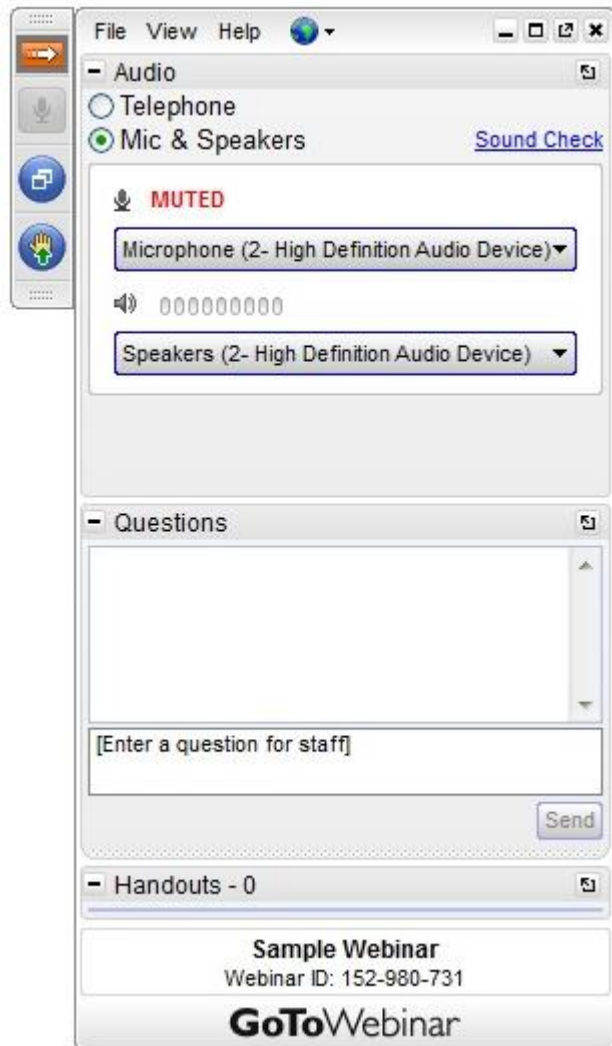# CAFE (Cognos Analysis for Excel)

Using Excel with Cognos BI and TM1

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Presentation Slide Deck on www.senturus.com

Today's Agenda

- Presenter Introduction
- Overview – What is CAFE?
- CAFE Demonstration and Use Cases
- Senturus Introduction
- Special Offers
- Additional Resources
- Q & A

Introduction: Today's Presenters

Ken O'Boyle

Solution Architect

Senturus, Inc.

Jim Frazier

Vice President of Client Solutions

Senturus, Inc.

Poll Question #1

With which product do you have the most experience?

- Cognos Business Intelligence

- Cognos TM1

- Microsoft Excel

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Poll Question #2

What is the status of CAFE in your organization?

- Currently using CAFE

- Considering CAFE

- No plans to use CAFE
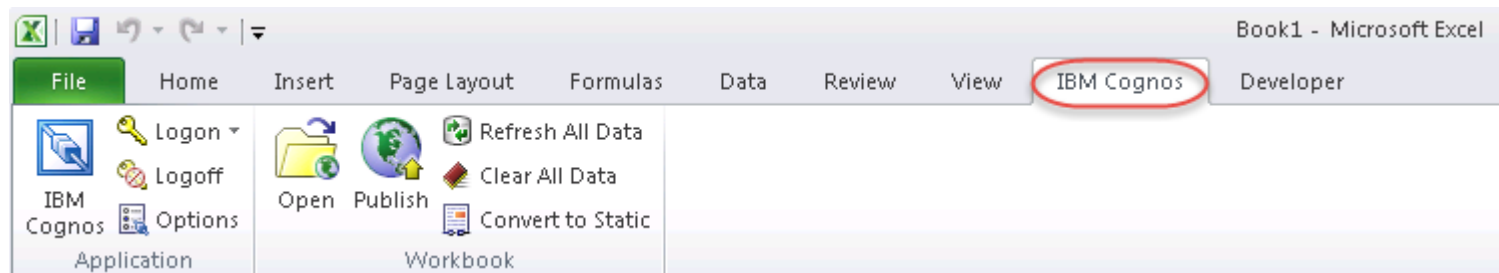
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OVERVIEW

What is CAFE?

Overview

What is CAFE?

- Excel add-in (IBM Cognos tab/ribbon)

- Provides analytical and report authoring capabilities against Cognos BI packages and TM1 cubes

- Evolving as the successor to TM1 Perspectives, the legacy add-in for TM1 forms and reports

- Productivity tool to streamline report writing tasks

Overview

Why use CAFE?

- Excel is the most widely used reporting tool with estimates of nearly 1 billion users. Many reports will be done in Excel; CAFE can make the task more productive, reliable and accurate.

- Leveraging Excel skills can broaden authoring and self-service capabilities within the organization.

- Enables IT/BI groups to focus on high priority, high impact projects, and delegate some report writing to business users.

- Best of both worlds: Excel ease-of-use, cell-based calculations and formatting, charting, print precision combined with refreshable links to governed, system of record data.

Overview

CAFE vs. TM1 Perspectives

Feature	CAFE	Perspectives
WAN Performance	Good	Citrix or equivalent required
Write back, sandboxes, spreading, data entry shortcuts	Yes	Yes
Reporting	Yes	Yes
Active Forms (dynamic rows)	No	Yes
Development Capabilities	Limited	Full

CAFE Demonstration
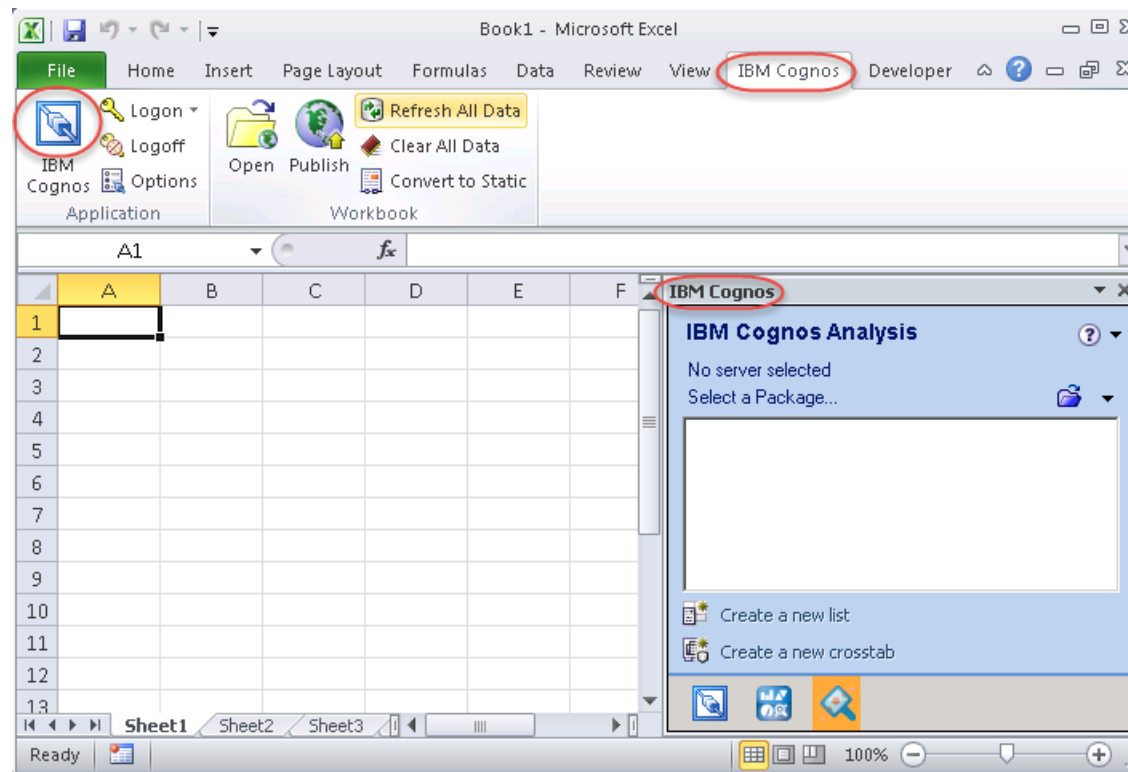
Demonstration

CAFE Modes

- Exploration – List or Crosstab (BI and TM1)

- Cell-based (BI)

- Flex View (TM1)
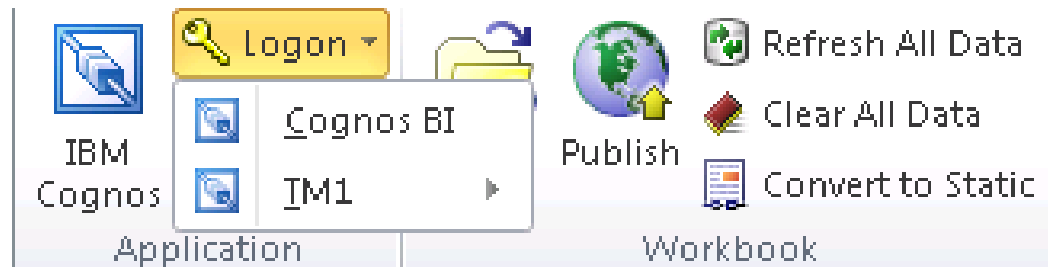
Demonstration

Launch CAFE

- Click IBM Cognos icon

- IBM Cognos panel opens to access server content

Demonstration

Logon

- Logon to BI, TM1 or both

- Functionality is based on the selected system

Demonstration

Exploration Overview

- Works with both BI and TM1 data sources

- Behaves like Analysis Studio/TM1 Cube viewer within Excel

- Limit: one exploration per worksheet /tab

- Each exploration can reference a different data source within a single Excel Workbook

- Governed data can be combined with local, cell-level calculations, formatting and commentary

- Starting point for other modes

Demonstration

Exploration Example:

- Multi-page report referencing a BI and a TM1 data source
- Excel formatting, chart and commentary
- Excel page setup / print functionality
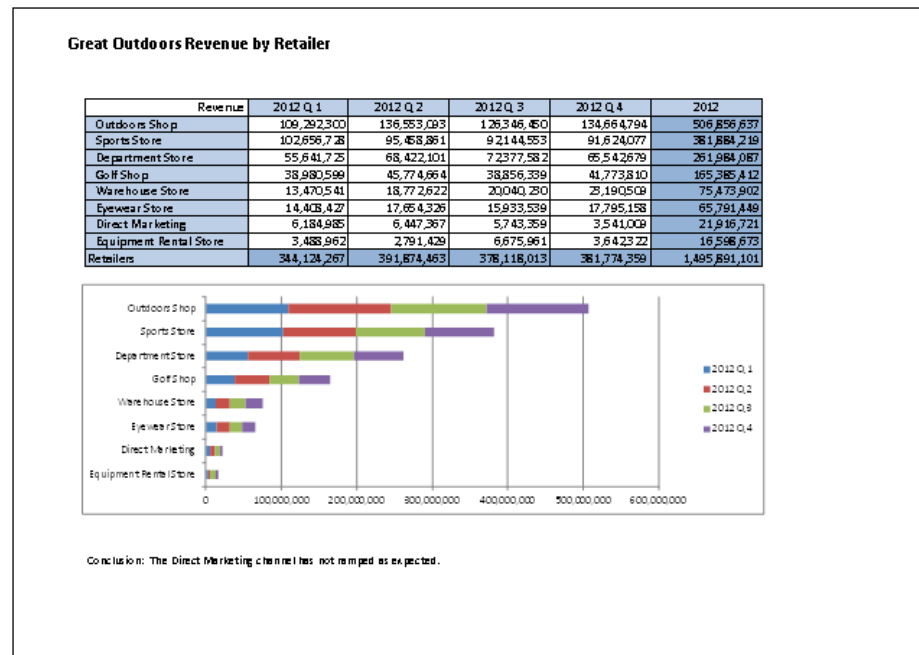
Demonstration

Cell-based Overview

- Works with BI sources only (note: TM1 can be configured as a BI source)

- Data from multiple sources can be included on a single sheet

- Data access implemented with Excel functions (COGNAME and COGVAL)

- No IBM Cognos toolbar, limited right-mouse menu

Demonstration

Cell-based Example

- Multiple data sources on a single sheet

Quarterly Revenue by Retailer

Revenue	2012 Q 1	2012 Q 2	2012 Q 3	2012 Q 4	2012
Outdoors Shop	109,292,300.25	136,553,092.89	126,346,449.72	134,664,794.09	506,856,636.95
Sports Store	102,656,727.83	95,458,861.02	92,144,552.89	91,624,077.40	381,884,219.14
Department Store	55,641,725.01	68,422,101.00	72,377,581.63	65,542,679.39	261,984,087.03
Golf Shop	38,980,599.43	45,774,663.97	38,856,339.29	41,773,809.67	165,385,412.36
Warehouse Store	13,470,541.21	18,772,621.95	20,040,229.98	23,190,509.30	75,473,902.44
Eyewear Store	14,408,426.52	17,654,326.25	15,933,538.64	17,795,157.58	65,791,448.99
Direct Marketing	6,184,985.16	6,447,366.79	5,743,359.27	3,541,009.44	21,916,720.66
Equipment Rental Store	3,488,961.66	2,791,428.64	6,675,961.12	3,642,321.91	16,598,673.33
Retailers	344,124,267.07	391,874,462.51	378,118,012.54	381,774,358.78	1,495,891,100.90

Direct Marketing Plan

	2013 Q1 Budget V1	2013 Q2 Budget V1	2013 Q3 Budget V1	2013 Q4 Budget V1	2013 Budget V1
Quantity	23,562	10,586	19,244	103,273	156,665
Unit sale price	187.44	434.73	525.75	748.54	307.74
Commissionable Sales Revenue	1,453,324	2,244,986	4,643,655	39,870,601	48,212,566
Other Sales Revenue	149,817	173,757	221,403	465,440	1,010,418
GROSS SALES REVENUE	1,603,141	2,418,743	4,865,059	40,336,041	49,222,984
Volume Discount	48,703	73,481	147,800	1,225,409	1,495,394
Cash Discount	62,042	93,605	188,278	1,561,005	1,904,929

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Demonstration

Flex View Overview

- Works with TM1 sources only

- Ability to combine data from multiple cubes/servers on a single sheet

- Views can be linked to each other to share parameters

- TM1 functionality includes write back, spreading and sandboxes

- Excel cell-level calculations, formatting and commentary

Demonstration

Flex View Example:

- Multiple Flex Views on a single sheet
- Link context cells
- Asymmetric crosstab
- Excel formatting, calculations

| TOTAL COMPANY | | | | | |
| Dollars | | | | | |

	Q1	Q2	Q3	Q4	Total Year
	Actual	Actual	Forecast	Forecast	Forecast
Gross Sales Revenue	1,683,410,999	2,886,869,561	1,783,604,996	2,284,989,794	8,638,875,350
Franchise Fees	0	0	0	0	0
TOTAL REVENUE	1,683,410,999	2,886,869,561	1,783,604,996	2,284,989,794	8,638,875,350
Total Discounts and Allowances	100,096,605	155,669,616	92,641,379	127,791,227	476,198,827
Freight	103,609,815	161,133,360	95,892,917	132,276,443	492,912,536
TOTAL SALES DEDUCTIONS	203,706,420	316,802,977	188,534,296	260,067,670	969,111,363
NET REVENUE	1,479,704,578	2,570,066,584	1,595,070,699	2,024,922,124	7,669,763,987
Cost of Sales	1,112,040,175	1,907,029,795	1,079,162,057	1,382,522,640	5,480,754,667
GROSS PROFIT	367,664,404	663,036,790	515,908,642	642,399,485	2,189,009,320
Salaries	21,777,514	38,296,923	26,429,546	33,164,006	119,667,988
Benefits	33,558,909	55,617,821	0	0	89,176,729
Overheads	0	0	0	0	0
TOTAL EXPENSES	55,336,422	93,914,744	26,429,546	33,164,006	208,844,717
OPERATING INCOME	312,327,981	959,122,046	489,479,097	609,235,479	1,980,164,603
Depreciation	0	0	0	0	0
Amortization	7,684,425	7,684,425	7,799,691	7,799,691	30,968,231
Interest Expense	9,879,351	9,959,745	10,017,522	9,901,584	39,758,203
Income Taxes	38,049,603	40,734,114	37,127,075	37,635,646	153,546,438
DEPRECIATION, AMORTIZATION, INTEREST, TAXES	55,613,379	58,378,284	54,944,288	55,336,922	224,272,872
NET INCOME	256,714,603	510,743,762	434,534,809	553,898,557	1,755,891,731

TOTAL COMPANY					
TOTAL PRODUCTS					
NET SALES REVENUE					

	Q1	Q2	Q3	Q4	Total Year
	Actual	Actual	Forecast	Forecast	Forecast
Golf Shop	51,386,851	98,522,929	20,130,095	33,262,222	203,302,097
Department Store	371,247,324	357,694,799	292,236,019	322,170,650	1,343,348,791
Direct Marketing	67,029,056	165,836,280	83,832,078	141,302,640	458,000,054
Warehouse Store	92,055,344	81,174,070	64,316,468	89,085,730	326,631,612
Equipment Rental Store	1,661,282	40,899,074	2,739,688	0	45,300,044
Outdoors Shop	689,020,113	1,420,692,318	922,958,999	1,177,177,800	4,209,849,230
Eyewear Store	1,330,260	3,230,672	760,783	2,939,370	8,261,085
Sports Store	215,899,456	398,370,937	208,374,636	255,384,829	1,078,029,857
ALL CHANNELS	1,479,704,578	2,570,066,584	1,595,070,699	2,024,922,124	7,669,763,987

Conclusions

Conclusion

CAFE Advantages

- Enables IT to focus on data management and enterprise wide reporting, and delegate some report writing to business users

- Improves productivity

- Combines governed data with local data, calculations, formatting and commentary

- Easy to reference multiple data sources in a single workbook, and a single sheet in some cases

- Business users can overcome technically challenging authoring by leveraging Excel skills

Conclusion

CAFE Advice

- Train CAFE users on BI/TM1 exploration tools. Experience with Excel does not eliminate the need for Cognos BI or TM1 knowledge.

- Develop guidelines within your organization for when to use CAFE versus Cognos BI for report development.

- Leverage CAFE as tool for business users to prototype and provide specifications for BI report requests

- Do not use CAFE to download large data sets. There are more efficient ways to move large amounts of data to the desktop.

SENTURUS INTRODUCTION

Who we are

Senturus: Business Analytics Consultants
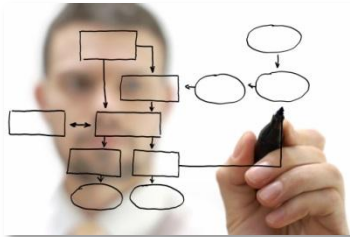
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Enterprise Planning

Predictive Analytics

C-Level Business Acumen

Deep Data Experience

Technical/Tool Expertise*

Project Management Rigor
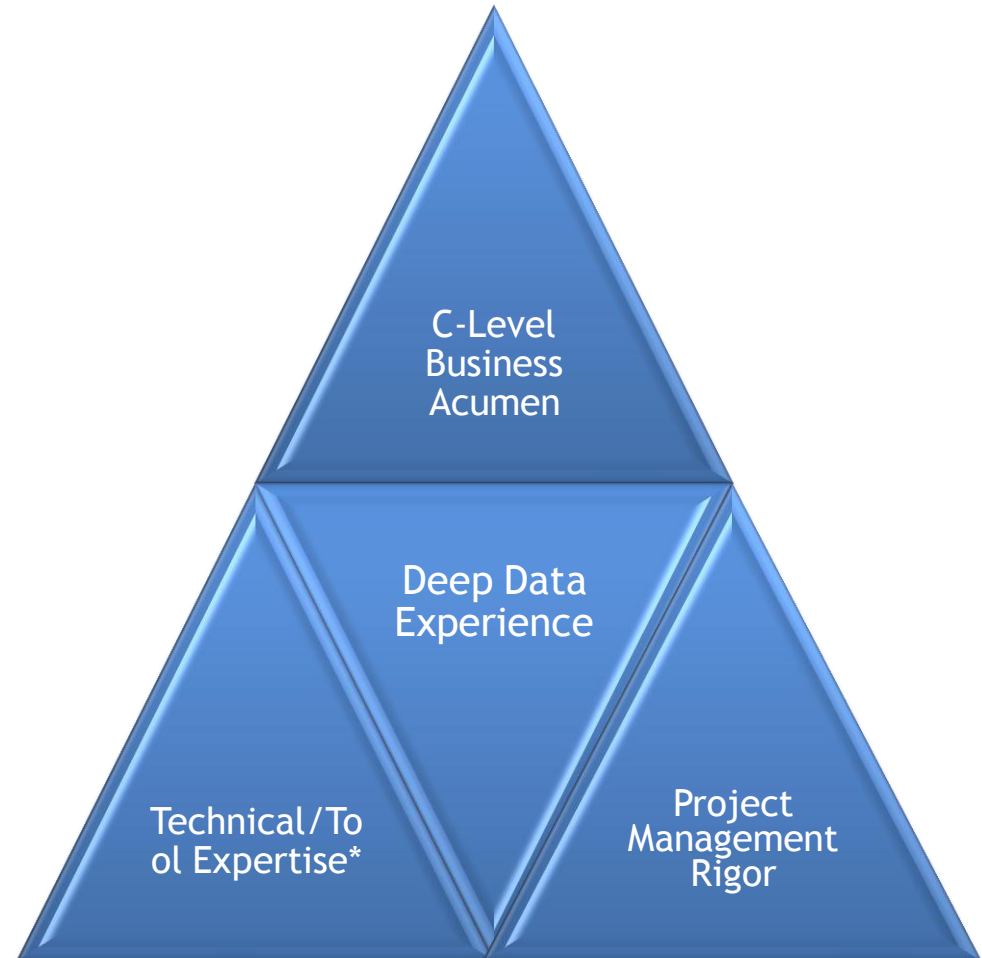
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Free CAFE Workshop

Customized demonstration of CAFE to your organization's business users

- Customized to your environment and user adoption issues

- Highlight how CAFE could address end user reporting challenges

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CAFE Quick Start Program

Includes

- CAFÉ workstation installation and configuration

- Customized documentation of the installation procedures for enterprise wide deployment

- Development of an initial CAFE workbook

- Publish to Cognos Connection

- Knowledge transfer session

<div align="center">All for only $1995</div>

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**For more details and prerequisites:
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Upcoming Events

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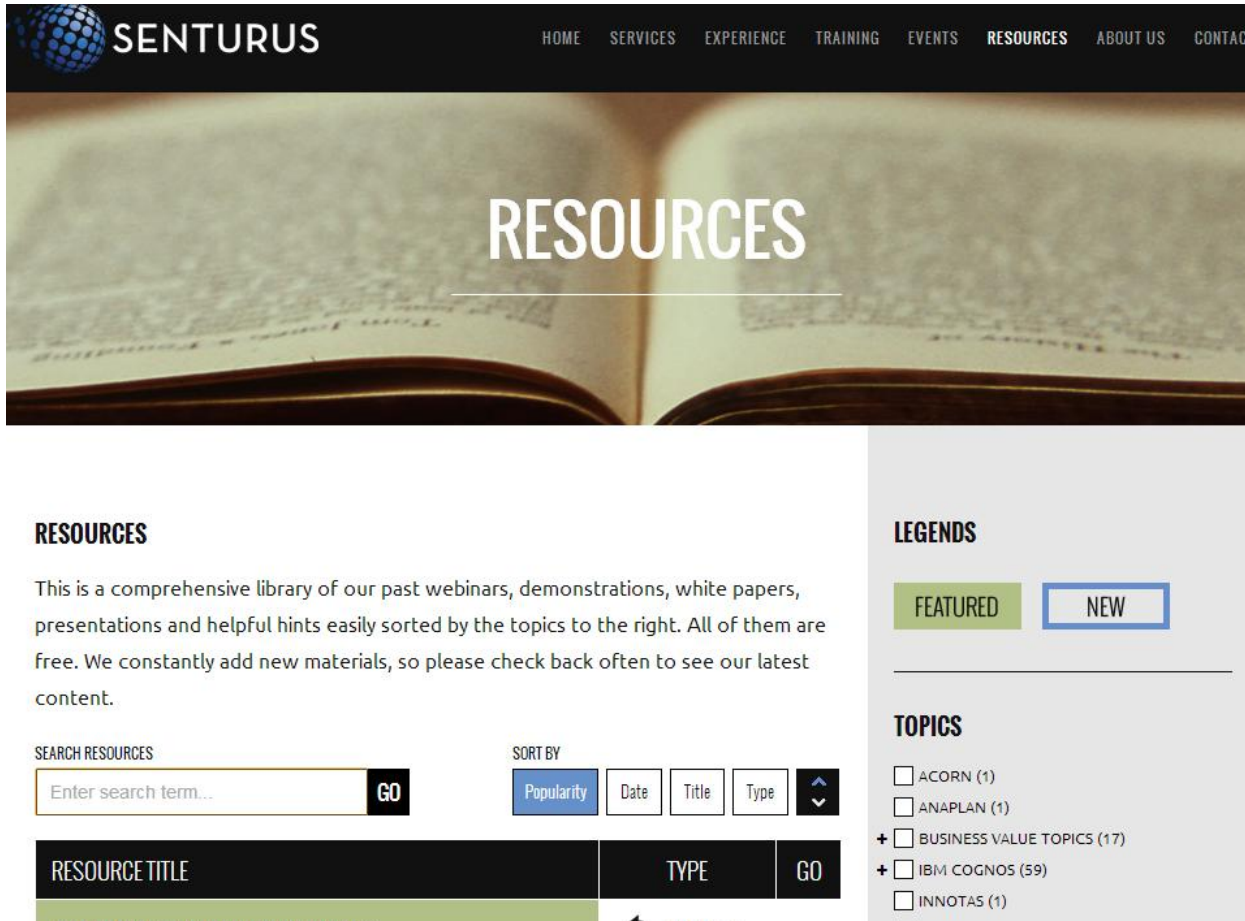
LEVERAGING COGNOS CONTENT IN MS OFFICE APPS

PROFESSIONAL REPORT AUTHORING FOR DASHBOARDS AND DESKTOP USE

Thursday, September 24, 2015 - 10am PT/1pm ET - 90 minutes

DETAILS

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