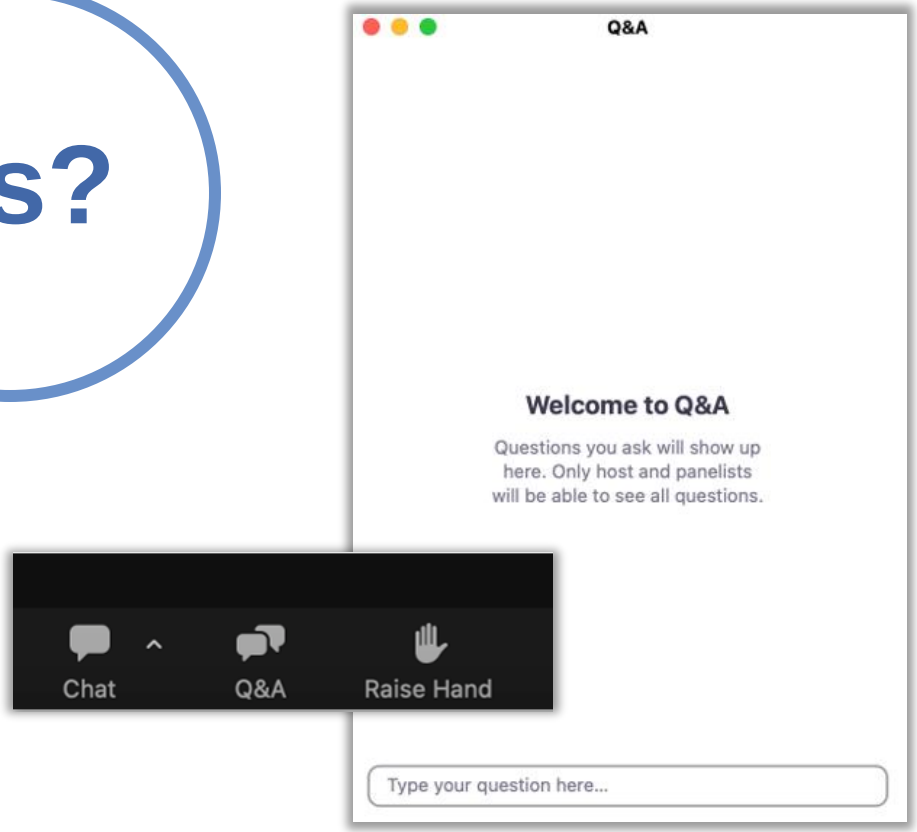
Cognos: Should I Stay or Should I Go?

Questions?

Click Q&A at the bottom of your screen



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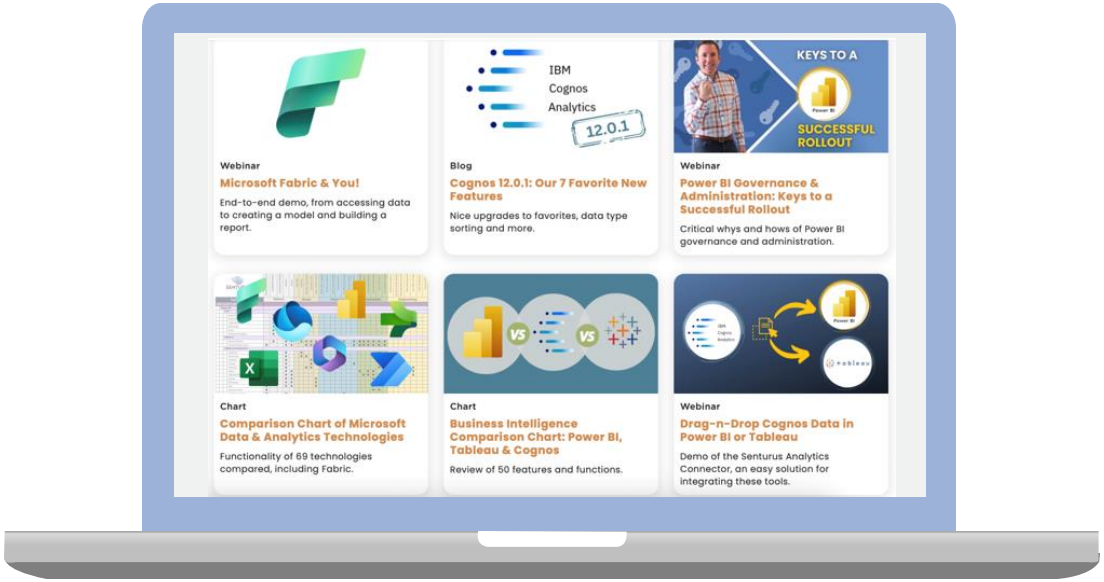
To get this presentation



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senturus.com/resources

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Agenda

- Introductions
- Industry trends
- Staying on Cognos
- Extending Cognos with cross-platforms
- Leave Cognos altogether
- Senturus overview and additional resources
- Q&A

Introductions

PEDRO INING
Senior BI Architect

DEVON REDDICK
Power BI Architect

STEVE REED-PITTMAN
Director of Enterprise Architecture and Engineering

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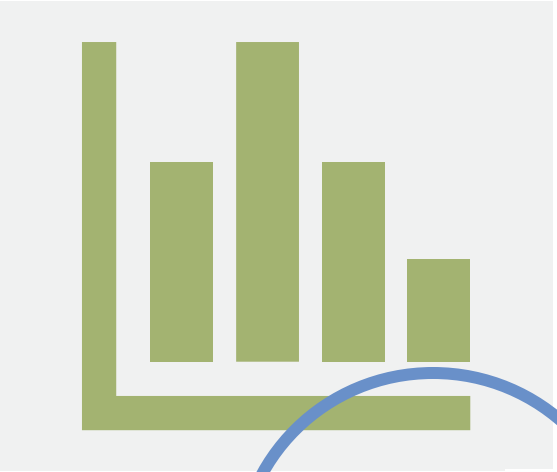

Poll

Which BI platform is your organization currently using? (Select all that apply)

- ○ Cognos
- ○ Power BI
- ○ Tableau
- ○ Other

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INDUSTRY TRENDS

Trends in modern BI

Data modernization as a cultural shift

It’s now as much a cultural shift as a technology shift

From a cultural perspective, modernization efforts are being driven by:

Executive management

- Looking for efficiency and innovation

Grassroots innovation

- Rogue line of business teams driving business-led innovation

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Data modernization as a technology shift

From a technological perspective, modernization efforts are being driven by:

Necessity

- Larger cloud transformation initiatives
- Source system changes

New use cases

- Workflow automation
- Generative AI
- Data science
- Automated change control and deployment

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Tool consolidation

Many companies are looking to consolidate to one tool

Reasons for tool consolidation include:

- Simpler licensing
- Potential reduction in overall licensing costs
- Greater self-service capabilities for end users
- Easier support and maintenance

Among companies that choose to consolidate, we see more companies choosing Power BI than Tableau.

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Multiple tools coexisting

Some companies maintain multiple tools, whether by choice or necessity.

1. Merger/acquisition
2. Grassroots innovation
3. Hesitation to tackle the complexity of moving off legacy environments
4. Time to transition the tool of choice
5. Exploring new use cases

Among companies that maintain multiple tools, we frequently see a desire to leverage the tools cooperatively.

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STAY ON COGNOS

Keeping the course

Staying on Cognos

For some companies, staying on Cognos for the long term is the right choice

Reasons for staying on Cognos include:

- Only list reporting is needed
- Limited need for advanced analytics use cases
- Anticipated cost/effort to move to a new platform exceeds the perceived benefits
- Long-term stability and reliability of Cognos

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Considerations for staying on Cognos

Cognos 11.2.4 end-of-support expected in 2025

Limited browser support for Query Studio and Analysis Studio in Cognos 11.2.4

No support for Query Studio or Analysis Studio in Cognos 12

Increasing license/ support costs

Not “cloud first” architecture

EXTEND WITH CROSS-PLATFORMS

Having it both ways

Extend Cognos cross-platform

Many companies use multiple platforms, whether transitionally or permanently

1

Bridging data from Cognos to new tools

- Leverage existing data sets from Cognos in other reporting tools
- New tools deliver modern front-end experience on top of trusted Cognos data

2

Reducing Cognos footprint and building new use cases in new tools

- Cognos continues to be used for core list reporting and bursting
- New tools are used to build out all new use cases

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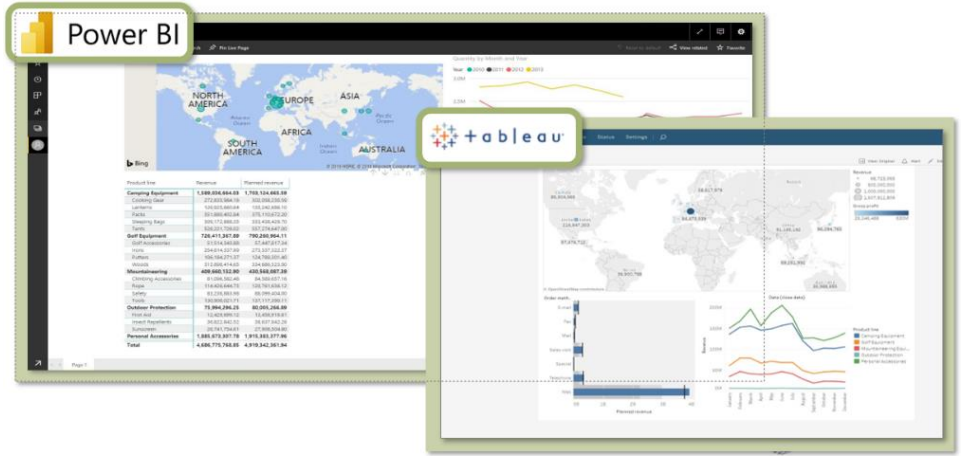

Bridging data from Cognos to new tools

Reasons for bridging data from Cognos to new tools:

Buying more time during a transition to newer tools

Accessing on-prem Cognos data from the cloud

Helping manage the cultural shift by using data that users already know and trust

Avoiding the risk and effort of rebuilding complex models on a new platform

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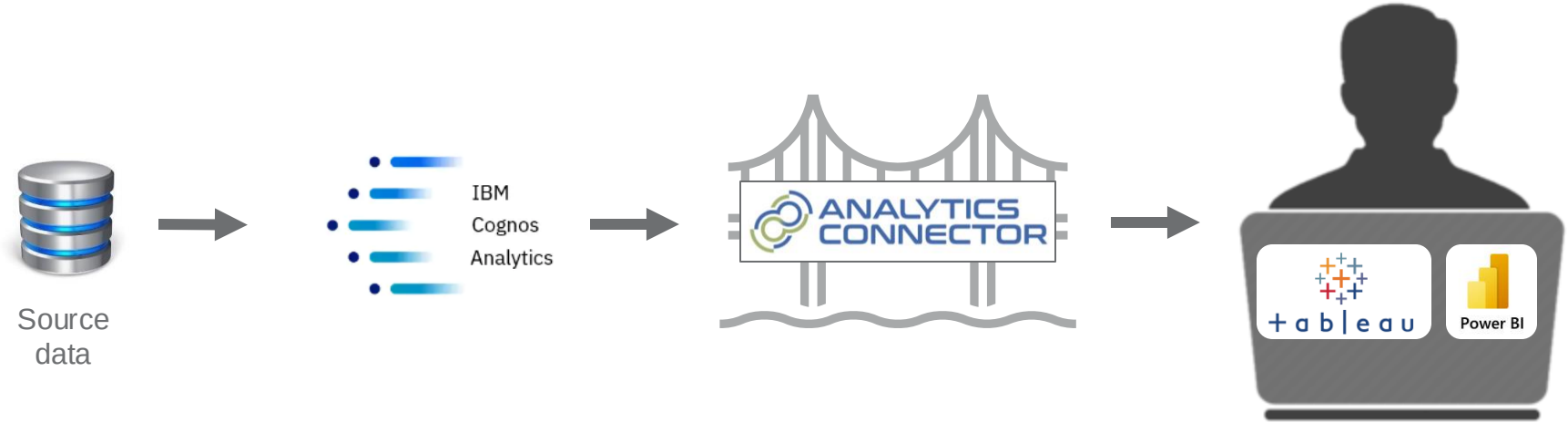
The Senturus Analytics Connector



- Bridge back to existing, curated, trusted Cognos data models
- Install, configure and start reporting quickly
- Security and audit trails continue to be enforced by Cognos
- Power BI and Tableau reporting using Cognos data

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Reduce Cognos footprint and introduce new tools

- Lower Cognos licensing costs
- Restricting Cognos only to essential list reports and/or bursting capabilities
- Freeing up resources to start building new use cases in new tools

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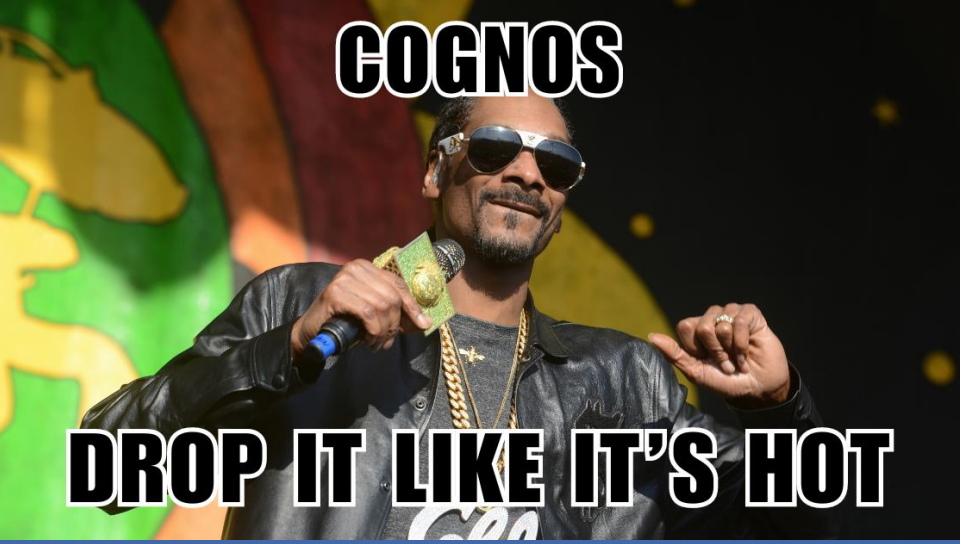
GO ALTOGETHER

Migrating off Cognos



Leave Cognos

Move entirely off Cognos to a new platform

Reasons for leaving Cognos include:

Potential cost savings

Greater self-service capabilities for end users

More modern, interactive report experiences

Support for heavier ETL/ELT workloads, data science and automation use cases

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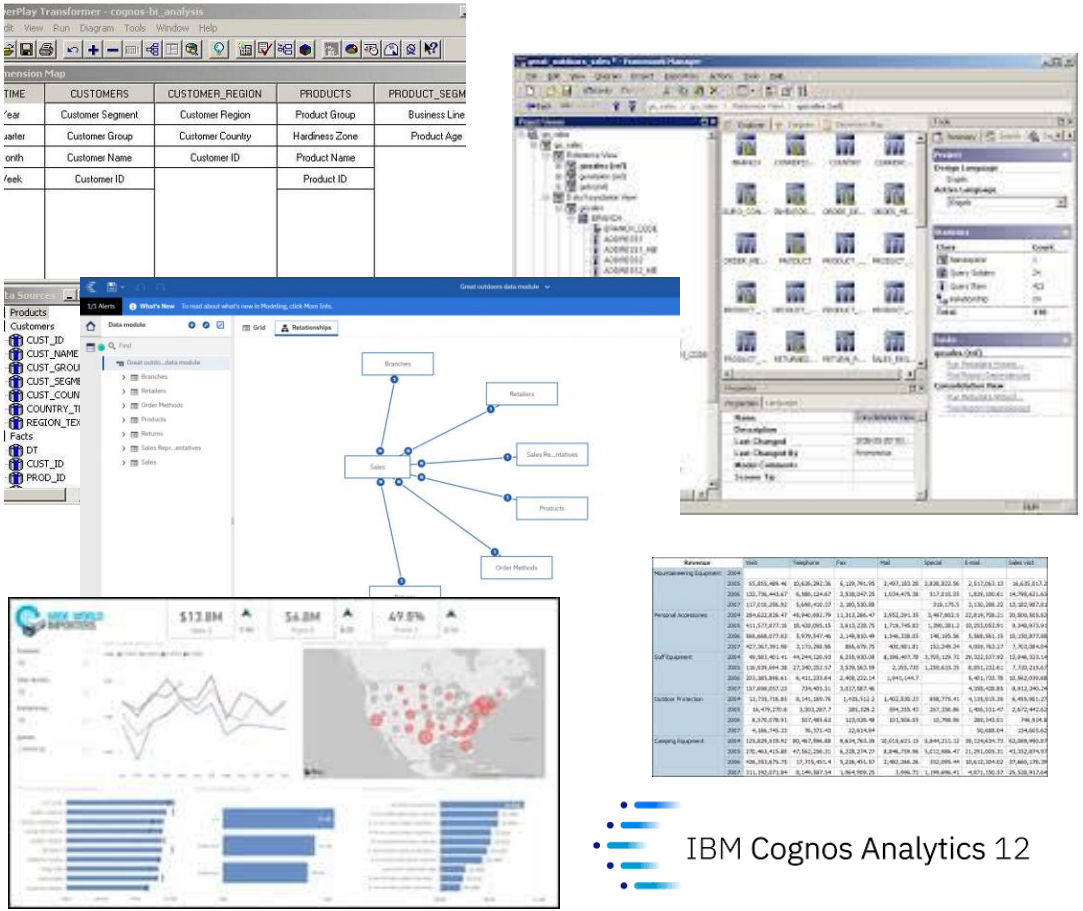
Leave Cognos

No magic bullet

Over the years, various Cognos BI technologies were developed

- Framework Manager
- Transformer Cubes
- Data modules/data sets



IBM Cognos Analytics 12

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Leave Cognos

No magic bullet

01 Legacy implementations can have hundreds of reports, dozens of packages and dozens of FM Models

02 Development may have been completed by different generations of developers and various changing business requirements

03 Today we're going to dive deeper into considerations and methodologies for migrating from Cognos

Where do I start?

Package down
Priority packages drive the decision of which reports to migrate

Reports up
Priority reports drive the decision of which packages to migrate

Critical customers

Who is our audience and how should this impact our effort?

Technically relevant

Is this data structured for our new environment or should we look to improve what we have?

Change receptive

Will our efforts disrupt or improve the customers we're supporting? Will they be champions or blockers?

Analytical impactful

Is this the best? Or can we do better?

Low hanging fruit =/= ROI.

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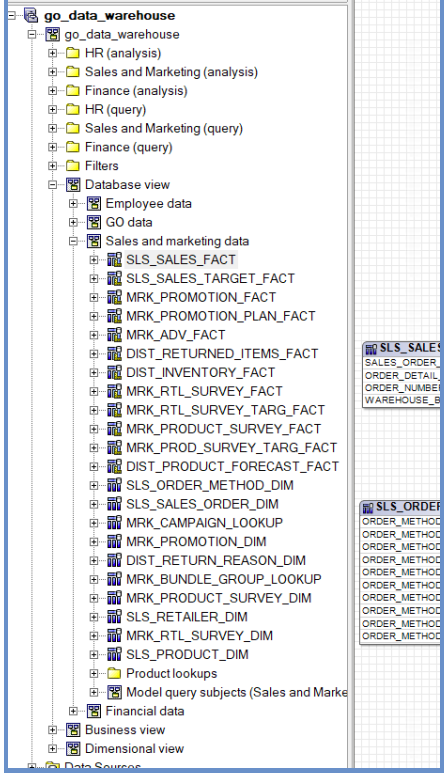
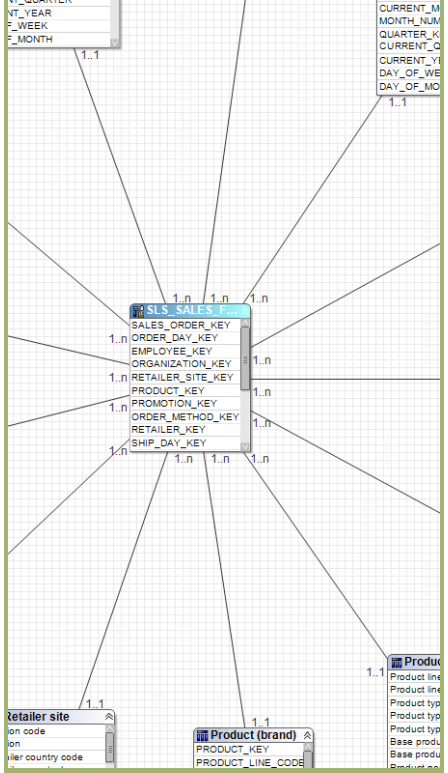
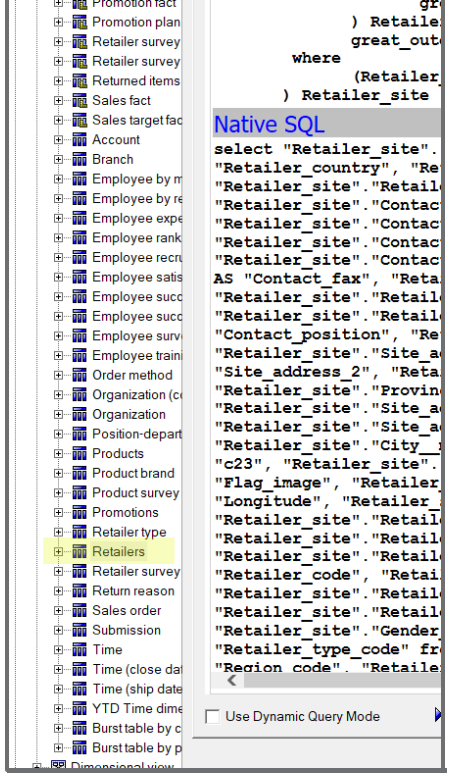


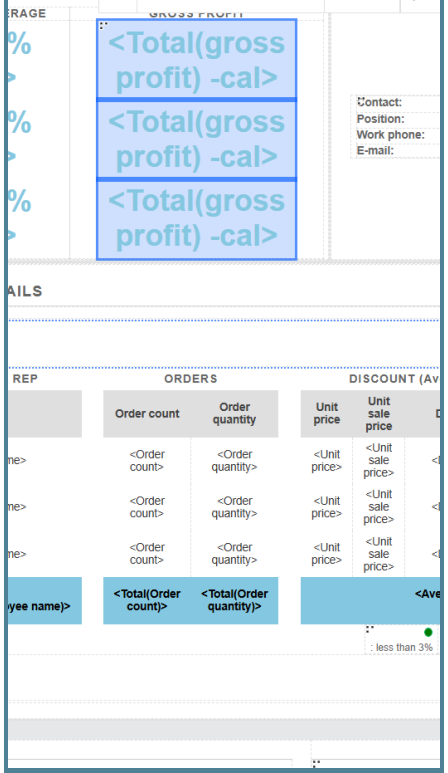
FM model:
Tables & usages



Database view:
Relationships

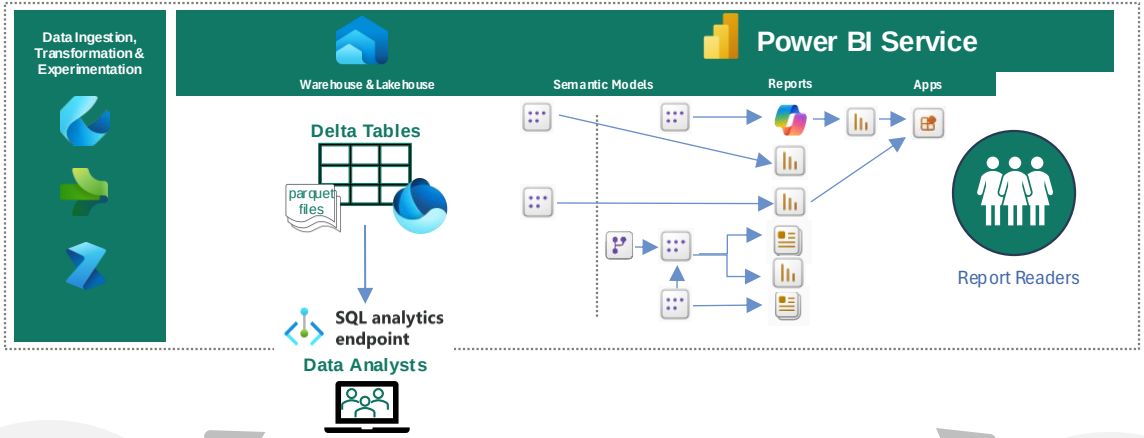


Business view:
Semantic logic
roleplaying dims



Cognos
Analytics:
Query expressions

What’s right for us?



Tables & metric usage

Relationships & roleplaying dims

Semantic logic

Query expressions

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UNTANGLING A COGNOS REPORT...BY HAND

Where do I need to look?

Untangling a Cognos report

FLM DASHBOARD FOR:

REVENUE COVERAGE	GROSS PROFIT
◆ 94%	41%

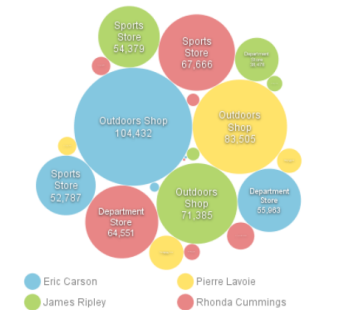
Contact:	Alex Rodriguez	**Address:**	1288 Dorchester Avenue
Position:	Branch sales manager	**City, Province or State:**	Boston, Massachusetts,
Work phone:	1 (617) 268-6754	**Postal code:**	02133
E-mail:	ARodriguez@grtd123.com	**Country:**	United States

TEAM DETAILS

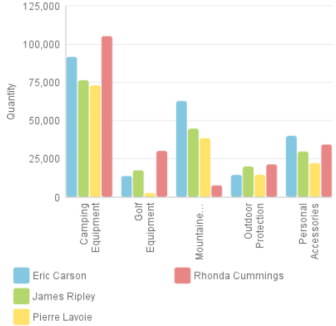
SALES REP	ORDERS		DISCOUNT (Average)			COST				REVEN
Name	Order count	Order quantity	Unit price	Unit sale price	Discount %	Unit cost	Total cost	Revenue	Planned revenue	Revenue %
Eric Carson	$52.00	$223,462.00	$137	$131	$0.05	$75	$7,319,432	$12,196,161	$12,918,865	$0.9
James Ripley	$52.00	$189,159.00	$135	$128	$0.05	$71	$5,533,064	$9,603,169	$10,172,479	$0
Pierre Lavoie	$42.00	$151,672.00	$162	$154	$0.05	$88	$5,931,554	$9,792,414	$10,341,274	
Rhonda Cummings	$69.00	$199,707.00	$169	$159	$0.06	$85	$7,612,489	$13,392,909	$14,287,735	
Rep count: 4	**215**	**764,000**			**5.1%**			**$44,984,653**	**$47,720,352**	

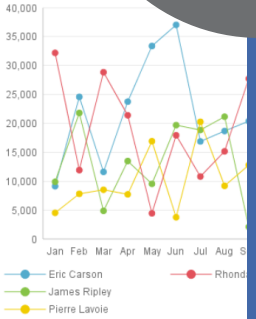
● less than 3% ■ greater than5%

TEAM SALES (Quantity)



TEAM SALES BY PRODUCT LINE





The Great Outdoors:
Sales Managers Report in Cognos

IBM Cognos Analytics

IBM Cognos Analytics with Watson | Sales managers | Search content

Edit | Report > Pages > Page1 | Page design | Properties

Insertable objects

Find

- GO data warehouse (query)
  - HR (query)
  - Sales and Marketing (query)
  - Finance (query)
  - Filters

FLM DASHBOARD FOR:

REVENUE COVERAGE

<Rev% - cal>	<Total(gross profit) -cal>
<Rev% - cal>	<Total(gross profit) -cal>
<Rev% - cal>	<Total(gross profit) -cal>

Contact:	<Employee name>	Address:	<Address 1>
Position:	Branch sales manager	City, Province or State:	<City>, <Province or State>,
Work phone:	<Work phone>	Postal code:	<Postal zone>
E-mail:	<Email>	Country:	<Country>

TEAM DETAILS

MONTH:

SALES REP	ORDERS		DISCOUNT (Average)			COST		REVENUE				
Name	Order count	Order quantity	Unit price	Unit sale price	Discount %	Unit cost	Total cost	Revenue	Planned revenue	Revenue %	Gross margin	Gross profit
<Employee name>	<Order count>	<Order quantity>	<Unit price>	<Unit sale price>	<Discount %>	<Unit cost>	<Product cost>	<Revenue>	<Planned revenue>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>
<Employee name>	<Order count>	<Order quantity>	<Unit price>	<Unit sale price>	<Discount %>	<Unit cost>	<Product cost>	<Revenue>	<Planned revenue>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>
<Employee name>	<Order count>	<Order quantity>	<Unit price>	<Unit sale price>	<Discount %>	<Unit cost>	<Product cost>	<Revenue>	<Planned revenue>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>
Rep count: <Count(Employee name)>	<Total(Order count)>	<Total(Order quantity)>			<Average(Discount %)1>			<Total(Revenue)1>	<Total(Planned revenue)1>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>

: less than 3% : greater than5% : greater than 45% : less than 40%

TEAM SALES (Quantity)

TEAM SALES BY PRODUCT LINE

TEAM PIPELINE

List column body

CONDITIONAL	
Conditional styles	
Style variable	
Text source variable	
TEXT SOURCE	
Source type	Data item value
Data item value	Total(gross profit) -cal
DATA	
Data format	Percent
Drill-through definitions	
Group span	
BOX	
Border	
Padding	
Box type	
COLOR & BACKGROUND	
Background image	
Background effects	
Background color	
Foreground color	
FONT & TEXT	
Font	
Horizontal alignment	Center
Vertical alignment	Middle
White space	
Spacing & breaking	
Direction & justification	
POSITIONING	
Size & overflow	
DATA ITEM	
Type	Data Item
Name	Total(gross profit) -cal
Label	
Expression	[Total(Gross margin - cal)]/[Total(Rev...
Detail aggregation	Default
Summary aggregation	Default
Solve order	
MISCELLANEOUS	
Classes	List column body measure cell

IBM Cognos Analytics

IBM Cognos Analytics with Watson | Sales managers | Search content

Edit | Report > Queries > Query1 | Properties

Insertable objects

Find

- GO data warehouse (query)
  - HR (query)
  - Sales and Marketing (query)
  - Finance (query)
  - Filters

Data Items

- Employee name
- Order count
- Unit price
- Unit sale price
- Order quantity
- Order revenue
- Revenue
- Unit cost
- Discount %
- Revenue %
- Average(Discount %)
- Planned revenue
- Total(Revenue)
- Total(Planned revenue)
- Product cost
- Rev% - cal
- Gross margin - cal
- Gross profit - cal
- Total(Gross margin - cal)
- Total(gross profit) -cal
- Count(Employee name)
- Total(Order count)
- Total(Order quantity)
- Average(Discount %)1
- Total(Revenue)1
- Total(Planned revenue)1
- Product line
- Quantity

Detail Filters

- [Sales (query)].[Time].[Year]=2012
- [Sales (query)].[Employee by manager].[Level 6 manager]=?Para_CurrentMgr?
- [Sales (query)].[Time].[Month] = ?Para_Month?

Summary Filters

Slicer

Data Item

DATA ITEM	
Type	Data Item
Name	Employee name
Label	
Expression	[Sales (query)].[Employee ...
Detail aggregation	None
Summary aggregation	None
Pre-sort	Sort ascending
Detail	Automatic
Calculation intersection	Show value
Solve order	

er type

Data Items

```
1  Sum of Product Cost = SUMX(Sales,[Sum of Unit Cost] * [Sum of Quantity])
```

IBM Cognos Analytics

IBM Cognos Analytics with Watson | * Sales managers | Search content

Edit | Report > Pages > Page1 | Page design | Properties

Insertable objects

Find

PINNED

Text item | Block | Table | List | Crosstab | Visualization

TEXTUAL

LAYOUT

DATA CONTAINER

PROMPTING

ADVANCED

DEVELOPER

FLM DASHBOARD FOR:

REVENUE COVERAGE

<Rev% - cal>	<Total(gross profit) -cal>
<Rev% - cal>	<Total(gross profit) -cal>
<Rev% - cal>	<Total(gross profit) -cal>

Contact:	<Employee name>	Address:	<Address 1>
Position:	Branch sales manager	City, Province or State:	<City>, <Province or State>,
Work phone:	<Work phone>	Postal code:	<Postal zone>
E-mail:	<Email>	Country:	<Country>

TEAM DETAILS

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Name	Order count	Order quantity	Unit price	Unit sale price	Discount %	Unit cost	Total cost	Revenue	Planned revenue	Revenue %	Gross margin	Gross profit
<Employee name>	<Order count>	<Order quantity>	<Unit price>	<Unit sale price>	<Discount %>	<Unit cost>	<Product cost>	<Revenue>	<Planned revenue>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>
<Employee name>	<Order count>	<Order quantity>	<Unit price>	<Unit sale price>	<Discount %>	<Unit cost>	<Product cost>	<Revenue>	<Planned revenue>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>
<Employee name>	<Order count>	<Order quantity>	<Unit price>	<Unit sale price>	<Discount %>	<Unit cost>	<Product cost>	<Revenue>	<Planned revenue>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>
Rep count: <Count(Employee name)>	<Total(Order count)>	<Total(Order quantity)>			<Average(Discount %)1>			<Total(Revenue)1>	<Total(Planned revenue)1>	<Revenue %>	<Gross margin - cal>	<Gross profit - cal>

: less than 3% : greater than5% : greater than 45% : less than 40%

TEAM SALES (Quantity)

TEAM SALES BY PRODUCT LINE

TEAM PIPELINE

List column body

Conditional styles	
Style variable	
Text source variable	
TEXT SOURCE	
Source type	Data item value
Data item value	Total(gross profit) -cal
DATA	
Data format	Percent
Drill-through definitions	
Group span	
BOX	
Border	
Padding	
Box type	
COLOR & BACKGROUND	
Background image	
Background effects	
Background color	
Foreground color	
FONT & TEXT	
Font	
Horizontal alignment	Center
Vertical alignment	Middle
White space	
Spacing & breaking	
Direction & justification	
POSITIONING	
Size & overflow	
DATA ITEM	
Type	Data Item
Name	Total(gross profit) -cal
Label	
Expression	[Total(Gross margin - cal)]/[Total(Revenue)]
Detail aggregation	Default
Summary aggregation	Summarize
Solve order	
MISCELLANEOUS	
Classes	List column body measure cell

Summary aggregation

Specifies the type of aggregation to apply to summarized values. These values appear at the higher levels of lists and crosstabs. For OLAP data sources, a rollup aggregate function of Count Distinct is supported for only levels and member

IBM Cognos Analytics

IBM Cognos Analytics with Watson | Content | Search content

Audit

New +

My content | Team content | Most Recent

Team content / Samples_Audit / Audit

Name	Type	Tenant	Last Accessed
Mobile report	Folder		1/3/2023, 11:21 AM
Multi-tenancy reports	Folder		1/3/2023, 11:21 AM
Style reference reports	Folder		1/3/2023, 11:21 AM
Agent execution history by user A list report and bar chart that shows the agent execution history of each user. You are prompted for date and time values.	Report		4/1/2020, 5:03 PM
Daily metric exceptions A list report shows daily metric exceptions for all services.	Report		3/8/2024, 1:52 PM
Deleted user account report This sample audit report lists user accounts that have been deleted during a specified time period. It provides information about the deleted user account, the time deleted, the account type, and the status of the request.	Report		4/1/2020, 5:19 PM
Execute reports by package and report This report groups on packages. It uses prompts to show user, report, and time stamp information.	Report		3/31/2020, 11:50 AM
Execute reports, dashboards and stories by package for past 30 days This active report displays report, dashboard and story execution details by package for the past 30 days. The report cascading prompts users, packages and reports/dashboards/stories that you can select. The list shows the report, dashbo...	Active Report		3/31/2020, 11:59 AM
Execute reports, dashboards and stories by user This sample audit report is grouped by user. It contains prompts for user and time stamp, and local filters for package and type.	Report		9/4/2019, 4:12 PM
Execution history by user This report uses prompts to show report history by user.	Report		9/29/2020, 9:58 AM
Failed report executions - by package A list report with a pie chart shows report failure executions by package. It also shows the failed percentage of each package in the Pie chart.	Report		9/3/2019, 2:31 PM
Logon operations by time stamp range.	Report		4/2/2020, 1:40 PM

IBM Cognos Analytics

IBM Cognos Analytics with Watson | Execute reports by ... and report

Edit | HTML

IBM Cognos Audit - Execute reports by package and report

On or after Jul 1, 2022 12:00 AM

Package	Report name	User name	Execution time
GO data warehouse (query)	Inventory status (target 2 - by country)	Devon Reddick	4371 milliseconds
	New report	Pedro Ining	862 milliseconds
	Sales managers	Devon Reddick	1686 milliseconds
			1700 milliseconds
			1765 milliseconds
			2808 milliseconds
			9055 milliseconds
			11873 milliseconds
			29686 milliseconds
		Todd Schuman	6638 milliseconds
			6900 milliseconds
			7709 milliseconds
			7863 milliseconds
			7944 milliseconds
			8164 milliseconds
			9620 milliseconds
			10689 milliseconds
			11077 milliseconds
			11331 milliseconds
			13073 milliseconds
			13366 milliseconds
			13609 milliseconds
			14645 milliseconds
			14956 milliseconds
			16525 milliseconds
			16706 milliseconds
			16834 milliseconds
			17813 milliseconds
			21389 milliseconds
			21730 milliseconds
			38342 milliseconds
			57877 milliseconds
GO Data Warehouse (query)	Sales Performance Report	Steve Reed-Pittman	508 milliseconds
	Sales Performance Report - pristine	Steve Reed-Pittman	506 milliseconds
	Sales Performance Report - pristine (1)	Steve Reed-Pittman	852 milliseconds
	TOC report	Steve Reed-Pittman	1692 milliseconds
	Total Revenue by Country - pristine	Steve Reed-Pittman	1413 milliseconds
			3167 milliseconds

IBM Cognos Analytics

great_outdoors_warehouse * - IBM Cognos Framework Manager

File Edit View Project Actions Tools Help

Back Forward go_data_warehouse > go_data_warehouse > Database view > Sales and marketing dat

Project Viewer

- go_data_warehouse
  - go_data_warehouse
    - HR (analysis)
    - Sales and Marketing (analysis)
    - Finance (analysis)
    - HR (query)
    - Sales and Marketing (query)
    - Finance (query)
    - Filters
    - Database view
      - Employee data
      - GO data
      - **Sales and marketing data**
        - SLS_SALES_FACT
        - SLS_SALES_TARGET_FACT
        - MRK_PROMOTION_FACT
        - MRK_PROMOTION_PLAN_FACT
        - MRK_ADV_FACT
        - DIST_RETURNED_ITEMS_FACT
        - DIST_INVENTORY_FACT
        - MRK_RTL_SURVEY_FACT
        - MRK_RTL_SURVEY_TARG_FACT
        - MRK_PRODUCT_SURVEY_FACT
        - MRK_PROD_SURVEY_TARG_FACT
        - DIST_PRODUCT_FORECAST_FACT
        - SLS_ORDER_METHOD_DIM
        - SLS_SALES_ORDER_DIM
        - MRK_CAMPAIGN_LOOKUP
        - MRK_PROMOTION_DIM
        - DIST_RETURN_REASON_DIM
        - MRK_BUNDLE_GROUP_LOOKUP
        - MRK_PRODUCT_SURVEY_DIM
        - SLS_RETAILER_DIM
        - MRK_RTL_SURVEY_DIM
        - SLS_PRODUCT_DIM
        - Product lookups
        - Model query subjects (Sales and Marke
      - Financial data
    - Business view
    - Dimensional view
  - Data Sources
  - Parameter Maps
  - Packages
    - GO Data Warehouse (analysis)
    - GO Data Warehouse (query)

Explorer | Diagram | Dimension Map

SLS_SALE... SLS_SALE... MRK_PRO... MRK_PRO... MRK_ADV...

MRK_PRO... <--> SLS_S... DIST_RETU... DIST_RETU... <--> DIST... DIST_RETU... <--> SLS_S... DIST_RETU... <--> SLS_...

SLS_PROD... <--> SLS_... SLS_PROD... <--> SLS_P... SLS_SALE... <--> Reta... Retailer site <--> SLS_... MRK_PRO... <--> Reta...

Product <--> DIST... DIST_INVE... <--> Prod... MRK_PRO... <--> Prod... MRK_PRO... <--> Prod... SLS_RETAI... <--> SLS_S...

Properties

Properties | Language

Name	Quantity
Description	
Last Changed	2007-05-01T11:40:33
Last Changed By	
Model Comments	
Screen Tip	
Expression	<Click to edit>
Is Hidden	False
Usage	Fact
Format	<Click to edit>
Currency	
Data Type	Int32
Precision	0
Scale	0
Size	4
Is Nullable	False
Display Type	Value
MIME Type	
Prompt Info	
Regular Aggregate	Sum
Semi-Aggregate	Sum
Is Unsortable	False

great_outdoors_warehouse * - IBM Cognos Framework Manager

File Edit View Project Actions Tools Help

Project Viewer

- go_data_warehouse
  - go_data_warehouse
    - HR (analysis)
    - Sales and Marketing (analysis)
    - Finance (analysis)
    - HR (query)
    - Sales and Marketing (query)
    - Finance (query)
    - Filters
    - Database view
      - Employee data
      - GO data
      - **Sales and marketing data**
        - SLS_SALES_FAC
        - SLS_SALES_TAR
        - MRK_PROMOTIO
        - MRK_PROMOTIO
        - MRK_ADV_FACT
        - DIST_RETURNED
        - DIST_INVENTOR
        - MRK_RTL_SURVI
        - MRK_RTL_SURVI
        - MRK_PRODUCT_
        - MRK_PROD_SUR
        - DIST_PRODUCT_
        - SLS_ORDER_ME
        - SLS_SALES_ORD
        - MRK_CAMPAIGN_
        - MRK_PROMOTIO
        - DIST_RETURN_R
        - MRK_BUNDLE_G
        - MRK_PRODUCT_
        - SLS_RETAILER_D
        - MRK_RTL_SURVI
        - SLS_PRODUCT_
        - Product lookups
        - Model query subje
      - Financial data
    - Business view
    - Dimensional view
  - Data Sources
  - Parameter Maps
  - Packages
    - GO Data Warehouse (analysis)
    - GO Data Warehouse (query)

Context Menu:

- Create
- New Parent
- Locate in Explorer
- Edit Definition...
- Test
- Reorder...
- Verify Selected Objects...
- Run Model Advisor...
- Show Object Dependencies...
- Merge in New Query Subject
- Merge in New Regular Dimension
- Create Star Schema Grouping...
- Edit
- Rename
- Select All Similar Objects
- Launch Context Explorer

Context Explorer 63.18%

GO_TIME_DIM (ship date): DAY_KEY, DAY_DATE, MONTH_KEY, CURRENT_MONTH, MONTH_NUMBER, QUARTER_KEY, CURRENT_QUARTER, CURRENT_YEAR, DAY_OF_WEEK, DAY_OF_MONTH

VIEW_BALANCED_ORG_DIM: ORGANIZATION_KEY, ORGANIZATION_CODE1, ORGANIZATION_CODE2, ORGANIZATION_CODE

GO_TIME_DIM: DAY_KEY, DAY_DATE, MONTH_KEY, CURRENT_MONTH, MONTH_NUMBER, QUARTER_KEY, CURRENT_QUAR., CURRENT_YEAR, DAY_OF_WEEK, DAY_OF_MONTH

GO_TIME_DIM (close day): DAY_KEY, DAY_DATE, MONTH_KEY, CURRENT_MONTH, MONTH_NUMBER, QUARTER_KEY, CURRENT_QUARTER, CURRENT_YEAR, DAY_OF_WEEK

MRK_PROMOTION_DIM: PROMOTION_KEY, CAMPAIGN_CODE, PROMOTION_CODE, BUNDLE_GROUP_CODE, PROMOTION_NAME_EN, PROMOTION_NAME_DE, PROMOTION_NAME_FR, PROMOTION_NAME_JA, PROMOTION_NAME_AR, PROMOTION_NAME_CS

SLS_SALES_FACT: SALES_ORDER_KEY, ORDER_DAY_KEY, EMPLOYEE_KEY, ORGANIZATION_KEY, RETAILER_SITE_KEY, PRODUCT_KEY, PROMOTION_KEY, ORDER_METHOD_KEY, RETAILER_KEY, SHIP_DAY_KEY

EMP_EMPLOYEE_DIM: EMPLOYEE_KEY, Level 1 Manager Code, Level 1 Manager, Level 1 Manager (multiscri., MANAGER_CODE2, MANAGER2, MANAGER_MB2, MANAGER_CODE3, MANAGER3, MANAGER_MB3

SLS_RETAILER_DIM: RETAILER_SITE_KEY, RETAILER_SITE_CODE, RETAILER_KEY, RETAILER_CODE, RETAILER_NAME, RETAILER_NAME_MB, RETAILER_CONTACT_C., CONTACT_FIRST_NAME, CONTACT_LAST_NAME, GENDER_CODE

ANIZATION_DIM: ON_KEY, ORGANIZATION_CODE1, ORGANIZATION_CODE2, ORGANIZATION_CODE3, ORGANIZATION_CODE4, ORGANIZATION_CODE, ORGANIZATION_PARENT, ORGANIZATION_LEVEL

Retailer site: Region code, Region, Retailer country code, Retailer country key, Retailer country, Retailer key, Retailer code, Retailer name, Retailer name (multiscript), Retailer site key

Product (brand): PRODUCT_KEY, PRODUCT_LINE_CODE, PRODUCT_TYPE_KEY, PRODUCT_TYPE_CO., PRODUCT_NUMBER, PRODUCT_COLOR_C., PRODUCT_SIZE_CODE, PRODUCT_BRAND_K., PRODUCT_BRAND_C., BASE_PRODUCT_KEY

Product: Product line code, Product line, Product type key, Product type code, Product type, Base product key, Base product nu., Product name, Product key, Product number

IBM Cognos Analytics

great_outdoors_warehouse * - IBM Cognos Framework Manager

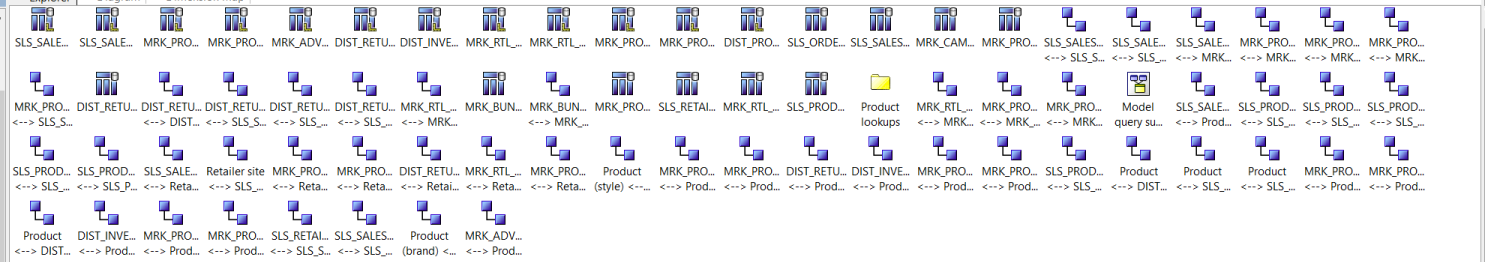
File Edit View Project Actions Tools Help

Back Forward go_data_warehouse > go_data_warehouse > Database view > **Sales and marketing data**

Project Viewer

- Sales and Marketing (query)
- Finance (query)
- Filters
- Database view
- Business view
  - Advertising fact
  - Employee expense fact
  - Employee expense plan fact
  - Employee position summary fact
  - Employee ranking fact
  - Employee recruitment fact
  - Employee recruitment leads fact
  - Employee succession fact
  - Employee summary fact
  - Employee survey fact
  - Employee survey target fact
  - Employee training fact
  - Finance fact
  - Inventory fact
  - Product forecast fact
  - Product survey fact
  - Product survey target fact
  - Promotion fact
  - Promotion plan fact
  - Retailer survey fact
  - Retailer survey target fact
  - Returned items fact
  - Sales fact
    - Quantity
    - Unit cost
    - Unit price
    - Unit sale price
    - Revenue
    - Gross profit
    - Product cost
    - Planned revenue
  - Sales target fact
  - Account
  - Branch
  - Employee by manager
  - Employee by region
  - Employee expense
  - Employee ranking
  - Employee recruitment
  - Employee satisfaction
  - Employee succession status
  - Employee successors
  - Employee survey topic
  - Employee training
  - Order method
  - Organization (consolidated)
  - Organization
  - Position-department
  - Products
  - Product brand
  - Product survey
  - Promotions

Explorer | Diagram | Dimension Map



Properties

Properties | Language

Name	Quantity
Description	
Last Changed	2007-05-01T11:40:33
Last Changed By	
Model Comments	
Screen Tip	
Expression	<Click to edit>
Is Hidden	False
Usage	Fact
Format	<Click to edit>
Currency	
Data Type	Int32
Precision	0
Scale	0
Size	4
Is Nullable	False
Display Type	Value
MIME Type	
Prompt Info	
Regular Aggregate	Sum
Semi-Aggregate	Sum
Is Unsortable	False

Tools

Summary | Search

Project

Design Language
English

Active Language
English

Statistics

Class	Count
Namespace	2
Folder	1
Query Subject	32
Query Item	630
Relationship	51
Total	**716**

Tasks

Sales and marketing data
- Run Metadata Wizard...
- Find Report Dependencies

Quantity
- Find Report Dependencies
- Format...
- Edit Definition...

IBM Cognos Analytics

great_outdoors_warehouse * - IBM Cognos Framework Manager

File Edit View Project Actions Tools Help

Back Forward go_data_warehouse > go_data_warehouse > Database view > **Sales and marketing data**

Project Viewer

- Employee expense fact
- Employee expense plan fact
- Employee position summary fact
- Employee ranking fact
- Employee recruitment fact
- Employee recruitment leads fact
- Employee succession fact
- Employee summary fact
- Employee survey fact
- Employee survey target fact
- Employee training fact
- Finance fact
- Inventory fact
- Product forecast fact
- Product survey fact
- Product survey target fact
- Promotion fact
- Promotion plan fact
- Retailer survey fact
- Retailer survey target fact
- Returned items fact
- Sales fact
- Sales target fact
- Account
- Branch
- Employee by manager
- Employee by region
- Employee expense
- Employee ranking
- Employee recruitment
- Employee satisfaction
- Employee succession status
- Employee successors
- Employee survey topic
- Employee training
- Order method
- Organization (consolidated)
- Organization
- Position-department
- Products
- Product brand
- Product survey
- Promotions
- Retailer type
- Retailers
- Retailer survey
- Return reason
- Sales order
- Submission
- Time
- Time (close date)
- Time (ship date)
- YTD Time dimension
- Burst table by country
- Burst table by product line
- Dimensional view
- Data Sources

Explorer

SLS_SALE... SLS_...

MRK_PRO... DIST_... <--> SLS_S...

SLS_PROD... SLS_... <--> SLS_... <-->

Product DIST_... <--> DIST... <-->

Properties

Properties Langu

Name
Description
Last Changed
Last Changed E
Model Commer
Screen Tip
Security Filters
Externalize Met
Externalize Aut
(DQM) Use In J
(DQM) Order O
(DQM) Usage
(DQM) Use Loc
Status

Query Subject Definition - Retailers

Query Subject Definition | Filters | Determinants | Test | Query Information

Query | Response | Print

```
                GO_REGION_DIM.REGION_CODE  as  REGION_CODE,
                GO_REGION_DIM.REGION_EN  as  Region,
                GO_REGION_DIM.COUNTRY_EN  as  Country,
                (N'../samples/images/' || GO_REGION_DIM.FLAG_IMAGE)  as  FLAG_IMAGE
            from
                great_outdoors_warehouse..GOSALESDW.GO_REGION_DIM GO_REGION_DIM
            ) Retailer_region_dimension,
            great_outdoors_warehouse..GOSALESDW.SLS_RTL_DIM SLS_RETAILER_DIM
        where
            (Retailer_region_dimension.COUNTRY_CODE = SLS_RETAILER_DIM.RTL_COUNTRY_CODE)
        ) Retailer_site
```

Native SQL

```
select "Retailer_site"."Region" AS "Region", "Retailer_site"."Retailer_country" AS "Retailer_country", "Retailer_site"."Retailer_name" AS "Retailer_name",
"Retailer_site"."Retailer_name__multiscript_" AS "Retailer__multiscript_", "Retailer_site"."Contact_first_name" AS "Contact_first_name",
"Retailer_site"."Contact_last_name" AS "Contact_last_name", "Retailer_site"."Contact_phone_number" AS "Contact_phone_number", "Retailer_site"."Contact_extension" AS
"Contact_extension", "Retailer_site"."Contact_fax" AS "Contact_fax", "Retailer_site"."c19" AS "c10", "Retailer_site"."c20" AS "c11",
"Retailer_site"."Retailer_start_date" AS "Retailer_start_date", "Retailer_site"."Retailer_type" AS "Retailer_type", "Retailer_site"."Contact_position" AS
"Contact_position", "Retailer_site"."Contact_email" AS "Contact_email", "Retailer_site"."Site_address_1" AS "Site_address_1", "Retailer_site"."Site_address_2" AS
"Site_address_2", "Retailer_site"."City" AS "Retailer_site", "Retailer_site"."Province_or_State" AS "Province_or_State",
"Retailer_site"."Site_address_1__multiscript_" AS "Site_address_1__multiscript_", "Retailer_site"."Site_address_2__multiscript_" AS "Site_address_2__multiscript_",
"Retailer_site"."City__multiscript_" AS "City__multiscript_", "Retailer_site"."c33" AS "c23", "Retailer_site"."Postal_zone" AS "Postal_zone",
"Retailer_site"."Flag_image" AS "Flag_image", "Retailer_site"."Latitude" AS "Latitude", "Retailer_site"."Longitude" AS "Longitude", "Retailer_site"."Region_code" AS
"Region_code", "Retailer_site"."Retailer_country_code" AS "Retailer_country_code", "Retailer_site"."Retailer_country_key" AS "Retailer_country_key",
"Retailer_site"."Retailer_key" AS "Retailer_key", "Retailer_site"."Retailer_code" AS "Retailer_code", "Retailer_site"."Retailer_site_key" AS "Retailer_site_key",
"Retailer_site"."Retailer_site_code" AS "Retailer_site_code", "Retailer_site"."Retailer_contact_code" AS "Retailer_contact_code", "Retailer_site"."Gender_code" AS
"Gender_code", "Retailer_site"."Retailer_type_code" AS "Retailer_type_code" from ( select "Retailer_region_dimension"."REGION_CODE" AS "Region_code",
"Retailer_region_dimension"."REGION_EN" AS "Region", "Retailer_region_dimension"."COUNTRY_CODE" AS "Retailer_country_code", "Retailer_region_dimension"."COUNTRY_KEY"
AS "Retailer_country_key", "Retailer_region_dimension"."COUNTRY_EN" AS "Retailer_country", "SLS_RETAILER_DIM"."RETAILER_KEY" AS "Retailer_key",
"SLS_RETAILER_DIM"."RETAILER_CODE" AS "Retailer_code", "SLS_RETAILER_DIM"."RETAILER_NAME" AS "Retailer_name", "SLS_RETAILER_DIM"."RETAILER_NAME_MB" AS
"Retailer_name__multiscript_", "SLS_RETAILER_DIM"."RETAILER_SITE_KEY" AS "Retailer_site_key", "SLS_RETAILER_DIM"."RETAILER_SITE_CODE" AS "Retailer_site_code",
"SLS_RETAILER_DIM"."RETAILER_CONTACT_CODE" AS "Retailer_contact_code", "SLS_RETAILER_DIM"."CONTACT_FIRST_NAME" AS "Contact_first_name",
"SLS_RETAILER_DIM"."CONTACT_LAST_NAME" AS "Contact_last_name", "SLS_RETAILER_DIM"."GENDER_CODE" AS "Gender_code", "SLS_RETAILER_DIM"."CONTACT_PHONE_NUMBER" AS
"Contact_phone_number", "SLS_RETAILER_DIM"."CONTACT_EXTENSION" AS "Contact_extension", "SLS_RETAILER_DIM"."CONTACT_FAX" AS "Contact_fax",
"SLS_RETAILER_DIM"."CONTACT_FIRST_NAME_MB" AS "c19", "SLS_RETAILER_DIM"."CONTACT_LAST_NAME_MB" AS "c20", "SLS_RETAILER_DIM"."RETAILER_START_DATE" AS
"Retailer_start_date", "SLS_RETAILER_DIM"."RETAILER_TYPE_CODE" AS "Retailer_type_code", "SLS_RETAILER_DIM"."RETAILER_TYPE_EN" AS "Retailer_type",
"SLS_RETAILER_DIM"."JOB_POSITION_EN" AS "Contact_position", "SLS_RETAILER_DIM"."CONTACT_EMAIL" AS "Contact_email", "SLS_RETAILER_DIM"."RTL_ADDRESS1" AS
"Site_address_1", "SLS_RETAILER_DIM"."RTL_ADDRESS2" AS "Site_address_2", "SLS_RETAILER_DIM"."RTL_CITY" AS "City", "SLS_RETAILER_DIM"."RTL_PROV_STATE" AS
"Province_or_State", "SLS_RETAILER_DIM"."RTL_ADDRESS1_MB" AS "Site_address_1__multiscript_", "SLS_RETAILER_DIM"."RTL_ADDRESS2_MB" AS "Site_address_2__multiscript_",
"SLS_RETAILER_DIM"."RTL_CITY_MB" AS "City__multiscript_", "SLS_RETAILER_DIM"."RTL_PROV_STATE_MB" AS "c33", "SLS_RETAILER_DIM"."RTL_POSTAL_ZONE" AS "Postal_zone",
N'../samples/images/'+"Retailer_region_dimension"."FLAG_IMAGE" AS "Flag_image", "SLS_RETAILER_DIM"."RTL_LAT" AS "Latitude", "SLS_RETAILER_DIM"."RTL_LON" AS
"Longitude" from "GOSALESDW"."GO_REGION_DIM" "Retailer_region_dimension", "GOSALESDW"."SLS_RTL_DIM" "SLS_RETAILER_DIM" where
"Retailer_region_dimension"."COUNTRY_CODE" = "SLS_RETAILER_DIM"."RTL_COUNTRY_CODE") "Retailer_site"
```

☐ Use Dynamic Query Mode

Test Sample | Total Rows | Options

Validate | OK | Cancel | Help

Tools

Summary | Search

Project

Design Language
English

Active Language
English

Statistics

Class	Count
Namespace	2
Folder	1
Query Subject	32
Query Item	630
Relationship	51
Total	**716**

Tasks

Sales and marketing data
- Run Metadata Wizard...
- Find Report Dependencies

Retailers
- Edit Definition...
- Find Report Dependencies

UNTANGLING A COGNOS REPORT...FASTER

Using the Senturus Migration Assistant

SENTURUS | Migration Assistant | Data updated 8/12/24

Search

Trial: 48 days left

File | Export | Share | Chat in Teams | Get insights | Subscribe to report | Set alert | Copilot

Pages

- Home
- Overview
- Reports
- Executions
- Relationships
- Schedules/Jobs
- Unused Reports

MIGRATION ASSISTANT — OVERVIEW — SENTURUS

174	10K	33
Query Subjects	Query Items	Report Queries

Packages

Package | Path | Model Date	Reports
Unknown Package	320
GO Sales (query)	63
Audit	29
Cognos Audit Extension	15
GO Data Warehouse (query)	11
Great Outdoors Sales (cube)	11
GO Sales (analysis)	9
GO data warehouse (analysis)	7
GO Data Warehouse Sales (DC)	6
GO (query)	5
GO Data Warehouse (simple)	5
Sales (query)	5
Record Package	4
AutoMagic Package	3
Burst Test Package	3
cog_rpt	3
great_outdoors_sales_en	3
Senturus Records	3
TYPES	3
WorldACD Cube	3
cog_rpt_sp	1
DEMDEMO	1
GO Data Warehouse Sales and Target (DC)	1
Base Sales Forecast	0
BellBankTest	0
Cache Test	0
Demo Package 1	0
Total	**513**

Reports and Executions

Source Report Name | Source Report Path | Report Path	Report Count	Last Run	Runs
Sales managers	1	5/10/2023	22
Samples > Reports > Standard reports > Sales managers	1	5/10/2023	22
Samples > Reports > Standard reports > Sales managers	1	5/10/2023	22
1 - Todd Report			1
Employee Quantity Sold by Branch/Region			0
Report Insights > Content and FM Reports > Archive > Sample Reports > Employee Quantity Sold by Branch/Region			0
Report Insights > Content and FM Reports > Archive > Sample Reports > Employee Quantity Sold by Branch/Regio			0
Inventory status (source)			0
Inventory status (target 1 - by product line)			0
Inventory status (target 2 - by country)			0
Inventory status (target 3 - by year)			
Multi Page Object Report			0
Multi Page Object Report (1)	1		0
Retailer Type by Product Line - Gross Profit	1		0
Report Insights > Content and FM Reports > Archive > Sample Reports > Retailer Type by Product Line - Gross Profit	1		0
Report Insights > Content and FM Reports > Archive > Sample Reports > Retailer Type by Product Line - Gross Profit	1		0
Top Level Org chart	1		0
Total	11	5/10/2023	23

Copy
Share
Expand
Collapse
Set alert
Show as a table
Drill up
Include
Exclude
Drill through — Reports Drill-through
Unfreeze row headers

Reports Drill-through

Data Sources Used

Data Source	Interface	Data Source Catalog	Data Source Schema
go_data_warehouse	SQL Server		GOSALESDW

Tables

Data Source	Table
go_data_warehouse	DIST_INVENTORY_FACT
	DIST_PRODUCT_FORECAST_FACT
	DIST_RETURNED_ITEMS_FACT
	EMP_EMPLOYEE_DIM
	GO_BRANCH_DIM
	GO_TIME_DIM
	SLS_SALES_FACT
	SLS_SALES_ORDER_DIM

Filters

Power BI

143%

MIGRATION ASSISTANT

MIGRATION ASSISTANT

SENTURUS

This is a drill-through version of the Reports page. To choose another Report, either navigate to the main Reports page, or click the Back button and drill-through to this page again.

5	1	9
Report Query Count	Page Count	Container Count
46	10	4
Report Query Item Count	Filter Count	Table Usage Count

Report Path

Samples > Reports > Standard reports > Sales managers

Report

Containers

Container	Container Type	Page	Report Query
	Value prompt	Page1	Query_PromptMgr
	Value prompt	Page1	Query_PromptMonth
Area - Stacked	Visual control	Page1	Query-Area by month
Column - Clustered1	Visual control	Page1	Query1

Choose a Query Item

Focus mode

Queries

Report Query
Query_PromptMgr
Query_PromptMonth
Query1
Query-Area by month
Query-NameTag

Report Query Items

Report Query	Report Query Item	Report Query Item Expression	Type	Agg	Rollup Agg
Query_PromptMgr	Current manager	[Sales (query)].[Employee by manager].[Current manager]	dataItem	none	none
Query_PromptMonth	Month	[Sales (query)].[Time].[Month]	dataItem	none	
Query_PromptMonth	Month (numeric)	[Sales (query)].[Time].[Month (numeric)]	dataItem	none	none
Query1	Average(Discount %)	average[Discount %]	dataItemListSummary		
Query1	Average(Discount %)1	average[Discount %]	dataItemLi		

Pages

Page
Page1

Filters

Report Query	Filter Type	Filter Expression
Query_PromptMgr	Detail	[Sales (query)].[Employee by manager].[Active indicator]=1
Query_PromptMgr	Detail	[Sales (query)].[Employee by manager].[Position code] in (5500, 5600, 5700)
Query_PromptMgr	Detail	[Sales (query)].[Time].[Year]=2012
Query_PromptMonth	Detail	[Sales (query)].[Time].[Month (numeric)] <> 0
Query1	Detail	[Sales (query)].[Employee by manager].[Level 6 manager]=? Para_CurrentMgr?

Data Sources

Data Source	Table
go_data_warehouse	EMP_EMPLOYEE_DIM
	GO_TIME_DIM
	SLS_SALES_FACT
	SLS_SALES_ORDER_DIM

SENTURUS | Migration Assistant | Data updated 8/12/24

Search

File | Export | Share | Chat in Teams | Get insights | Subscribe to report | Set alert | ···

Home
Create
Browse
OneLake data hub
Apps
Metrics
Monitor
Learn
Real-Time hub
Workspaces
Migration Assistant ...
Migration Assistant
Power BI

Back to report

REPORT QUERY ITEMS

Report Query	Report Query Item	Report Query Item Expression	Type	Agg	Rollup Agg
Query_PromptMgr	Current manager	[Sales (query)].[Employee by manager].[Current manager]	dataItem	none	none
Query_PromptMonth	Month	[Sales (query)].[Time].[Month]	dataItem	none	
Query_PromptMonth	Month (numeric)	[Sales (query)].[Time].[Month (numeric)]	dataItem	none	none
Query1	Average(Discount %)	average[Discount %]	dataItemListSummary		
Query1	Average(Discount %)1	average[Discount %]	dataItemListSummary		
Query1	Count(Employee name)	count[Employee name]	dataItemListSummary		
Query1	Discount %	([Unit price]-[Unit sale price])/[Unit price]	dataItem		
Query1	Employee name	[Sales (query)].[Employee by manager].[Employee name (multiscript)]	dataItem	none	none
Query1	Gross margin - cal	([Revenue]-[Product cost])	dataItem		
Query1	Gross profit - cal	[Gross margin - cal]/[Revenue]	dataItem		
Query1	Order count	count([Sales (query)].[Sales order].[Order number])	dataItem	total	
Query1	Order quantity	[Sales (query)].[Sales fact].[Quantity]	dataItem	total	
Query1	Order revenue	[Sales (query)].[Sales fact].[Revenue]	dataItem	total	
Query1	Planned revenue	[Sales (query)].[Sales fact].[Planned revenue]	dataItem	total	
Query1	Product cost	[Sales (query)].[Sales fact].[Product cost]	dataItem	total	
Query1	Product line	([Sales (query)].[Products].[Product line])	dataItem	none	none
Query1	Quantity	[Sales (query)].[Sales fact].[Quantity]	dataItem	total	
Query1	Retailer type	[Sales (query)].[Retailer type].[Retailer type]	dataItem	none	none
Query1	Rev% - cal	[Total(Revenue)]/[Total(Planned revenue)]	dataItem		
Query1	Revenue	[Sales (query)].[Sales fact].[Revenue]	dataItem	total	
Query1	Revenue %	[Revenue]/[Planned revenue]	dataItem		
Query1	Total(Gross margin - cal)	total[Gross margin - cal]	dataItemListSummary		
Query1	Total(gross profit) -cal	[Total(Gross margin - cal)]/[Total(Revenue)]	dataItem		
Query1	Total(Order count)	total[Order count]	dataItemListSummary		
Query1	Total(Order quantity)	total[Order quantity]	dataItemLi		
Query1	Total(Planned revenue)	total[Planned revenue]	stSummary		
Query1	Total(Planned revenue)1	total[Planned revenue]	dataItemListSummary		
Query1	Total(Revenue)	total[Revenue]	dataItemListSummary		
Query1	Total(Revenue)1	total[Revenue]	dataItemListSummary		
Query1	Unit cost	[Sales (query)].[Sales fact].[Unit cost]	dataItem		
Query1	Unit price	[Sales (query)].[Sales fact].[Unit price]	dataItem	average	average
Query1	Unit sale price	[Sales (query)].[Sales fact].[Unit sale price]	dataItem	average	average
Query-Area by month	Employee name	[Sales (query)].[Employee by manager].[Employee name (multiscript)]	dataItem	none	none
Query-Area by month	Month	substring([Sales (query)].[Time].[Month],1,3)	dataItem	none	none
Query-Area by month	Month (numeric)	[Sales (query)].[Time].[Month (numeric)]	dataItem	none	none
Query-Area by month	Month short name	substring([Month],1,3)	dataItem		
Query-Area by month	Quantity	[Sales (query)].[Sales fact].[Quantity]	dataItem	total	
Query-NameTag	Address 1	[Sales (query)].[Employee by manager].[Address 1]	dataItem	none	none
Query-NameTag	City	[Sales (query)].[Employee by manager].[City (multiscript)]	dataItem	none	none
Query-NameTag	Country	[Sales (query)].[Employee by manager].[Country]	dataItem	none	none
Query-NameTag	Current manager	[Sales (query)].[Employee by manager].[Current manager]	dataItem	none	none

Copy
Share
Set alert
Show as a table
Include
Exclude
Drill through
Clear selections

Lineage

Lineage

MIGRATION ASSISTANT

SENTURUS | Migration Assistant | Data updated 8/12/24

Search

Trial: 48 days left

Pages

- Home
- Overview
- Reports
- Executions
- Relationships
- Schedules/Jobs
- Unused Reports

File | Export | Share | Chat in Teams | Get insights | Subscribe to report | Set alert | Copilot

MIGRATION ASSISTANT

SENTURUS

Lineage Analysis for: Rev% - cal

Lineage #	Lineage Type	Query Item Type	Query Item Full Name	Data Source	Query Item Expression
1	Report	Query Item	[Query1].[Planned revenue]		[Sales (query)].[Sales fact].[Planned revenue]
1	Report	Query Item	[Query1].[Revenue]		[Sales (query)].[Sales fact].[Revenue]
1	Report	Query Item	[Query1].[Rev% - cal]		[Total(Revenue)]/[Total(Planned revenue)]
1	Report	Query Item	[Query1].[Total(Planned revenue)]		total[Planned revenue]
1	Report	Query Item	[Query1].[Total(Revenue)]		total[Revenue]
2	FM Model	Query Item	[Sales (query)].[Sales fact].[Planned revenue]		[Business view].[Sales fact].[Unit price] *[Business view].[Sales fact].[Quantity]
2	FM Model	Query Item	[Sales (query)].[Sales fact].[Revenue]		[Sales and marketing data].[SLS_SALES_FACT].[SALE_TOTAL]
3	FM Model	Query Item	[Business view].[Sales fact].[Quantity]		[Sales and marketing data].[SLS_SALES_FACT].[QUANTITY]
3	FM Model	Query Item	[Business view].[Sales fact].[Unit price]		[Sales and marketing data].[SLS_SALES_FACT].[UNIT_PRICE]
4	Database	Query Item	[Sales and marketing data].[SLS_SALES_FACT].[QUANTITY]	go_data_warehouse	Select *from[go_data_warehouse].SLS_SALES_FACT
4	Database	Query Item	[Sales and marketing data].[SLS_SALES_FACT].[SALE_TOTAL]	go_data_warehouse	Select *from[go_data_warehouse].SLS_SALES_FACT
4	Database	Query Item	[Sales and marketing data].[SLS_SALES_FACT].[UNIT_PRICE]	go_data_warehouse	Select *from[go_data_warehouse].SLS_SALES_FACT

143%

MIGRATION ASSISTANT

SENTURUS | Migration Assistant | Data updated 8/12/24

Search

Trial: 48 days left

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Pages

- Home
- Overview
- Reports
- Executions
- Relationships
- Schedules/Jobs
- Unused Reports

MIGRATION ASSISTANT

RELATIONSHIPS

SENTURUS

Package, Path & Model Date

GO Data Warehouse (query)

1	9	5
Query Subjects	Query Subject Joins To	Query Subject Joins From

Query Subject Type

- [x] Database Table

Query Subject

- MRK_PROD_SURVEY_TARG_FACT
- MRK_PRODUCT_SURVEY_DIM
- MRK_PRODUCT_SURVEY_FACT
- MRK_PROMOTION_DIM
- MRK_PROMOTION_FACT
- MRK_PROMOTION_PLAN_FACT
- MRK_RTL_SURVEY_DIM
- MRK_RTL_SURVEY_FACT
- MRK_RTL_SURVEY_TARG_FACT
- SLS_ORDER_METHOD_DIM
- SLS_PRODUCT_BRAND_LOOKUP
- SLS_PRODUCT_COLOR_LOOKUP
- SLS_PRODUCT_DIM
- SLS_PRODUCT_LINE_LOOKUP
- SLS_PRODUCT_LOOKUP
- SLS_PRODUCT_SIZE_LOOKUP
- SLS_PRODUCT_TYPE_LOOKUP
- SLS_RETAILER_DIM
- SLS_SALES_FACT
- SLS_SALES_ORDER_DIM
- SLS_SALES_TARGET_FACT
- VIEW_BALANCED_ORG_DIM
- VIEW_STATEMENT_FACT

Joins To

Left Query Subject	Left Card	Right Card	Right Query Subject	Query Subject Relationship Expression
SLS_SALES_FACT	1:N	1:1	EMP_EMPLOYEE_DIM	[Sales and marketing data].[SLS_SALES_FACT].[EMPLOYEE_KEY]=[Employee data].[EMP_EMPLOYEE_DIM].[EMPLOYEE_KEY]
SLS_SALES_FACT	1:N	1:1	GO_ORGANIZATION_DIM	[Sales and marketing data].[SLS_SALES_FACT].[ORGANIZATION_KEY]=[GO data].[GO_ORGANIZATION_DIM].[ORGANIZATION_KEY]
SLS_SALES_FACT	1:N	1:1	GO_TIME_DIM	[Sales and marketing data].[SLS_SALES_FACT].[ORDER_DAY_KEY]=[GO data].[GO_TIME_DIM].[DAY_KEY]
SLS_SALES_FACT	1:N	1:1	GO_TIME_DIM (close day)	[Sales and marketing data].[SLS_SALES_FACT].[CLOSE_DAY_KEY]=[Model query subjects (GO)].[GO_TIME_DIM (close day)].[DAY_KEY]
SLS_SALES_FACT	1:N	1:1	GO_TIME_DIM (ship date)	[Sales and marketing data].[SLS_SALES_FACT].[SHIP_DAY_KEY]=[Model query subjects (GO)].[GO_TIME_DIM (ship date)].[DAY_KEY]
SLS_SALES_FACT	1:N	1:1	MRK_PROMOTION_DIM	[Sales and marketing data].[SLS_SALES_FACT].[PROMOTION_KEY]=[Sales and marketing data].[MRK_PROMOTION_DIM].[PROMOTION_KEY]
SLS_SALES_FACT	1:N	1:1	SLS_ORDER_METHOD_DIM	[Sales and marketing data].[SLS_SALES_FACT].[ORDER_METHOD_KEY]=[Sales and marketing data].

Joins From

Left Query Subject	Left Card	Right Card	Right Query Subject	Query Subject Relationship Expression
PRODUCT	1:1	1:N	SLS_SALES_FACT	[Model query subjects (Sales and Marketing)].[Product].[Product key]=[Sales and marketing data].[SLS_SALES_FACT].[PRODUCT_KEY]
Product (brand)	1:1	1:N	SLS_SALES_FACT	[Model query subjects (Sales and Marketing)].[Product (brand)].[PRODUCT_KEY]=[Sales and marketing data].[SLS_SALES_FACT].[PRODUCT_KEY]
Retailer site	1:1	1:N	SLS_SALES_FACT	[Model query subjects (Sales and Marketing)].[Retailer site].[Retailer site key]=[Sales and marketing data].[SLS_SALES_FACT].[RETAILER_SITE_KEY]
SLS_RETAILER_DIM	1:1	1:N	SLS_SALES_FACT	[Sales and marketing data].[SLS_RETAILER_DIM].[RETAILER_KEY]=[Sales and marketing data].[SLS_SALES_FACT].[RETAILER_KEY]
VIEW_BALANCED_ORG_DIM	1:1	1:N	SLS_SALES_FACT	[GO data].[VIEW_BALANCED_ORG_DIM].[ORGANIZATION_KEY]=[Sales and marketing data].[SLS_SALES_FACT].[ORGANIZATION_KEY]

MIGRATION ASSISTANT

WRAP UP & BONUS MATERIAL

Download the deck for our bonus section:

"Moving a Report with Lightweight Transformations to Power BI"

Stay, extend or go?

STAY

01

- Optimization tuning
- Upgrade services
- V11.x custom extended support
- Mitigate deprecated functionality in v12

EXTEND

02

- Senturus Analytics Connector
- Maximize value of cross-platform data access

GO

03

- Senturus Migration Assistant
- Jumpstart ROI
- Significantly reduce migration time and cost

SENTURUS

Ready to go?
Modernization and migration options:

MIGRATION ASSESSMENT

Leveraging our Migration Assistant, we evaluate your current Cognos environment, uncover user needs, and address pain points.

3 – 4 Weeks

FOUNDATION

We'll start your journey by developing your most crucial semantic model, leveraging our expertise and Generative AI.

2 – 3 Months

EXECUTE ON BI ROADMAP

We'll continue to execute against your BI modernization roadmap using our agile methodologies.

6 Months +

Events and resources

senturus.com/resources

STAY

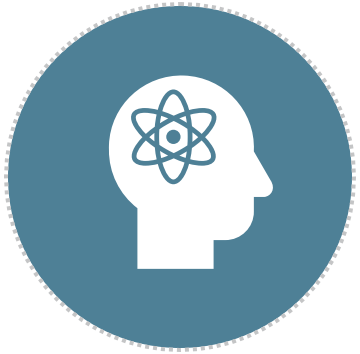
Cognos: Never Going to Give You Up

EXTEND

3 Ways to Use Cognos with Power BI & Tableau

GO

Rolling Out Power BI in a Cognos Shop



KNOWLEDGE CENTER

Blogs, webinars and resources available 24/7

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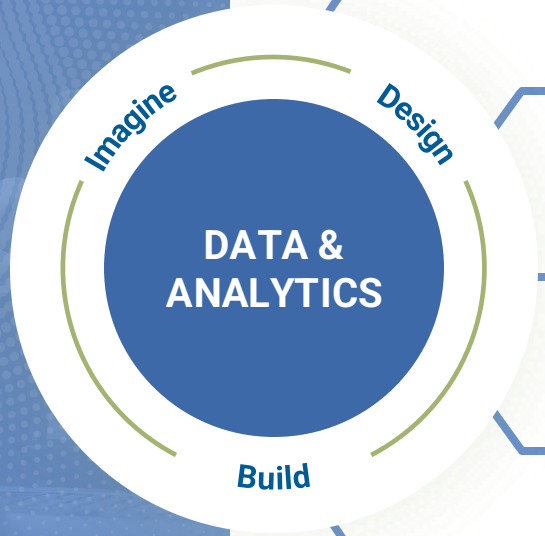
What we do



ANALYTICS STRATEGY

- Data roadmaps
- Maturity assessments
- Data governance
- AI/ML enablement

DATA MANAGEMENT

- Data architecture
- Data integration
- Cost optimization
- Master Data Management

INSIGHTS & DATA

- Enterprise analytics
- Dashboards and visualizations
- Customer insights
- Self service and enablement

SUPPORT & TRAINING

- Training/mentoring
- Change management
- Support services
- CBTs

ACCELERATORS

- Senturus Analytics Connector
- Senturus Migration Assistant
- Envisor Cloud FinOps Platform

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History of success

- 23 years
- 1400+ clients
- 3000+ projects

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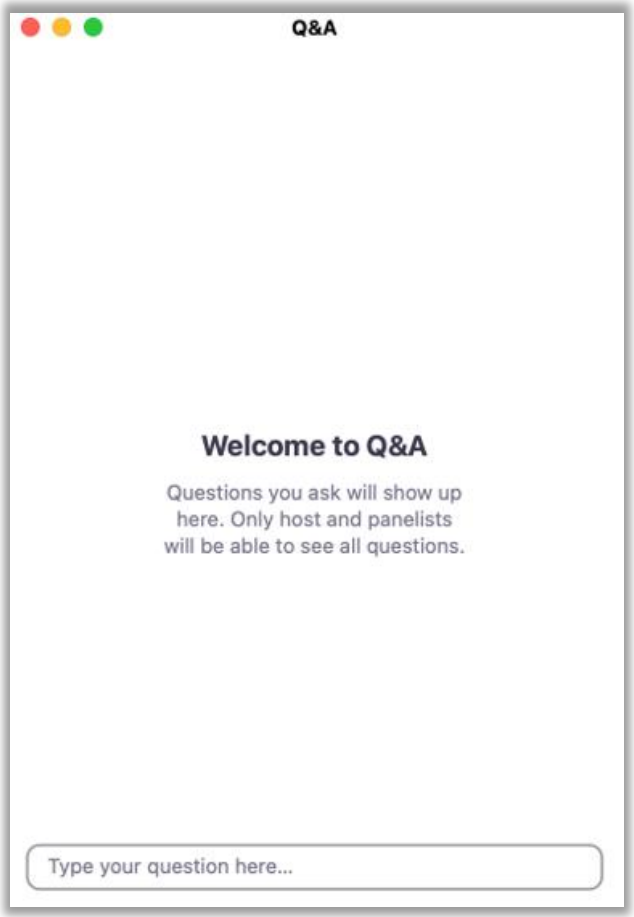
Q&A

If your question or issue is broader than what we can answer today, contact us at: **info@senturus.com** and we will set up a free consultation.



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Thank You!

Let’s keep in touch

888-601-6010

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BONUS MATERIAL

Moving a report with lightweight transformations to Power BI

Moving a report to Power BI

The screenshots on the following pages provide a high-level overview of moving a report to Power BI.

For this example, we moved the Great Outdoors "Sales Managers" sample report from Cognos to Power BI using the following steps:

Use Power BI dataflows to capture and transform merged queries from Cognos

Leverage SQL data warehouse and generative AI for SQL-to-Power Query transformations

Build the semantic model in Power BI Desktop

Utilize raw tables and dataflow objects

Replicate the source report in Power BI

Adjust for visual differences while maintaining the original wireframe

Publish the final report to the appropriate workspace

Report developers and consumers can easily access the report directly from the workspace

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Cognos source report

FLM DASHBOARD FOR:

REVENUE COVERAGE	GROSS PROFIT
94%	41%

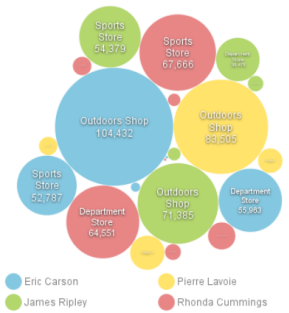
Contact:	Alex Rodriguez	**Address:**	1288 Dorchester Avenue
Position:	Branch sales manager	**City, Province or State:**	Boston, Massachusetts,
Work phone:	1 (617) 268-6754	**Postal code:**	02133
E-mail:	ARodriguez@grtd123.com	**Country:**	United States

TEAM DETAILS

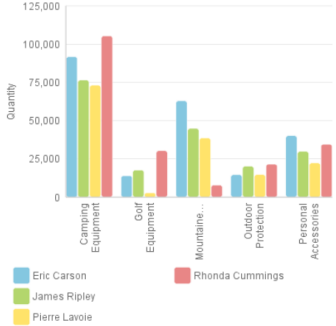
SALES REP	ORDERS		DISCOUNT (Average)			COST				
Name	Order count	Order quantity	Unit price	Unit sale price	Discount %	Unit cost	Total cost	Revenue	Planned revenue	Revenue %
Eric Carson	$52.00	$223,462.00	$137	$131	$0.05	$75	$7,319,432	$12,196,161	$12,918,865	$0.9
James Ripley	$52.00	$189,159.00	$135	$128	$0.05	$71	$5,533,064	$9,603,169	$10,172,479	$0
Pierre Lavoie	$42.00	$151,672.00	$162	$154	$0.05	$88	$5,931,554	$9,792,414	$10,341,274	
Rhonda Cummings	$69.00	$199,707.00	$169	$159	$0.06	$85	$7,612,489	$13,392,909	$14,287,735	
Rep count: 4	**215**	**764,000**			**5.1%**			**$44,984,653**	**$47,720,352**	

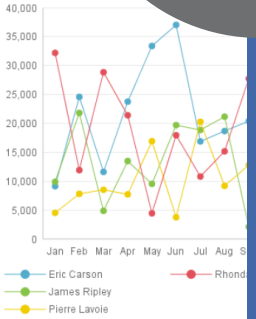
● less than 3% ■ greater than5%

TEAM SALES (Quantity)



TEAM SALES BY PRODUCT LINE





IBM Cognos Analytics

The Great Outdoors:
Sales Managers Report in Cognos

SENTURUS

Power BI target report

FLM DASHBOARD FOR:

Current Manager	Sales Reps	Month	Month
Alex Rodriguez	All	All	2011

REVENUE COVERAGE	GROSS PROFIT
93%	40%

Contact: Alex Rodriguez
Position: Branch Sales Manager
Work Phone: 1 (617) 268-6754
Email: ARodriguez@grtd123.com

Address: 1288 Dorchester Avenue
City, Province or State: Boston, Massachusetts
Postal Code: 02133
Country: United States

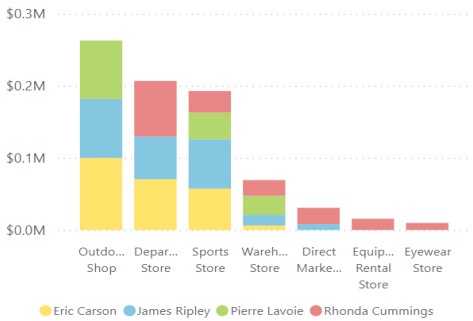
TEAM DETAILS

Sales Rep	ORDERS		DISCOUNT (AVERAGE)			COST		REVENUE				
	Order Count	Order Quantity	Unit Price	Unit Sale Price	Discount %	Unit Cost	Unit Cost	Total Cost	Planned Revenue	Revenue %	Gross Margin	Gros
Eric Carson	48	$234,170	$146	$137	6%	$36,819	$79	$6,258,086	$11,301,675	94%	$4,330,610	
James Ripley	71	$232,412	$171	$161	6%	$40,886	$90	$6,190,233	$11,471,934	92%	$4,407,90	
Pierre Lavoie	55	$144,477	$139	$131	6%	$20,168	$81	$4,052,876	$6,949,338	94%	$2,469,	
Rhonda Cummings	74	$176,722	$143	$134	6%	$36,533	$77	$5,944,309	$10,509,737	93%	$3,823	
Total	**248**	**$787,781**	**$151**	**$142**	**6%**	**$134,405**	**$82**	**$22,445,504**	**$40,232,685**	**93%**	**$15,031**	

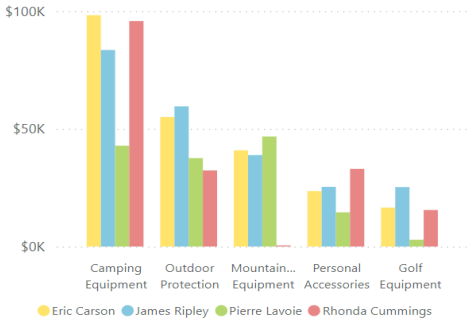
less than 3% greater than 5%

greater t

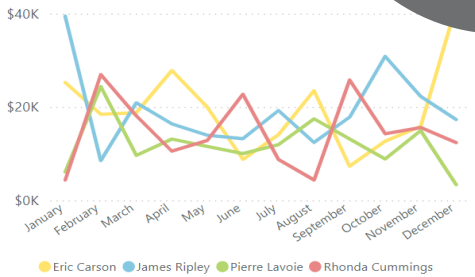
TEAM SALES BY RETAIL TYPE



TEAM SALES BY PRODUCT LINE



TEAM PIPELINE



Sales Managers

The Great Outdoors:
Sales Managers Report in Power BI

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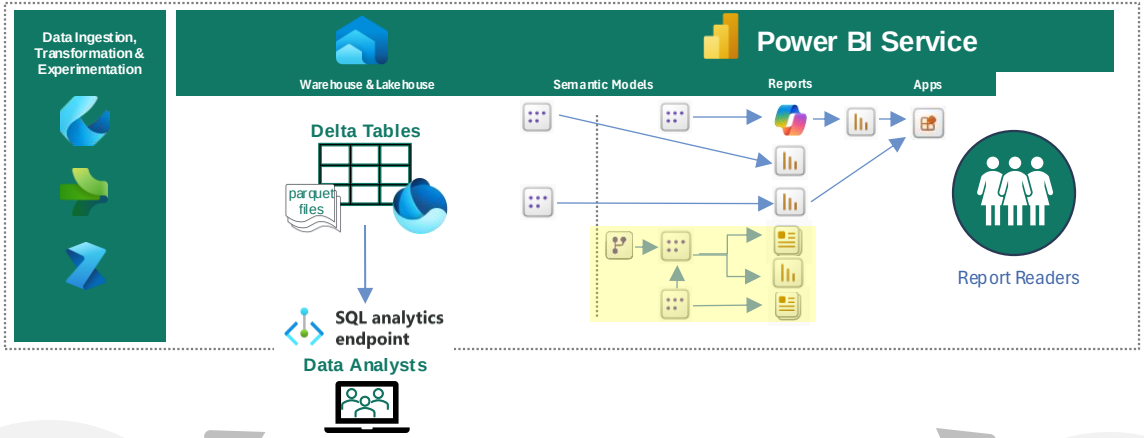
Power BI dataflow use case



Tables & Metric usage

Relationships & roleplaying dims

Semantic logic

Query expressions

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Trial: 44 days left

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Real-Time hub
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Power BI

Demo and Tutorials

Development

View deployment pipeline | Create app | Manage access | Workspace settings

New | Upload

Filter by keyword

SQL Server
GOSALESDW-senturus-azure.database.windows....

Query Subjects
Dataflow
Refreshed: 9/11/24, 5:41:37 PM

SQL Server
GOSALESDW-senturus-azure.database.windows....

SQL Server
GOSALESDW-senturus-azure.database.windows....

SQL Server
GOSALESDW-senturus-azure.database.windows....

Master Model
Semantic model
Refreshed: 9/5/24, 6:15:42 PM

Sales and Marketing Semantic M...
Semantic model
Refreshed: 9/11/24, 5:51:17 PM

Financial Partner Semantic Model
Semantic model
Refreshed: 9/12/24, 9:41:00 AM

Sales Manager Semantic Model f...
Semantic model
Refreshed: 9/26/24, 4:58:01 PM

Sales Managers
Report
0 Viewers 0 Views

Employee Quantity Sold by Bran...
Report

Retailer Type by Product Line - G...
Report

Partner Survey Results 2010
Paginated Report

100%

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SENTURUS | Power BI Demo and Tutorials

Search

Trial: 44 days left

Demo and Tutorials

Development

View deployment pipeline | Create app | Manage access | Workspace settings

New | Upload

Filter by keyword | Filter

Demo and Tutorials > Interactive Reports > Sales and Marketing

Name	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
Employee Quantity Sold by Branch/Region	Report	—	Demo and Tutorials	9/11/24, 5:51:17 PM	—	—	—	No
Retailer Type by Product Line - Gross Profit	Report	—	Demo and Tutorials	9/11/24, 5:51:17 PM	—	—	—	No
Sales Managers	Report	—	Demo and Tutorials	9/11/24, 5:51:17 PM	—	—	—	No

- Explore this data (preview)
- Analyze in Excel
- Delete
- Quick insights
- Save a copy
- Settings
- View usage metrics report
- View workspace lineage
- View item lineage
- Create paginated report
- Manage permissions
- Move to

Home | Create | Browse | OneLake data hub | Apps | Metrics | Monitor | Learn | Real-Time hub | Workspaces | Demo and Tutorials | Power BI

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BUILDING THE FOUNDATION

Creating the semantic model

SENTURUS | Power BI Demo and Tutorials

Search

Trial: 48 days left

21

Home
Create
Browse
OneLake data hub
Apps
Metrics
Monitor
Learn
Real-Time hub
Workspaces
Demo and Tutorials
...
Power BI

Demo and Tutorials

Create deployment pipeline | Create app | Manage access | Workspace settings

New | Upload

- Folder (preview)
- Report
- Paginated report
- Scorecard
- Dashboard
- Semantic model
- Dataflow — Prep, clean, and transform data.
- Datamart (preview)
- Streaming dataset
- Streaming dataflow
- More options

Filter by keyword | Filter

	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
	Folder	—	—	—	—	—	—	
	Folder	—	—	—	—	—	—	
	Folder	—	—	—	—	—	—	
	Folder	—	—	—	—	—	—	

SENTURUS | Query Subjects

Search

Trial: 48 days left

Power Query

Search (Alt + Q)

Home | Transform | Add column | View | Help

Get data | Recent sources | Enter data | Manage connections | Options | Manage parameters | Refresh | Properties | Advanced editor | Manage | Choose columns | Remove columns | Keep rows | Remove rows | Filter rows | Split column | Group by | Data type: Whole number | Use first row as headers | Replace values | Merge queries | Append queries | Combine files | Map to entity | AI insights | Export template

New query | Data sources | Options | Parameters | Query | Manage columns | Reduce rows | Sort | Transform | Combine | CDM | Insights | Share

Queries [11]

- gosalesdw SLS_PRODUCT_BRAND_LOOKUP
- gosalesdw SLS_PRODUCT_COLOR_LOOKUP
- gosalesdw SLS_PRODUCT_DIM
- gosalesdw SLS_PRODUCT_LINE_LOOKUP
- gosalesdw SLS_PRODUCT_LOOKUP
- gosalesdw SLS_PRODUCT_SIZE_LOOKUP
- gosalesdw SLS_PRODUCT_TYPE_LOOKUP
- Product (Expanded Method)
- Product (Merge)
- Employee by manager
- Retailers

```
Table.RemoveColumns(#"Renamed Columns", Table.ColumnsOfType(#"Renamed Columns", {type table, type record, type list, type nullable binary, type binary, type function}))
```

	Retailer site key	Retailer site code	Retailer key	Retailer code	Retailer name	Retailer (multiscript)	Retailer contact code	Contact first name	Contact last name
	847 distinct, 847 unique	847 distinct, 847 unique	562 distinct, 477 u...	562 distinct, 477 un...	562 distinct, 477 unique	562 distinct, 477 unique	847 distinct, 847 unique	630 distinct, 488 unique	776 distinct, 724 unique
1	5001	20001	6789	1189	Rock Steady	Rock Steady	3030	Trudy	Gates
2	5002	20002	6789	1189	Rock Steady	Rock Steady	3007	Mark	Myers
3	5003	20003	6789	1189	Rock Steady	Rock Steady	3016	Yves	Fortin
4	5004	20004	6790	1190	Ultra Sports	Ultra Sports	3006	Marie	Turcotte
5	5005	20005	6790	1190	Ultra Sports	Ultra Sports	3065	Andrea	Martens
6	5006	20006	6790	1190	Ultra Sports	Ultra Sports	3066	Bill	Follett
7	5007	20007	6790	1190	Ultra Sports	Ultra Sports	3023	Tom	Mackley
8	5008	20008	6791	1191	Mountain Madness	Mountain Madness	3067	Bob	Harvey
9	5009	20009	6792	1192	VIP Department Stores	VIP Department Stores	3068	Bonnie	Richards
10	5010	20010	6792	1192	VIP Department Stores	VIP Department Stores	3009	Jack	Marshall
11	5011	20011	6792	1192	VIP Department Stores	VIP Department Stores	3022	Richard	Seitak
12	5012	20012	6792	1192	VIP Department Stores	VIP Department Stores	3069	Douglas	Petterson
13	5013	20013	6792	1192	VIP Department Stores	VIP Department Stores	3070	Ellen	Smith
14	5014	20014	6793	1193	Le Golfeur	Le Golfeur	3010	Frank	Smith
15	5015	20015	6794	1194	Sunglass Corner	Sunglass Corner	3071	Emma	Wilson
16	5016	20016	6794	1194	Sunglass Corner	Sunglass Corner	3072	Julia	Ortega
17	5017	20017	6795	1195	Falcon Outfitters	Falcon Outfitters	3073	Karen	Bowman
18	5018	20018	6795	1195	Falcon Outfitters	Falcon Outfitters	3074	Lloyd	Johnson
19	5019	20019	6795	1195	Falcon Outfitters	Falcon Outfitters	3004	Gilles	Rapier
20	5020	20020	6795	1195	Falcon Outfitters	Falcon Outfitters	3017	Walter	Reilly
21	5021	20021	6795	1195	Falcon Outfitters	Falcon Outfitters	3032	David	Henschel
22	5022	20022	6796	1196	Maximum Sports	Maximum Sports	3075	Sam	O'Donnell
23	5023	20023	6796	1196	Maximum Sports	Maximum Sports	3005	Walter	Baker
24	5024	20024	6796	1196	Maximum Sports	Maximum Sports	3076	Ron	Winter
25	5025	20025	6796	1196	Maximum Sports	Maximum Sports	3011	Frank	Bretton
26	5026	20026	6796	1196	Maximum Sports	Maximum Sports	3077	Phil	Daily
27	5027	20027	6797	1197	Act'N'Up Fitness	Act'N'Up Fitness	3013	Elise	Leblanc
28	5028	20028	6797	1197	Act'N'Up Fitness	Act'N'Up Fitness	3031	Harmon	Pederson
29	5029	20029	6797	1197	Act'N'Up Fitness	Act'N'Up Fitness	3015	Guy	Lamoureux
30	5030	20030	6797	1197	Act'N'Up Fitness	Act'N'Up Fitness	3014	Serge	Champoux
31									

Query settings

Properties

Name: Retailers

Entity type: Custom

Applied steps

- Source
- GOSALESDW
- Retailer_region_dimension
- SLS_RETAILER_DIM
- Join_Tables
- Expanded_Region
- Renamed Columns
- Remove columns

Completed (8.05 s) Columns: 94 Rows: 99+ Column profiling based on top 1,000 rows

Step

Cancel | Save & close

Here is the Power Query M code that replicates your SQL query, with all the column names adjusted to have spaces instead of underscores, and any occurrence of "multiscript" replaced with " (multiscript)".

Power Query M Script:

powerquery

Copy code

```powerquery
let
    // Connect to the source database
    Source = Sql.Databases("your-server-name-here"),
    GOSALESDW = Source{[Name="GOSALESDW"]}[Data],

    // Load the GO_REGION_DIM table (Retailer_region_dimension)
    Retailer_region_dimension = GOSALESDW{[Schema="gosalesdw", Item="GO_REGION_DIM"]}[Data

    // Load the SLS_RTL_DIM table (SLS_RETAILER_DIM)
    SLS_RETAILER_DIM = GOSALESDW{[Schema="gosalesdw", Item="SLS_RTL_DIM"]}[Data],

    // Merge the Retailer_region_dimension and SLS_RETAILER_DIM tables
    Join_Tables = Table.NestedJoin(SLS_RETAILER_DIM, {"RTL_COUNTRY_CODE"}, Retailer_region_
    Expanded_Region = Table.ExpandTableColumn(Join_Tables, "RegionLookup", {"REGION_CODE",
                                              {"Region code", "Region", "Retailer country

    // Rename columns to match the SQL aliases, replacing underscores with spaces and hand
    #"Renamed Columns" = Table.RenameColumns(Expanded_Region,
        {
            {"Region", "Region"},
            {"Retailer country", "Retailer country"},
            {"RETAILER_NAME", "Retailer name"},
            {"RETAILER_NAME_MB", "Retailer (multiscript)"},
            {"CONTACT_FIRST_NAME", "Contact first name"},
            {"CONTACT_LAST_NAME", "Contact last name"},
            {"CONTACT_PHONE_NUMBER", "Contact phone number"},
            {"CONTACT_EXTENSION", "Contact extension"},
            {"CONTACT_FAX", "Contact fax"},
            {"c19", "c10"},
            {"c20", "c11"},
            {"RETAILER_START_DATE", "Retailer start date"},
            {"RETAILER_TYPE_EN", "Retail type"},
            {"JOB_POSITION_EN", "Contact position"},
```

Message ChatGPT

SENTURUS | Power BI Demo and Tutorials

Search

Trial: 48 days left

21

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Demo and Tutorials

Create deployment pipeline | Create app | Manage access | Workspace settings

+ New | Upload

Filter by keyword | Filter

Demo and Tutorials > Qualified Sources

Name	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
Master Model	Semantic model	—	Demo and Tutorials	9/5/24, 6:15:42 PM	N/A	—	—	
Query Subjects	Dataflow	—	Devon Reddick	9/11/24, 5:41:37 PM	N/A	—	—	

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Queries

New visual | Text box | More visuals
Insert

New calculation | New measure | Quick measure
Calculations

Sensitivity
Sensitivity

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Common data sources

- Excel workbook
- Power BI semantic models
- Dataflows
- Dataverse
- SQL Server
- Analysis Services
- Text/CSV
- Web
- OData feed
- Blank query
- Power BI Template Apps
- More...

Navigator

Display Options

- Dataflows [2]
  - Environments [1]
  - Workspaces [1]
    - Demo and Tutorials [1]
      - Query Subjects [4]
        - Employee by manager
        - Product (Expanded Method)
        - Product (Merge)
        - Retailers

Retailers

Retailer site key	Retailer site code	Retailer key	Ret
5065	20068	6799	
5066	20069	6799	
5067	20070	6799	
5068	20071	6799	
5069	20072	6799	

The data in the preview has been truncated due to size limits.

Load | Transform Data | Cancel

Filters

Visualizations

Build visual

Values

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

Data

Search

Page 1

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Sales and Marketing Semantic Model

File | Home | Transform | Add Column | View | Tools | Help

Close & Apply | New Source | Recent Sources | Enter Data | Data source settings | Manage Parameters | Refresh Preview | Properties | Advanced Editor | Manage | Choose Columns | Remove Columns | Keep Rows | Remove Rows | Split Column | Group By | Data Type: Whole Number | Use First Row as Headers | Replace Values | Merge Queries | Append Queries | Combine Files | Text Analytics | Vision | Azure Machine Learning

Close | New Query | Data Sources | Parameters | Query | Manage Columns | Reduce Rows | Sort | Transform | Combine | AI Insights

Queries [6]

- Base Queries [3]
  - Sales
  - Sales Orders
  - Order Date
- Dataflows [3]
  - Employee by manager
  - Product
  - Retailers
- Other Queries

```
= GOSALESDW{[Schema="gosalesdw", Item="SLS_SALES_ORDER_DIM"]}[Data]
```

	SALES_ORDER_KEY	ORDER_DETAIL_CODE	ORDER_NUMBER	WAREHOUSE_BRANCH_...	gosalesdw.DIST_RETURNED_ITEMS_F...	gosalesdw.MRK_PROMOTION_...	gosalesdw.SLS_SALES_FACT
	1000 distinct, 1000 unique	1000 distinct, 1000 u					
1	100001					Table	Table
2	100002					Table	Table
3	100003					Table	Table
4	100004					Table	Table
5	100005					Table	Table
6	100006					Table	Table
7	100007					Table	Table
8	100008					Table	Table
9	100009					Table	Table
10	100010					Table	Table
11	100011					Table	Table
12	100012					Table	Table
13	100013					Table	Table
14	100014					Table	Table
15	100015					Table	Table
16	100016					Table	Table
17	100017					Table	Table
18	100018					Table	Table
19	100019					Table	Table
20	100020					Table	Table
21	100021					Table	Table
22	100022					Table	Table
23	100023					Table	Table
24	100024					Table	Table
25	100025					Table	Table
26	100026					Table	Table
27	100027					Table	Table
28	100028					Table	Table
29	100029					Table	Table
30	100030					Table	Table
31	100031					Table	Table
32	100032					Table	Table
33	100033	1000103	100008	17	Table	Table	Table
34	100034	1000104	100008	17	Table	Table	Table
35	100035	1000105	100008	17	Table	Table	Table
36	100036	1000106	100008	17	Table	Table	Table
37	100037	1000107	100008	17	Table	Table	Table
38	100038	1000108	100008	17	Table	Table	Table

Navigation

Specify a resource to navigate to.

- gosalesdw.MRK_RTL_SURVEY_FACT
- gosalesdw.MRK_RTL_SURVEY_TARG_FACT
- gosalesdw.SLS_ORDER_METHOD_DIM
- gosalesdw.SLS_PRODUCT_BRAND_LOOKUP
- gosalesdw.SLS_PRODUCT_COLOR_LOOKUP
- gosalesdw.SLS_PRODUCT_DIM
- gosalesdw.SLS_PRODUCT_LINE_LOOKUP
- gosalesdw.SLS_PRODUCT_LOOKUP
- gosalesdw.SLS_PRODUCT_MASTER
- gosalesdw.SLS_PRODUCT_SIZE_LOOKUP
- gosalesdw.SLS_PRODUCT_TYPE_LOOKUP
- gosalesdw.SLS_RETAILER_DIM
- gosalesdw.SLS_RTL_DIM
- gosalesdw.SLS_SALES_FACT
- gosalesdw.SLS_SALES_ORDER_DIM
- gosalesdw.SLS_SALES_TARG_FACT
- gosalesdw.xgorevdw
- MigrationAssistant-20231009
- PSA DB
- SalesforceDemoData
- TableauTestV1
- WideWorldImporters
- WideWorldImportersDW

OK | Cancel

Query Settings

PROPERTIES

Name: Sales Orders

All Properties

APPLIED STEPS

- Source
- Navigation
- Renamed Columns

7 COLUMNS, 999+ ROWS Column profiling based on top 1000 rows

PREVIEW DOWNLOADED ON THURSDAY, SEPTEMBER 5, 2024

Sales and Marketing Semantic Model

File | Home | Transform | Add Column | View | Tools | Help

Close & Apply | New Source | Recent Sources | Enter Data | Data source settings | Manage Parameters | Refresh Preview | Properties | Advanced Editor | Manage | Choose Columns | Remove Columns | Keep Rows | Remove Rows | Split Column | Group By | Data Type: Whole Number | Use First Row as Headers | Replace Values | Merge Queries | Append Queries | Combine Files | Text Analytics | Vision | Azure Machine Learning

Close | New Query | Data Sources | Parameters | Query | Manage Columns | Reduce Rows | Sort | Transform | Combine | AI Insights

Queries [6]

- Base Queries [3]
  - Sales
  - Sales Orders
  - Order Date
- Dataflows [3]
  - Employee by manager
  - Product
  - Retailers
- Other Queries

```
= Table.RenameColumns(SLS_SALES_ORDER_DIM,
```

	Sales order key	Order detail code	Order number	Warehouse branch code	gosalesdw.DIST_RETURNED_ITEMS_F...	gosalesdw.MRK_PROMOTION_...	gosalesdw.SLS_SALES_FACT
	1000 distinct, 1000 unique	1000 distinct, 1000 unique	175 distinct, 29 unique	4 distinct, 0 unique			
1	100001	1000001	100001	21	Table	Table	Table
2	100002	1000002	100001	21	Table	Table	Table
3	100003	1000013	100002	30	Table	Table	Table
4	100004	1000014	100002	30	Table	Table	Table
5	100005	1000015	100002	30	Table	Table	Table
6	100006	1000016	100002	30	Table	Table	Table
7	100007	1000017	100002	30	Table	Table	Table
8	100008	1000028	100003	30	Table	Table	Table
9	100009	1000029	100003	30	Table	Table	Table
10	100010	1000030	100003	30	Table	Table	Table
11	100011	1000031	100003	30	Table	Table	Table
12	100012	1000042	100004	30	Table	Table	Table
13	100013	1000043	100004	30	Table	Table	Table
14	100014	1000044	100004	30	Table	Table	Table
15	100015	1000045	100004	30	Table	Table	Table
16	100016	1000056	100005	30	Table	Table	Table
17	100017	1000057	100005	30	Table	Table	Table
18	100018	1000058	100005	30	Table	Table	Table
19	100019	1000059	100005	30	Table	Table	Table
20	100020	1000060	100005	30	Table	Table	Table
21	100021	1000061	100005	30	Table	Table	Table
22	100022	1000072	100006	30	Table	Table	Table
23	100023	1000073	100006	30	Table	Table	Table
24	100024	1000074	100006	30	Table	Table	Table
25	100025	1000075	100006	30	Table	Table	Table
26	100026	1000076	100006	30	Table	Table	Table
27	100027	1000077	100006	30	Table	Table	Table
28	100028	1000088	100007	17	Table	Table	Table
29	100029	1000089	100007	17	Table	Table	Table
30	100030	1000100	100008	17	Table	Table	Table
31	100031	1000101	100008	17	Table	Table	Table
32	100032	1000102	100008	17	Table	Table	Table
33	100033	1000103	100008	17	Table	Table	Table
34	100034	1000104	100008	17	Table	Table	Table
35	100035	1000105	100008	17	Table	Table	Table
36	100036	1000106	100008	17	Table	Table	Table
37	100037	1000107	100008	17	Table	Table	Table
38	100038	1000108	100008	17	Table	Table	Table

Query Settings

PROPERTIES

Name: Sales Orders

All Properties

APPLIED STEPS

- Source
- Navigation
- Renamed Columns

7 COLUMNS, 999+ ROWS Column profiling based on top 1000 rows

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Close

File | Home | Insert | Modeling | View | Optimize | Help | External tools | Table tools | Measure tools

Share

Name: Gross Profit %

Home table: Reporting Measures

Structure

Format: Percentage

Formatting

Data category: Uncategorized

Properties

New measure | Quick measure

Calculations

Auto recovery contains some recovered files that haven't been opened.

View recovered files

```
1 Gross Profit % = DIVIDE([Sum of Gross Margin],[Sum of Revenue])
```

Build visuals with your data

Select or drag fields from the **Data** pane onto the report canvas.

Page 1

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Visualizations

Build visual

Values

Add data fields here

Drill through

Cross-report: Off

Keep all filters: On

Add drill-through fields here

Data

Search

- Reporting Measures
  - Sales Managers
    - Average Unit Cost
    - Average Unit Price
    - Average Unit Sale Price
    - Discount %
    - Gross Profit %
    - Order Count
    - Rep Count
    - Revenue %
    - Sum of Gross Margin
    - Sum of Planned Revenue
    - Sum of Product Cost
    - Sum of Quantity
    - Sum of Revenue
    - Sum of Unit Cost
    - Sum of Unit Price
    - Sum of Unit Sale Price
- Employee by manager
- Order Date
- Product
- Retailers
  - City (multiscript)
  - Contact email
  - Contact extension
  - Contact fax
  - Contact first name
  - Contact last name
  - Contact phone number
  - Contact position
  - CONTACT_FIRST_NAME_MB
  - CONTACT_LAST_NAME_MB
  - Flag image
  - Gender code
  - Latitude

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Data: Transform data | Refresh

Queries: New visual | Text box | More visuals

Insert: New calculation | New measure | Quick measure

Calculations: Sensitivity

Sensitivity: Publish

Share: Copilot

Copilot

Publish to Power BI

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My workspace

All

- Demo and Tutorials
- Demo and Tutorials Cognos
- Intranet
- Microsoft Fabric Capacity Metrics 9/...
- Migration Assistant Demo
- Pulse Reporting

Demo and Tutorials > Semantic Models > Sales and Marketing

Name	Type	Owner
Sales and Marketing Semantic Model	Semantic model	-

Select | Cancel

Visualizations

Build visual

Data

Search

- Reporting Measures
  - Sales Managers
    - Average Unit Cost
    - Average Unit Price
    - Average Unit Sale Price
    - Discount %
    - Gross Profit %
    - Order Count
    - Rep Count
    - Revenue %
    - Sum of Gross Margin
    - Sum of Planned Revenue
    - Sum of Product Cost
    - Sum of Quantity
    - Sum of Revenue
    - Sum of Unit Cost
    - Sum of Unit Price
    - Sum of Unit Sale Price
- Employee by manager
- Order Date
- Product
- Retailers
  - City (multiscript)
  - Contact email
  - Contact extension
  - Contact fax
  - Contact first name
  - Contact last name
  - Contact phone number
  - Contact position
  - CONTACT_FIRST_NAME_MB
  - CONTACT_LAST_NAME_MB
  - Flag image
  - Gender code
  - Latitude

Page 1

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BUILDING THE FINAL PICTURE

Creating the report

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Queries

New visual | Text box | More visuals

Insert

New calculation | New measure | Quick measure

Calculations

Sensitivity

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Copilot

OneLake data hub

- Power BI semantic models
- Datamarts (Preview)
- Lakehouses
- Warehouses
- KQL Databases

Create a live connection to semantic models in the Power BI service.

OneLake data hub

Discover data from across your org and use it to create reports

All | My data | Endorsed in your org

sales and

Filter(1)

Name	Owner	Refreshed	Location	Endorsement	Sensitivity
Sales and Marketing Semantic Mo...	Devon Reddick	9/11/24, 5:51:17 PM	Demo and Tutorials	—	—

Connect | Cancel

Import d

Visualizations

Build visual

Values

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

Filters

Data

Page 1

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Data

Transform data | Refresh

Queries

New visual | Text box | More visuals

Insert

New calculation | New measure | Quick measure

Calculations

Sensitivity

Sensitivity

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Build visuals with your data

Select or drag fields from the **Data** pane onto the report canvas.

Page 1

Filters

Visualizations

Build visual

Values

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

Data

Search

- Reporting Measures
  - Sales Managers
    - _
    - Average Unit Cost
    - Average Unit Price
    - Average Unit Sale Price
    - Discount %
    - Gross Profit %
    - Order Count
    - Rep Count
    - Revenue %
    - Sum of Gross Margin
    - Sum of Planned Revenue
    - Sum of Product Cost
    - Sum of Quantity
    - Sum of Revenue
    - Sum of Unit Cost
    - Sum of Unit Price
    - Sum of Unit Sale Price
- Employee by manager
- Order Date
- Product
- Retailers
- Sales Orders

Page 1 of 1

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116%

FLM DASHBOARD FOR:

REVENUE COVERAGE	GROSS PROFIT
◆ 94%	41%

Contact:	Alex Rodriguez	**Address:**	1288 Dorchester Avenue
Position:	Branch sales manager	**City, Province or State:**	Boston, Massachusetts,
Work phone:	1 (617) 268-6754	**Postal code:**	02133
E-mail:	ARodriguez@grtd123.com	**Country:**	United States

TEAM DETAILS

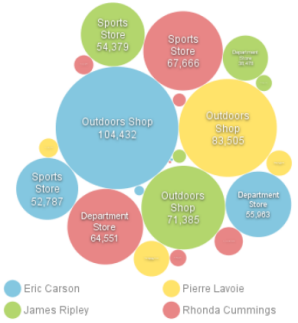
MONTH:

SALES REP	ORDERS		DISCOUNT (Average)			COST		REVENUE				
Name	**Order count**	**Order quantity**	**Unit price**	**Unit sale price**	**Discount %**	**Unit cost**	**Total cost**	**Revenue**	**Planned revenue**	**Revenue %**	**Gross margin**	**Gross profit**
Eric Carson	$52.00	$223,462.00	$137	$131	$0.05	$75	$7,319,432	$12,196,161	$12,918,865	$0.94	$4,876,729 ■	$0.40
James Ripley	$52.00	$189,159.00	$135	$128	$0.05	$71	$5,533,064	$9,603,169	$10,172,479	$0.94	$4,070,105	$0.42
Pierre Lavoie	$42.00	$151,672.00	$162	$154	$0.05	$88	$5,931,554	$9,792,414	$10,341,274	$0.95	$3,860,860 ■	$0.39
Rhonda Cummings	$69.00	$199,707.00	$169	$159 ■	$0.06	$85	$7,612,489	$13,392,909	$14,287,735	$0.94	$5,780,420	$0.43
Rep count: 4	**215**	**764,000**			**5.1%**			**$44,984,653**	**$47,720,352**	**94.3%**	**$18,588,113**	**41.3%**

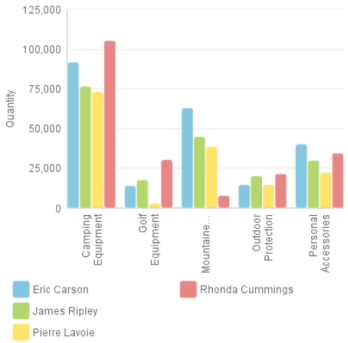
●: less than 3% ■: greater than5%

●: greater than 45% ■: less than 40%

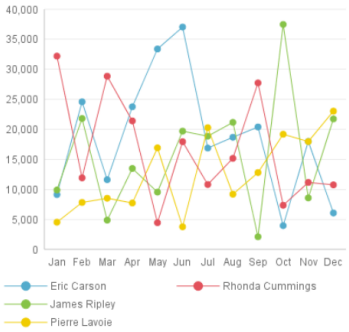
TEAM SALES (Quantity)



TEAM SALES BY PRODUCT LINE



TEAM PIPELINE



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Data

Transform data | Refresh

Queries

New visual | Text box | More visuals

Insert

New calculation | New measure | Quick measure

Calculations

Sensitivity

Sensitivity

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FLM DASHBOARD FOR:

Current Manager	Sales Reps	Month	Month
Alex Rodriguez	All	All	2011

Select or drag fields to po ual

Select or drag fields t s

Contact:
Position:
Work Phone:
Email:

Address:
City, Province or State:
Postal Code:
Country:

TEAM DETAILS

ORDERS	DISCOUNT (AVERAGE)	COST	REVENEUE

Select or drag fields to populate this visual

TEAM SALES BY RETAIL TYPE

TEAM SALES BY PRODUCT LINE

TEAM PIPELINE

Filters

Search

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Visualizations

Build visual

Values

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

Data

Search

- Reporting Measures
- Employee by manager
- Order Date
- Product
- Retailers
- Sales Orders

Sales Managers

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Sales Managers DQ2 • Last saved: 9/12/2024 at 8:57 AM

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Data

Transform data | Refresh

Queries

New visual | Text box | More visuals

Insert

New calculation | New measure | Quick measure

Calculations

Sensitivity

Sensitivity

Publish

Share

Copilot

Copilot

FLM DASHBOARD FOR:

Current Manager	Sales Reps	Month	Month
Alex Rodriguez	All	All	2011

REVENUE COVERAGE	GROSS PROFIT
93%	40%

Contact: Alex Rodriguez
Position: Branch Sales Manager
Work Phone: 1 (617) 268-6754
Email: ARodriguez@grtd123.com

Address: 1288 Dorchester Avenue
City, Province or State: Boston, Massachusetts
Postal Code: 02133
Country: United States

TEAM DETAILS

	ORDERS		DISCOUNT (AVERAGE)			COST		REVENEUE				
Sales Rep	Order Count	Order Quantity	Unit Price	Unit Sale Price	Discount %	Unit Cost	Unit Cost	Total Cost	Planned Revenue	Revenue %	Gross Margin	Gross Profit %
Eric Carson	48	$234,170	$146	$137	6%	$36,819	$79	$6,258,086	$11,301,675	94%	$4,330,610	41%
James Ripley	71	$232,412	$171	$161	6%	$40,886	$90	$6,190,233	$11,471,934	92%	$4,407,905	42%
Pierre Lavoie	55	$144,477	$139	$131	6%	$20,168	$81	$4,052,876	$6,949,338	94%	$2,469,785	38%
Rhonda Cummings	74	$176,722	$143	$134	6%	$36,533	$77	$5,944,309	$10,509,737	93%	$3,823,130	39%
Total	**248**	**$787,781**	**$151**	**$142**	**6%**	**$134,405**	**$82**	**$22,445,504**	**$40,232,685**	**93%**	**$15,031,429**	**40%**

● less than 3% ◆ greater than 5%

● greater than 45% ◆ less than 40%

TEAM SALES BY RETAIL TYPE

Select or drag fields to populate this visual

TEAM SALES BY PRODUCT LINE

Select or drag fields to populate this visual

TEAM PIPELINE

Select or drag fields to populate this visual

Filters | Selection

Visualizations

Build visual

X-axis: Add data fields here

Y-axis: Add data fields here

Legend: Add data fields here

Small multiples: Add data fields here

Tooltips: Add data fields here

Drill through

Cross-report: Off

Keep all filters: On

Add drill-through fields here

Data

Search

- Reporting Measures
- Employee by manager
- Order Date
- Product
- Retailers
- Sales Orders

Sales Managers

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113%

Sales Managers DQ2 • Last saved: 9/12/2024 at 8:57 AM

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Devon Reddick

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Themes | Page view | Scale to fit | Mobile layout | Mobile | Gridlines | Snap to grid | Lock objects | Page options | Filters | Bookmarks | Selection | Performance analyzer | Sync slicers | Show panes

FLM DASHBOARD FOR:

Current Manager	Sales Reps	Month	Month
Alex Rodriguez	All	All	2011

REVENUE COVERAGE	GROSS PROFIT
93%	40%

Contact: Alex Rodriguez
Position: Branch Sales Manager
Work Phone: 1 (617) 268-6754
Email: ARodriguez@grtd123.com

Address: 1288 Dorchester Avenue
City, Province or State: Boston, Massachusetts
Postal Code: 02133
Country: United States

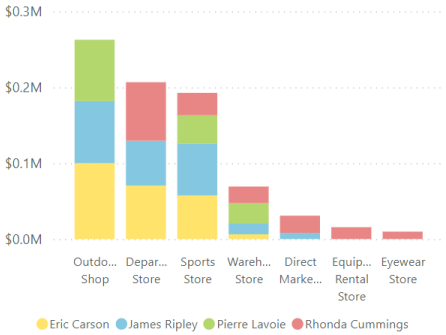
TEAM DETAILS

Sales Rep	ORDERS		DISCOUNT (AVERAGE)			COST		REVENUE				
	Order Count	Order Quantity	Unit Price	Unit Sale Price	Discount %	Unit Cost	Unit Cost	Total Cost	Planned Revenue	Revenue %	Gross Margin	Gross Profit %
Eric Carson	48	$234,170	$146	$137	6%	$36,819	$79	$6,258,086	$11,301,675	94%	$4,330,610	41%
James Ripley	71	$232,412	$171	$161	6%	$40,886	$90	$6,190,233	$11,471,934	92%	$4,407,905	42%
Pierre Lavoie	55	$144,477	$139	$131	6%	$20,168	$81	$4,052,876	$6,949,338	94%	$2,469,785	38%
Rhonda Cummings	74	$176,722	$143	$134	6%	$36,533	$77	$5,944,309	$10,509,737	93%	$3,823,130	39%
Total	**248**	**$787,781**	**$151**	**$142**	**6%**	**$134,405**	**$82**	**$22,445,504**	**$40,232,685**	**93%**	**$15,031,429**	**40%**

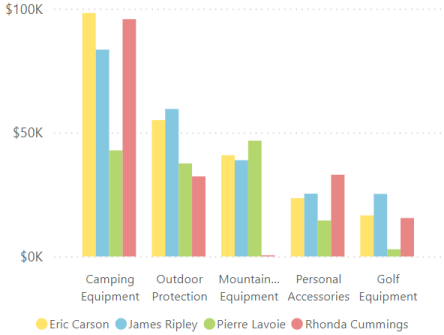
less than 3% | greater than 5%

greater than 45% | less than 40%

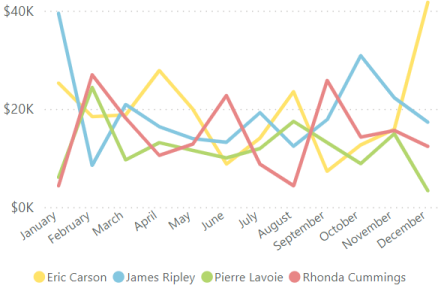
TEAM SALES BY RETAIL TYPE



TEAM SALES BY PRODUCT LINE



TEAM PIPELINE



Filters | Selection

Visualizations | Build visual

Values: Add data fields here

Drill through: Cross-report Off | Keep all filters On | Add drill-through fields here

Data | Search

- Reporting Measures
- Employee by manager
- Order Date
- Product
- Retailers
- Sales Orders

Sales Managers

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123%

Sales Managers DQ2 • Last saved: Today at 4:50 PM

Search

Devon Reddick

File | Home | Insert | Modeling | View | Optimize | Help | External tools

Share

Paste | Cut | Copy | Format painter — Clipboard

Get data | Excel workbook | OneLake data hub | SQL Server | Enter data | Dataverse | Recent sources — Data

Transform data | Refresh — Queries

New visual | Text box | More visuals — Insert

New calculation | New measure | Quick measure — Calculations

Sensitivity — Sensitivity

Publish — Share

Copilot — Copilot

FLM DASHBOARD FOR:

Current Manager: Alex Rodriguez | Sales Reps: All | Month: All | Month: 2011

REVENUE COVERAGE 93%

GROSS PROFIT 40%

Contact: Alex Rodriguez

Address: 1288 Dorchester Avenue

TEAM DETAILS — ORDERS

Sales Rep	Order Count	Order Qu
Eric Carson	48	$2
James Ripley	71	$2
Pierre Lavoie	55	$1
Rhonda Cummings	74	$1
Total	248	$78

TEAM SALES BY RETAIL TYPE

$0.3M, $0.2M, $0.1M, $0.0M

Outdo... Shop, Depar... Store, Sports Store, Wareh... Store, Direct Marke..., Equip... Rental Store, Eyewear Store

Eric Carson, James Ripley, Pierre Lavoie, Rhonda Cummings

$0K

Camping Equipment, Outdoor Protection, Mountain... Equipment, Personal Accessories, Golf Equipment

Eric Carson, James Ripley, Pierre Lavoie, Rhonda Cummings

$0K

January, February, March, April, May, June, July, August, September, October, November, December

Eric Carson, James Ripley, Pierre Lavoie, Rhonda Cummings

Publish to Power BI

Search

My workspace

All

- Demo and Tutorials
- Demo and Tutorials Cognos
- Intranet
- Microsoft Fabric Capacity Metrics 9/...
- Migration Assistant Demo
- Pulse Reporting

Demo and Tutorials > Interactive Reports > Sales and Marketing

Name	Type	Owner
Sales Managers	Report	-
Employee Quantity Sold by Branch/Region	Report	-
Retailer Type by Product Line - Gross Profit	Report	-

Select | Cancel

Filters | Selection

Visualizations

Build visual

Values

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

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Sales Managers

Page 1 of 1

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123%

BEFORE AND AFTER

The Cognos and Power BI versions of the report

Before: The Cognos report

FLM DASHBOARD FOR:

REVENUE COVERAGE	GROSS PROFIT
◆ 94%	41%

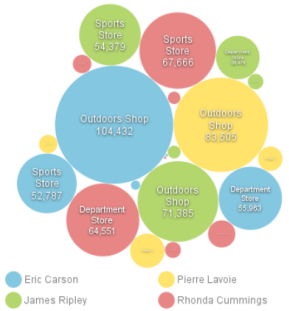
Contact:	Alex Rodriguez	**Address:**	1288 Dorchester Avenue
Position:	Branch sales manager	**City, Province or State:**	Boston, Massachusetts,
Work phone:	1 (617) 268-6754	**Postal code:**	02133
E-mail:	ARodriguez@grtd123.com	**Country:**	United States

TEAM DETAILS

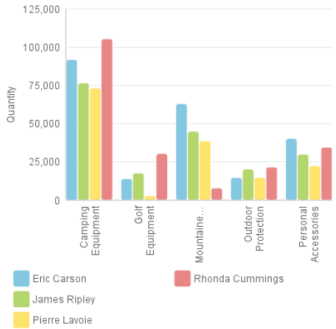
SALES REP	ORDERS		DISCOUNT (Average)			COST				REVEN
Name	Order count	Order quantity	Unit price	Unit sale price	Discount %	Unit cost	Total cost	Revenue	Planned revenue	Revenue %
Eric Carson	$52.00	$223,462.00	$137	$131	$0.05	$75	$7,319,432	$12,196,161	$12,918,865	$0.9
James Ripley	$52.00	$189,159.00	$135	$128	$0.05	$71	$5,533,064	$9,603,169	$10,172,479	$0
Pierre Lavoie	$42.00	$151,672.00	$162	$154	$0.05	$88	$5,931,554	$9,792,414	$10,341,274	$
Rhonda Cummings	$69.00	$199,707.00	$169	$159	$0.06	$85	$7,612,489	$13,392,909	$14,287,735	
Rep count: 4	**215**	**764,000**			**5.1%**			**$44,984,653**	**$47,720,352**	**9**

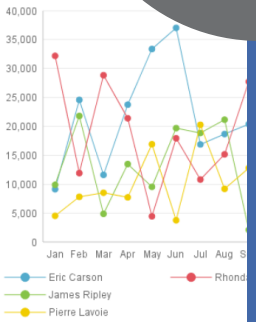
● less than 3% ■ greater than5%

TEAM SALES (Quantity)



TEAM SALES BY PRODUCT LINE





IBM Cognos Analytics

The Great Outdoors:
Sales Managers Report in Cognos

SENTURUS

After: The Power BI report

FLM DASHBOARD FOR:

Current Manager	Sales Reps	Month	Month
Alex Rodriguez	All	All	2011

REVENUE COVERAGE	GROSS PROFIT
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Pierre Lavoie	55	$144,477	$139	$131	6%	$20,168	$81	$4,052,876	$6,949,338	94%	$2,469,	
Rhonda Cummings	74	$176,722	$143	$134	6%	$36,533	$77	$5,944,309	$10,509,737	93%	$3,823	
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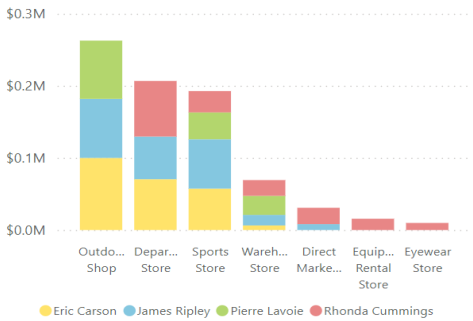
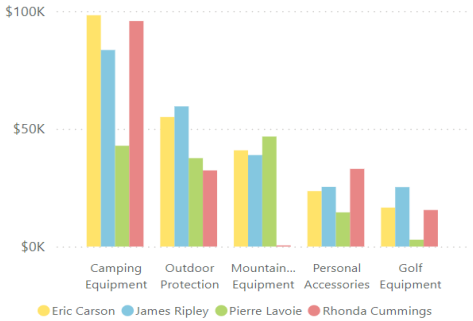
less than 3% greater than 5% greater th

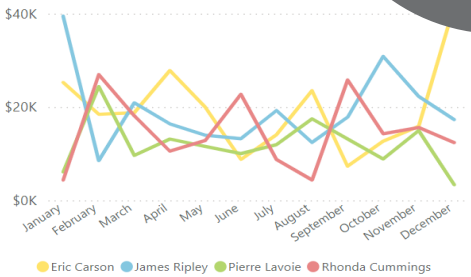
TEAM SALES BY RETAIL TYPE



TEAM SALES BY PRODUCT LINE



TEAM PIPELINE



Sales Managers

The Great Outdoors:
Sales Managers Report in Power BI

SENTURUS