



# Conference Agenda, Abstracts & Other Info.





Welcome to Profit 2015! Our goal is to make your experience as informative and beneficial to you as possible, so please don't hesitate to let anyone from Silvon know if we can be of any assistance to you while you're here.

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### **Conference Attire**

If you're a "Profit First-Timer," please note that the dress code is business casual. We encourage you to pack a jacket, too, just in case it gets a little cool during our outdoor events.

### **Registration & Welcome Reception**

We look forward to having you join us at our On-Site Registration & Welcome Reception on Sunday, May 31<sup>st</sup> from 6:30 – 9:00 p.m. Both will take place on the lower level by the Gazebo Patio, where you can enjoy hors d'oeuvres and beverages around a fire pit on the edge of the resort's lush greens. Plenty of food will be available, so be sure to bring your appetite AND a jacket to be safe! Should we run into inclement weather, the Welcome Reception and Registration desk will be relocated to the Prince of Wales meeting room (upper level).

For first-time conference attendees, the Welcome Reception is a great time to meet and mingle with Silvon's staff and other attending customers. And for those of you who have been long-time conference attendees, we look forward to seeing and catching up with you!

### **Late Registration**

Unable to register on Sunday evening? No worries ... you can do so on Monday from 8:00 - 8:30 a.m. in the Royal Court North Foyer. Or, stop by the Profit 2015 LAB (Canterbury Room) any time afterwards.

### **Golf Outing**

If you are participating in the Profit 2015 Golf Outing on Monday afternoon, please join us downstairs at the Pro Shop (lower level) by no later than 12:45 p.m. Our first foursome will tee-off at 1:00 p.m. Afterwards, head over to the Medinah Room (just off the greens on the lower level of the hotel) for food and drinks.

### **World-Famous Chicago Architectural Boat Cruise**

For those of you who will be joining us for the Chicago Tour, please plan to meet in the Lobby by 12:50 p.m. for our departure at 1:00 p.m. We have quite an adventurous day planned for you, including a narrated boat tour along the Chicago River and Lake Michigan to learn more about Chicago's history and breathtaking architecture. You'll also have the opportunity to explore Navy Pier, take a ride on the Pier's majestic Ferris Wheel (if desired), and get a real Taste of Chicago during an al fresco dinner on the Pier before heading back to Oak Brook at 6:00 p.m.!

### **Tuesday Banquet & Evening of Magic**

At 5:45 p.m. on Tuesday, we'll depart promptly from the Oak Brook Hills Hotel & Resort for an evening of delectable Italian cuisine and jaw-dropping magic just a few miles away at Maggiano's Italian Restaurant. This year's entertainment features a world-class magician and mentalist, praised by the Chicago Tribune as "*A master of misdirecting attention.*" His performance will surely make this night one night to remember!

### **Breakfasts, Lunches & Refreshment Breaks**

During the conference, *all lunches will be hosted in the Windows Restaurant* during the timeframes noted on the last page of this brochure. *Monday's breakfast will take place in the Windows Restaurant, as well.* On Tuesday and Wednesday, enjoy a number of taste-tempting continental breakfast items on the kiosks outside our upper-level meeting space in the Royal Court North Foyer. A full array of refreshments and snacks will also be available there for you to enjoy throughout the conference.

### Profit 2015 LAB (Canterbury Room)

While you're here, be sure to stop by the Profit 2015 LAB in the Canterbury Room. The LAB is the place to go for product demos, to sit down with Silvon executives and staff, to meet with members of our Support team (who can discuss all of the tools and information resources that are available to you), and to relax and chat with other Profit 2015 attendees.

LAB HOURS:

- Monday: 9:30 a.m. – Noon
- Tuesday: 8:30 a.m. – 5:00 p.m.
- Wednesday: 8:30 a.m. – 2:00 p.m.

### Conference Proceedings

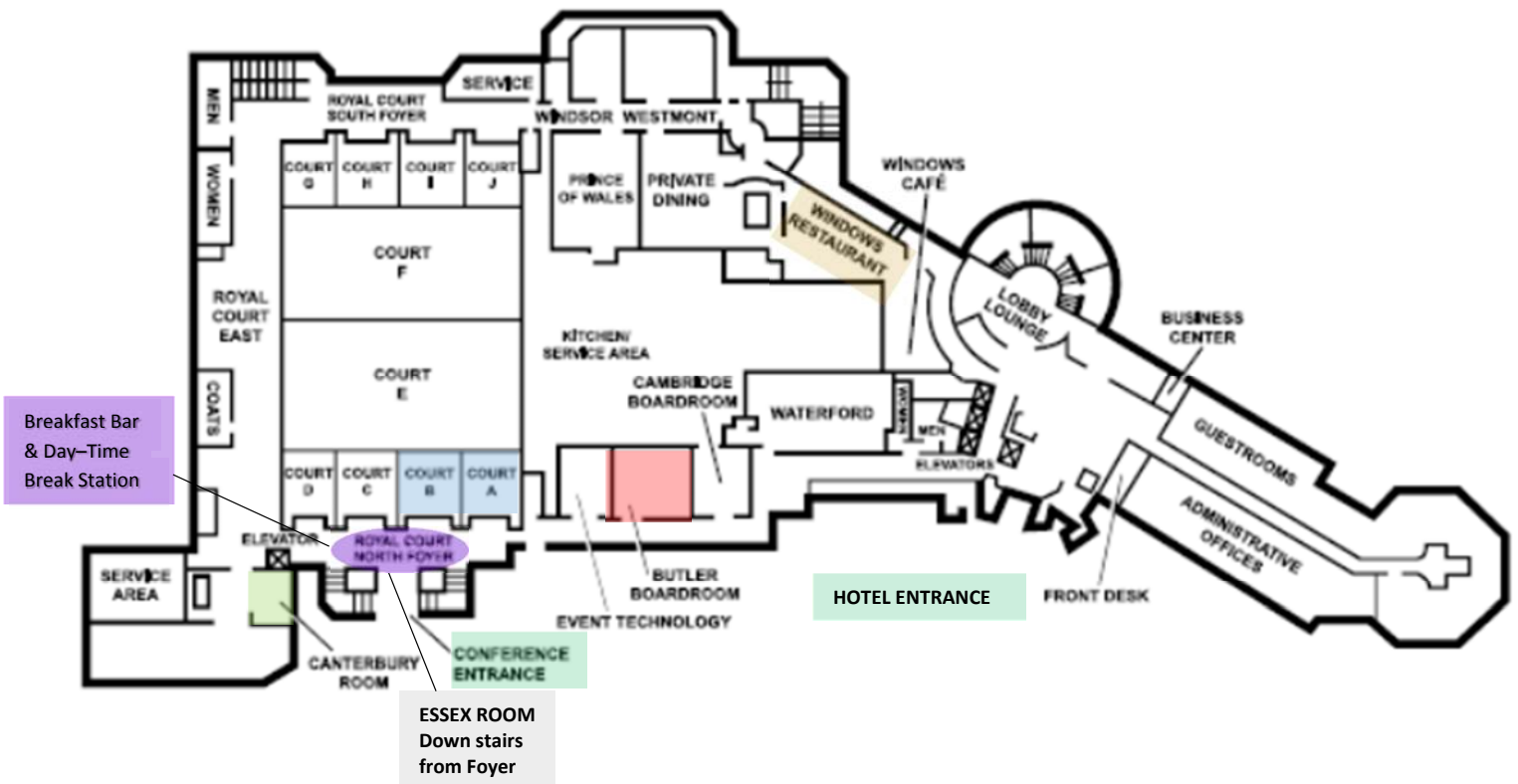
The Profit 2015 presentations will be available to all attendees on the Silvon CustomerNet website a few days after the conference. If you have not yet received access to CustomerNet, please stop by the LAB to obtain a User ID or e-mail [product.support.usa@silvon.com](mailto:product.support.usa@silvon.com).

### Internet Access During Profit 2015

In addition to internet access in your guest room, free wireless access is available throughout the meeting space. Simply log on to *Oakbrookhillsresort* or *Globalmeetingwireless*.

### Conference & Speaker Evaluations

Please let us know your thoughts about the conference and the sessions you attended by completing the Overall Conference Evaluation form in the packet you receive during on-site registration (as well as the speaker critiques that you receive in each session). Simply give them to any Silvon employee or drop them off in the LAB before you leave. We appreciate your input!







## Extending How Stratum Data Gets Delivered and Used (Version 6.5+)

While Stratum V6.4 has enabled customers like you to easily build and share personal views of data on-the-fly so that more people can benefit from Stratum's business insights in a very efficient way, Stratum V6.5 and beyond will take the concept of "BI for the masses" even further with the addition of two powerful, new applications: Stratum.Broadcast Server and Stratum.Viewer Express. Both of these applications will be officially unveiled during Profit 2015!

### V65-1 Stratum Broadcast Server: Overview & Demo

Experience firsthand the Stratum.Broadcast Server, which puts business users in control of scheduling and broadcasting Stratum information to both Stratum and non-Stratum users inside and outside your organization. Deliver a single email with one attachment containing multiple reports to key users and partners on a schedule or on demand. Schedule actions with it in a matter of seconds. Attend this session to learn more about the myriad of things that you can schedule and broadcast with this latest addition to the Stratum family of applications!

### V65-2 Stratum.Broadcast Server: Technical Overview and Setup

What's behind the Stratum.Broadcast Server? This session provides a technical overview of the product, along with suggestions for setting it up, creating user groups, broadcast schedules, and more. We'll also cover tips and tricks for controlling which users can distribute what Stratum information.

### V65-3 Stratum.Viewer Express: Overview & Demo

Stratum.Viewer Express is an exciting new solution that offers easy-to-use, single web page access to select Stratum views and custom reports with drop-down filters and search capabilities to boot. Join us during this session to learn more about it and how it can enable fast and simple access to your Stratum data for a select group of users - or for a wider audience if you so choose!

### V65-4 Beyond Stratum V6.5

As we get ready to roll out V6.5 of Stratum, Silvon's development team is already specking out a number of enhancements for future Stratum releases. Join us during this session to learn more about what we're working on and what we're considering based on input from customers just like you who are looking to the future and how they can extend the power and reach of Stratum across their businesses!

## Extending the Value of Your Stratum Investment

### FID-1 Going Global with Stratum: A Case Study

HarperCollins Publishers (with more than 400 best-selling book titles in 2014 alone) has been a long-time Silvon customer and one of the first companies to deploy Stratum Viewer to a large user community. Over the years, HarperCollins has continued to push the limits with Viewer in its analysis of data from bookstores, big-box retailers, on-line retailers and others across North America. During this session, DJ Spellman (Harper's VP of Systems Development) will explain how the company is now using Stratum to collect and analyze data globally. DJ will discuss the processes followed to collect data from around the world, what worked best and what didn't, and how the company is leveraging Silvon's newest Viewer extension (Stratum Viewer Express) as its delivery mechanism for presenting Stratum data to executives and high-level analysts on a global scale.

### FID-2 Sales Planning Considerations

So many businesses continue to rely on MS Excel for planning and analysis; but while this long-time spreadsheet program boasts numerous qualities, there are several shortfalls to it as a sales planning tool. Join us during this session to discuss the tradeoffs between Excel and sales planning applications like Stratum Planning. We'll cover some of the limitations of spreadsheet-based systems, the additional functionality offered by sales planning apps and their value, along with some suggested ways to use both spreadsheets and planning applications together (if desired) during the sales planning process.



### **FID-3 Sales Planning with Stratum**

During this session, we'll demonstrate how you can set up a Planning view in Viewer V6.2+ and what's required to do so. We'll take you through a few scenarios of entering and changing Plans. We'll demo the interface's basic write-back functionality and allocations to other levels. We'll explain how the Stratum update process handles Viewer-created Plans. Plus, we'll show you some unique custom planning solutions developed by Silvon for specific planning applications.

### **FID-4 Going Mobile with Stratum**

Join us to see how Stratum can provide a personalized mobile BI experience that puts users in touch with your data anytime, anywhere while they're on the run. We'll cover the different options that are available to you for harnessing the power of Stratum information on iPads, tablets, and smartphones. Plus, we'll show you how each of the options work on these mobile devices, including how easy it is to use Stratum's new filtering capabilities when you're on your iPad. We'll also present some technical considerations that you'll want to make as you develop your mobile BI strategy for giving users access to Stratum data, whether it's via email or as a completely interactive experience.

### **FID-5 Stratum and Excel**

A key element of Silvon's Flexible Information Delivery strategy is to provide business users with the ability to use Stratum information in Excel. During this session, we'll review how to create a connection between Excel and Stratum. We'll provide some best-practice techniques and examples for leveraging the power of pivot tables within your spreadsheet once the connection to Stratum has been made. And we'll show you how the data in XLS files is automatically updated as Stratum is refreshed. We'll also show you how you can take advantage of new Excel options (like Power View visualization and mapping) together with Stratum.

### **FID-6 Creating Daily Flash Reports with Stratum AND Non-Stratum Data**

Companies use flash reports to see how the business is doing on a daily basis. The reports provide management with a sense of how the business is performing and what the period-end may look like so corrective action can be taken beforehand if needed. During this session, we'll cover some tips and tricks that some of Silvon's customers have found valuable as they've launched their own flash reporting initiatives. And we'll share some examples of the flash reports that they created with both Stratum and non-Stratum data in order to showcase their most important KPIs.

### **FID-7 Stratum in the Cloud**

During this session, we'll share our personal experiences in moving Stratum to a cloud-based environment internally and what your options are now for moving away from on-premise hosting of your Stratum applications.

### **FID-8 Introduction to Viewer (for Planner Users)**

If you or your company uses Stratum Planner / DataTracker or the Retail IDEAS (RI) Client, attend this session to learn about the functionality and advantages of the web-based Stratum.Viewer. See how view creation and management can reside in the business community ... and how complex matrix (crosstab), subtotaled and filtered views are now easy to create and use. We'll show how you can easily filter on multiple items without having to create a user list ... and use Time down the side and across the top to see trended data year over year. Simple and easy-to-use, Stratum Viewer is the basis for Silvon's Flexible Information Delivery strategy. This session will highlight how you can simply and easily take advantage of this strategy while leveraging the information you've already collected in Stratum.



## Tips & Tricks for Stratum Users

Of course, Profit 2015 will feature a number of sessions that offer up valuable tips and techniques for users and administrators alike. These sessions will focus on topics like:

### **USR-1 Creating Performance Dashboards**

Attend this session to learn how you can take advantage of Stratum and Microsoft SharePoint (including Viewer Express and SharePoint 2013) to create highly effective visualizations of your Stratum data. Our examples will include executive-level displays of various Stratum views complete with graphical indicators, alerts, and drill-down functions for root-cause analysis. We'll also show you some examples of dashboards consisting of unrelated Web parts (e.g., a collection of Stratum views, favorite Web sites and often-used applications arranged into a personal dashboard for easy access). This session is essential for every enterprise report and dashboard developer!

### **USR-2 Taking Advantage of New Release Features**

A number of new features became available in Stratum Versions 6.3, 6.4 and 6.5, all of which were unveiled since Silvon's last Profit conference. This session provides an overview of those new features, including what they were designed to do and why you should use them. You'll learn how to leverage new, easy-to-use automatic filtering windows and simplified search flows. We'll show you how you can easily build and share personal views of data on-the-fly. For those of you who are administrators, we'll also discuss the steps for assigning reports to groups of users. These are just a few of the things to be covered in this informative session.

### **USR-3 Filtering in Stratum**

This session covers all of the new, basic and advanced filtering options that are available to you in Stratum, including how and where you should use user lists and where you should apply filters in a view definition. A few "more complex" examples of filtering will be provided, like axis filters, why you would use them, and how.

### **USR-4 Taking Viewer View Building To The Next Level (Part 1)**

This session will share a cornucopia of methods for getting even more out of your Viewer views! During this Advanced-level class, we'll cover TIME as a range (and as a dimension), complex filtering and tips for adding images and indicators.

### **USR-5 Taking Viewer View Building To The Next Level (Part 2)**

This session picks up from where we dropped off in "View Building Best Practices (Part 1)." Stop on by for another information-packed hour on Viewer view building, where we'll cover topics like linking to reports/other views, using Parameter functionality to call other applications, and creating drill-to views.

### **USR-6 Viewer Advanced Calculations**

Add to your repertoire of advanced Viewer usage by extending your knowledge of calculations! During this session, you'll learn how to use the predefined Stratum functions, member properties and time dimensions to create calculations. This session is "super-charged" in terms of content level, so we highly recommend that Advanced Users only attend!

### **USR-7 Cool Stuff**

Over the years, Silvon's consultants and many of our customers have uncovered a number of unique ways to do things with Stratum. During this class, we'll share this "cool stuff" with you, including how you can change the way Viewer looks to your users, the "whys" and "hows" of linking to external websites from a view, custom icons, conditional formatting, and more!





## Tips & Tricks for Stratum Administrators

### ADM-1 Stratum.Viewer Administration

Are you a Viewer administrator who's new to the task or just looking for a few new tips and tricks to help make your job a bit easier? Then join us during this information-packed session where the total focus will be on Viewer Administration. Learn more about defining and managing your Viewer User Profiles to control the functionality and data that each user can access. We'll also discuss other administrative functions such as Select Member Options and the Application window.

### ADM-2 Stratum Connector Administration

Attend this session to learn more about adding, removing and renaming measures and dimensions, creating virtual dimensions, and adding new calendar and fiscal years. Plus, we'll cover the processing options that are available and why you would use one process over another, along with some tips on interpreting your job logs!

### ADM-3 Stratum Connector Processing Options – *CANCELLED; topic will be covered in ADM-2*

The Stratum.Viewer Connector provides 3 different processing options: Full Process, Re-Process, and Limited Process (trickle load). Attend this session to learn what each one represents, and when and why you would use a particular process over another.

### ADM-4 Connector Pre-Processing – *CANCELLED*

Connector Pre-Processing prepares your master data for processing by the Stratum Viewer Connector. Join us during this session to discuss precisely what the connector Pre-Process does, what your options are (yes – you DO have options!), what to do if something goes wrong, and solutions to consider for any pesky “bad data” that you uncover!

### ADM-5 Uptime & Troubleshooting

If you're the person who gets the calls from users if a Stratum update doesn't run correctly, then this session is a must attend for you! The goal of this session is to get you more comfortable in troubleshooting and resolving issues related to the Stratum.Server load process and Viewer cube building. In this class, we'll cover cube backup and recovery, as well as a troubleshooting approach in reviewing the processes involved to move data from your source into Stratum and from Stratum into Viewer and key logs that can help.

### ADM-6 Interpreting Viewer Job Logs – *CANCELLED; topic will be covered in ADM-2*

Have you ever caught yourself staring blankly at a Viewer job log, wondering what it all means? This session takes the mystery out of those job logs as we review what's in them and what everything means. We'll discuss how long it takes to process all of that master file data, which categories are processed, and how long each one takes. Then, we'll review common error messages and what you should do if you ever receive one!

### ADM-7 Getting Excel Data into Stratum

If you're looking to add Excel data to your Stratum data repository, join us during the session to discuss some tips and tricks for getting data from Excel into Stratum.

### ADM-8 Stratum Viewer Architecture Considerations – *CANCELLED - contact Pat Hennel (pat.hennel@silvon.com) if you'd like to arrange a personal meeting about this topic*

During this this session, we'll discuss a number of considerations that should be made when you're planning an expansion and/or update of your Stratum implementation. This includes the use of virtual dimensions, change set considerations, and planning for future dimension additions.



## CONFERENCE SCHEDULE

	Ballroom Courts A&B	Butler Room	Essex Room - Lower Level
<b>Mon., 6/1</b>			
7:30 - 8:30	BREAKFAST - Windows Restaurant		
8:30 - 9:30	Profit 2015 Opening Session - Welcome & Overview of Silvon's Direction with Stratum		
9:30 - 10:30	V65-1: Stratum.Broadcast Server Overview & Demo		
10:45 - 11:45	FID-1: Going Global with Stratum (HarperCollins Case Study)	V65-2: Stratum.Broadcast Server - Technical Overview & Setup	FID-8: Intro to Viewer for Planner Users
11:45 - 12:45	LUNCH in Windows Restaurant, followed by AFTERNOON OUTINGS		
<b>Tues., 6/2</b>			
7:30 - 8:30	BREAKFAST Bar - North Foyer Breakstation		
8:30 - 9:30	USR-2: Taking Advantage of New Release Features	USR-1: Creating Performance Dashboards	ADM-5: Uptime & Troubleshooting Tips & Techniques
9:45 - 10:45	USR-4: Taking Viewer View Building to the Next Level (Part 1)	FID-2: Sales Planning Considerations	ADM-7: Getting Excel Data Into Stratum
11:00 - 12:00	USR-6: Viewer Advanced Calculations	FID-3: Sales Planning with Stratum	ADM-1: Stratum.Viewer Administration
12:00 - 1:15	LUNCH - Windows Restaurant		
1:15 - 2:15	FID-6: Creating Daily Flash Reports	V65-4: Beyond Stratum V6.5	ADM-2: Stratum Connector Administration
2:30 - 3:30	V65-3: Stratum.Viewer Express: Overview & Demo		
3:45 - 4:45	FID-5: Stratum & Excel	FID-4: Going Mobile with Stratum	
5:45 - 9:00	Dinner Banquet & Evening of Magic at Maggianos / Oak Brook		
<b>Wed., 6/3</b>			
7:30 - 8:30	BREAKFAST Bar - North Foyer Breakstation		
8:45 - 9:45	USR-1: Creating Performance Dashboards (REPEATED FROM TUES A.M.)	FID-7: Stratum in the Cloud	
10:00 - 11:00	USR-5: Taking Viewer View Building to the Next Level (Part 2)	USR-3: Filtering in Stratum	FID-3: Sales Planning with Stratum (REPEATED FROM TUES A.M.)
11:15-12:15	USR-7: Cool Stuff	FID-4: Going Mobile with Stratum (REPEATED FROM TUES P.M.)	FID-5: Stratum & Excel (REPEATED FROM TUES P.M.)
12:15 - 2:00	LUNCH - Windows Restaurant / LAB remains open until 2:00		