

# Budgeting & Forecasting using PerformancePoint Server

**Client:** World's largest ISV

**Location:** USA

## Client Description

The client is the world's largest software vendor with multiple software solutions and services offerings that are commonly used across the globe.

## Business Need

The client is a multi-billion dollar software giant. One of their business groups, that provides various leading online services to consumers, wanted to replace their existing budgeting and forecasting solution. The existing system was not able to scale to changing business requirements and incurred very high cost for maintenance. They wanted to support new templates for distribution and search; and also wanted the ability to support 18 months rolling forecasting.

## Solution Offered

Blue Star Infotech studied the existing system functionality in detail and interviewed users to fine tune the requirements of the new system. It then implemented the desired functionality leveraging the out of box functionalities in Performance Point Server Product.

The solution involved 5 major steps:

- Build the dimensions, fact tables and cubes in PerformancePoint Business Modeler.
- Write Extract, Transform and Load Routines to bring the Actuals, FY08 Budget and historical Forecast data into PerformancePoint Server.
- Create data entry templates for entering FY08 Forecast and FY09 Budget figures using PerformancePoint Excel Add In.
- Write Business Rules in PerformancePoint Business Modeler to compute different metrics and revenue values.
- Build Validation Reports using Excel Pivot functionality and Scorecard Reports using Excel and Business Scorecard Manager.

## TECHNOLOGY

- PerformancePoint Server 2007
- SQL Server 2005
- SQL Server Analysis Services
- SQL Server Integration Services
- Excel Pivots
- Business Scorecard Manager

## Benefits to the Client

- Improved data quality and timeliness of data used as input for forecasting
- Reduced costs, in terms of time and money, for maintenance and support of the forecasting system
- Cost savings associated with external vendors for software and services
- Removal of artificial user limitations caused by seat-based licensing of the forecasting tool
- Alignment with the corporate Enterprise Data Architecture (EDA) and Enterprise Application Integration (EAI) strategies
- Ultimately, improved corporate-wide system integration with corporate and other business groups' forecasting models using common tools
- Familiar and easy to use Excel interface for PerformancePoint Server Input Forms.

### For more information about Blue Star Infotech:

USA +1-(408) 235-1640  
UK +44-020-8538 2710  
India +91-22-2490 1870

Email: [globalha@bsil.com](mailto:globalha@bsil.com)

[www.bsil.com](http://www.bsil.com)