

## 零售商品分类管理绩效蓝图



Information Management

Cognos.  
software

## 简介

选择和管理商品往往是一个平衡协调的过程 — 一切都始于一份良好的计划。促进消费趋势、改变市场条件以及更多消费者购买决策，使优良计划的开发成为想要提供不同类别商品并实现利润最大化的零售商的挑战。

那么，成功的零售商如何能够在竞争对手蹒跚不前之时发展壮大？他们可以轻松地建模场景来开发最佳计划，对照计划查看其经营绩效，并通过这一可见性制定智慧的决策。他们可以使用工具来判断不断变化的客户爱好和关注点，并对计划和运营进行必要的调整，以满足客户偏好和市场因素。

利用 IBM Cognos® 零售商品分类管理绩效蓝图，您也可以拥有这些工具。零售商品分类管理蓝图可为您提供可见性来开发更好的商品计划，实时了解您的行为并迅速做出调整 — 始终保护收益，利用独特的商品提高销量并满足客户。

本文阐述了零售商品分类管理绩效蓝图的内容，它是一份基于 Web 的零售商解决方案，尤其关注商品规划和绩效管理。该解决方案是一份资产，用于开发更好的计划来做出智慧的库存投资，管理库存水平来提高销量和利润，并在趋势出现时发现它们来调整供需。

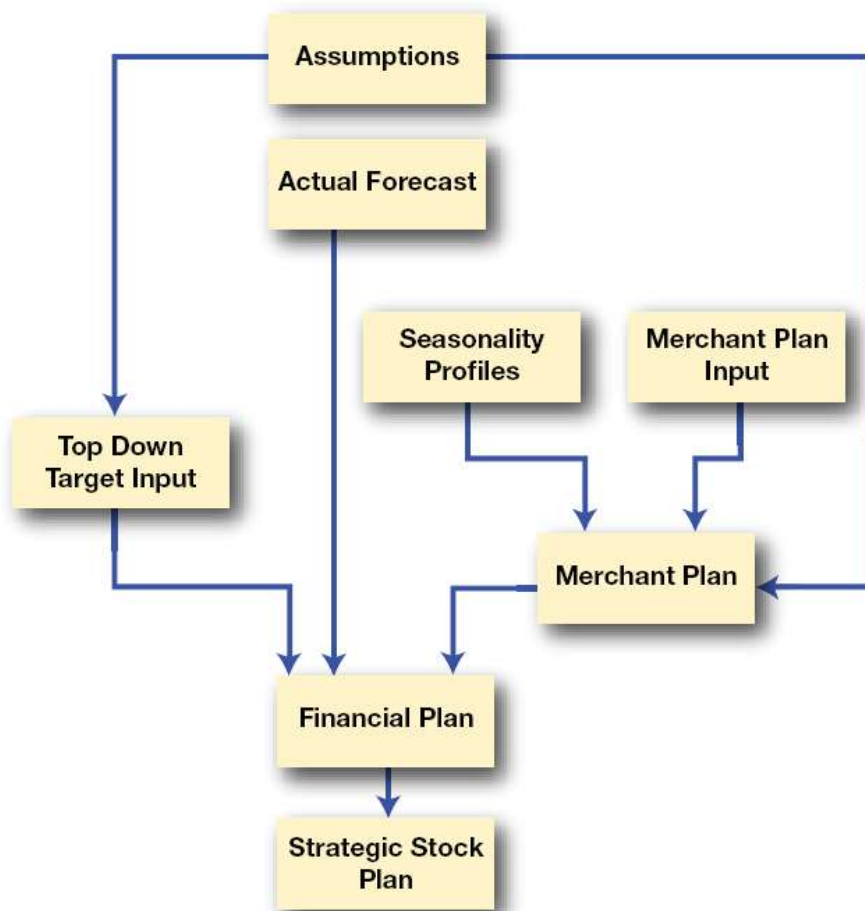
## 零售商品分类管理 TM1 模型

利用零售商品分类管理蓝图，零售商能够设定自顶向下的商品规划目标，而商家或买家则可以创建自底向上的商业预测，最终与自顶向下的目标整合。

可以使用 IBM Cognos TM1 Web 软件或 TM1 Contributor 对零售商品分类管理蓝图进行部署。这两种前端已完全经过配置并包括在蓝图中。本文档基于 TM1 Contributor 界面提供视图并介绍模型功能。

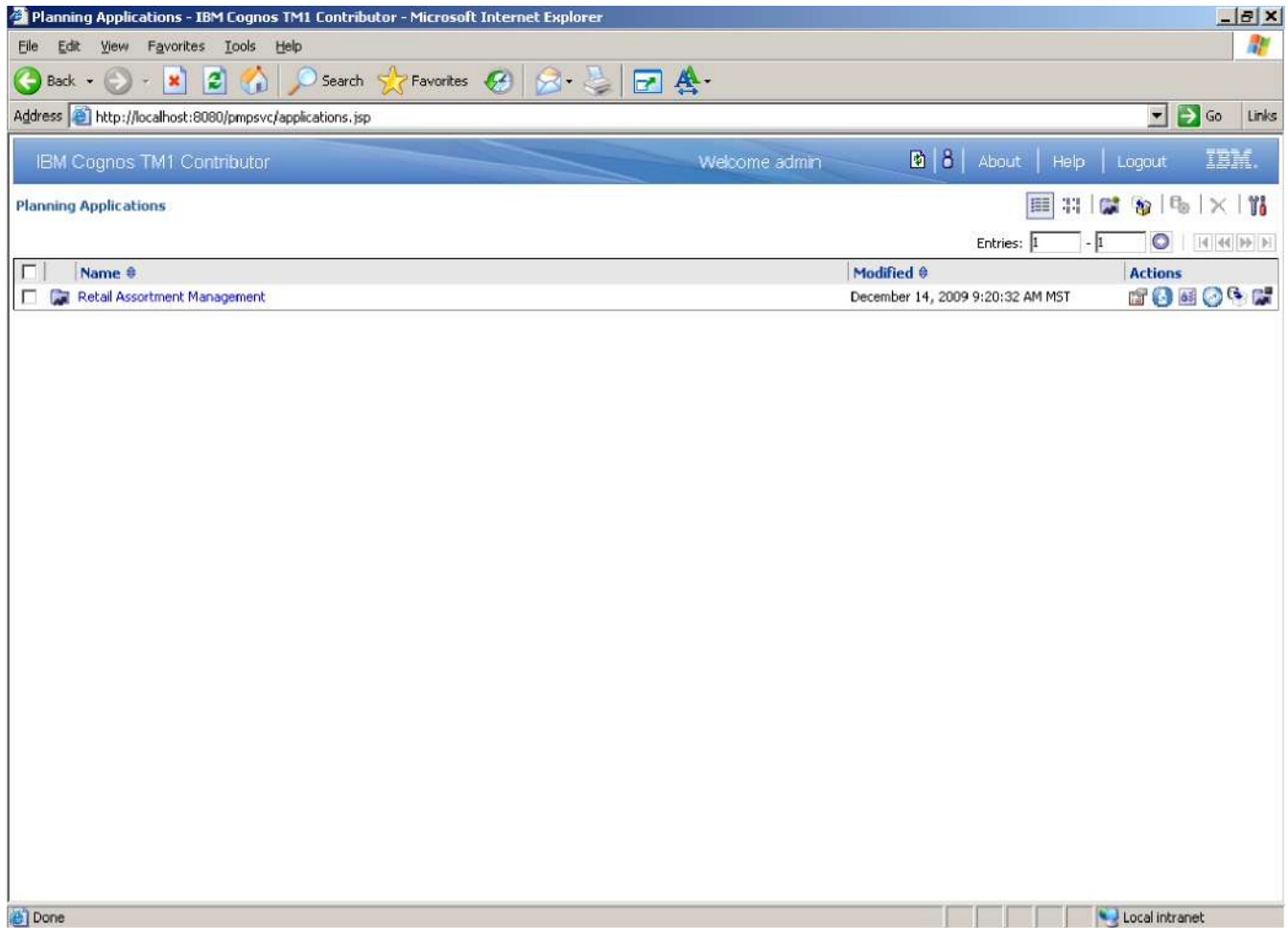
零售商品分类管理绩效蓝图由 10 个不同的多维数据集构成。其中 8 个将在下列流程图中显示，而另外两个将用于定义模型中的参数和属性。用户基于角色访问不同的多维数据集，因此在规划过程中，每个用户只能看到完成他或她的特定任务所需的多维数据集。例如，某些用户只能访问自顶向下的规划，而其他用户则只能访问自底向上的规划组成部分。对于本文档，用户是管理员角色（以下简称“管理员”），这意味着他或她可访问所有选项卡以及贡献层次结构的每个层级。

分类管理蓝图流程图




## 开始


在管理员级用户登录 TM1 Contributor 后，一个显示所有可用应用程序的页面打开。




管理员选择零售商品分类管理应用程序，这会打开另一个界面，为当前用户提供贡献和审核访问权限。核准层次结构按部门建立，各部门逐级组成整个公司。

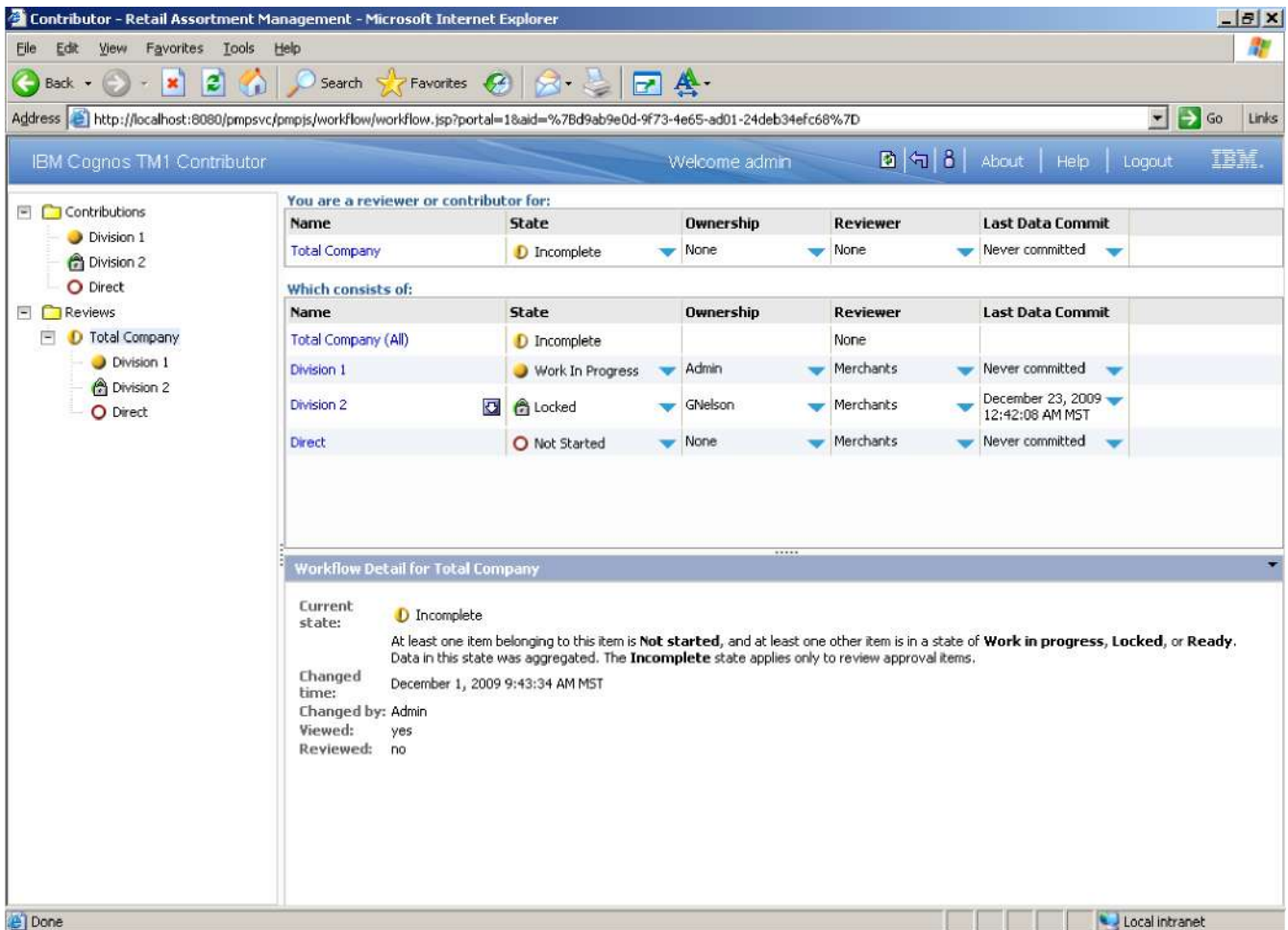
审阅者可以查看部门预测的综合结果，以及那些预测对整体盈利和库存状况的影响。这些审阅者能够看到负责所属工作的每个部门的工作流状态，他们也可以共同享有这些信息，这就使他们能够做出必要修改。所有工作流状态均改变，用户保存信息时便会实时进行数据汇总和聚合，从而能够实现频繁的规划迭代。

数据输入之前，计划状态指定为  **Not started** 保存计划之后，状态

变为  **Work in progress**，仍然可供进一步编辑。在提交项目后，该计划

即被  **Locked** 并且不可再做任何变更。锁定状态表明，该计划正在等待审核。审阅者可以审核处于任何状态的计划，但只能拒绝锁定的计划项目。当锁定计划遭到拒绝后，它将重新返回工作状态，可供计划的所有者再次编辑。

下方屏幕截图从整个公司数据最终审阅者的角度显示工作流程。此人是整个公司的审阅者，可查看下至最低（部门）层次的细节。



The screenshot shows the IBM Cognos TM1 Contributor web interface. The browser title is "Contributor - Retail Assortment Management - Microsoft Internet Explorer". The address bar shows a local URL. The page header includes "IBM Cognos TM1 Contributor" and "Welcome admin".

The main content area displays a table of workflow items. The first table, "You are a reviewer or contributor for:", lists items with columns for Name, State, Ownership, Reviewer, and Last Data Commit. The second table, "Which consists of:", lists sub-items with the same columns.

Name	State	Ownership	Reviewer	Last Data Commit
Total Company	Incomplete	None	None	Never committed

Name	State	Ownership	Reviewer	Last Data Commit
Total Company (All)	Incomplete		None	
Division 1	Work In Progress	Admin	Merchants	Never committed
Division 2	Locked	GNelson	Merchants	December 23, 2009 12:42:08 AM MST
Direct	Not Started	None	Merchants	Never committed

Below the tables is a section titled "Workflow Detail for Total Company".

**Current state:** Incomplete  
At least one item belonging to this item is **Not started**, and at least one other item is in a state of **Work in progress, Locked, or Ready**. Data in this state was aggregated. The **Incomplete** state applies only to review approval items.

**Changed time:** December 1, 2009 9:43:34 AM MST  
**Changed by:** Admin  
**Viewed:** yes  
**Reviewed:** no

## 假设

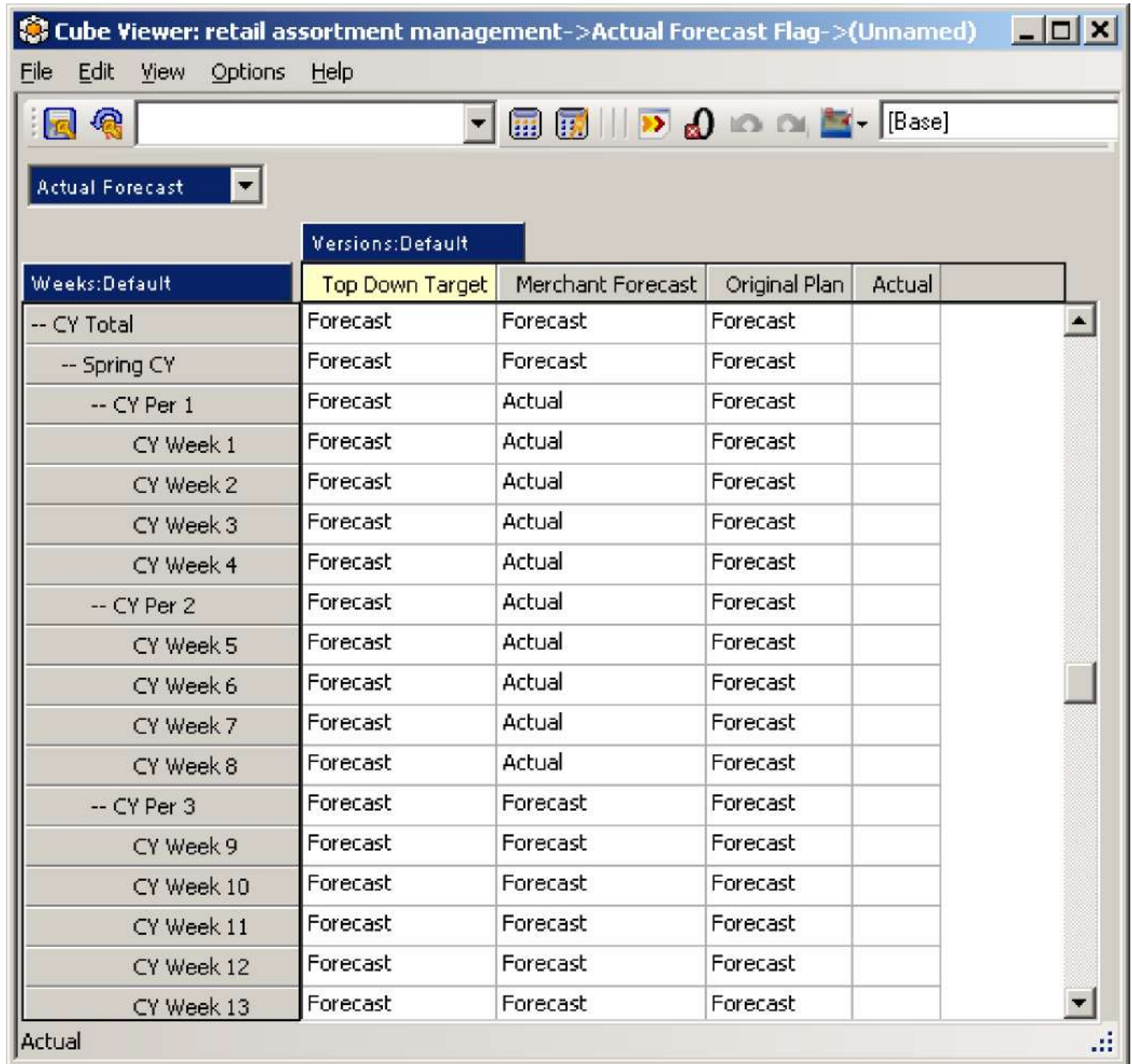
为利润、促销、降价、销售成本、损耗、分销及配送输入企业指导百分比。这些百分比均用于计算自顶向下目标的财务计划和商业预测，除非用户在 Top Down Target Input 选项卡或 Merchant Plan 选项卡中进行覆盖。

The screenshot displays the 'Retail Assortment Management' application in a Microsoft Internet Explorer browser window. The interface includes a top navigation bar with the title 'Retail Assortment Management | Work InProgress | Division 1 - Microsoft Internet Explorer'. Below the navigation bar is a menu of tabs: Assumptions, Product Attributes, Seasonality Profiles, Top Down Target Input, Merchant Plan Input Seasonal, Merchant Plan Input Basic, Merchant Plan Input Waves, Merchant Plan, Financial Plan, Consensus, and Strategic Stock Plan. The main content area shows a grid with 'Rows' set to 'Assumptions [Assumptions]' and 'Columns' set to 'Corporate Guidelines [Corporate Guidelines]'. The grid displays a table of percentages for various categories. At the bottom of the grid, there are navigation buttons: Top, Page up, Page down, Bottom, and a page indicator 'Page 1 of 1'. The current user is identified as 'Admin'.

Corporate Guidelines	
Returns %	5.0%
<b>Total Promotions</b>	<b>15.0%</b>
Promotion A %	5.0%
Promotion B %	10.0%
<b>Total Markdowns</b>	<b>9.0%</b>
Markdown A %	5.0%
Markdown B %	4.0%
COGS %	45.0%
Shrinkage %	2.0%
Distribution %	3.0%
Delivery %	2.0%

## 实际预测

每个版本的周数均将标记为实际或预测周数。Contributor 用户看不到该选项卡，而是由管理员在启动新的预测流程前进行更新。周数设置为 **Actual** 时，将获取预载入实际版本中的数据，而当周数设置为 **Forecast** 时，将采用自顶向下或商家预测计算，具体取决于本文档中描述的版本。



The screenshot shows the Cube Viewer application window titled "Cube Viewer: retail assortment management->Actual Forecast Flag->(Unnamed)". The interface includes a menu bar (File, Edit, View, Options, Help) and a toolbar. A dropdown menu is set to "Actual Forecast". Below this, there are tabs for "Versions: Default" and "Weeks: Default". The main data area is a table with the following structure:

	Top Down Target	Merchant Forecast	Original Plan	Actual
-- CY Total	Forecast	Forecast	Forecast	
-- Spring CY	Forecast	Forecast	Forecast	
-- CY Per 1	Forecast	Actual	Forecast	
CY Week 1	Forecast	Actual	Forecast	
CY Week 2	Forecast	Actual	Forecast	
CY Week 3	Forecast	Actual	Forecast	
CY Week 4	Forecast	Actual	Forecast	
-- CY Per 2	Forecast	Actual	Forecast	
CY Week 5	Forecast	Actual	Forecast	
CY Week 6	Forecast	Actual	Forecast	
CY Week 7	Forecast	Actual	Forecast	
CY Week 8	Forecast	Actual	Forecast	
-- CY Per 3	Forecast	Forecast	Forecast	
CY Week 9	Forecast	Forecast	Forecast	
CY Week 10	Forecast	Forecast	Forecast	
CY Week 11	Forecast	Forecast	Forecast	
CY Week 12	Forecast	Forecast	Forecast	
CY Week 13	Forecast	Forecast	Forecast	

The word "Actual" is displayed at the bottom left of the window.

## 产品属性

这个多维数据集涵盖了各种产品尺寸属性。以下列表列举了产品尺寸的各种属性，并强调了它们在模型中的使用方法：

- **小计：**此属性用于识别为汇总季节性、基本和波动三种不同的产品类型数据而建立的三种不同的小计项目。每种产品类型都有自己的产品尺寸动态子集，这种属性用于将小计项目添加至适当的动态子集。
- **活动：**此属性定义在进行任何预测期间产品继续活动，还是在模型中保持历史状态。
- **季节：**此属性适用于季节性产品，确定在哪个季节出售该产品。可供选择的季节有 2007 年至 2010 年的春季或秋季。
- **产品类型：**此属性定义每种产品是季节性产品、基础产品、还是波动产品。这个属性确定该产品将会显示在哪个输入选项卡上，以及这三种产品类型计算的哪一种将运用于该产品。
- **消费群体：**此属性定义产品属于哪种消费群体，如家庭、早期使用者、临时工。
- **供应商：**此属性定义给定产品的供应商。
- **材料：**此属性定义给定产品的材料，如棉花、羊毛或高泰克斯。
- **大小：**此属性定义给定产品的大小（S=小，O=均一尺寸）。
- **项目名：**此属性是别名，定义项目的产品名称。产品清单按 SKU 号建立，并且该栏位包含每个 SKU 的完整项目名称。
- 
- **颜色：**此属性定义给定产品的颜色。
- **样式：**此属性定义给定产品的样式。



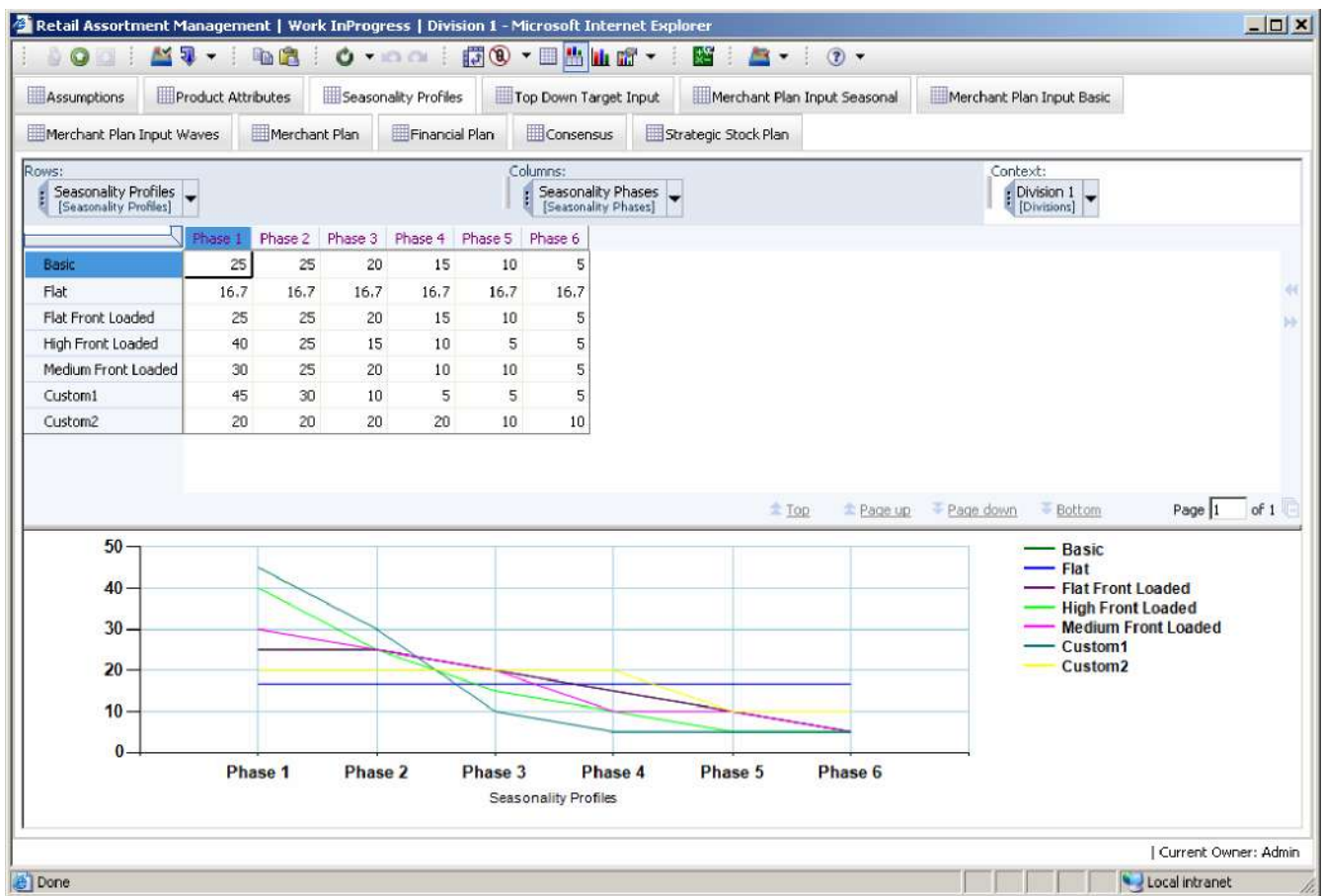
如果在此处更新属性，模型中创建的多维数据集会选取变更，模型中的计算结果也将相应地做出调整。例如，如果将某种产品从季节性基本产品变为波动产品，该项目将不会再显示在 Merchant Plan Input Seasonal 选项卡中。而是显示在 Merchant Plan Input Waves 选项卡中，并且此项目的商业计划计算将调整为使用波动计算方法。某些属性变更更要求用户退出 Contributor，然后重新登录，以查看反映在模板中的变更。

The screenshot shows the 'Retail Assortment Management' application in a Microsoft Internet Explorer browser. The interface includes a navigation bar with tabs for 'Assumptions', 'Product Attributes', 'Seasonality Profiles', 'Top Down Target Input', 'Merchant Plan Input Seasonal', and 'Merchant Plan Input Basic'. Below the navigation bar, there are additional tabs for 'Merchant Plan Input Waves', 'Merchant Plan', 'Financial Plan', 'Consensus', and 'Strategic Stock Plan'. The main area displays a data table with columns for 'Subtotal', 'Active', 'Season', 'Product Type', 'Consumer Segment', 'Vendor', 'Material', 'Size', 'Item Name', and 'Color'. The table lists various products, including seasonal basics and waves, with details on their attributes and vendor information.

SKU	Subtotal	Active	Season	Product Type	Consumer Segment	Vendor	Material	Size	Item Name	Color
2M450312114S		No	Fall 2007	Seasonal Basic	Casual	MHA Outdoors	Wool	S	Woodland Coat-M-Brown-S	Brown
2M450312114M		No	Fall 2007	Seasonal Basic	Casual	MHA Outdoors	Wool	M	Woodland Coat-M-Brown-M	Brown
2M450312114L		No	Fall 2007	Seasonal Basic	Casual	MHA Outdoors	Wool	L	Woodland Coat-M-Brown-L	Brown
2M450312122S		No	Fall 2007	Seasonal Basic	Casual	MHA Outdoors	Wool	S	Woodland Coat-M-Black-S	Black
2M450312122M		No	Fall 2007	Seasonal Basic	Casual	MHA Outdoors	Wool	M	Woodland Coat-M-Black-M	Black
2M450312122L		No	Fall 2007	Seasonal Basic	Casual	MHA Outdoors	Wool	L	Woodland Coat-M-Black-L	Black
2M450312334S		No	Spring 2007	Seasonal Basic	Casual	Woods End	Cotton	S	Field Coat-M-Tan-S	Tan
2M450312334M		No	Spring 2007	Seasonal Basic	Casual	Woods End	Cotton	M	Field Coat-M-Tan-M	Tan
2M450312334L		No	Spring 2007	Seasonal Basic	Casual	Woods End	Cotton	L	Field Coat-M-Tan-L	Tan
2M450312341S		No	Spring 2007	Seasonal Basic	Casual	Woods End	Cotton	S	Field Coat-M-Grey-S	Grey
2M450312341M		No	Spring 2007	Seasonal Basic	Casual	Woods End	Cotton	M	Field Coat-M-Grey-M	Grey
2M450312341L		No	Spring 2007	Seasonal Basic	Casual	Woods End	Cotton	L	Field Coat-M-Grey-L	Grey
2M450312428S		Yes	Other	Waves	Technical Outdoors	North Rim Outfitters	Goretex	S	Double Goretex Coat-M-Navy-S	Navy
2M450312428M		Yes	Other	Waves	Technical Outdoors	North Rim Outfitters	Goretex	M	Double Goretex Coat-M-Navy-M	Navy
2M450312428L		Yes	Other	Waves	Technical Outdoors	North Rim Outfitters	Goretex	L	Double Goretex Coat-M-Navy-L	Navy
2M450312422S		Yes	Other	Waves	Technical Outdoors	North Rim Outfitters	Goretex	S	Double Goretex Coat-M-Black-S	Black
2M450312422M		Yes	Other	Waves	Technical Outdoors	North Rim Outfitters	Goretex	M	Double Goretex Coat-M-Black-M	Black
2M450312422L		Yes	Other	Waves	Technical Outdoors	North Rim Outfitters	Goretex	L	Double Goretex Coat-M-Black-L	Black
2M450312519S		No	Spring 2008	Seasonal Basic	Casual	KLA Sportswear	Cotton	S	Light Rain Coat-M-Olive-S	Olive
2M450312519M		No	Spring 2008	Seasonal Basic	Casual	KLA Sportswear	Cotton	M	Light Rain Coat-M-Olive-M	Olive

## 季节性概要信息

有 7 种不同的概要信息可用于将数据分配至各个季节或用户定义的波动季节。每种概要信息有 6 个时间段或时间相位。概要信息包括基本、平面、平面前载、高前载、中前载、custom1 和 custom2 文件。自定义概要信息旨在供部门用户变更之用，每个部门都有不同的 custom1 和 custom2 概要信息。季节性概要信息用来改变季节长度。模型计算对照季节开始和季节结束的日期，然后将其间的时间分成 6 个不同的时间段或时间相位。然后使用季节性概要信息比例，将销售总额和单位分配至隶属该季节的各周。



### **自顶向下的目标输入**

用户可以查看两年的实际数据，以及所有财务计划措施的同期组合百分比。为本年度和下年度输入总销量和一个单位平均销售价格的组合百分比，使用假设多维数据集中的企业指导百分比筹划每年的所有财务计划措施。用户可以覆盖这些百分比的任何部分。还必须选择季节性概要信息作为上年度或两年的平均水平，推动将财务计划向下分配到多维数据集中自顶向下目标版本的产品和周级别。例如，如果用户选择上年度，模型计算会使用与上年度运用的实际数据相同的比例，将本年度和下年度的自顶向下的目标数据分配至产品和周。

Retail Assortment Management | Work InProgress | Division 1 - Microsoft Internet Explorer

Assumptions | Product Attributes | Seasonality Profiles | Top Down Target Input | Merchant Plan Input Seasonal | Merchant Plan Input Basic

Merchant Plan Input Waves | Merchant Plan | Financial Plan | Consensus | Strategic Stock Plan

Rows: Financial Plan [Financial Plan] Columns: Top Down Target Input [Top Down Target Input] Context: Top Down Target [Versions] Division 1 [Divisions]

	Seasonality Profile	2007 Actual	2008 Actual	2008 Actual Comp	2009 Plan	2009 Comp	2010 Plan	2010 Comp
Gross Sales	Prior Year	5,621,225	17,856,290	14.3%	20,534,734	15.0%	22,588,207	10.0%
Units	Prior Year	94,957.0	111,166.0	17.1%	168,317.5	51.4%	183,644.0	9.1%
Average Sales Price per Unit	Two Year Average	164.51	160.63	-2.4%	122.00	-24.0%	123.00	.8%
Returns		796,710	908,765	14.1%	1,232,084	35.6%	1,739,292	41.2%
Returns %		5.1%	5.1%	-2.2%	5.0%	-1.8%	5.0%	.0%
Returns % Override	Prior Year	.0%	.0%	.0%	6.0%	.0%	7.7%	28.3%
<b>Promotions</b>	Prior Year	1,408,390	1,607,066	14.1%	3,285,557	104.4%	3,388,231	3.1%
Promotions %	Prior Year	9.0%	9.0%	-2.2%	16.0%	77.8%	15.0%	-6.3%
Promotion A	Prior Year	625,304	714,252	14.2%	1,232,084	72.5%	1,129,410	-8.3%
Promotion A %	Prior Year	4.0%	4.0%	-1.1%	5.0%	25.0%	5.0%	.0%
Promotion A % Override	Prior Year	.0%	.0%	.0%	6.0%	.0%	.0%	-100.0%
Promotion B	Prior Year	783,085	892,815	14.0%	2,053,473	130.0%	2,258,821	10.0%
Promotion B %	Prior Year	5.0%	5.0%	-3.3%	10.0%	100.0%	10.0%	.0%
Promotion B % Override	Prior Year	.0%	.0%	.0%	.0%	.0%	.0%	.0%
<b>Markdowns</b>	Prior Year	1,405,910	1,607,066	14.3%	2,874,863	78.9%	2,032,939	-29.3%
Markdowns %	Prior Year	9.0%	9.0%	.0%	14.0%	55.6%	9.0%	-35.7%
Markdown A	Prior Year	781,061	892,815	14.3%	2,053,473	130.0%	1,129,410	-45.0%
Markdown A %	Prior Year	5.0%	5.0%	.0%	5.0%	.0%	5.0%	.0%
Markdown A % Override	Prior Year	5.0%	.0%	-100.0%	10.0%	.0%	.0%	-100.0%
Markdown B	Prior Year	624,849	714,252	14.3%	821,389	15.0%	903,528	10.0%
	Prior Year	4.0%	4.0%	-0.0%	4.0%	.0%	4.0%	.0%

Page 1 of 1 | Current Owner: Admin

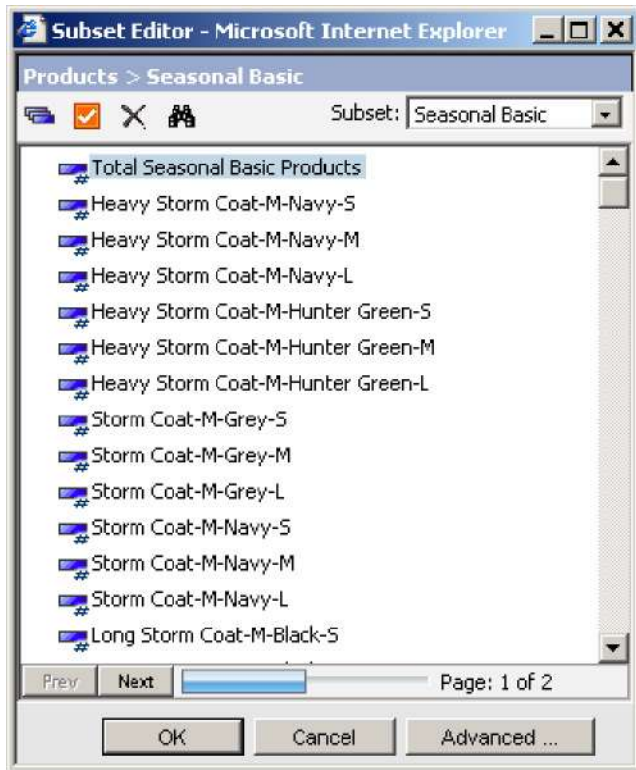
模型中有三种不同类型的产品用于商业或自底向上规划：季节性、基本和波动产品。季节性产品是在单季出售的产品。在该模型中，我们将每个季节定义为半年或六个月。每年的季节要么是春季要么是秋季，并且均已针对每种产品预先定义，用户可在 Products Attributes 选项卡中对其进行覆盖。基本产品是每年均出售的产品。波动产品是具有可以由用户定义的季节的产品。这些产品的起始周和季节长度由用户定义，一般适用于较为畅销的产品而非季节性产品。这三种产品类型中的每一种都有其自己的输入选项卡。

## Merchant Plan Input Seasonal

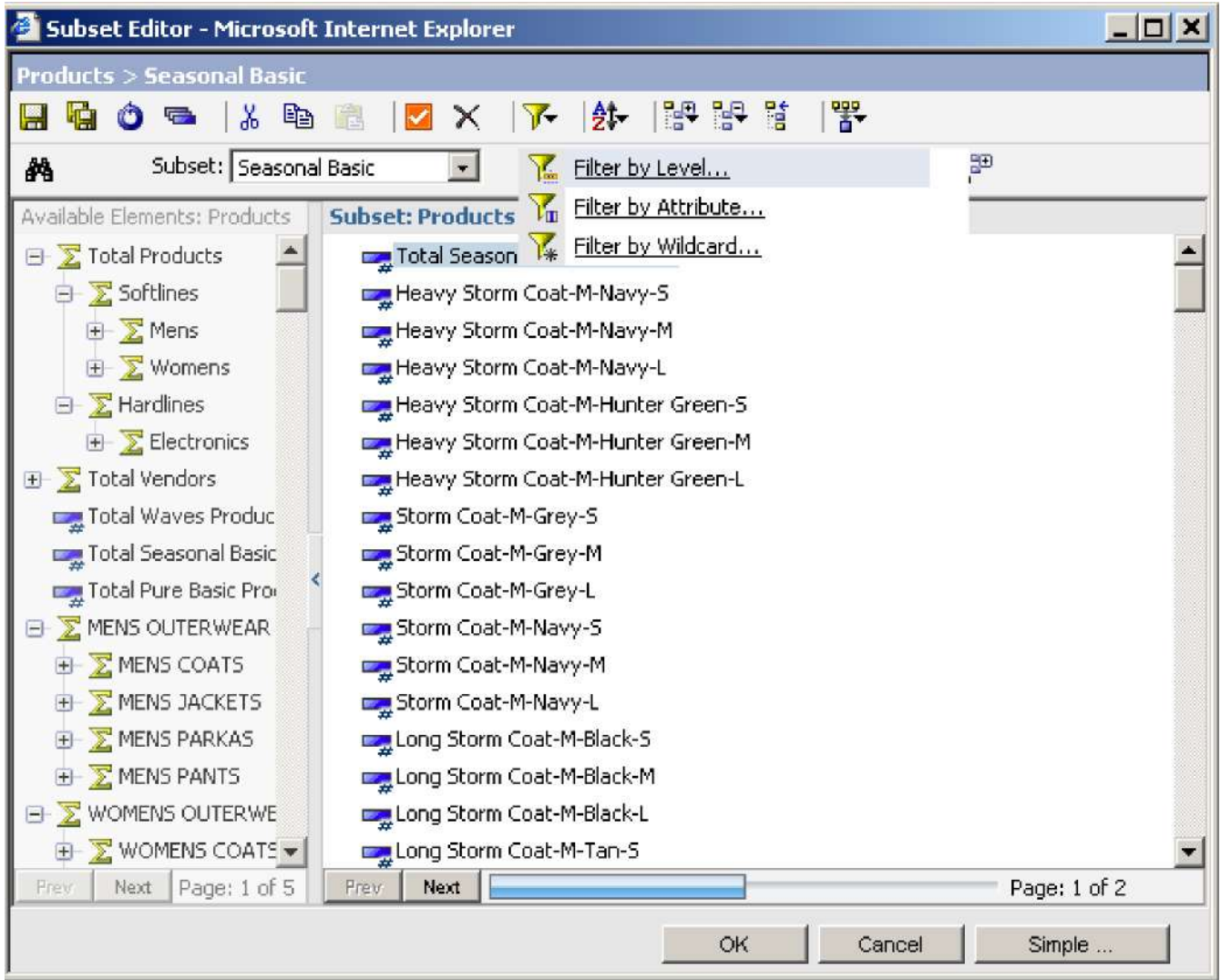
在规划季节性产品类型时，用户将看到 **PY Sales Category Average**、**PY Avg Sales Price per Unit Category Average** 和 **PY Units Category Average**，并可输入 **Sales**、**Average Sales Price per Unit**、**Season** 和一个季节性概要信息来将这些数据散布在季节的各周中。对单位、季节开始及结束周进行计算。模型会根据选择的季节性概要信息确定计划销售比例，以及应用于 6 个季节性概要信息每个阶段的单位，然后将数据分配至该阶段的各周。该模型还会将企业指导百分比应用至所有其他财务计划措施，为这些产品提出整体商业计划。结果可在 Merchant Plan 选项卡中查看，并且用户可以在该选项卡上覆盖按周计算的单位或任何百分比。

Product	Avg	PY Avg Sales Price Per Unit Category Avg	PY Units Category Avg	Sales	Average Sales Price per Unit	Units	Season	Season Start Week	Season End Week	Seasonality Profile
Total Seasonal Basic Products	30	99.58	104,377	27,391,475.00	78.41	349,316			Week 25 2007	
Heavy Storm Coat-M-Navy-S	16	71.14	717	81,200.00	80.00	1,015	Fall 2009	Week 27 2009	Week 52 2009	Flat
Heavy Storm Coat-M-Navy-M	16	71.14	717	87,000.00	80.00	1,088	Fall 2009	Week 27 2009	Week 52 2009	Basic
Heavy Storm Coat-M-Navy-L	16	71.14	717	92,800.00	80.00	1,160	Fall 2009	Week 27 2009	Week 52 2009	Flat
Heavy Storm Coat-M-Hunter Green-S	16	71.14	717	81,200.00	80.00	1,015	Fall 2009	Week 27 2009	Week 52 2009	Flat Front Loaded
Heavy Storm Coat-M-Hunter Green-M	16	71.14	717	87,000.00	80.00	1,088	Fall 2009	Week 27 2009	Week 52 2009	High Front Loaded
Heavy Storm Coat-M-Hunter Green-L	16	71.14	717	92,800.00	80.00	1,160	Fall 2009	Week 27 2009	Week 52 2009	Medium Front Loaded
Storm Coat-M-Grey-S	16	71.14	717	81,200.00	60.00	1,353	Spring 2009	Week 1 2009	Week 26 2009	Custom1
Storm Coat-M-Grey-M	16	71.14	717	87,000.00	60.00	1,450	Spring 2009	Week 1 2009	Week 26 2009	Custom2
Storm Coat-M-Grey-L	16	71.14	717	92,800.00	60.00	1,547	Spring 2009	Week 1 2009	Week 26 2009	
Storm Coat-M-Navy-S	16	71.14	717	81,200.00	60.00	1,353	Spring 2009	Week 1 2009	Week 26 2009	
Storm Coat-M-Navy-M	16	71.14	717	87,000.00	60.00	1,450	Spring 2009	Week 1 2009	Week 26 2009	Flat
Storm Coat-M-Navy-L	16	71.14	717	92,800.00	60.00	1,547	Spring 2009	Week 1 2009	Week 26 2009	Flat
Long Storm Coat-M-Black-S	16	71.14	717	93,950.00	75.00	1,253	Spring 2010	Week 1 2010	Week 25 2010	Basic
Long Storm Coat-M-Black-M	16	71.14	717	97,875.00	75.00	1,305	Spring 2010	Week 1 2010	Week 26 2010	Basic
Long Storm Coat-M-Black-L	16	71.14	717	101,790.00	75.00	1,357	Spring 2010	Week 1 2010	Week 26 2010	Basic
Long Storm Coat-M-Tan-S	16	71.14	717	93,950.00	75.00	1,253	Spring 2010	Week 1 2010	Week 26 2010	Basic
Long Storm Coat-M-Tan-M	16	71.14	717	97,875.00	75.00	1,305	Spring 2010	Week 1 2010	Week 26 2010	Basic
Long Storm Coat-M-Tan-L	16	71.14	717	101,790.00	75.00	1,357	Spring 2010	Week 1 2010	Week 26 2010	Basic
Wool Ranch Coat-M-Hunter Green-S	16	71.14	717	95,700.00	70.00	1,367	Fall 2010	Week 27 2010	Week 52 2010	Custom1
Wool Ranch Coat-M-Hunter Green-M	16	71.14	717	99,587.50	70.00	1,424	Fall 2010	Week 27 2010	Week 52 2010	Custom1
Wool Ranch Coat-M-Hunter Green-L	16	71.14	717	103,675.00	70.00	1,481	Fall 2010	Week 27 2010	Week 52 2010	Custom1
Wool Ranch Coat-M-Grey-S	16	71.14	717	95,700.00	70.00	1,367	Fall 2010	Week 27 2010	Week 52 2010	Custom1
Wool Ranch Coat-M-Grey-M	16	71.14	717	99,587.50	70.00	1,424	Fall 2010	Week 27 2010	Week 52 2010	Custom1
Wool Ranch Coat-M-Grey-L	16	71.14	717	103,675.00	70.00	1,481	Fall 2010	Week 27 2010	Week 52 2010	Custom1
Smith Goretex Jacket-M-Hunter Green-S	27	76.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Smith Goretex Jacket-M-Hunter Green-M	27	76.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Smith Goretex Jacket-M-Hunter Green-L	27	76.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Smith Goretex Jacket-M-Black-S	27	76.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Smith Goretex Jacket-M-Black-M	27	76.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Smith Goretex Jacket-M-Black-L	27	76.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Wind Chill 300 Fleece-M-Black-S	27	76.25	504	78,300.00	75.00	1,044	Spring 2010	Week 1 2010	Week 26 2010	Flat
Wind Chill 300 Fleece-M-Black-M	27	76.25	504	78,300.00	75.00	1,044	Spring 2010	Week 1 2010	Week 26 2010	Flat
Wind Chill 300 Fleece-M-Black-L	27	76.25	504	78,300.00	75.00	1,044	Spring 2010	Week 1 2010	Week 26 2010	Flat
Wind Chill 300 Fleece-M-Grey-S	27	76.25	504	78,300.00	75.00	1,044	Spring 2010	Week 1 2010	Week 26 2010	Flat

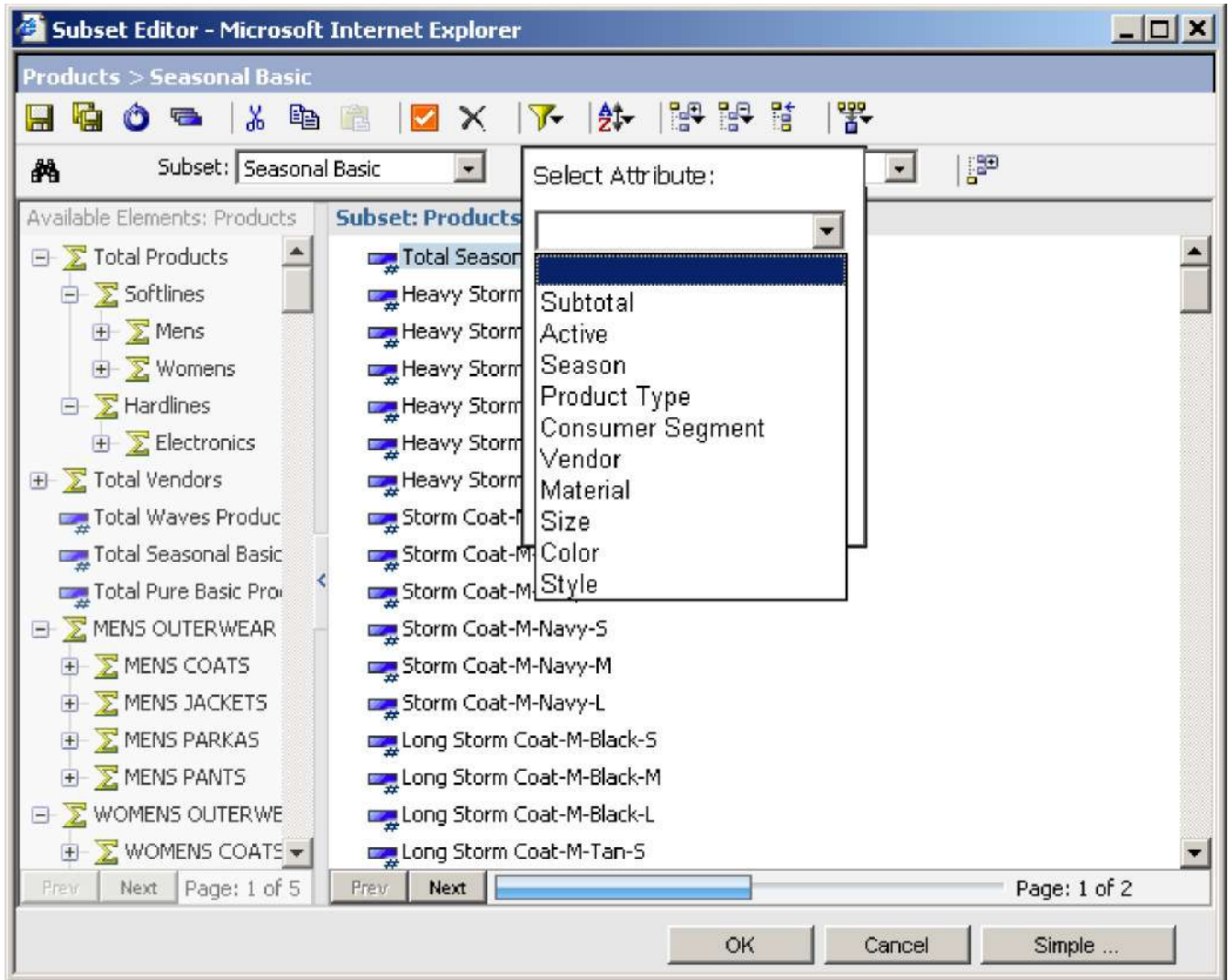
Merchant Plan Input Seasonal 选项卡的默认视图会显示所有的季节性产品，但用户可以根据模型中的各种产品属性限制产品清单。在这里，我们会演示用户如何重新选择产品清单，从而仅显示黑色产品。用户须首先点击 Seasonal Basic [Products] 尺寸旁边的下拉箭头。然后打开 Subset Editor。



用户可以点击 Advanced 按钮，打开。

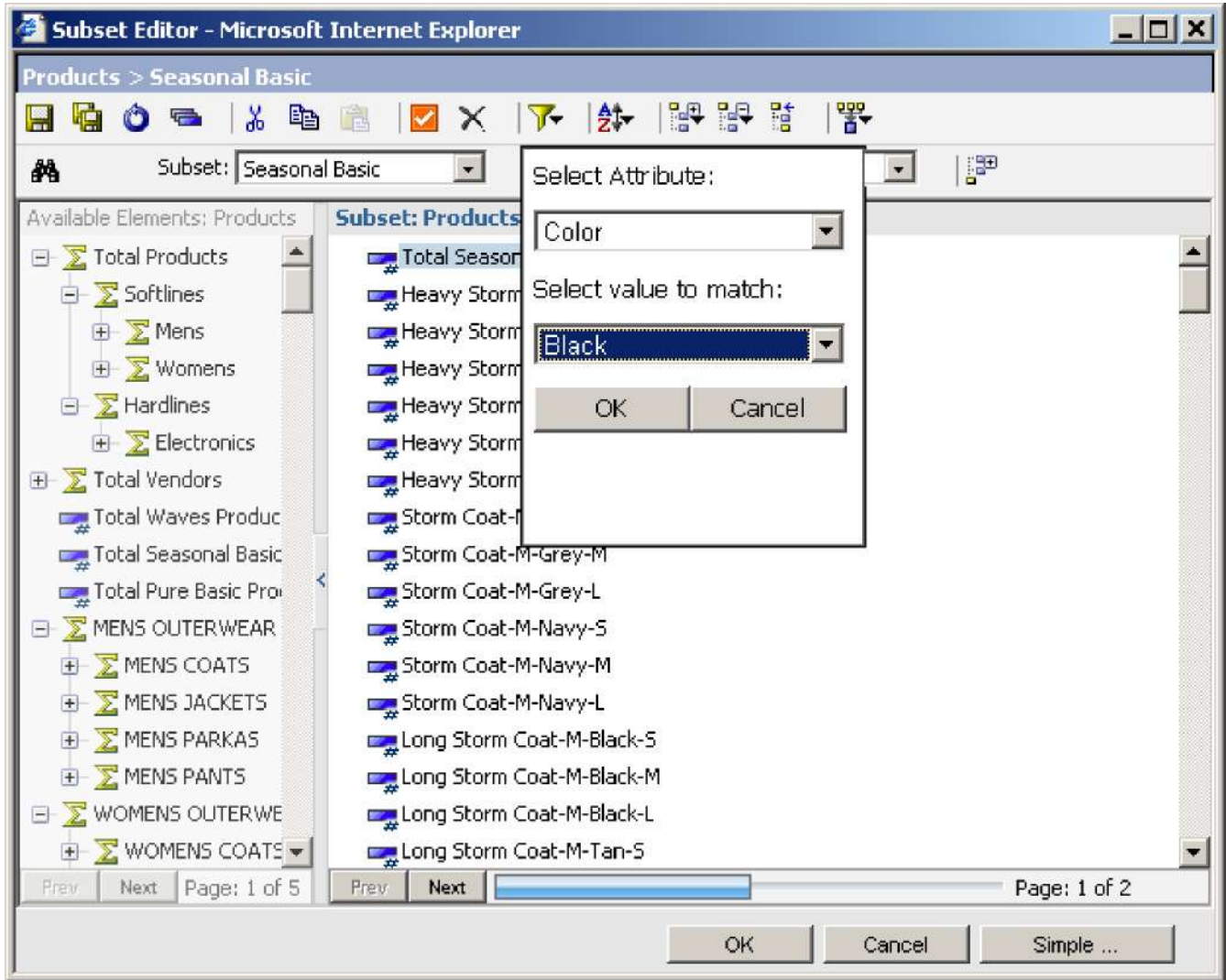


点击 filter 图标，用户便可以选择按级别、属性还是通配符执行过滤。在选择 **Filter by Attribute** 后，用户便能够查看可用属性列表。

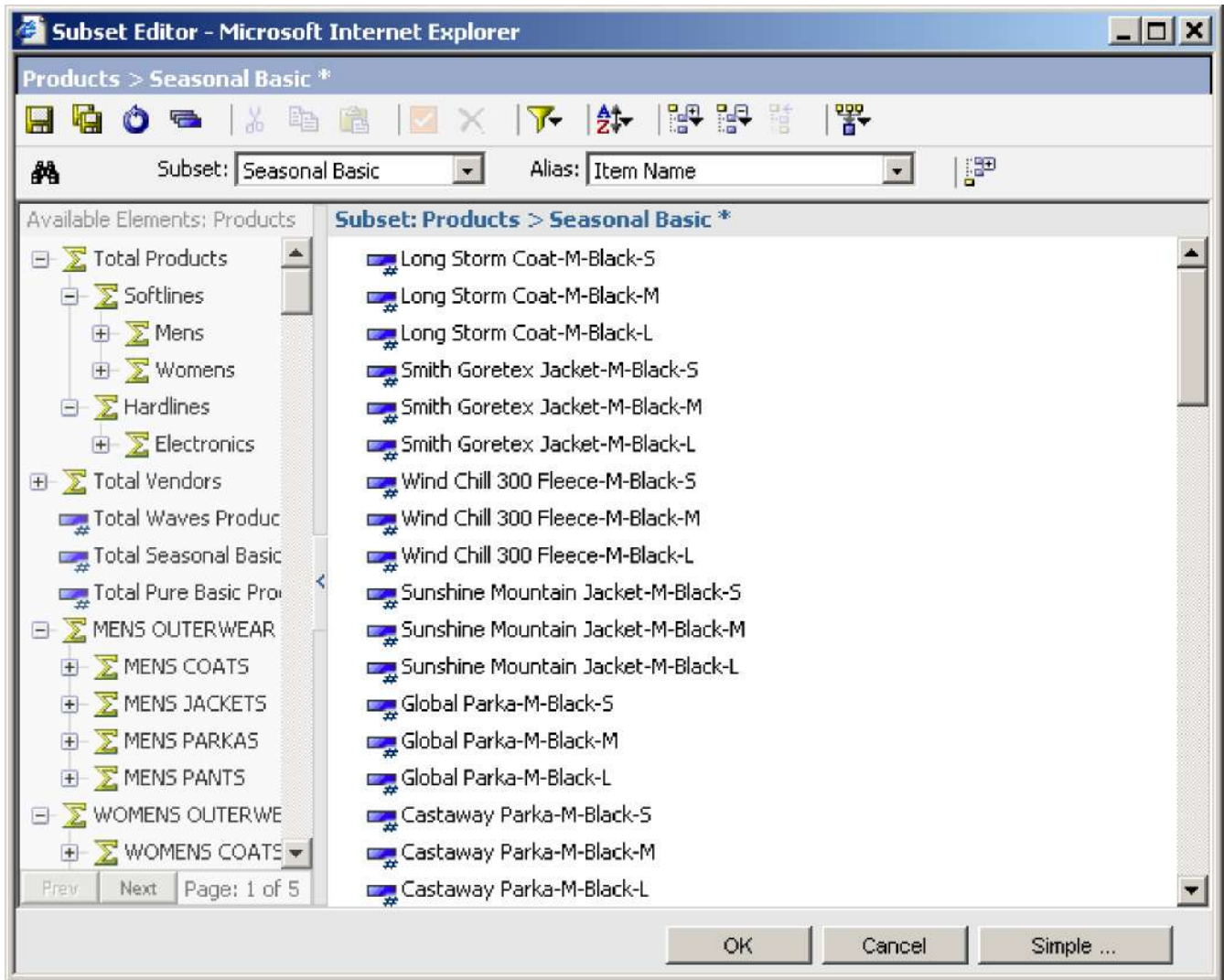




用户可以按照显示的任何属性进行过滤，但在本例中，用户选择了 **Color**，并打开了提供产品属性可用颜色的下拉框。用户选择 **Black** 并点击 **OK**。



结果会仅显示黑色产品清单。



点击 **OK**，返回 Merchant Plan Input Seasonal 选项卡，仅查看黑色产品。相同的功能也可用于按照供应商、样式、材料或其他任何产品属性进行规划。

The screenshot shows the 'Merchant Plan Input Seasonal' tab in the Retail Assortment Management application. The table displays various product categories and their associated metrics. The columns include PY Sales Category Avg, PY Avg Sales Price Per Unit Category Avg, PY Units Category Avg, Sales, Average Sales Price per Unit, Units, Season, Season Start Week, and Season End Week. The rows list products such as Long Storm Coat-M-Black-S, Smith Goretex Jacket-M-Black-S, Wind Chill 300 Fleece-M-Black-S, and others, with their respective sales and pricing data.

	PY Sales Category Avg	PY Avg Sales Price Per Unit Category Avg	PY Units Category Avg	Sales	Average Sales Price per Unit	Units	Season	Season Start Week	Season End Week	
Long Storm Coat-M-Black-S	51,036.46	71.14	717	93,960.00	75.00	1,253	Spring 2010	Week 1 2010	Week 26 2010	Bas
Long Storm Coat-M-Black-M	51,036.46	71.14	717	97,875.00	75.00	1,305	Spring 2010	Week 1 2010	Week 26 2010	Bas
Long Storm Coat-M-Black-L	51,036.46	71.14	717	101,790.00	75.00	1,357	Spring 2010	Week 1 2010	Week 26 2010	Bas
Smith Goretex Jacket-M-Black-S	39,474.27	78.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Smith Goretex Jacket-M-Black-M	39,474.27	78.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Smith Goretex Jacket-M-Black-L	39,474.27	78.25	504	58,000.00	125.00	464	Fall 2009	Week 27 2009	Week 52 2009	Flat
Wind Chill 300 Fleece-M-Black-S	39,474.27	78.25	504	78,300.00	75.00	1,044	Spring 2010	Week 1 2010	Week 26 2010	Flat
Wind Chill 300 Fleece-M-Black-M	39,474.27	78.25	504	78,300.00	75.00	1,044	Spring 2010	Week 1 2010	Week 26 2010	Flat
Wind Chill 300 Fleece-M-Black-L	39,474.27	78.25	504	78,300.00	75.00	1,044	Spring 2010	Week 1 2010	Week 26 2010	Flat
Sunshine Mountain Jacket-M-Black-S	39,474.27	78.25	504	58,000.00	120.00	483	Spring 2009	Week 1 2009	Week 26 2009	Flat
Sunshine Mountain Jacket-M-Black-M	39,474.27	78.25	504	58,000.00	120.00	483	Spring 2009	Week 1 2009	Week 26 2009	Flat
Sunshine Mountain Jacket-M-Black-L	39,474.27	78.25	504	58,000.00	120.00	483	Spring 2009	Week 1 2009	Week 26 2009	Flat
Global Parka-M-Black-S	57,835.42	117.14	494	78,300.00	110.00	712	Spring 2010	Week 1 2010	Week 26 2010	Flat
Global Parka-M-Black-M	57,835.42	117.14	494	78,300.00	110.00	712	Spring 2010	Week 1 2010	Week 26 2010	Flat
Global Parka-M-Black-L	57,835.42	117.14	494	78,300.00	110.00	712	Spring 2010	Week 1 2010	Week 26 2010	Flat
Castaway Parka-M-Black-S	57,835.42	117.14	494	79,750.00	100.00	798	Fall 2010	Week 27 2010	Week 52 2010	Flat
Castaway Parka-M-Black-M	57,835.42	117.14	494	79,750.00	100.00	798	Fall 2010	Week 27 2010	Week 52 2010	Flat
Castaway Parka-M-Black-L	57,835.42	117.14	494	79,750.00	100.00	798	Fall 2010	Week 27 2010	Week 52 2010	Flat
Sunshine Parka-M-Black-S	57,835.42	117.14	494	58,000.00	90.00	644	Spring 2009	Week 1 2009	Week 26 2009	Flat
Sunshine Parka-M-Black-M	57,835.42	117.14	494	58,000.00	90.00	644	Spring 2009	Week 1 2009	Week 26 2009	Flat
Sunshine Parka-M-Black-L	57,835.42	117.14	494	58,000.00	90.00	644	Spring 2009	Week 1 2009	Week 26 2009	Flat
Sunshine Parka Pro-M-Black-S	57,835.42	117.14	494	78,300.00	100.00	783	Spring 2010	Week 1 2010	Week 26 2010	Flat
Sunshine Parka Pro-M-Black-M	57,835.42	117.14	494	78,300.00	100.00	783	Spring 2010	Week 1 2010	Week 26 2010	Flat
Sunshine Parka Pro-M-Black-L	57,835.42	117.14	494	78,300.00	100.00	783	Spring 2010	Week 1 2010	Week 26 2010	Flat
Sunshine Parka Sport-M-Black-S	57,835.42	117.14	494	79,750.00	100.00	798	Fall 2010	Week 27 2010	Week 52 2010	Flat
Sunshine Parka Sport-M-Black-M	57,835.42	117.14	494	79,750.00	100.00	798	Fall 2010	Week 27 2010	Week 52 2010	Flat
Sunshine Parka Sport-M-Black-L	57,835.42	117.14	494	79,750.00	100.00	798	Fall 2010	Week 27 2010	Week 52 2010	Flat
Hampton Roads Goretex Coat-W-Black-S	40,887.00	80.53	508	79,750.00	100.00	798	Fall 2010	Week 27 2010	Week 52 2010	Flat

## Merchant Plan Input Basic

在规划基本产品类型时，用户将看到 **Prior Year Sales**、**Prior Year Average Sales Price per Unit** 及 **Prior Year Units**，并可以输入本年度和下年度销售额、单位平均销售价格以及计算用的单位量。用户还可输入季节性概要信息将数据分配至各周。可供使用的概要信息为 **Prior Year Category Average** 或 **Two Year Category Average**。该模型还会将企业指导百分比应用至所有其他财务计划措施，为这些产品提出整体商业计划。结果可在 Merchant Plan 选项卡中查看，并且用户可以在该选项卡上覆盖按周计算的单位或任何百分比。

	2008 Sales	2008 Average Sales Price per Unit	2008 Units	2009 Sales	2009 Average Sales Price per Unit	2009 Units	2010 Sales	2010 Average Sales Price per Unit	2010 Units	Seasonality Profile
Total Pure Basic Products	7,462,800.00	1,099.25	6,789	8,350,000.00	1,124.00	7,429	8,550,000.00	1,148.95	7,442	
WaveTV 24 Colour-Silver-O	1,361,600.00	800.00	1,702	1,550,000.00	625.00	1,879	1,600,000.00	850.00	1,892	Prior Year Category Average
WaveTV 27 Colour-Silver-O	1,702,000.00	1,000.00	1,702	1,900,000.00	1,025.00	1,854	1,950,000.00	1,050.00	1,857	Prior Year Category Average
WaveTV 33 Colour-Black-O	2,038,800.00	1,200.00	1,699	2,250,000.00	1,225.00	1,837	2,300,000.00	1,250.00	1,840	Two Year Category Average
WaveTV 36 Colour-Black-O	2,360,400.00	1,400.00	1,686	2,650,000.00	1,425.00	1,860	2,700,000.00	1,450.00	1,862	

在规划波动产品类型时，用户可以输入 **Sales**、**Average Sales Price per Unit**、**Season Start Week**、**Season Length in Weeks** 及 **Seasonality Profile**。计算单位和季节结束周。模型会根据选定的季节性概要信息确定计划销售的比例，以及应用于 6 个季节性概要信息每个阶段的单位，然后将数据分配至该阶段的各周。该模型还会将企业指导百分比应用至所有其他财务计划措施，为这些产品提出整体商业计划。结果可在 Merchant Plan 选项卡中查看，并且用户可以在该选项卡上覆盖按周计算的单位或任何百分比。

Rows:	Columns:	Context:					
Waves [Products]	Waves [Merchant Plan Input]	Original Plan [Versions]					
		Division 1 [Divisions]					
	Sales	Average Sales Price per Unit	Units	Season Start Week	Season Length in Weeks	Season End Week	Seasonality Profile
Total Waves Products	84,000.00	133.86	628		26	Week 25 2007	
Double Goretex Coat-M-Navy-S	4,000.00	100.00	40	Week 31 2009	20	Week 50 2009	Flat
Double Goretex Coat-M-Navy-M	4,000.00	100.00	40	Week 23 2009	20	Week 42 2009	Flat
Double Goretex Coat-M-Navy-L	4,000.00	100.00	40	Week 31 2009	5	Week 35 2009	Flat
Double Goretex Coat-M-Black-S	4,000.00	100.00	40	Week 31 2010	20	Week 50 2010	Flat
Double Goretex Coat-M-Black-M	4,000.00	100.00	40	Week 31 2009	20	Week 50 2009	Flat
Double Goretex Coat-M-Black-L	4,000.00	100.00	40	Week 31 2009	20	Week 50 2009	Flat
Gamma PDA-2010-Black-O	15,000.00	150.00	100	Week 23 2009	20	Week 42 2009	Flat
Gamma PDA-3001-White-O	15,000.00	150.00	100	Week 23 2009	20	Week 42 2009	Flat
RipTide SS Tower-Black-O	15,000.00	160.00	94	Week 23 2009	20	Week 42 2009	Flat
RipTide XS Sub-Black-O	15,000.00	160.00	94	Week 23 2009	20	Week 42 2009	Flat

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## 财务计划

财务计划多维数据集存储实际数据，并汇总自顶向下的目标和商业预测。默认视图显示产品类别级的财务计划。用户可深入任何版本。用户可以存储数据并查看下至产品和周级别的数据。

Rows:	Columns:	Context:																	
Products [Products]	Financial Plan [Financial Plan]	Division 1 [Division]	Top Down Target [Version]	2009 Total [Weeks]															
					Gross Sales	Returns	Returns %	Promotions	Promotions %	Promotion A	Promotion A %	Promotion B	Promotion B %	Markdowns	Markdowns %	Markdown A	Markdown A %	Markdown B	Markdown B %
Total Products					20,534,734	1,232,084	6.0%	3,205,557	16.0%	1,232,084	6.0%	2,053,473	10.0%	2,074,863	14.0%	2,053,473	10.0%	821,389	
Softlines					9,141,471	540,031	5.9%	1,462,635	16.0%	548,488	6.0%	914,147	10.0%	1,279,806	14.0%	914,147	10.0%	365,659	
Mens					5,704,840	337,300	5.9%	912,774	16.0%	342,290	6.0%	570,484	10.0%	798,678	14.0%	570,484	10.0%	228,194	
MENS OUTERWEAR					5,704,840	337,300	5.9%	912,774	16.0%	342,290	6.0%	570,484	10.0%	798,678	14.0%	570,484	10.0%	228,194	
Womens					3,436,631	202,732	5.9%	549,861	16.0%	206,198	6.0%	343,663	10.0%	481,128	14.0%	343,663	10.0%	137,465	
WOMENS OUTERWEAR					3,436,631	202,732	5.9%	549,861	16.0%	206,198	6.0%	343,663	10.0%	481,128	14.0%	343,663	10.0%	137,465	
Hardlines					11,393,263	692,053	6.1%	1,822,922	16.0%	683,596	6.0%	1,139,326	10.0%	1,595,057	14.0%	1,139,326	10.0%	455,731	
Electronics					11,393,263	692,053	6.1%	1,822,922	16.0%	683,596	6.0%	1,139,326	10.0%	1,595,057	14.0%	1,139,326	10.0%	455,731	
Consumer Electronics					1,187,904	70,107	5.9%	190,065	16.0%	71,274	6.0%	118,790	10.0%	166,307	14.0%	118,790	10.0%	47,516	
Home Theatre					10,205,359	621,945	6.1%	1,632,857	16.0%	612,322	6.0%	1,020,536	10.0%	1,428,750	14.0%	1,020,536	10.0%	408,214	

## 一致性

这种一致性是财务计划数据的另一个角度，使自顶向下的目标与整体产品级别的商业预测保持一致。该计划百分比将商业预测显示为自顶向下目标的百分比。

The screenshot displays a web application window titled "Retail Assortment Management | Work InProgress | Division 1 - Microsoft Internet Explorer". The interface includes a navigation menu with options like "Assumptions", "Product Attributes", "Seasonality Profiles", "Top Down Target Input", "Merchant Plan Input Seasonal", "Merchant Plan Input Basic", "Merchant Plan Input Waves", "Merchant Plan", "Financial Plan", "Consensus", and "Strategic Stock Plan".

The main content area shows a table with the following data:

Rows:	Columns:	Context:		
Financial Plan [Financial Plan]	Versions [Versions]	Division 1 [Divisions]	Total Products [Products]	CY Total [Weeks]
	Top Down Target	Merchant Forecast	Variance	% of Plan
Gross Sales	20,534,734	21,437,515	902,781	104.4%
Returns	1,232,084	1,074,342	-157,742	87.2%
<b>Promotions</b>	<b>3,285,557</b>	<b>3,037,014</b>	<b>-248,543</b>	<b>92.4%</b>
Promotion A	1,232,084	1,042,107	-189,977	84.6%
Promotion B	2,053,473	1,994,907	-58,566	97.1%
<b>Markdowns</b>	<b>2,874,863</b>	<b>1,929,376</b>	<b>-945,486</b>	<b>67.1%</b>
Markdown A	2,053,473	1,071,876	-981,598	52.2%
Markdown B	821,389	857,501	36,111	104.4%
<b>Net Sales</b>	<b>13,142,229</b>	<b>15,396,783</b>	<b>2,254,553</b>	<b>117.2%</b>
COGS	8,624,588	9,646,882	1,022,294	111.9%
<b>Gross Margin</b>	<b>4,517,641</b>	<b>5,749,901</b>	<b>1,232,260</b>	<b>127.3%</b>
Shrinkage	410,695	422,809	12,115	102.9%
<b>Supply Chain Costs</b>	<b>2,464,168</b>	<b>1,071,788</b>	<b>-1,392,380</b>	<b>43.5%</b>
Distribution	2,053,473	643,064	-1,410,409	31.3%
Delivery	410,695	428,724	18,029	104.4%
<b>Gross Profit</b>	<b>1,642,779</b>	<b>4,255,304</b>	<b>2,612,525</b>	<b>259.0%</b>

Navigation controls at the bottom include "Top", "Page up", "Page down", "Bottom", "Page 1 of 1", and "Current Owner: Admin". The status bar shows "Done" and "Local intranet".



## 战略库存计划

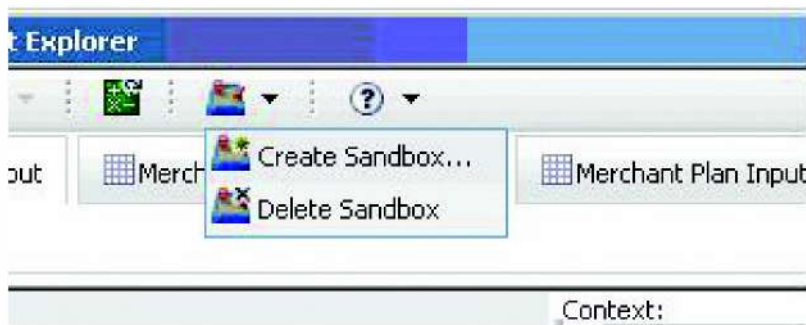
战略库存计划多维数据集存储实际库存数据，同时还可执行商业预测库存计算。从财务计划多维数据集中获取的销售量和单位容积均将用于库存计算。用户必须输入零售库存收货和产品级的库存收货单位。其他所有项目均从之前的模型选项卡中获取并计算。此多维数据集包含各种项目，如存货周转率、GMROI、开始和结束时的零售库存及成本。

	Beginning Inventory at Retail	Sales Value	Inventory Receipts at Retail	Permanent Markdown %	Permanent Markdown Value	Closing Inventory at Retail	Beginning Invent. Units
<b>Total Products</b>	4,979,273.03	21,437,514.79	22,091,909.63	0.09	1,988,271.87	5,574,772.33	36,2
<b>Softlines</b>	2,423,790.65	11,831,328.85	12,802,575.00	0.09	1,152,231.75	3,307,624.65	33,4
<b>Mens</b>	1,540,529.50	7,297,782.31	7,739,175.00	0.09	696,525.75	1,942,196.85	20,2
<b>MENS OUTERWEAR</b>	1,540,529.50	7,297,782.31	7,739,175.00	0.09	696,525.75	1,942,196.85	20,2
<b>MENS COATS</b>	833,651.40	1,689,044.62	1,744,875.00	0.09	157,038.75	384,457.05	4,9
Woodland Coat-M-Brown-S	0.00	0.00	0.00	0.00	0.00	0.00	
Woodland Coat-M-Brown-M	0.00	0.00	0.00	0.00	0.00	0.00	
Woodland Coat-M-Brown-L	0.00	0.00	0.00	0.00	0.00	0.00	
Woodland Coat-M-Black-S	0.00	0.00	0.00	0.00	0.00	0.00	
Woodland Coat-M-Black-M	0.00	0.00	0.00	0.00	0.00	0.00	
Woodland Coat-M-Black-L	0.00	0.00	0.00	0.00	0.00	0.00	
Field Coat-M-Tan-S	1,711.80	0.00	0.00	0.00	0.00	1,711.80	
Field Coat-M-Tan-M	1,722.60	0.00	0.00	0.00	0.00	1,722.60	
Field Coat-M-Tan-L	1,738.80	0.00	0.00	0.00	0.00	1,738.80	
Field Coat-M-Grey-S	1,749.60	0.00	0.00	0.00	0.00	1,749.60	
Field Coat-M-Grey-M	1,722.60	0.00	0.00	0.00	0.00	1,722.60	
Field Coat-M-Grey-L	1,733.40	0.00	0.00	0.00	0.00	1,733.40	
Double Goretex Coat-M-Navy-S	0.00	4,000.00	4,000.00	0.09	360.00	0.00	
Double Goretex Coat-M-Navy-M	0.00	4,000.00	4,000.00	0.09	360.00	0.00	
Double Goretex Coat-M-Navy-L	0.00	4,000.00	4,000.00	0.09	360.00	0.00	
Double Goretex Coat-M-Black-S	0.00	0.00	0.00	0.00	0.00	0.00	
Double Goretex Coat-M-Black-M	0.00	4,000.00	4,000.00	0.09	360.00	0.00	
Double Goretex Coat-M-Black-L	0.00	4,000.00	4,000.00	0.09	360.00	0.00	
Light Rain Coat-M-Olive-S	0.00	0.00	0.00	0.00	0.00	0.00	
Light Rain Coat-M-Olive-M	0.00	0.00	0.00	0.00	0.00	0.00	
Light Rain Coat-M-Olive-L	0.00	0.00	0.00	0.00	0.00	0.00	
Light Rain Coat-M-Tan-S	0.00	0.00	0.00	0.00	0.00	0.00	
Light Rain Coat-M-Tan-M	0.00	0.00	0.00	0.00	0.00	0.00	

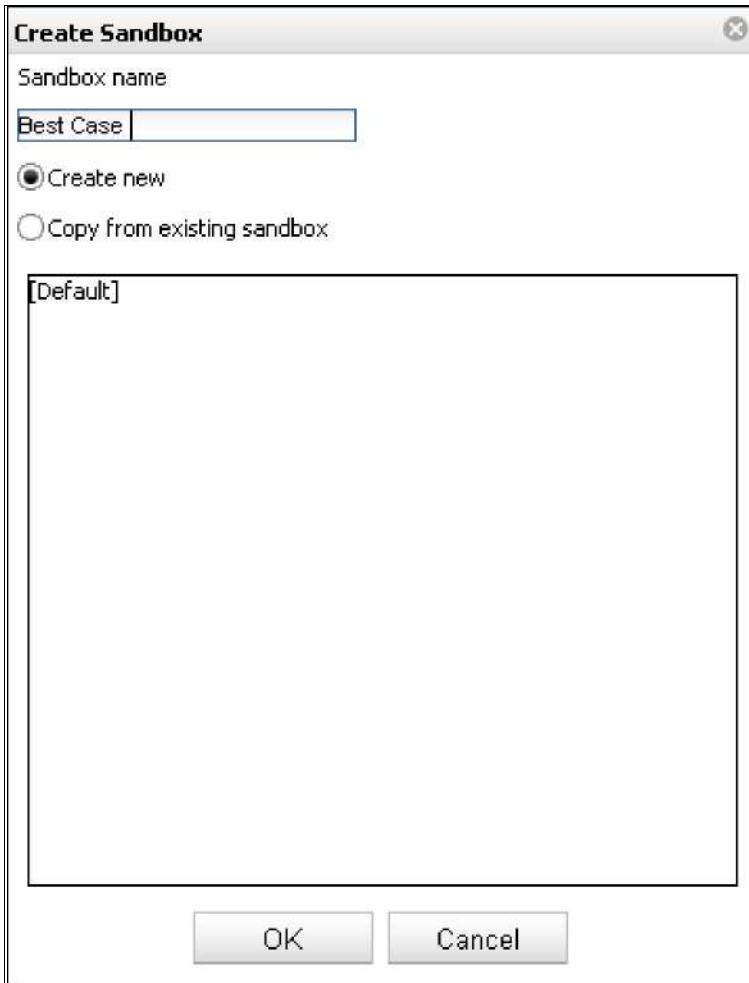
通过转置行和列，您便可以看到行中的 Strategic Stock Plan 选项卡中的完整计算表。

Rows:	Columns:	Context:								
Strategic Stock Plan (Strategic Stock Plan)	Products: Default (Products)	Merchant Forecast (Merchant Forecast)   Division 1 (Division)   CY Total (Weeks)								
<b>Total Products</b>	softlines									
	Mens									
	MENS OUTERWEAR									
	MENS COATS									
	Woodland Coat-M-Brown-S									
	Woodland Coat-M-Brown-M									
	Woodland Coat-M-Brown-L									
	Woodland Coat-M-Black-S									
	Woodland Coat-M-Black-M									
	Woodland Coat-M-Black-L									
Beginning Inventory at Retail	4,979,273.03	2,423,790.65	1,540,529.50	1,540,529.50	333,651.40	0.00	0.00	0.00	0.00	0.00
Sales Value	21,437,514.79	11,831,328.85	7,297,782.31	7,297,782.31	1,689,044.62	0.00	0.00	0.00	0.00	0.00
Inventory Receipts at Retail	22,091,909.63	12,802,575.00	7,739,175.00	7,739,175.00	1,744,875.00	0.00	0.00	0.00	0.00	0.00
Permanent Markdown %	0.09	0.09	0.09	0.09	0.09	0.00	0.00	0.00	0.00	0.00
Permanent Markdown Value	1,988,271.87	1,152,231.75	696,525.75	696,525.75	157,038.75	0.00	0.00	0.00	0.00	0.00
Closing Inventory at Retail	5,574,772.33	3,307,624.65	1,942,196.85	1,942,196.85	384,457.05	0.00	0.00	0.00	0.00	0.00
Beginning Inventory Units	36,291.26	33,446.78	20,295.66	20,295.66	4,935.26	0.00	0.00	0.00	0.00	0.00
Inventory Receipts Units	177,870.73	167,170.95	88,926.89	88,926.89	20,726.00	0.00	0.00	0.00	0.00	0.00
Units Sold	165,965.31	154,798.81	85,241.39	85,241.39	20,180.26	0.00	0.00	0.00	0.00	0.00
Closing Inventory Units	48,196.68	45,818.92	23,981.15	23,981.15	5,481.00	0.00	0.00	0.00	0.00	0.00
Beginning Inventory Margin %	0.49	0.49	0.48	0.49	0.49	0.00	0.00	0.00	0.00	0.00
Retail Sales Margin %	0.45	0.45	0.45	0.45	0.45	0.00	0.00	0.00	0.00	0.00
Inventory Receipts Margin %	0.46	0.46	0.46	0.46	0.46	0.00	0.00	0.00	0.00	0.00
Sales Cost Value	9,646,881.66	5,324,097.98	3,284,002.04	3,284,002.04	760,070.08	0.00	0.00	0.00	0.00	0.00
Inventory Receipts Cost Value	9,941,359.33	5,761,158.75	3,462,628.75	3,462,628.75	795,193.75	0.00	0.00	0.00	0.00	0.00
Inventory Turnover	4.06	4.13	4.19	4.19	4.70	0.00	0.00	0.00	0.00	0.00
GMIROI	2.20	2.22	2.26	2.26	2.54	0.00	0.00	0.00	0.00	0.00

TM1 Contributor 具有内置功能，可对假设分析创建附加场景。用户可以使用多个场景或沙箱，然后选择重新提交哪一个作为最终计划。若要创建新的沙箱，用户须从 Sandbox Toolbar 下拉框中选择 Create Sandbox。



必须输入新的沙箱名称。在这个例子中，新沙箱名称是“Best Case”。



现在，您可以从沙箱下拉框中选择 Default 或 Best Case 沙箱，对两种场景模型执行更新，比较不同场景的结果，并在准备妥当后，交托或提交一个将要与其他部门计划整合的预测版本。



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