

# In Case You Missed It Kscope 2024 Recap

August 15, 2024



## Agenda

- Dodeca 101
- A Look Back at Kscope24
- Dodeca Year in Review
- Dodeca Roadmap
- Drillbridge
- Customer Sessions

## Dodeca 101



## Dodeca 101

- What problem does Dodeca solve?
  - Users *love* spreadsheets
    - Familiar
    - Flexible
    - Ubiquitous
  - Management hates spreadsheets
    - No governance
    - Shared drives full of Excel files
    - Poor workbook quality
    - Productivity losses
    - Increased risk-of-error

*Dodeca Provides Spreadsheet Intelligence™*



## Dodeca 101

Q: Why did we create this product?

A: Because spreadsheets are everywhere!

*Nobody sets out to create a mission-critical spreadsheet, they 'just happen'.*

*- Felienne Hermans*



## Why Dodeca?

Q: Why did we create this product?

A: Because spreadsheets are everywhere!

**Our mission is to make spreadsheets and spreadsheet operations as efficient, reliable, repeatable, and error-free as possible.**



## High Productivity Spreadsheet Application Platform™

### Best of Smart View

Flexible Excel format  
Formulas  
Formatting  
Charts

### Robust Extensibility

No code point-and-click  
Low code Event-driven

### Best of HFR

Automated report production  
Managed report templates  
Point of view selectors

### Best of Planning

Managed environment  
Essbase Forms  
Configurable Actions

*EPM Applications Tailored to Fit Your Business™*



Income Statement for New York - Cola - Actual

Income Statement  
December 31, 2021

	Qtr1	Qtr2	Qtr3	Qtr4	Year	All Products	Product %
Sales	1,998	2,358	2,612	1,972	8,940	34,698	25.8%
COGS	799	942	1,044	788	3,573	17,582	20.3%
<b>Margin</b>	<b>1,199</b>	<b>1,416</b>	<b>1,568</b>	<b>1,184</b>	<b>5,367</b>	<b>17,116</b>	<b>31.4%</b>
Marketing	278	328	364	275	1,245	6,522	19.1%
Payroll	153	159	153	153	618	2,346	26.3%
Misc	2	1	1	2	6	86	13.0%
<b>Total Expenses</b>	<b>433</b>	<b>488</b>	<b>518</b>	<b>430</b>	<b>1,869</b>	<b>8,914</b>	<b>21.0%</b>
<b>Profit</b>	<b>766</b>	<b>928</b>	<b>1,050</b>	<b>754</b>	<b>3,498</b>	<b>8,202</b>	<b>42.6%</b>
<b>% of Sales:</b>							
COGS	40.0%	39.9%	40.0%	40.0%	40.0%	50.7%	
Margin	60.0%	60.1%	60.0%	60.0%	60.0%	49.3%	
Marketing	13.9%	13.9%	13.9%	13.9%	13.9%	18.8%	
Payroll	7.7%	6.7%	5.9%	7.8%	6.9%	6.8%	
Misc	0.1%	0.0%	0.0%	0.1%	0.1%	0.1%	
<b>Total Expenses</b>	<b>21.7%</b>	<b>20.7%</b>	<b>19.8%</b>	<b>21.8%</b>	<b>20.9%</b>	<b>25.7%</b>	
<b>Profit</b>	<b>38.3%</b>	<b>39.4%</b>	<b>40.2%</b>	<b>38.2%</b>	<b>39.1%</b>	<b>23.6%</b>	



## Dodeca 101



## Different and Better

Increased spreadsheet quality

**Flexibility**

Robust low/no-code development

No end-user training required

Continuous innovation

Reliable, repeatable spreadsheets

**Reduced Risk****Significant savings**

Superior technical support

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## A Look Back at Kscope24



## Symposium





## Exhibit Hall



## Community Service



## Opening Session

- Interview - Elizabeth Ferrell - The Kroger Company



## Customer Panel

- Panelists
  - Elizabeth Ferrell - The Kroger Company
  - Victor Turner - LexisNexis
  - Carlos Fajardo - ADT
  - Angie Anderson - Principal Financial



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## Oracle Sessions

- Essbase Symposium
  - Huge investment in Federated Partitions
    - Broadens Essbase use cases
    - May be delivered in Oracle database in the future (similar to APEX)
  - Artificial Intelligence
    - Member name inference
    - Essbase “chat”
- EPM Roadmap
  - MDX via REST API
  - MDX for forms



## Aquarium Event



## Denim & Diamonds



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## Year In Review

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## Year in Review

- Dodeca 8.3
- Cloud EPM Connector



## Year in Review

### Dodeca 8.3

- June 2023 - 97 work items closed
- Universal Views
- Security updates
- Essbase Excel Views
  - Parallel execution of SQL Ranges
  - Use Blank as Missing Label
- SQL Excel Views
  - Parallel operations
  - Multi-template cascade



## Year in Review

## Dodeca 8.3

- PowerPoint exports
- Render View as PDF
- Workbook Script
  - 14 new or updated methods
  - 3 new or updated functions
- Dodeca Shell
  - 5 new commands



## Year in Review

## Dodeca 8.3 Patches

- Dodeca 8.3.1 (July '23 - 1 work item closed)
- Dodeca 8.3.2 (August '23 - 5 work items closed)
- Dodeca 8.3.3 (October '23 - 22 work items closed)
- Dodeca 8.3.4 (January '24 - 28 work items closed)
- Dodeca 8.3.5 (March '24 - 17 work items closed)



## Year in Review

## Cloud EPM Connector (8 releases)

- 1.5.6
  - Proxy server support
- 1.6.0
  - Attribute dimension support
  - Business rule support
  - Member caching
- 1.6.2
  - Performance improvements
- 1.6.3
  - Performance improvements



## Year in Review

## Cloud EPM Connector

- 1.7.0
  - Blank row and column support
  - New member query scripting language
  - Grid metric support for drill-through and member selection
  - Business rules with runtime prompt variables
  - Improved support for aliases
  - Improved zoom-in support
  - Suppress missing/suppress zero support
  - Indentation support
  - Navigate without data support
  - Grid layout improvements





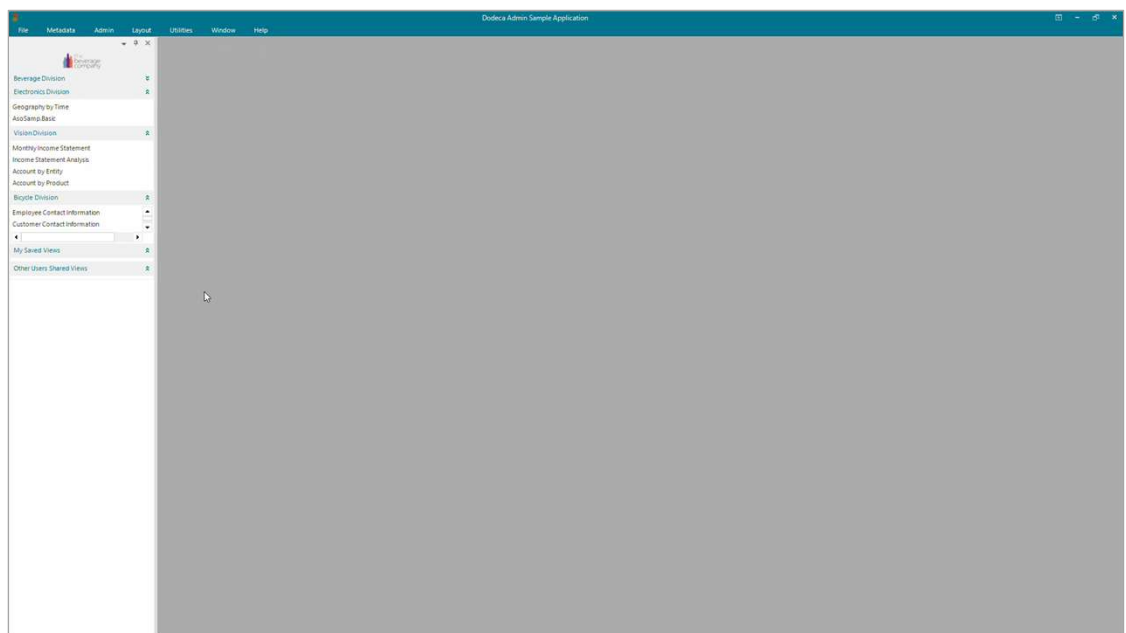
## Year in Review

## Cloud EPM Connector

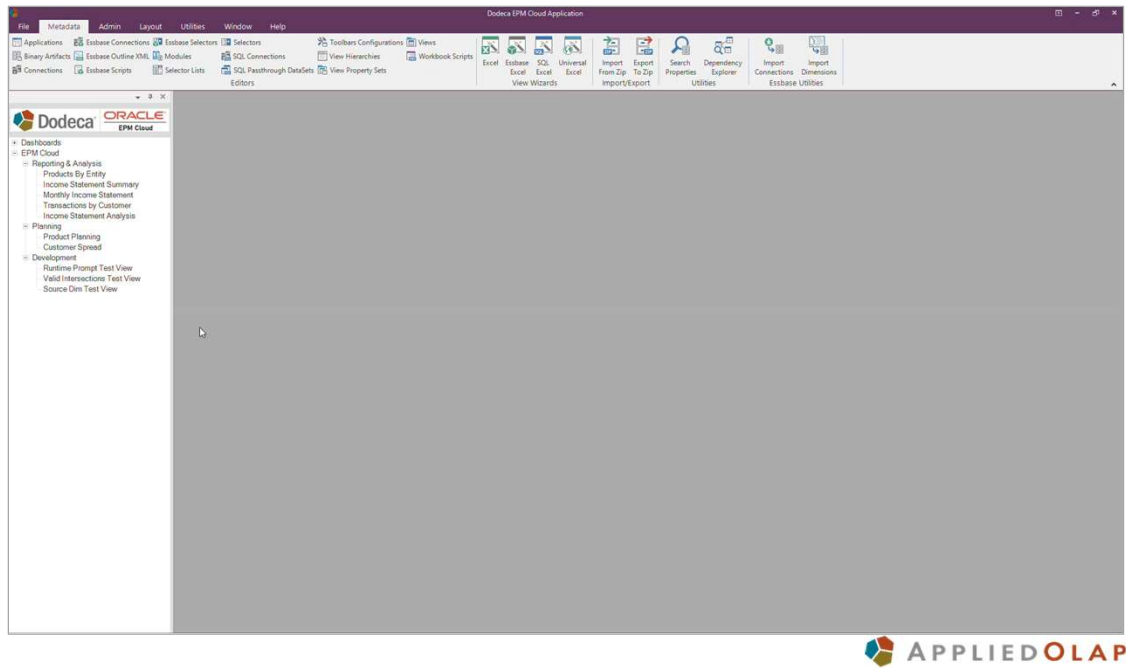
- 1.7.2
  - SmartList support
- 1.7.3
  - Zoom-out support
  - Fixed rounding issue on numeric values
- 1.7.4
  - Remove only support (for rows only)
  - Improved member caching
  - More grid layout improvements



## Cloud EPM Connector



# Cloud EPM Connector



## Roadmap

- Drillbridge
- Essbase 21c drill-through
- AuraPlayer
  - Provides access to E-Business Suite and Oracle SaaS applications

File Home Layout References Send To View Tools		Microsoft Word - 12345678901011121314151617181920212223242526272829303132333435363738394041424344454647484950515253545556575859606162636465666768697071727374757677787980818283848586878889909192939495969798991001011021031041051061071081091101111121131141151161171181191201211221231241251261271281291301311321331341351361371381391401411421431441451461471481491501511521531541551561571581591601611621631641651661671681691701711721731741751761771781791801811821831841851861871881891901911921931941951961971981992002012022032042052062072082092102112122132142152162172182192202212222232242252262272282292302312322332342352362372382392402412422432442452462472482492502512522532542552562572582592602612622632642652662672682692702712722732742752762772782792802812822832842852862872882892902912922932942952962972982993003013023033043053063073083093103113123133143153163173183193203213223233243253263273283293303313323333343353363373383393403413423433443453463473483493503513523533543553563573583593603613623633643653663673683693703713723733743753763773783793803813823833843853863873883893903913923933943953963973983994004014024034044054064074084094104114124134144154164174184194204214224234244254264274284294304314324334344354364374384394404414424434444454464474484494504514524534544554564574584594604614624634644654664674684694704714724734744754764774784794804814824834844854864874884894904914924934944954964974984995005015025035045055065075085095105115125135145155165175185195205215225235245255265275285295305315325335345355365375385395405415425435445455465475485495505515525535545555565575585595605615625635645655665675685695705715725735745755765775785795805815825835845855865875885895905915925935945955965975985996006016026036046056066076086096106116126136146156166176186196206216226236246256266276286296306316326336346356366376386396406416426436446456466476486496506516526536546556566576586596606616626636646656666676686696706716726736746756766776786796806816826836846856866876886896906916926936946956966976986997007017027037047057067077087097107117127137147157167177187197207217227237247257267277287297307317327337347357367377387397407417427437447457467477487497507517527537547557567577587597607617627637647657667677687697707717727737747757767777787797807817827837847857867877887897907917927937947957967977987998008018028038048058068078088098108118128138148158168178188198208218228238248258268278288298308318328338348358368378388398408418428438448458468478488498508518528538548558568578588598608618628638648658668678688698708718728738748758768778788798808818828838848858868878888898908918928938948958968978988999009019029039049059069079089099109119129139149159169179189199209219229239249259269279289299309319329339349359369379389399409419429439449459469479489499509519529539549559569579589599609619629639649659669679689699709719729739749759769779789799809819829839849859869879889899909919929939949959969979989991000100110021003100410051006100710081009101010111012101310141015101610171018101910201021102210231024102510261027102810291030103110321033103410351036103710381039104010411042104310441045104610471048104910501051105210531054105510561057105810591060106110621063106410651066106710681069107010711072107310741075107610771078107910801081108210831084108510861087108810891090109110921093109410951096109710981099110011001110021100311004110051100611007110081100911010110111101211013110141101511016110171101811019110201102111022110231102411025110261102711028110291103011031110321103311034110351103611037110381103911040110411104211043110441104511046110471104811049110501105111052110531105411055110561105711058110591106011061110621106311064110651106611067110681106911070110711107211073110741107511076110771107811079110801108111082110831108411085110861108711088110891109011091110921109311094110951109611097110981109911000110011100211003110041100511006110071100811009110101101111012110131101411015110161101711018110191102011021110221102311024110251102611027110281102911030110311103211033110341103511036110371103811039110401104111042110431104411045110461104711048110491105011051110521105311054110551105611057110581105911060110611106211063110641106511066110671106811069110701107111072110731107411075110761107711078110791108011081110821108311084110851108611087110881108911090110911109211093110941109511096110971109811099110001100111002110031100411005110061100711008110091101011011110121101311014110151101611017110181101911020110211102211023110241102511026110271102811029110301103111032110331103411035110361103711038110391104011041110421104311044110451104611047110481104911050110511105211053110541105511056110571105811059110601106111062110631106411065110661106711068110691107011071110721107311074110751107611077110781107911080110811108211083110841108511086110871108811089110901109111092110931109411095110961109711098110991100011001110021100311004110051100611007110081100911010110111101211013110141101511016110171101811019110201102111022110231102411025110261102711028110291103011031110321103311034110351103611037110381103911040110411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# Universal View Demo

**Dodoca Admin Sample Application**

- File
- Metadata
- Admin
- LAYOUT
- UTILITIES
- WINDOW
- HELP

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Beverage Division

- TEST-ADD-LOOKING
  - Quarterly
    - Quarterly Income Statement
    - Quarterly Income Statement by
    - Quarterly Income Statement By
  - Monthly
    - Monthly Income Statement For
    - Monthly Income Statement For
    - Monthly Income Statement For
- Analysis
  - Comparatives
    - Income Statement Variance by
    - Income Statement Variance by
  - Variance Analysis
    - Monthly Variance Walks
    - Variance Analysis Input
    - Variance Analysis Input by Mar
    - Variance Analysis Input by Prod
    - Income Statement Variance Mo
  - Transaction Detail
    - Product Reports
    - Adhoc
      - Adhoc Analysis Excel Add-in
- Planning
  - Annual
    - Planning by Product
    - Planning by Market
    - Planning by Market and Produ
    - Planning by Attribute
    - Data Audit Log
  - Strategic
    - Database Information
    - Sample Back
- Admin
  - Member Description Maintenance
  - Sales Reconciliation
  - General Ledger Reconciliation
  - View Usage
- Auxiliary
  - Sales Orders
  - Get Customers
  - Get All Expense Records
  - GetAllAccountBalances

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Electronics Division

- Geography by Time
- Acquisition Back

Vision Division

- Monthly Income Statement
- Income Statement Analysis
- Account by Entity
- Account by Product

Bicycle Division

- Employee Contact Information



## Roadmap 8.4

## User Interface

- Improved Excel spreadsheet functionality
  - Fine grained protections
  - Graphics in print headers/footers
  - Excel cell comment support in xlsx
  - Chart sheets
  - Document property support
  - Improved shape object support
  - Improved forms control support
- Export to Excel pivot table
- Export to Powerpoint enhancements
- Spellcheck in comment explorer



## Roadmap 8.4

## Essbase

- Native connector for Essbase REST API
  - No Dodeca-Essbase middle-tier service required!



## Roadmap 8.4

## Cloud EPM Connector

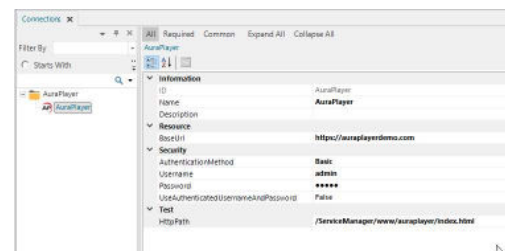
- Unknown member support
- Improvements to adhoc operations
- MDX support (when available from Oracle)
- Other EPM functionalities as requested by customers



## Roadmap 8.4

## Admin

- New Connections editor
  - Support for universal connector and SMTP connections
  - Essbase, Cloud EPM, HFM, and SQL connections will move here
- Universal Dataset editor
- Universal Dataset selector list support
- EssConnection tokenization





## Roadmap 8.4

## Core

- SSO support
  - OAuth via default browser
- Re-wrote client caching
- Dropped Powerpoint requirement for Powerpoint export
- Updated standalone wrapper for increased security



## Roadmap 8.4

## Workbook Scripting

- Design-time formula editor resolution
- New event
  - ExceptionOccurred
- New methods
  - FileOperations - CopyFile/MoveFile
  - AddDataCache - Tokens
  - ForEach - DelimitedString
  - SetPageSetup.HeadersAndFooters token replacement
- New functions
  - @ProcessInfo()
  - @Directory()



## Roadmap 8.x

## 8.x

- Client connector to SQL Server, Oracle, and Snowflake
- Support write back in connectors/adapters
- Report books
- Fine-grained authorization
- Consolidated connections editor
- Pivot Views
- Localization
- Stored procedure in/out parameters support
- Support for large SQL IN clauses
- Workbook script functionality to manipulate ribbons



## Roadmap 9.x

## 9.x

- Headless Dodeca client
- Report bursting definitions and execution
- REST API
- Native connector for Cloud EPM
- View IDE
- Support for GrapeCity Spread grid
- XMLA support



Drillbridge



Drillbridge 101



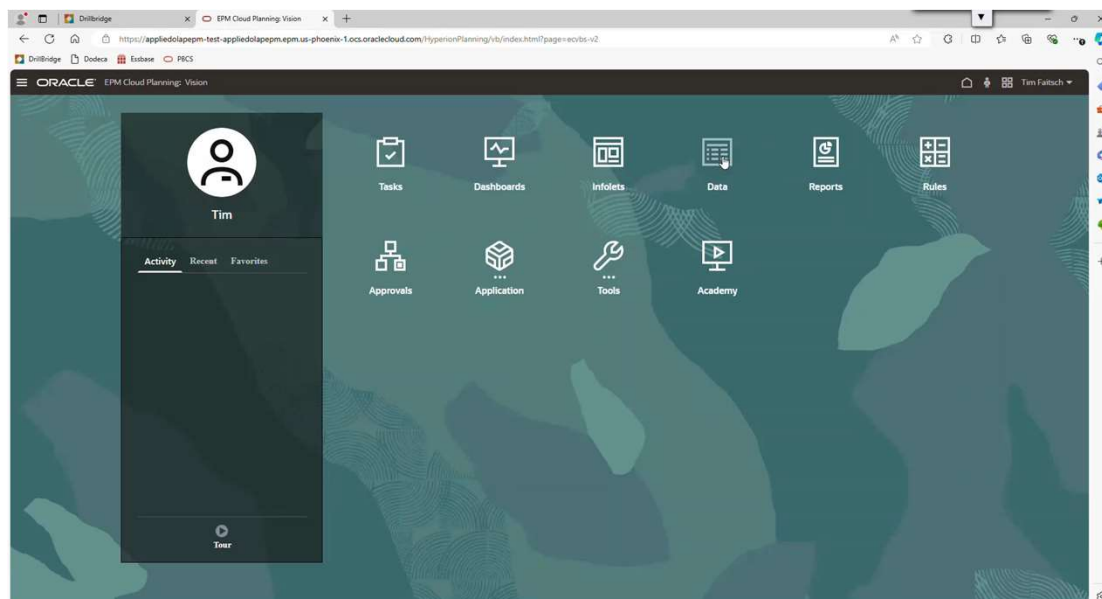
## Drillbridge

Drillbridge provides access to details that support the numbers

- EPM Cloud and Essbase provide summary numbers
- Analysts often need to see the details
- Details are often stored in disparate systems

The screenshot shows the Drillbridge application interface. On the left, a summary table titled 'Total Assets' displays various financial metrics. A large yellow arrow points from the 'Assets' row in this table to a detailed view on the right titled 'Assets Transactions'. This detailed view is a table with columns including Year, Currency, Scenario, Version, Product, Period, Account, EntryID, Date, Related Line, and Value, providing a granular breakdown of the data.

## Demo



## Update / Roadmap

- Updates
  - Support for Active Directory
  - Option to choose delimiter for CSV report
- Roadmap
  - Option to remove items from token based on condition
  - Drillbridge REST API
  - Drill-through to REST targets
  - Return records to worksheet in Smart View



## Customer Sessions





## Principal Financial

*Principal's digital transformation efforts are easier to execute as Dodeca contains an inventory of spreadsheets and who uses them.*

- Accenture

850 users globally Actuaries & Accountants

Approximately 3,000 reports

Average of 170,000 reports run per month

AD groups manage access to Essbase data

Folder security allows admins access to restricted reports



## Kroger

Dodeca is used in many areas of the business to accomplish many different tasks.

#### The many ways Kroger uses Dodeca

- Forecasting and Budgeting (FP&A)
- Financial close activities (validation, exceptions, etc.)
- Dodeca reporting change management/tracking
- Managing Essbase security
- Project tracking and dashboard
- Labor expense modelling
- Tracking and managing KPI's
- Too much to mention!!!



## ADT

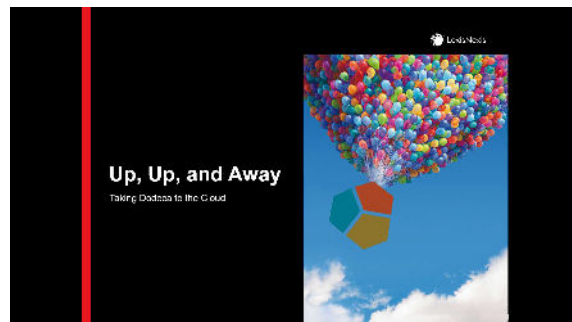
Query and present transaction level data using EPM business terms.



 APPLIED OLAP

## LexisNexis

Dodeca is integral to the global digital transformation strategy tying together Cloud ERP, Cloud EPM, relational sources, and Essbase.



 APPLIED OLAP

Questions?

