes	Yes	Yes	Yes
By cell	Yes	Yes	Yes	Yes
Zero-row suppression	Yes	Yes	Yes	Yes
Conditional formatting by cell, e.g., highlight cells below threshold	Yes	Yes	Yes	Yes
Returns text (e.g., if value > 90, returns "excellent")	Yes	Yes	Yes	Yes
French version	Yes	Yes	Yes	Yes
Screens	Yes	Yes	Yes	Yes
Reports	Yes	Yes	Yes	Yes
Documentation	Yes	Yes	Yes	Yes
Metadata	Yes	Yes	Yes	Yes
OLAP functionality	Yes	Yes	Yes	Yes
Skip missing levels - support ragged dimensions	Yes	Yes	Yes	Yes
Write back	Yes	Yes	Yes	Partly
With audit trail	Yes	Yes	Yes	Partly
Includes charting tools	Yes	Yes	Yes	Yes
Access multiple cubes at a time	Yes	Yes	Yes	Yes
Excel client	Yes	Yes	Yes	Yes
Internet Explorer client	Yes	Yes	Yes	Yes
Netscape client	No			Yes
Geographical representation	Yes	No	Yes	Yes
Drag and drop	Yes	Yes	Yes	Yes
Attach notes to cube	Yes	No	Yes	Yes
Attach notes to cells	Yes	Yes	Yes	Yes
Attach files to cube	Yes	No	Yes	Yes
Attach files to cells	Yes	Yes	Yes	Yes
Password security	Yes	Yes	Yes	Yes

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Additions				
Changes				
Product				
By company	Yes	Yes	Yes	Yes
By department or division	Yes	Yes	Yes	Yes
By menu	Yes	Yes	Yes	No
By function (view, add, change, delete)	Yes	Yes	Yes	No
By dimension	Yes	Yes	Yes	Yes
By level	Yes	Yes	Yes	Yes
By cell	Yes	Yes	Yes	Yes
Respect active directory authentication	Yes	Yes	Yes	Yes
Respect database security	Yes	Yes	Yes	Customization
Portal generation that includes HTML reports	Yes	Yes	Yes	Yes
Report writer	Yes	Yes	Yes	Yes
Web-based	Yes	Yes	Yes	Yes
Generate cube	Yes	Yes	Yes	N/A
Drag and drop	Yes	Yes	Yes	Yes
WYSIWYG report design	Yes	Yes	Yes	Yes
Technology	Yes			
API-enabled (SDK provided)	Yes	Future date	Future date	Yes
Web-based (Only need browser at client)	Yes	Yes	Yes	Yes
For entire application	Partly	Yes	Yes	No
Support for .NET web services	Yes	Yes	Yes	Yes
Support for Java web services	No	No	No	Yes
Transfer data to:	Yes			
Report writer	Yes	Yes	Yes	Future date
Excel	Yes	Yes	Yes	Yes
PivotTable	Yes	Future date	Future date	Yes
HTML	Yes	Yes	Yes	Yes
PDF	Yes	Yes	Yes	Yes
PowerPoint	Yes	Yes	Yes	Yes
XML	Yes	Yes	Yes	Yes
Views	Yes			
Crosstabs	Yes	Yes	Yes	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Charts	Yes	Yes	Yes	Yes
Both crosstabs and chart at the same time	Yes	Yes	Yes	Yes
Work flow	Yes	Yes	Yes	
Alerts can be automatically triggered	Yes	Yes	Yes	Yes
Consolidation				
Journal entries	No	Future date	Future date	
Manual	No	No	Future date	N/A
Recurring	No	No	Future date	N/A
Automated for currency translation gains/losses	Yes	No	Yes	N/A
Automated for Intercompany eliminations	Yes	No	Yes	N/A
Reclassification journal entry - e.g., used to generate cash flow report or balance sheet	Yes	Yes	Yes	N/A
Intercompany processing	Yes	Yes	Yes	N/A
Automated balancing	No	Partly	Yes	N/A
Consolidation processor	Yes	Yes	Yes	N/A
Consolidate actuals and budgets	Yes	Yes	Yes	N/A
Consolidate statistical ledgers such as headcounts	Yes	Yes	Yes	N/A
Incremental for entities that have changed	Yes	Yes	Yes	N/A
Different fiscal periods	Yes	Yes	Yes	Yes
Different fiscal calendars	Yes	Yes	Yes	Yes
Short year-ends	Yes	Yes	Yes	N/A
Multiple levels or tiers	Yes	Yes	Yes	N/A
Automated Intercompany eliminations to first common parent	Yes	Partly	Yes	N/A
Data collection	Yes	Yes	Yes	
Online over the internet	No	Yes	Yes	Yes
Only a browser required (don't need Citrix or terminal services)	No	Yes	Yes	Yes
Work offline and synchronize	Yes	Yes	Yes	Yes
Parsing	Yes	Yes	Yes	Yes

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Additions				
Changes				
Product				
Mapping	Third party	Yes	Yes	Yes
Wildcards	Yes	Yes	Yes	Yes
Validation	Yes	Yes	Yes	Partly
Can proceed or stop depending on variance	Yes	Yes	Yes	Partly
Maintain status	Yes	Yes	Yes	Partly
Approvals	Yes	Yes	Yes	N/A
Escalations if late	Yes	Future date	Future date	N/A
Intercompany eliminations	Yes	Yes	Yes	
Define intercompany accounts	Yes	Yes	Yes	N/A
Automated eliminations	Partly	Future date	Yes	N/A
Reporting tool to identify out of balance entities	Yes	Yes	Yes	Yes
Foreign currency translation	Yes	Yes	Yes	N/A
Support temporal method	Yes	Yes	Yes	N/A
Multiple rate types	Yes	Yes	Yes	N/A
Define which rate type by account	Yes	Yes	Yes	N/A
Maintain rate schedule that can be shared across all legal entities	Yes		Yes	N/A
Download daily rates automatically	No	No	Partly	N/A
Methods:	Yes			
Proportional	Yes	Yes	Yes	N/A
Equity	Yes	Yes	Yes	N/A
Minority interest	Yes	Yes	Yes	N/A
Wholly owned	Yes	Yes	Yes	N/A
Multi tier Consolidation	Yes	Yes	Yes	
On-line review and approval of consolidation process at each tier	Yes	Partly	Yes	N/A
Drill down to any tier	Yes	Yes	Yes	N/A
Multiple ledgers	Yes	Yes	Yes	
Ownership	Yes			No
Date sensitive ownership - for changes during the month	Yes	Yes	Yes	No
Reorganizations	Yes	Yes	Yes	No

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Change account structure and replicate across system	Yes	Yes	Yes	No
Revaluations	Yes	Yes	Yes	No
Financial reporting				
Analysis codes	Yes	Yes	Yes	
Attach to accounts or g/l segments	Yes	Yes	Yes	Yes
Can be used in any financial report for selection or ordering	Yes	Yes	Yes	Yes
Results in home or reporting currency	Yes	Yes	Yes	Yes
Rows can be defined	Yes	Yes	Yes	Yes
Columns can be defined	Yes	Yes	Yes	Yes
Cell override	Yes	Yes	Yes	Yes
Hierarchical reporting	Yes	Yes	Yes	Yes
Multiple hierarchies	Yes	Yes	Yes	Yes
Lead schedules	Yes	Yes	Yes	Yes
Ready for external reporting	Yes	Yes	Yes	Yes
Rounding to nearest 1,000 and allocation of rounding error to specified financial statement line	Yes	Yes	Yes	Partly
Trend analysis showing last 12 periods	Yes	Yes	Yes	Yes
Exception reporting	Yes	Yes	Yes	Yes
Highlight all accounts with a variance over a certain % or amount	Yes	Yes	Yes	Yes
Consolidate Accounts Receivable subledger	Yes		Yes	Yes
Compute daily sales opstanding	Yes	Yes	Yes	Yes
Eliminate intercompany accounts	Yes	Yes	Yes	N/A
Budgeting				
Automatic % change of previous budget	Partly	Yes	Yes	Partly
Automatic based On actual	Partly	Yes	Yes	Partly
Excel like formulas	Yes	Yes	Yes	Yes
Seasonality allocations	Yes	Yes	Yes	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Budgeting process	Yes	Yes	Yes	
Bottom up	Yes	Yes	Yes	Partly
Top down	Yes	Yes	Yes	Partly
Export to Excel	Yes	Yes	Yes	Yes
Import from Excel	Yes	Yes	Yes	Yes
Lockable	Yes	Yes	Yes	Yes
Maintain explanation of budget variances	Yes	Yes	Yes	No
Based on employee information in HR system	Yes	Yes	Yes	Yes
Multiple budgets	Yes	Yes	Yes	Yes
Rolling budget	Yes	Yes	Yes	Yes
Sign assumed	Yes		Yes	No
What if analysis	Yes	Yes	Yes	Yes
Ability to update assumptions which are used in the calculations	Yes	Yes	Yes	Yes
Rollup forecast to budget	Yes	Yes	Yes	Yes
Approval process	Yes	Yes	Yes	Third party
Forecasting				
Quotes and their probability	Yes	No	No	Yes
Outstanding orders	Yes	Yes	No	Yes
Customer forecasts	Yes	Yes	Yes	Yes
Historical trends	Yes	Yes	Yes	Yes
Average of 13 weeks volume	Yes	Yes	Yes	Yes
Can apply factors such as seasonality	Yes	Yes	Yes	Yes
Apply regression analysis	Yes	No	No	No
Apply faqctaors such as housing starts and market adjustment factor	Yes	Yes	Yes	Yes
Ability to accept input from multiple users	Yes	Yes	Yes	No
Approval process	Yes	Yes	Yes	No
What if Analysis	Yes	Yes	Yes	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Microsoft Office PerformancePoint Server	PROPHIX Express	PROPHIX for SQL Server	QlikView
Additions				
Changes				
Product				
Name One to five unique or very important features of your product (limit of 250 characters)				
Unique/important feature no.1	Associations, being able to map data fields across planning models	Fully integrated budgeting, planning and reporting implemented remotely in less than 2 weeks	InfoFlex™ gives users numerous options to transform their data. Users can copy or move data, allocate existing data, increase data by a percentage, or forecast based on YTD data or assumptions	In memory data model for high performance, ad-hoc analysis
Unique/important feature no. 2	Economics, in terms of lower end user training costs, expansive ecosystem of individuals skilled on Microsoft technology and licensing costs	Pre-built and pre-defined financial statements with the unlimited ability to create more reports	Delta Analysis is an interactive, graphical tool used to compare, contrast and update any data point. For example, users can perform a year-on-year comparison or drill down to the monthly or weekly level to get a more detailed analysis	Single platform for development, reporting, end user and enterprise deployment
Unique/important feature no. 3	Strong integration with productivity and collaboration tools	Personnel planning module with predefined payroll calculations linking to defined payroll accounts and budgets	Advanced Data Visualization (ADV) is a reporting solution that delivers visualization capabilities for analytics and monitoring of key decision metrics. ADV provides analysis of details from many different perspectives with drillable dashboards	Ability to select any dimension, presentation of included and excluded based on each selection

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Question - Highlighted questions indicate a difference from the previous year:	SAP CPM	SAP NetWeaver Business Intelligence	SAP BusinessObjects BI Platform	SAS Business Intelligence and Financial Intelligence Solutions
Additions				
Changes				
Product				
Product	For CPM: SAP Strategy Management, Business Objects Profitability and Cost Management, SAP Business Planning and Consolidation, Business Objects Financial Consolidation, SAP Spend Analytics.	SAP NetWeaver Business Intelligence	SAP BusinessObjects BI Platform	SAS Business Intelligence and Financial Intelligence Solutions
Vendor	SAP	SAP	SAP	SAS
Version	CPM - all 7.0 except SAP Spend Analytics 2.0	SAP NetWeaver BI - 7.0	XI 3.1	SAS 9.2
Release date (mmm-yy)	CPM - all in 2008	SAP NetWeaver BI - 2006	Sep-08	Jul-08
Contact				
Name	Joy Chan	Joy Chan	Joy Chan	Jim LaRue
Telephone	416-250-3347	416-250-3347	416-250-3347	416 307 4552
E-mail	j.chan@sap.com	j.chan@sap.com	j.chan@sap.com	jim.larue@sas.com
Website	www.sap.ca ; www.sap.com	www.sap.ca ; www.sap.com	www.sap.ca ; www.sap.com	www.sas.com
Cost (Canadian dollars)				
Licence based				
Average cost per user				
Average no. of users				
Average cost				
Ratio - average Implementation cost/licence cost				
Average implementation cost				
Total licence based				
Annual maintenance %				
Annual maintenance dollars				

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	SAP CPM	SAP NetWeaver Business Intelligence	SAP BusinessObjects BI Platform	SAS Business Intelligence and Financial Intelligence Solutions
Additions				
Changes				
Product				
Support included in maintenance fee				
ASP (application service provider) based				
Average annual fee / user				
Average no. of users				
Average annual fees				
Average implementation costs / average fees - year One				
Average implementation costs				
Total ASP based - 1st year				
Support included in ASP fee				
Applications				
Business intelligence	See SAP NetWeaver BI and BusinessObjects BI	Yes	Yes	Yes
Strategic planning	Yes	See SAP CPM	See SAP CPM	Yes
Budgeting and forecasting	Yes	See SAP CPM	See SAP CPM	Yes
Consolidation	Yes	See SAP CPM	See SAP CPM	Yes
Financial reporting	Yes	See SAP CPM	Yes	Yes
Scorecarding	Yes	See SAP CPM	See SAP CPM	Yes
Dashboard	Yes, also spend analysis	See SAP CPM	Yes	Yes
Profile				
World head office	Walldorf, Germany	Walldorf, Germany	Walldorf, Germany	Cary, NC, USA
Canadian head office	Toronto, ON	Toronto, ON	Toronto, ON	280 King Street East, Toronto, ON
No. of customers - worldwide - all products	Approx. 75,000	Approx. 75,000	Approx. 75,000	44,000
No. of customers - worldwide - this product				
No. of customers - Canada - all products	1,170+ customers collectively with Business Objects, an SAP company	1,170+ customers collectively with Business Objects, an SAP company	1,170+ customers collectively with Business Objects, an SAP company	2,000 +
No. of customers - Canada - this product				64
Revenue 2007 - all products (est.)	342.6M Euros	342.6M Euros	342.6M Euros	2,150M

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Additions				
Changes				
Product				
Revenue 2007 - this product (est.)				As a privately held company we do not report product revenue
Revenue 2006 - all products	304.7M Euros	304.7M Euros	304.7M Euros	2,100M
Revenue 2006 - this product				As a privately held company we do not report product revenue
Target market				
Average revenue/customer (CAD)	All revenue ranges	All revenue ranges	All revenue ranges	<\$5M
Average no. of employees/customer	100++	100++	100++	1-9
Industry classification based On The North American Industry Classification System (NAICS) - see http://www.naics.com/info.htm#Structure for more about NAICS (approximate % of Implementations)				
11 Agriculture, forestry, fishing and hunting	Yes	Yes	Yes	
21 Mining	Yes	Yes	Yes	1%
22 Utilities	Yes	Yes	Yes	10%
23 Construction	Yes	Yes	Yes	
31-33 Manufacturing	Yes	Yes	Yes	12%
42 Wholesale trade	Yes	Yes	Yes	1%
44-45 Retail trade	Yes	Yes	Yes	10%
48-49 Transportation and warehousing	Yes	Yes	Yes	2%
51 Information	Yes	Yes	Yes	1%
52 Finance and insurance	Yes	Yes	Yes	20%
53 Real estate and rental and leasing	Yes	Yes	Yes	1%
54 Professional, scientific, and technical services	Yes	Yes	Yes	2%
55 Management of companies and enterprises	Yes	Yes	Yes	6%
56 Administrative and support and waste management and remediation services	Yes	Yes	Yes	
61 Education services	Yes	Yes	Yes	9%

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Additions				
Changes				
Product				
62 Health care and social assistance	Yes	Yes	Yes	5%
71 Arts, entertainment and recreation	Yes	Yes	Yes	
72 Accommodation and food services	Yes	Yes	Yes	2%
81 Other services (except public administration)	Yes	Yes	Yes	2%
92 Public administration	Yes	Yes	Yes	16%
Total				100%
Technology				
Supported database (% of Implementations)				
Microsoft SQL Server	Yes	Yes	Yes	Supported
Oracle	Yes	Yes	Yes	Supported
Pervasive SQL				Supported
IBM DB2	Yes	Yes	Yes	Supported
Sybase			Yes	Supported
Informix	Yes	Yes	Yes	Supported
Access			Yes	Supported
Btrieve			Yes	Supported
Proprietary				
FoxPro			Yes	Supported
Progress				Supported
MySQL	Yes	Yes	Yes	Supported
Other	Yes; Max-DB	Yes; Max-DB	Yes	
Total				
Supported networks (% of Implementations)				
Microsoft	Yes	Yes	Yes	Supported
Linux	Yes	Yes	Yes	Supported
Unix	Yes	Yes	Yes	Supported

2008 Corporate Performance Management / Business Intelligence Survey

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Additions				
Changes				
Product				
AIX	Yes	Yes	Yes	Supported
Novell Netware				
IBM AS/400 (OS/400)				Supported
IBM S/390				Supported
Other				
Total				
Development tools used to build application	Java, C++, ABAP/4	Java, C++, ABAP/4	Java, C++	SAS AppDev Studio
Report writer used - which One(s)?	SAP NetWeaver	SAP NetWeaver	SAP BusinessObjects Crystal Reports	SAS Web Report Studio, SAS Enterprise Guide - part of SAS Enterprise BI Server; SAS Financial Management; Add-in for Microsfot Office
Data Extract Transform Load (ETL) tools - which One(s)?	SAP NetWeaver	SAP NetWeaver	SAP BusinessObjects Data Integrator	SAS Data Integration Studio
Cubes supported - which one(s)?	SAP NetWeaver	SAP NetWeaver	SAP NetWeaver, Oracle, Microsoft	
Existing integration to accounting and ERP systems - which systems?	SAP, Oracle	SAP, Oracle	SAP, Oracle	Oracle, PeopleSoft, SAP, Siebel

2008 Corporate Performance Management / Business Intelligence Survey

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Additions				
Changes				
Product				
Existing integration to customer relationship management systems - which systems?	SAP, Oracle	SAP, Oracle	SAP, Oracle	Siebel
Existing integration to payroll systems - which systems?	SAP, Oracle/Peoplesoft	SAP, Oracle/Peoplesoft	SAP, Oracle/Peoplesoft	
Existing integration to HRMS systems - which systems?	SAP, Oracle/Peoplesoft	SAP, Oracle/Peoplesoft	SAP, Oracle/Peoplesoft	
Available from Application Service Provider				Yes
Approx. no. of implementations				
2-tier, 3-tier or n-tier architecture			n-Tier	n-Tier
Metadata standard supported	CWM	CWM	CWM	CWM, XML
Maximum size of OLAP cube	No limit	No limit	N/A	No limit
Generic				
Integration of applications in Section D	Yes	Yes	Yes	Yes
Share same database	Yes	Yes	Yes	Yes
Same user interface	Future date	Future date	Yes	Partly
Integrated	Future date	Future date	Yes	Yes
Dashboard				
Role specific	Yes	Yes	Yes	Yes
Graphical	Yes	Yes	Yes	Yes
Drill down to:			Yes	Yes

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Additions				
Changes				
Product				
Business intelligence	Yes	Yes	Yes	Yes
Consolidation	Yes	Yes	Yes	Yes
Budgeting and forecasting	Yes	Yes	Yes	Yes
Scorecarding	Yes	Yes	Yes	Yes
Excel integration			Yes	Yes
Formatting intact	Yes	Yes	Yes	Yes
Formulas intact	Yes	Yes	Yes	Yes
Business Intelligence	See SAP NetWeaver BI and BusinessObjects BI			
Analytic functionality		Yes	Yes	Yes
Bubble up exceptions		Yes	Yes	No
Drill down		Yes	Yes	Yes
Drill through to source data		Yes	Yes	Yes
Ranking		Yes	Yes	Yes
Sorting		Yes	Yes	Yes
Restrict results by date range		Yes	Yes	Yes
Includes dashboard		Yes	Yes	Yes
Time trending (for example, over 12 months)		Yes	Yes	Yes
Pareto filtering (automatically groups the categories that amount to less than 20% of a row or column total into "other")		Partly	Yes	Yes
Calculations		Yes	Yes	Yes
Counts		Yes	Yes	Yes
Percentage of total		Yes	Yes	Yes
Allocations		Yes	Yes	Yes
Total and subtotal		Yes	Yes	Yes
Create OLAP cubes		Yes	Yes	Yes
Data extraction and transformation tools		Yes	Yes	Yes
Incremental extraction		Partly	Yes	Yes
Impact analysis - objects impacted by change		Partly	Yes	Yes

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Additions				
Changes				
Product				
Can schedule process to run overnight		Yes	Yes	Yes
Formatting		Yes	Yes	Yes
By dimension		Yes	Yes	Yes
By level		Yes	Yes	Yes
By cell		Yes	Yes	Yes
Zero-row suppression		Yes	Yes	Yes
Conditional formatting by cell, e.g., highlight cells below threshold		Yes	Yes	Yes
Returns text (e.g., if value > 90, returns "excellent")		Customization	Yes	Yes
French version		Yes	Yes	Yes
Screens		Yes	Yes	Yes
Reports		Yes	Yes	Yes
Documentation		Yes	Yes	Yes
Metadata		Yes	Yes	Yes
OLAP functionality		Yes	Yes	Yes
Skip missing levels - support ragged dimensions		Partly	Yes	Yes
Write back		Partly	Yes	Yes
With audit trail		Yes	Yes	Yes
Includes charting tools		Yes	Yes	Yes
Access multiple cubes at a time		Yes	Yes	Yes
Excel client		Yes	Yes	Yes
Internet Explorer client		Yes	Yes	Yes
Netscape client		Yes	Yes	No
Geographical representation		Yes	Yes	Yes
Drag and drop		Yes	Yes	Yes
Attach notes to cube		Yes	Yes	Yes
Attach notes to cells		Yes	Yes	Yes
Attach files to cube		Yes	Yes	No
Attach files to cells		Yes	Yes	No
Password security		Yes	Yes	

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Additions				
Changes				
Product				
By company		Yes	Yes	Yes
By department or division		Yes	Yes	Yes
By menu		Yes	Yes	Yes
By function (view, add, change, delete)		Yes	Yes	Yes
By dimension		Yes	Yes	Yes
By level		Yes	Yes	Yes
By cell		Yes	Yes	Yes
Respect active directory authentication		Yes	Yes	Yes
Respect database security		Yes	Yes	Yes
Portal generation that includes HTML reports		Yes	Yes	Yes
Report writer		Yes	Yes	Yes
Web-based		Yes	Yes	Yes
Generate cube		Yes	Yes	Yes
Drag and drop		Yes	Yes	Yes
WYSIWYG report design		Partly	Yes	Yes
Technology				
API-enabled (SDK provided)		Yes	Yes	Yes
Web-based (Only need browser at client)		Yes	Yes	Yes
For entire application		Partly	Partly	Yes
Support for .NET web services		Partly	Partly	Yes
Support for Java web services		Partly	Partly	Yes
Transfer data to:				
Report writer		Yes	Yes	Yes
Excel		Yes	Yes	Yes
PivotTable		Partly	No	Yes
HTML		Yes	Yes	Yes
PDF		Yes	Yes	Yes
PowerPoint		No	Yes	Yes
XML		Yes	Yes	Yes
Views				
Crosstabs		Yes	Yes	Yes

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Additions				
Changes				
Product				
Charts		Yes	Yes	Yes
Both crosstabs and chart at the same time		Yes	Yes	Yes
Work flow		Yes	Yes	Yes
Alerts can be automatically triggered		Yes	Yes	Yes
Consolidation		See SAP CPM	See SAP CPM	
Journal entries	Yes			Yes
Manual	Yes			Yes
Recurring	Yes			Yes
Automated for currency translation gains/losses	Yes			Yes
Automated for Intercompany eliminations	Yes			Yes
Reclassification journal entry - e.g., used to generate cash flow report or balance sheet	Yes			Yes
Intercompany processing	Yes			Yes
Automated balancing	Yes			Yes
Consolidation processor	Yes			Yes
Consolidate actuals and budgets	Yes			Yes
Consolidate statistical ledgers such as headcounts	Yes			Yes
Incremental for entities that have changed	Yes			Yes
Different fiscal periods	Yes			Yes
Different fiscal calendars	Yes			Yes
Short year-ends	Yes			Yes
Multiple levels or tiers	Yes			Yes
Automated Intercompany eliminations to first common parent	Yes			Yes
Data collection	Yes			Yes
Online over the internet	Yes			Yes
Only a browser required (don't need Citrix or terminal services)	Yes			Yes
Work offline and synchronize	Yes			Yes
Parsing	Yes			Yes

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2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	SAP CPM	SAP NetWeaver Business Intelligence	SAP BusinessObjects BI Platform	SAS Business Intelligence and Financial Intelligence Solutions
Additions				
Changes				
Product				
Mapping	Yes			No
Wildcards	Yes			Yes
Validation	Yes			Yes
Can proceed or stop depending on variance	Yes			Yes
Maintain status	Yes			Yes
Approvals	Yes			Yes
Escalations if late	Yes			Yes
Intercompany eliminations	Yes			Yes
Define intercompany accounts	Yes			Yes
Automated eliminations	Yes			Yes
Reporting tool to identify out of balance entities	Yes			Yes
Foreign currency translation	Yes			Yes
Support temporal method	Yes			Yes
Multiple rate types	Yes			Yes
Define which rate type by account	Yes			Yes
Maintain rate schedule that can be shared across all legal entities	Yes			Yes
Download daily rates automatically	Yes			Yes
Methods:	Yes			Yes
Proportional	Yes			Yes
Equity	Yes			Yes
Minority interest	Yes			Yes
Wholly owned	Yes			Yes
Multi tier Consolidation	Yes			Yes
On-line review and approval of consolidation process at each tier	Yes			Yes
Drill down to any tier	Yes			Yes
Multiple ledgers	Yes			Yes
Ownership	Yes			Yes
Date sensitive ownership - for changes during the month	Yes			Yes
Reorganizations	Yes			Yes

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2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	SAP CPM	SAP NetWeaver Business Intelligence	SAP BusinessObjects BI Platform	SAS Business Intelligence and Financial Intelligence Solutions
Additions				
Changes				
Product				
Change account structure and replicate across system	Yes			Yes
Revaluations	Yes			Yes
Financial reporting				
Analysis codes				Yes
Attach to accounts or g/l segments	Yes		Yes	Yes
Can be used in any financial report for selection or ordering	Yes		Yes	Yes
Results in home or reporting currency	Yes		Yes	Yes
Rows can be defined	Yes		Yes	Yes
Columns can be defined	Yes		Yes	Yes
Cell override	Yes		Yes	Yes
Hierarchical reporting	Yes		Yes	Yes
Multiple hierarchies	Yes		Yes	Yes
Lead schedules	Yes		Yes	Yes
Ready for external reporting	Yes		Yes	Yes
Rounding to nearest 1,000 and allocation of rounding error to specified financial statement line	Yes		Yes	Yes
Trend analysis showing last 12 periods	Yes		Yes	Yes
Exception reporting	Yes		Yes	Yes
Highlight all accounts with a variance over a certain % or amount	Yes		Yes	Yes
Consolidate Accounts Receivable subledger	Yes		No	Yes
Compute daily sales opstanding	Yes		No	Yes
Eliminate intercompany accounts	Yes		No	Yes
Budgeting			See SAP CPM	
Automatic % change of previous budget	Yes			Yes
Automatic based On actual	Yes			Yes
Excel like formulas	Yes			Yes
Seasonality allocations	Yes			Yes

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2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	SAP CPM	SAP NetWeaver Business Intelligence	SAP BusinessObjects BI Platform	SAS Business Intelligence and Financial Intelligence Solutions
Additions				
Changes				
Product				
Budgeting process	Yes			Yes
Bottom up	Yes			Yes
Top down	Yes			Yes
Export to Excel	Yes			Yes
Import from Excel	Yes			Yes
Lockable	Yes			Yes
Maintain explanation of budget variances	Yes			Yes
Based on employee information in HR system	Yes			Yes
Multiple budgets	Yes			Yes
Rolling budget	Yes			Yes
Sign assumed	Yes			Yes
What if analysis	Yes			Yes
Ability to update assumptions which are used in the calculations	Yes			Yes
Rollup forecast to budget	Yes			Yes
Approval process	Yes			Yes
Forecasting				
Quotes and their probability				Yes
Outstanding orders				Yes
Customer forecasts	Yes		Yes	Yes
Historical trends	Yes		Yes	Yes
Average of 13 weeks volume	Yes		Yes	Yes
Can apply factors such as seasonality	Customization		Customization	Yes
Apply regression analysis	Yes		Yes	Yes
Apply faqctaors such as housing starts and market adjustment factor	Customization		Customization	Yes
Ability to accept input from multiple users	Yes		Yes	Yes
Approval process	Yes		Yes	Yes
What if Analysis	Yes		Yes	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	SAP CPM	SAP NetWeaver Business Intelligence	SAP BusinessObjects BI Platform	SAS Business Intelligence and Financial Intelligence Solutions
Additions				
Changes				
Product				
Name One to five unique or very important features of your product (limit of 250 characters)				
Unique/important feature no.1	Unified platform, user-driven and high usability	Enterprise data warehousing platform; high performance and high usability	All business intelligence users and all data sources on a single unified platform	Real time consolidation integration with advanced analytics such as forecasting, operations research, and data mining
Unique/important feature no. 2	Complete Office of the CFO solution - core suite, CPM and GRC/governance, risk and compliance	Strong integration with SAP Business Suite and industry solutions with pre-defined business content	Business Intelligence solutions for query, reporting, analysis, dashboard, and user-friendly information search and exploration, enabling quick access to information to make enlightened decisions	Complete integration of CPM components through common SAS 9 platform (including analytical human capital mgmt)
Unique/important feature no. 3	SOA/service-oriented architecture-enabled; integration with MDM/master data management, process management and portal technology	SOA/service-oriented architecture-enabled; integration with MDM/master data management, process management and portal technology	Information management solutions for delivering data, structured or unstructured, across the enterprise that is integrated, accurate, reconciled, and well understood	Capacity to incorporate data to measure and optimize Carbon Footprint / Offsetting

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2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Product	Yellowfin
Vendor	Yellowfin
Version	4
Release date (mmm-yy)	Aug-08
Contact	
Name	Glen Rabie
Telephone	61396422241
E-mail	glen.rabie@yellowfin.bi
Website	www.yellowfin.bi
Cost (Canadian dollars)	
Licence based	
Average cost per user	\$650
Average no. of users	100
Average cost	\$65,000
Ratio - average Implementation cost/licence cost	0.75
Average implementation cost	\$48,750
Total licence based	\$113,750
Annual maintenance %	20%
Annual maintenance dollars	\$13,000

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Support included in maintenance fee	Yes
ASP (application service provider) based	Can be - by partners
Average annual fee / user	\$300
Average no. of users	1,000
Average annual fees	\$300,000
Average implementation costs / average fees - year One	3.00
Average implementation costs	\$900,000
Total ASP based - 1st year	\$1,200,000
Support included in ASP fee	
Applications	
Business intelligence	Yes
Strategic planning	No
Budgeting and forecasting	No
Consolidation	No
Financial reporting	Partly
Scorecarding	Yes
Dashboard	Yes
Profile	
World head office	Australia
Canadian head office	Ottawa
No. of customers - worldwide - all products	300
No. of customers - worldwide - this product	300
No. of customers - Canada - all products	20
No. of customers - Canada - this product	20
Revenue 2007 - all products (est.)	\$5M

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Revenue 2007 - this product (est.)	\$5M
Revenue 2006 - all products	\$3M
Revenue 2006 - this product	\$3M
Target market	
Average revenue/customer (CAD)	\$50M-\$200M
Average no. of employees/customer	>500
Industry classification based On The North American Industry Classification System (NAICS) - see http://www.naics.com/info.htm#Structure for more about NAICS (approximate % of Implementations)	
11 Agriculture, forestry, fishing and hunting	5%
21 Mining	5%
22 Utilities	5%
23 Construction	
31-33 Manufacturing	10%
42 Wholesale trade	5%
44-45 Retail trade	5%
48-49 Transportation and warehousing	10%
51 Information	20%
52 Finance and insurance	5%
53 Real estate and rental and leasing	
54 Professional, scientific, and technical services	
55 Management of companies and enterprises	5%
56 Administrative and support and waste management and remediation services	
61 Education services	5%

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
62 Health care and social assistance	10%
71 Arts, entertainment and recreation	
72 Accommodation and food services	
81 Other services (except public administration)	
92 Public administration	10%
Total	100%
Technology	
Supported database (% of Implementations)	
Microsoft SQL Server	30%
Oracle	30%
Pervasive SQL	5%
IBM DB2	5%
Sybase	5%
Informix	2%
Access	2%
Btrieve	
Proprietary	
FoxPro	1%
Progress	5%
MySQL	10%
Other	5%
Total	100%
Supported networks (% of Implementations)	
Microsoft	40%
Linux	50%
Unix	5%

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2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
AIX	
Novell Netware	
IBM AS/400 (OS/400)	5%
IBM S/390	
Other	
Total	100%
Development tools used to build application	Eclipse
Report writer used - which One(s)?	Yellowfin
Data Extract Transform Load (ETL) tools - which One(s)?	Talend, Kettle, Informatica
Cubes supported - which one(s)?	MDX Compliant
Existing integration to accounting and ERP systems - which systems?	SAP, JD Edwards, Oracle, Pronto, many others

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2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Existing integration to customer relationship management systems - which systems?	Multiple
Existing integration to payroll systems - which systems?	Multiple
Existing integration to HRMS systems - which systems?	Multiple
Available from Application Service Provider	Yes
Approx. no. of implementations	50
2-tier, 3-tier or n-tier architecture	n-Tier
Metadata standard supported	Yes
Maximum size of OLAP cube	NA
Generic	
Integration of applications in Section D	Yes
Share same database	No
Same user interface	Yes
Integrated	Yes
Dashboard	Yes
Role specific	Yes
Graphical	Yes
Drill down to:	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Business intelligence	Yes
Consolidation	No
Budgeting and forecasting	No
Scorecarding	Yes
Excel integration	Yes
Formatting intact	Yes
Formulas intact	Future date
Business Intelligence	
Analytic functionality	Yes
Bubble up exceptions	Yes
Drill down	Yes
Drill through to source data	Yes
Ranking	Yes
Sorting	Yes
Restrict results by date range	Yes
Includes dashboard	Yes
Time trending (for example, over 12 months)	Yes
Pareto filtering (automatically groups the categories that amount to less than 20% of a row or column total into "other")	Yes
Calculations	Yes
Counts	Yes
Percentage of total	Yes
Allocations	Yes
Total and subtotal	Yes
Create OLAP cubes	No
Data extraction and transformation tools	No
Incremental extraction	No
Impact analysis - objects impacted by change	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Can schedule process to run overnight	Yes
Formatting	Yes
By dimension	Yes
By level	Yes
By cell	Yes
Zero-row suppression	Yes
Conditional formatting by cell, e.g., highlight cells below threshold	Yes
Returns text (e.g., if value > 90, returns "excellent")	Yes
French version	Yes
Screens	Yes
Reports	Yes
Documentation	Partly
Metadata	Yes
OLAP functionality	Yes
Skip missing levels - support ragged dimensions	Yes
Write back	No
With audit trail	No
Includes charting tools	Yes
Access multiple cubes at a time	No
Excel client	No
Internet Explorer client	Yes
Netscape client	Yes
Geographical representation	Yes
Drag and drop	Yes
Attach notes to cube	Yes
Attach notes to cells	Yes
Attach files to cube	Future date
Attach files to cells	Future date
Password security	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
By company	Yes
By department or division	Yes
By menu	Yes
By function (view, add, change, delete)	Yes
By dimension	Yes
By level	Yes
By cell	Yes
Respect active directory authentication	Yes
Respect database security	Yes
Portal generation that includes HTML reports	Yes
Report writer	Yes
Web-based	Yes
Generate cube	No
Drag and drop	Yes
WYSIWYG report design	Yes
Technology	
API-enabled (SDK provided)	Yes
Web-based (Only need browser at client)	Yes
For entire application	Yes
Support for .NET web services	Yes
Support for Java web services	Yes
Transfer data to:	
Report writer	Yes
Excel	Yes
PivotTable	Yes
HTML	Yes
PDF	Yes
PowerPoint	Yes
XML	Yes
Views	
Crosstabs	Yes

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Charts	Yes
Both crosstabs and chart at the same time	Yes
Work flow	Yes
Alerts can be automatically triggered	Yes
Consolidation	
Journal entries	No
Manual	No
Recurring	No
Automated for currency translation gains/losses	No
Automated for Intercompany eliminations	No
Reclassification journal entry - e.g., used to generate cash flow report or balance sheet	No
Intercompany processing	No
Automated balancing	No
Consolidation processor	No
Consolidate actuals and budgets	No
Consolidate statistical ledgers such as headcounts	No
Incremental for entities that have changed	No
Different fiscal periods	No
Different fiscal calendars	No
Short year-ends	No
Multiple levels or tiers	No
Automated Intercompany eliminations to first common parent	No
Data collection	No
Online over the internet	No
Only a browser required (don't need Citrix or terminal services)	No
Work offline and synchronize	No
Parsing	No

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Mapping	No
Wildcards	No
Validation	No
Can proceed or stop depending on variance	No
Maintain status	No
Approvals	No
Escalations if late	No
Intercompany eliminations	No
Define intercompany accounts	No
Automated eliminations	No
Reporting tool to identify out of balance entities	No
Foreign currency translation	No
Support temporal method	No
Multiple rate types	No
Define which rate type by account	No
Maintain rate schedule that can be shared across all legal entities	No
Download daily rates automatically	No
Methods:	No
Proportional	No
Equity	No
Minority interest	No
Wholly owned	No
Multi tier Consolidation	No
On-line review and approval of consolidation process at each tier	No
Drill down to any tier	No
Multiple ledgers	No
Ownership	No
Date sensitive ownership - for changes during the month	No
Reorganizations	No

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Change account structure and replicate across system	No
Revaluations	No
Financial reporting	
Analysis codes	Yes
Attach to accounts or g/l segments	Yes
Can be used in any financial report for selection or ordering	Yes
Results in home or reporting currency	Yes
Rows can be defined	Yes
Columns can be defined	Yes
Cell override	Yes
Hierarchical reporting	Yes
Multiple hierarchies	Yes
Lead schedules	No
Ready for external reporting	Yes
Rounding to nearest 1,000 and allocation of rounding error to specified financial statement line	Yes
Trend analysis showing last 12 periods	Yes
Exception reporting	Yes
Highlight all accounts with a variance over a certain % or amount	Yes
Consolidate Accounts Receivable subledger	
Compute daily sales opstanding	Yes
Eliminate intercompany accounts	No
Budgeting	
Automatic % change of previous budget	No
Automatic based On actual	No
Excel like formulas	No
Seasonality allocations	No

2008 Corporate Performance Management / Business Intelligence Survey

Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Budgeting process	No
Bottom up	No
Top down	No
Export to Excel	Yes
Import from Excel	No
Lockable	No
Maintain explanation of budget variances	No
Based on employee information in HR system	No
Multiple budgets	No
Rolling budget	No
Sign assumed	No
What if analysis	No
Ability to update assumptions which are used in the calculations	No
Rollup forecast to budget	No
Approval process	Yes
Forecasting	
Quotes and their probability	Yes
Outstanding orders	Yes
Customer forecasts	Yes
Historical trends	Yes
Average of 13 weeks volume	Yes
Can apply factors such as seasonality	Yes
Apply regression analysis	Yes
Apply faqctaors such as housing starts and market adjustment factor	Yes
Ability to accept input from multiple users	No
Approval process	Yes
What if Analysis	Yes

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Question - Highlighted questions indicate a difference from the previous year:	Yellowfin
Additions	
Changes	
Product	
Name One to five unique or very important features of your product (limit of 250 characters)	
Unique/important feature no.1	Usability
Unique/important feature no. 2	100% Web based
Unique/important feature no. 3	Security