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November 15-16, 2011

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Best Practices in Designing for Planning Data Forms

Tracy McMullen

interRel Consulting

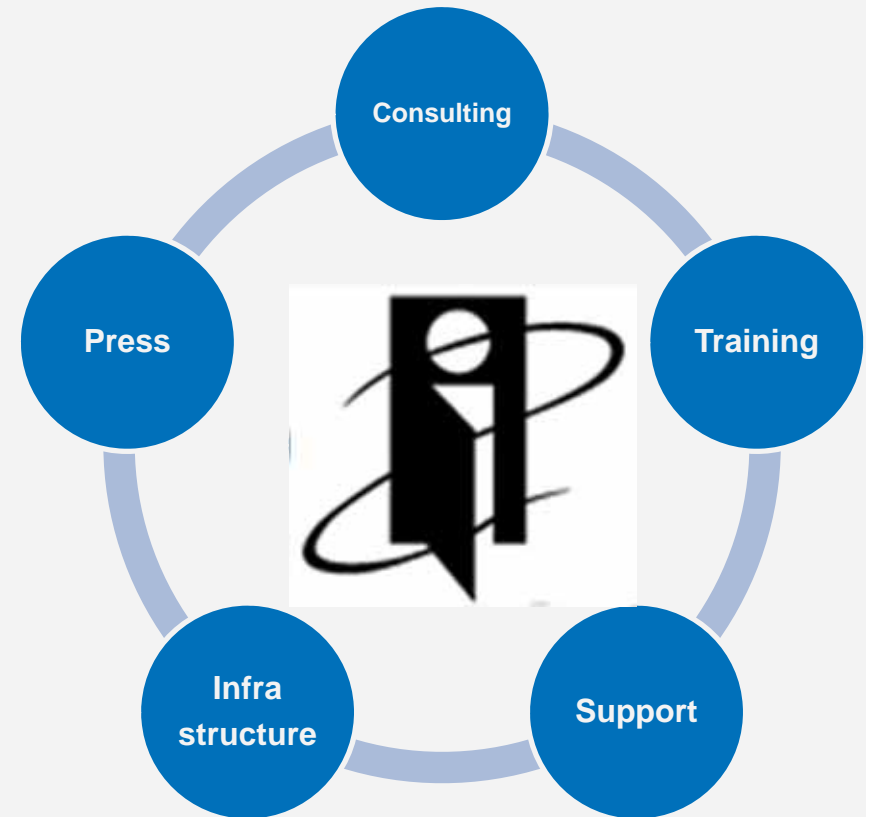
Oracle Ace Director, OAUG Planning Domain Lead

tmcmullen@interrel.com

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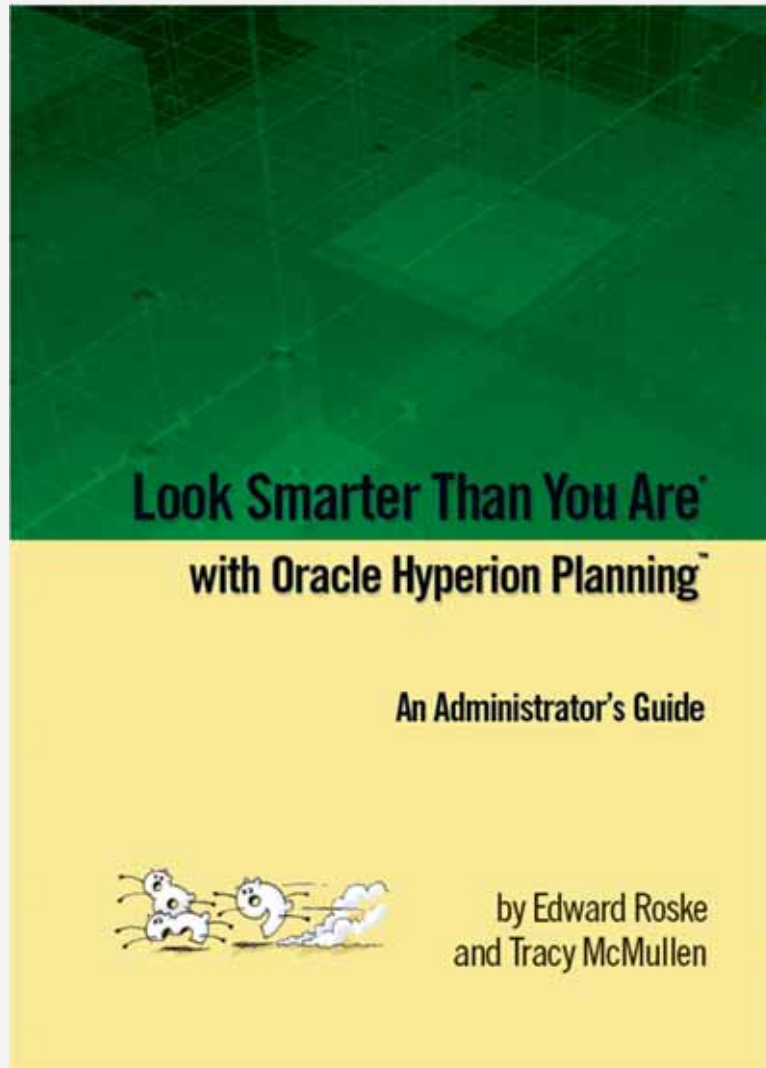
- Authors of the 8 Best Selling books on Hyperion & Essbase
- Only 4 books in the world on v11
- All available on LuLu.com

- **Free webcasts every Tuesday and Thursday—email dwhite@interrel.com**



Focused exclusively on
Oracle EPM & BI





8 Hyperion Books Available:

- Essbase (7): Complete Guide
- Essbase System 9: Complete Guide
- Essbase System 9: End User Guide
- Essbase 11: Admin Guide
- Essbase Studio 11
- Smart View 11: End User Guide
- Planning: End Users Guide
- Planning: Administrators

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Hyperion Solutions Road Trip to Southern California

Thursday, November 10, 2011

8:30am – 5:00pm

JW Marriott at L.A. LIVE

It's Free to attend!!!

RSVP to dwhite@interrel.com.



- 15 presentations across 3 tracks
- - Getting to Know Oracle EPM
- - What's New in Oracle EPM 11.1.2
- - Enhancing Your Oracle EPM Investment



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Why Do We Need Data Forms?

Hyperion Planning Data Forms

- Collect plan from end users
- Share related information to users so they can plan
- Standard structure and form to reduce error
- Flexibility in newer versions for adhoc within Planning data forms
 - View text data like Smart Lists and text measures
- Run related business rules – pass in data form selections to focus calculations



Overall Goals

- Keep it simple
- Keep them small
- Break the planning process up into steps
- Use right click menus





RELEVANT ANALYSIS. RELEVANT SOLUTIONS.

Introducing the New Data Form Designer

interRel Consulting

Simple or Composite?

Simple data form: Plan Revenue Demo

Properties Layout Other Options Business Rules



Simple data form Composite data form

Data Form:

Description:

Plan Type:

Enter Instructions:

Preview

Save Save As... Previous Next Cancel Finish



- All in one layout view
- Properties displayed to the side based on selected section

Simple data form: Plan Revenue Demo

Properties **Layout** Other Options Business Rules

Formula: Select [A]-[B]

Point of View: 1st Pass

Page: IDescendants(Entity) IDescendants(YearTotal) Units,Sales

		Columns		
		A	B	C
Rows		Actual	Forecast	Variance
1	IDescendants(Product)			

Grid Properties

Rows

- Suppress missing blocks
- Suppress missing data

Columns

- Suppress missing data
- Column width: Medium

Column Properties: C

- Hide
- Show separator
- Display formula on data form

Formula Data Type

Scenario: Unspecified None

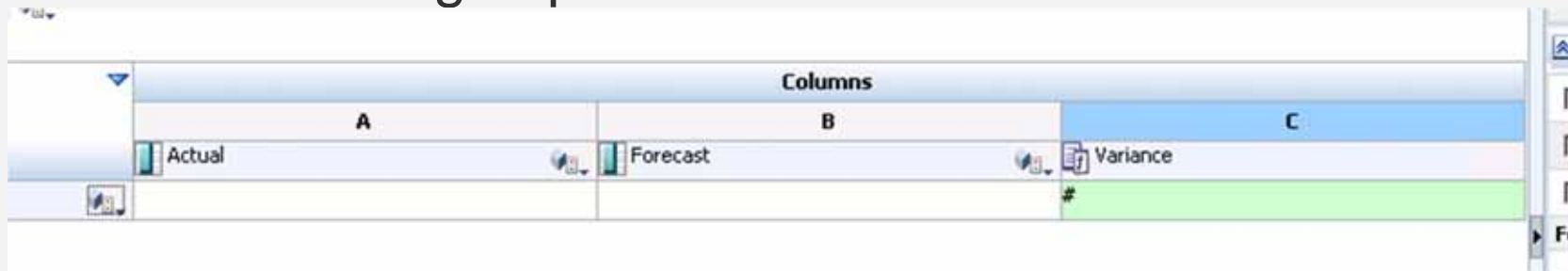
Validation Rules: Column C Rules at

Variance Check:



Multiple Rows and/or Columns

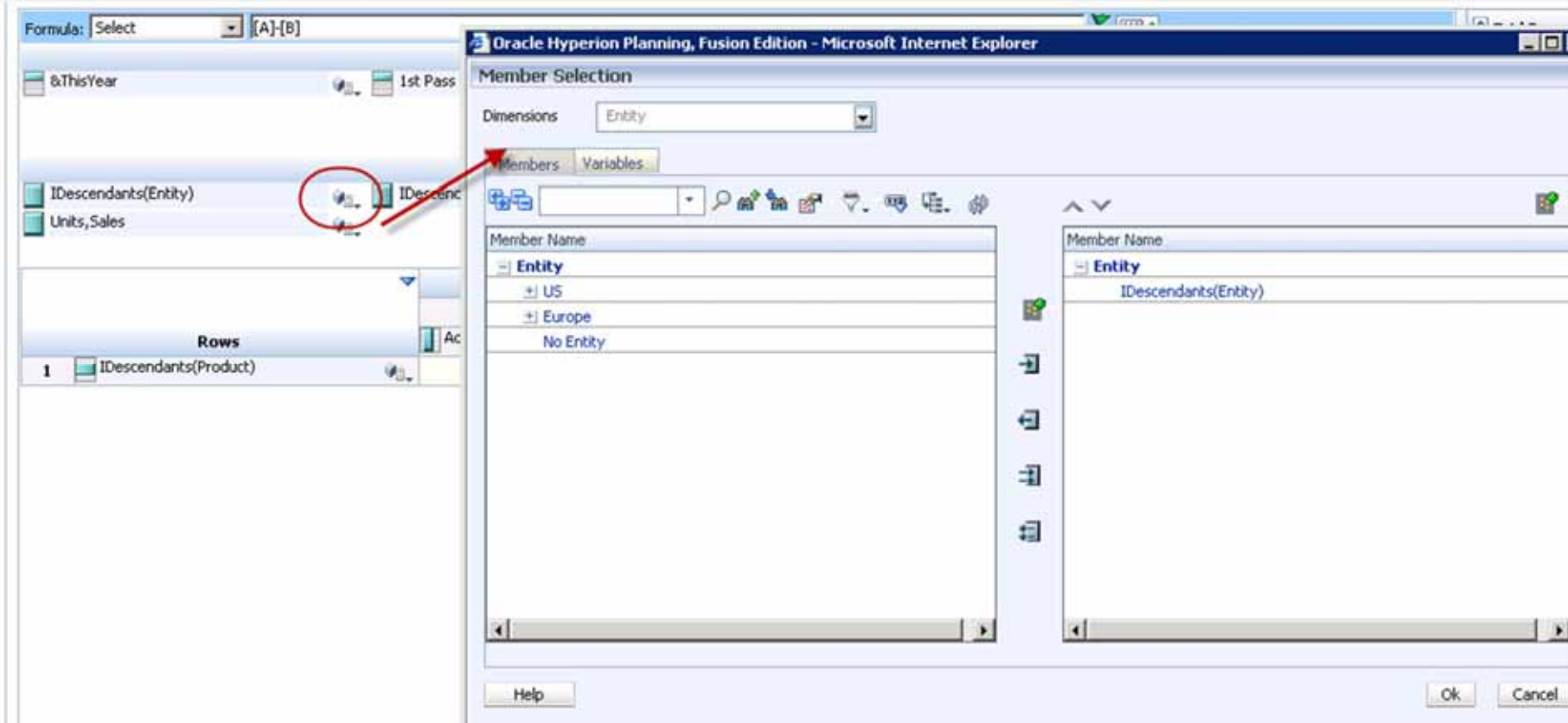
- Replaces the “segments” from earlier versions
- Now you can use multiple rows and columns with different properties
 - Read vs. write
 - Rows or columns used in calculations
 - Hidden rows or columns
 - Adding separators



	Columns		
	A	B	C
Actual			
Forecast			
Variance			#



Member Selection

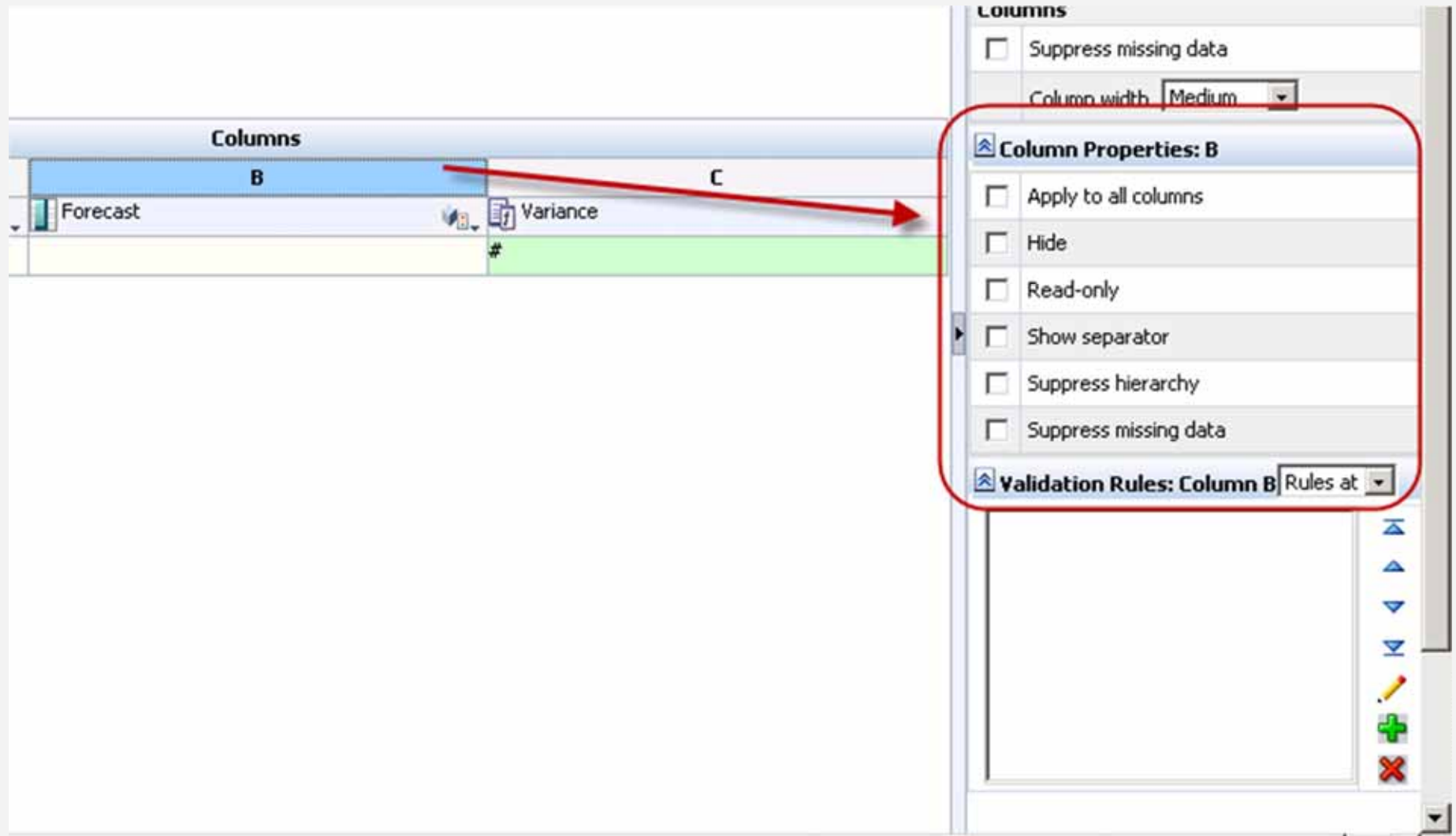


The screenshot shows the Oracle Hyperion Planning interface with a 'Member Selection' dialog box open. The dialog is titled 'Oracle Hyperion Planning, Fusion Edition - Microsoft Internet Explorer' and 'Member Selection'. It features a 'Dimensions' dropdown set to 'Entity'. Below this are tabs for 'Members' and 'Variables'. The 'Members' tab is active, showing a list of member names under the heading 'Member Name'. The list includes 'Entity', 'US', 'Europe', and 'No Entity'. A red circle highlights the 'Entity' member in the background application, with a red arrow pointing to the 'Entity' member in the dialog's list. The dialog also has 'Ok' and 'Cancel' buttons at the bottom right and a 'Help' button at the bottom left.

Member Name
Entity
US
Europe
No Entity



Column Properties



The screenshot displays a software interface with a table and a properties panel. The table has two columns, B and C, and two rows. The first row is labeled 'Forecast' and the second row is labeled 'Variance'. A red arrow points from the 'Forecast' row in column B to the 'Column Properties: B' section of the properties panel. The properties panel includes a 'Columns' section with a 'Suppress missing data' checkbox and a 'Column width' dropdown set to 'Medium'. The 'Column Properties: B' section contains several checkboxes: 'Apply to all columns', 'Hide', 'Read-only', 'Show separator', 'Suppress hierarchy', and 'Suppress missing data'. Below this is a 'Validation Rules: Column B' section with a 'Rules at' dropdown and a list of rules. The interface also features a toolbar with navigation and editing icons.

Columns	
B	C
Forecast	Variance
	#

Columns

- Suppress missing data
- Column width: Medium

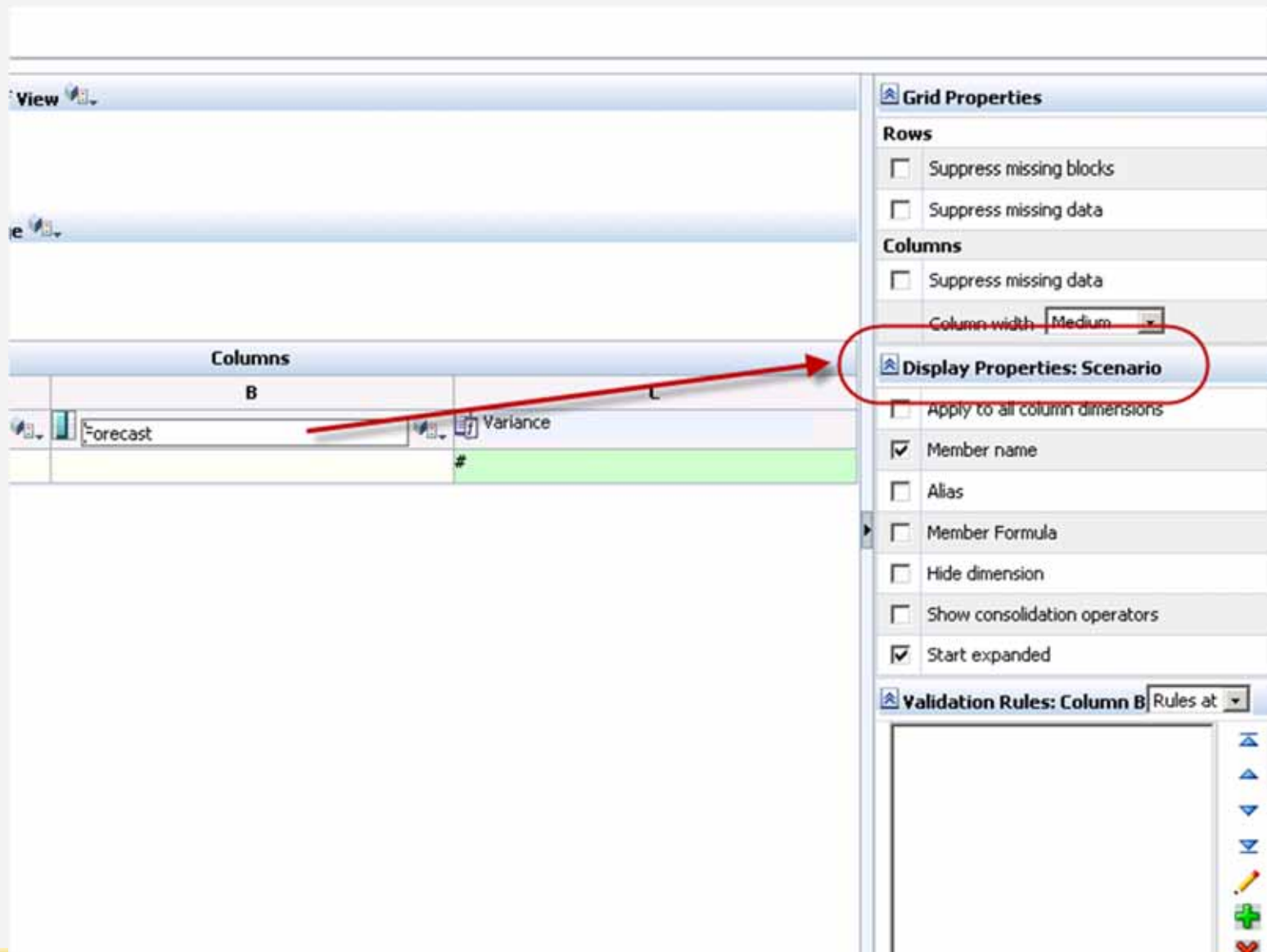
Column Properties: B

- Apply to all columns
- Hide
- Read-only
- Show separator
- Suppress hierarchy
- Suppress missing data

Validation Rules: Column B Rules at



Display Properties



The screenshot displays a software interface with a grid and a properties panel. The grid has a header row labeled 'Columns' with sub-headers 'B' and 'L'. Below this, there are two rows: the first row contains 'Forecast' under 'B' and 'Variance' under 'L'; the second row contains a '#' symbol under 'L'. A red arrow points from the 'Forecast' cell to the 'Display Properties: Scenario' section in the properties panel on the right. The properties panel includes sections for 'Grid Properties', 'Display Properties: Scenario', and 'Validation Rules: Column B'. The 'Display Properties: Scenario' section is circled in red and contains several checkboxes.

Columns	
B	L
Forecast	Variance
	#

Grid Properties

- Rows
 - Suppress missing blocks
 - Suppress missing data
- Columns
 - Suppress missing data
 - Column width: Medium

Display Properties: Scenario

- Apply to all column dimensions
- Member name
- Alias
- Member Formula
- Hide dimension
- Show consolidation operators
- Start expanded



Validation Rules: Column B Rules at









Formula Columns and Rows


- FR like syntax






Properties | **Layout** | Other Options | Business Rules

Formula: Select [A]-[B]  

&ThisYear   1st Pass 

IDescendants(Entity)   IDescendants(YearTotal) 

Units,Sales 

		Columns		
		A	B	C
Rows		Actual 	Forecast 	Variance 
1	 IDescendants(Product) 			#



Validations


Data Validation Rule Builder: Variance Check - Microsoft Internet Explorer





Location:

Name:

Description:

Enable validation rule
 Custom grouping



	Condition	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
<input type="checkbox"/>	IF	<input type="checkbox"/> Current Cell Value		< <input type="checkbox"/>	<input type="checkbox"/> Value	0 	<input type="checkbox"/>	
	THEN	<input type="checkbox"/> Process Cell						
	ELSE	<input type="checkbox"/> Process Cell						



Simple data form: Plan Revenue Demo

Properties Layout **Other Options** Business Rules

Precision

Cell Type	Minimum	Maximum
Currency values:	0	None
Non-currency values:	0	None
Percentage values:	0	None

Smart View Options

Enable offline usage

Display Properties

- Make data form read-only
- Hide Data Form
- Display missing values as blank
- Enable Mass Allocate
- Enable Grid Spread
- Enable for ad-hoc
- Enable cell-level document

Message for data forms with no data:

Printing Options

- Include supporting detail Normal Order
- Show comments
- Format data
- Show attribute members
- Apply precision
- Show currency codes
- Show account annotations

Context Menus

Available Menus

- Annual Plan
- Client Menu
- WFPMenu
- WFPMenuNewHires
- WFPMenuRecXfer



Selected Menus

Dynamic User Variables

- Enable dynamic user variables



Simple data form: Plan Revenue Demo

Properties Layout Other Options **Business Rules**

Plan Type:

Business Rules

- CalcScript - AggAll
- CalcScript - AggBud
- Rule - Add TBH Hourly
- Rule - Aggregate My Entity
- Rule - Change Employee Status
- Rule - CopyProps
- Rule - Plan Departure
- Rule - Reconcile TBH
- Rule - Remove TBH
- Rule - Rollup
- Rule - Transfer
- Rule - Transfer In
- Rule - Transfer Out
- Rule - Unreconciled Transfers



Selected Business Rules

<Calculate Data Form>

Description

<Select a business rule>



Minor but Annoying Navigation Fixed

- Save or Finish – you choose



ReThink the End User Interface

New Scenarios Possible

- Tabular view of data forms within composite
- Horizontal layout with tabs
- Same form twice
- Share or not share POV and Page selections
- Each data form within a composite displays in a separate worksheet in Smart View



The image shows a screenshot of the Microsoft Excel 2010 application window. The title bar reads "Book3 - Microsoft Excel". The ribbon is set to the "Home" tab, with sub-tabs for "Clipboard", "Font", "Alignment", "Number", "Styles", "Cells", and "Editing". The main workspace is a blank spreadsheet with columns A through K and rows 1 through 25. The "Smart View" task pane is open on the right side, displaying a tree view of data sources under the connection "HP-11.1.2 - Oracle® Hyperion Planning, Fusi". The tree structure is as follows:

- HP-11.1.2 - Oracle® Hyperion Planning, Fusi
 - nepm1112
 - SampApp
 - SampApp2
 - trainRG
 - Forms
 - Expense
 - Plan Expenses
 - Plan Expenses - My Entity
 - Salary Demo
 - Salary Demo 2
 - Salary Demo 3
 - Salary Expense
 - Revenue
 - Workforce
 - Actual vs. Budget
 - Plan Summary
 - Product Note
 - Product Status
 - Products
 - Task Lists

The status bar at the bottom indicates "Ready" and "100%".

Tools Help

Microsoft Excel

Developer Smart View

Profiles

Capture

- All-in-One*
- Full Screen
- Copy to clipboard (no preview)
- Web page as PDF with links

Profile Settings Hotkey: (Default) Ctrl+Shift+P

Input Output Effects Options Capture

Region File No Effects

and stop capture.

Smart View

Shared Connections

HP-11.1.2 - Oracle® Hyperion Planning, Fusi

- nepm1112
 - SampApp
 - SampApp2
 - trainRG
 - Forms
 - Expense
 - Revenue
 - Workforce
 - Actual vs. Budget
 - Plan Summary
 - Product Note
 - Product Status
 - Products
 - Task Lists

Sheet1 Sheet2 Sheet3

Ready 100%



Same Form Twice?

Scenario: Budget Fiscal Year: FY11

Page

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
517001										
517002										
517003										
517004										
<input type="checkbox"/> Additional Pay										

Fiscal Year: FY11 Scenario: Budget

Page

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
517001										
517002										
517003										
517004										
<input type="checkbox"/> Additional Pay										



The screenshot displays a software interface with a data table and a capture tool overlay. At the top, a notification bar states "The data form was saved." Below this, a toolbar contains icons for "Full Screen", "Copy to clipboard (no preview)", and "Web page as PDF with links". The capture tool overlay includes sections for "Effects" (set to "No Effects"), "Options", and "Capture".

The main data table is structured as follows:

		Columns		
		A	B	C
	Actual		Forecast	Calculated Variance
1	IDescendants(Product)			



POV Plan Revenue Demo - nepm1112_trainRG__1

West | Jan | Units | FY11 | 1st Pass | Refresh

A1		fx				
	A	B	C	D	E	F
1		Actual	Forecast	Variance		
2	BAS	500	450	50		
3	HTAS	500	425	75		
4	-HA	1000	875	125		
5	BB	200	220	-20		
6	PCD	250	250	0		
7	MP3	600	555	45		
8	-AG	1050	1025	25		
9	-AS	2050	1900	150		
10	DV1000	1000	900	100		
11	DV2000	700	650	50		
12	-DV	1700	1550	150		
13	-Product	3750	3450	300		
14						



Not Just Pages, Rows and Columns

Composite form for different plan types –
e.g. Flash consolidated results

Calculated columns / rows when using
attributes

Composite forms to address security by year

Composite design for Smart View

Design for adhoc analysis

Design for Grid Spreader



Planning Tips and Tricks

Top Tips for Faster Data Forms

Top Tips for Faster Forms

1. The obvious – build optimal size forms.



The Obvious – Build Optimal Sized Forms

- Build forms of optimal size
- Memory usage on the client is found to be fairly static in the form size range from 200 cells to 5,000 cells
- Use the Suppress Missing Data option to skip #MISSING values
- Split single larger data forms into multiple smaller data forms with fewer rows and columns.
- Create composites of many small forms
- Hide forms which are used in composites



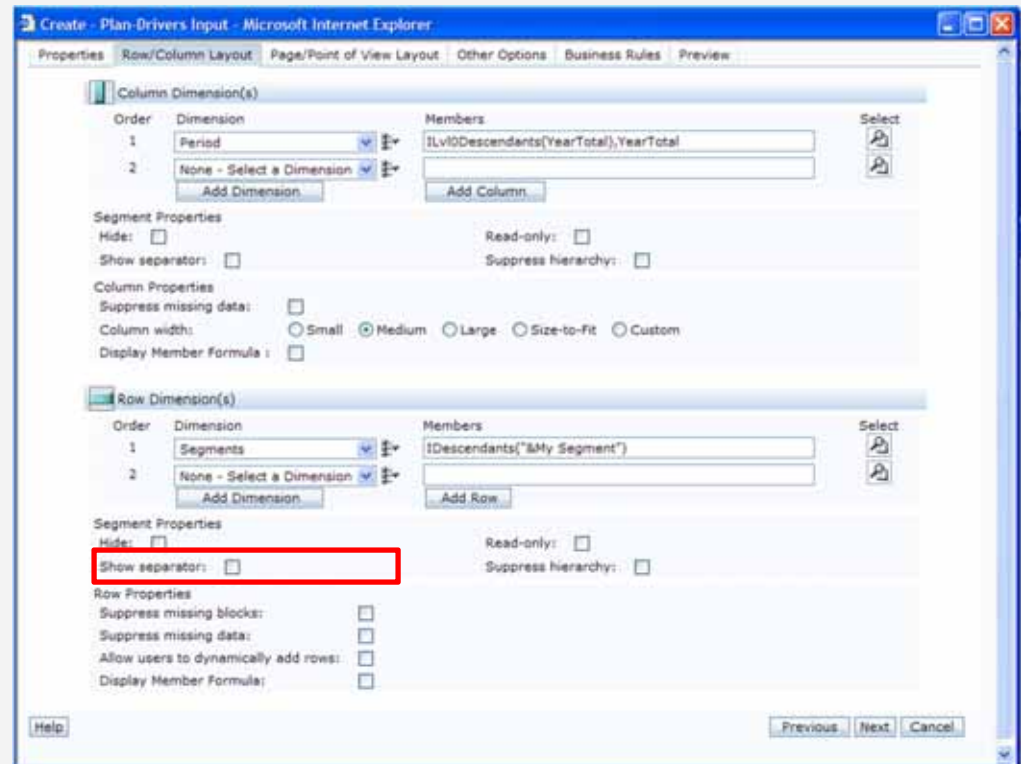
Top Tips for Faster Forms

1. The obvious – build smaller forms.
2. Use Suppress Missing Blocks for sparse retrievals.



Use Suppress Missing Blocks for sparse retrievals

- Data form definition >> Row properties section
- Use when sparse dimensions are in rows.
- Select to aid performance of the Suppress missing data setting when suppressing a large number of rows, such as 90% or more
- Can degrade performance if few or no rows are suppressed
- Cannot display attributes in data forms with this setting
- Certain suppressed blocks may have dynamic calc members ignored
- Test data forms before and after using this setting to determine if performance is improved
- Also available in Financial Reports in 11.1.1



Top Tips for Faster Forms

1. The obvious – build smaller forms.
2. Use Suppress Missing Blocks for sparse retrievals.
3. Place dense dimensions in the rows and columns.



Place dense dimensions in the rows and columns.

- Intersection of dense dimension members make up a single block
- By placing dense dimensions in the rows and columns, one block is required for the data form
- Vs. if you place one or more sparse dimensions in the rows or columns, multiple blocks are required for the data form
- When you have to place sparse dimensions on rows, use suppress missing blocks feature
- Place Scenario, Version, and Year dimensions in the Page/POV



Top Tips for Faster Forms

1. The obvious – build smaller forms.
2. Use Suppress Missing Blocks for sparse retrievals.
3. Place dense dimensions in the rows and columns.
4. Design fewer dimensions (rethink dimensionality and use Smart Lists, attributes)



Design fewer dimensions

- Few dimensions = smaller database, better performance, less complex for end users
- Only those dimensions required for planning
 - Don't try to build Actuals reporting in your Planning application
 - ASO-BSO partitioning with actuals on ASO partition being moved to BSO for relevant years only
- Rethink current attribute dimensions and possibly regular dimensions as a Smart List

Page MA Plan Working FY09 Sales_Risk Go

	BegBalance
Bookshelf Audio System	Medium
Home Theater Audio System	High
Personal Audio	High
Boom Box	Low
Personal CD Player	
MP3 Player	High
DVD Player	Medium
DVD Recorder	Low



Top Tips for Faster Forms

1. The obvious – build smaller forms.
2. Use Suppress Missing Blocks for sparse retrievals.
3. Place dense dimensions in the rows and columns.
4. Design fewer dimensions (rethink dimensionality and use smart lists, text, dates).
5. Where is the performance issue?



Where is the performance issue?

- Understanding the grid size
 - Grid size consists of the number of rows, multiplied by the number of columns
 - The size of the HTML is the portion of the data form that changes based on grid size
 - The impact on data form performance relates to grid size.
 - The grid size doubles if an application uses multiple currencies; So design multicurrency enabled forms carefully
 - In fact, consider not using built-in Planning currency functionality
 - Build your own and achieve easier adhoc analysis and better performance



Top Tips for Faster Forms

1. The obvious – build smaller forms.
2. Use Suppress Missing Blocks for sparse retrievals.
3. Place dense dimensions in the rows and columns.
4. Design fewer dimensions (rethink dimensionality and use smart lists, text, dates).
5. Where is the performance issue?
6. Careful! Calc on Save or Load



Use Calc on Save / Calc on Load only when necessary

- You can attach Calculate Data Form business rules or custom business rules to data forms
- Run on save / Run on Load
 - Runs the business rule when the user clicks the save button on the data form or when the user opens the form
 - User may be prompted if runtime prompt is included in the business rule
 - Options Use Members on Data Form and Hide prompts
- Can increase response time for users
- Only use if you need to; E.g. if the entire form is level zero members or dynamically calculated members there is no need to Run on Save / Run on Load
- @IANCESTORS Tip!

Properties	Row/Column Layout	Page/Point of View Layout	Other Options	Business Rules	Preview
Business Rule Properties for Plan Revenue - COS					
Business Rule	Run on Load	Run on Save	Use Members on Data Form	Hide Prompt	
Add Asset	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



Focus Business Rules.

- Focus Business Rule logic for only those members that need to be calculated.
 - E.g. if you need to roll up a specific entity, don't Agg(Entity)
 - Use a run time prompt to focus the calculation on the desired member(s)
- Members available for runtime prompts are limited by security and limitations specific to the prompt
- Can be single or multiple members, numeric value, Smart List value, or text value



Run Time Prompts - Eden Product Revenue

Select Scenario
Forecast

Select Version
Working

select Channel
Distribution*

Select Year
FY06

Select Segment
BAS*

Launch Go Back

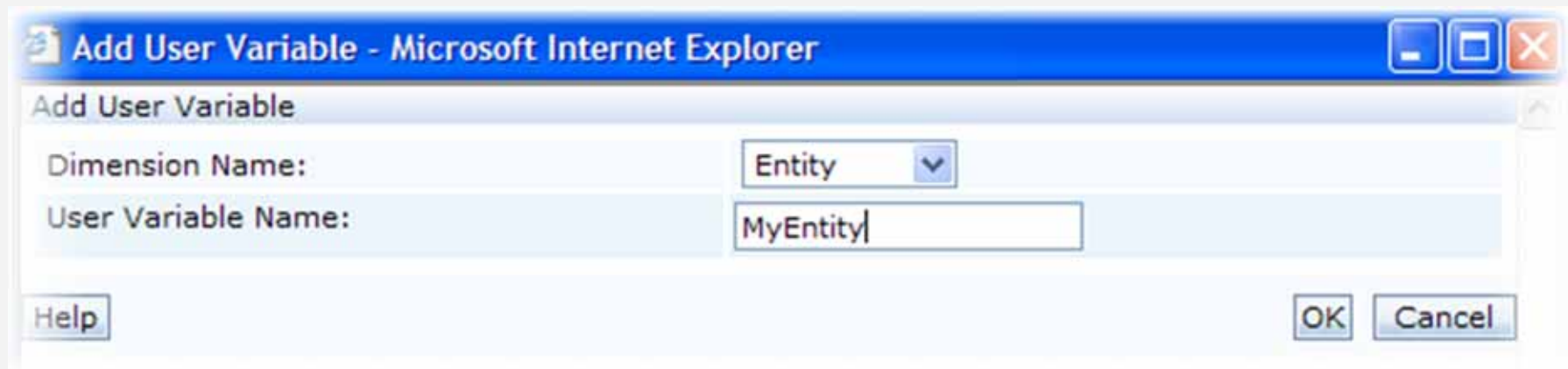


Planning Tips and Tricks

Top Tips for Reducing Data Form Maintenance

Filter member lists and reduce form counts with user variables.

- User variables act as filters in data forms, enabling planners to focus only on the members they are interested in
- Example - Departments in a particular division
- Before you can associate a user variable with a data form, an administrator must create the user variable
- When you set up a data form with a user variable, planners must select a value for the variable before opening the data form in their user preferences



Add User Variable - Microsoft Internet Explorer

Add User Variable

Dimension Name: Entity

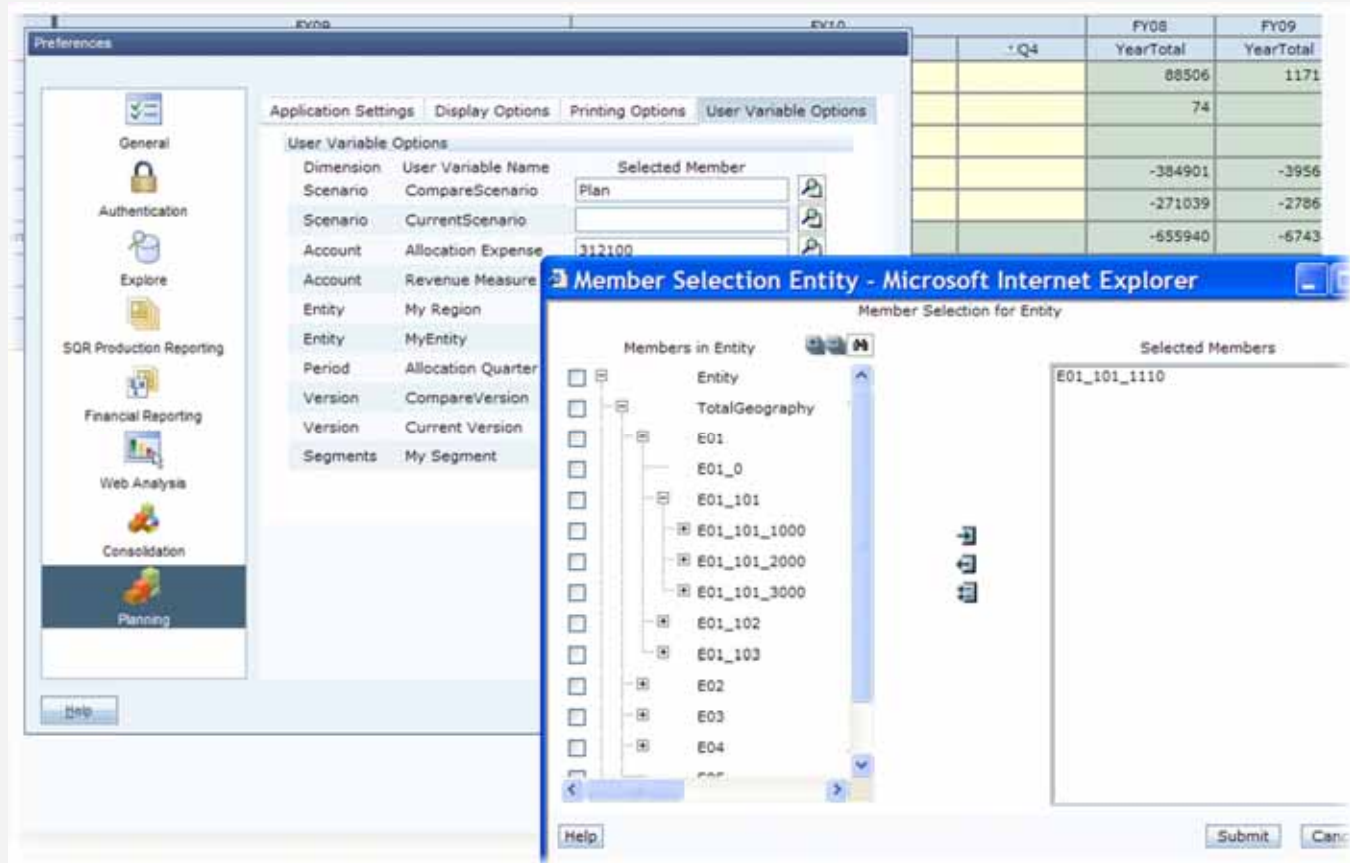
User Variable Name: MyEntity

Help OK Cancel



End User Process – Select a Value for the User Variable

- This action is performed by the end user
- Select File >> Preferences
- Select the User Variable tab
- Select the member they want to set for the user variable



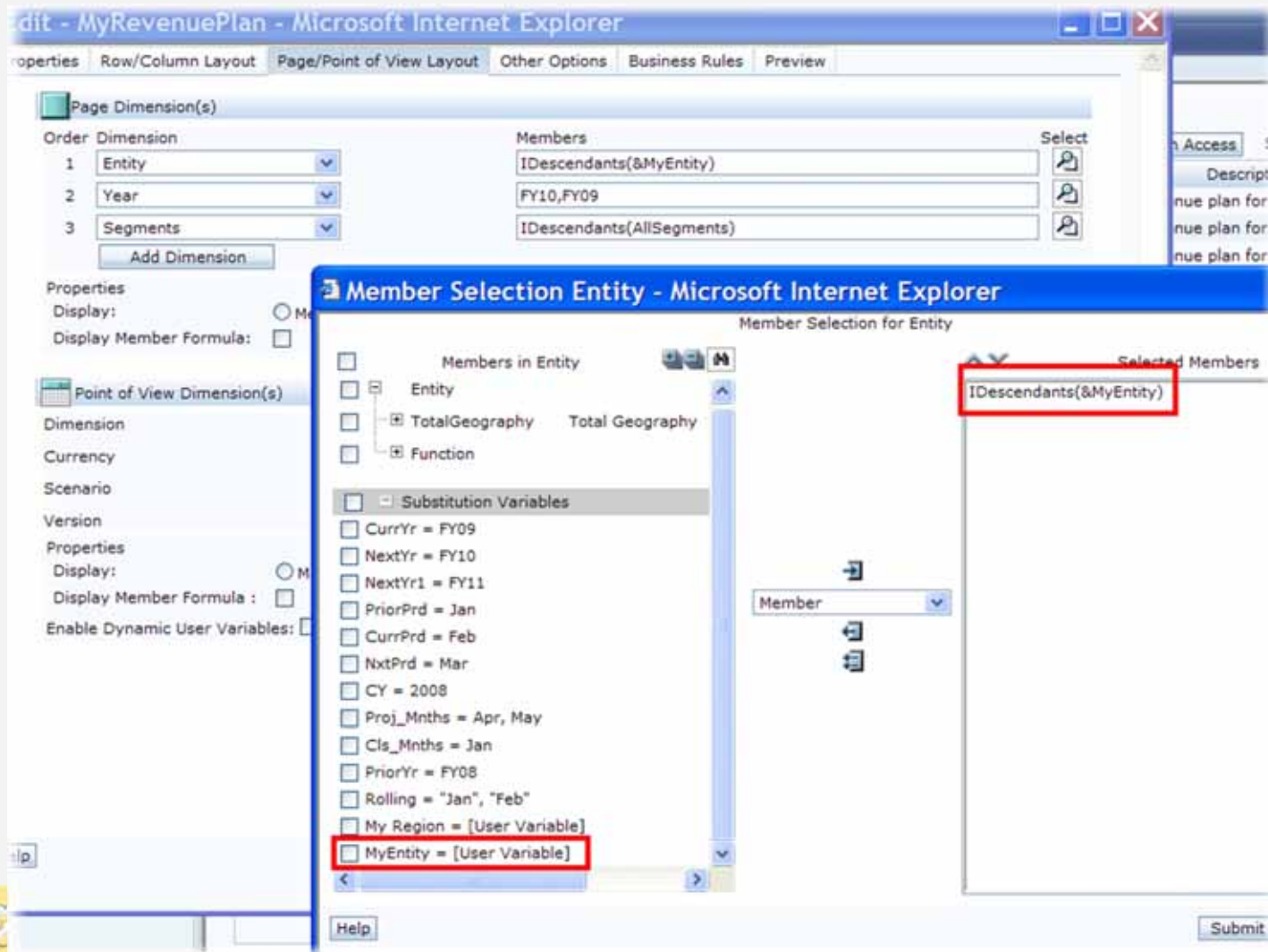
The screenshot displays the 'User Variable Options' dialog box in the background, which is part of a larger application window. The dialog box has tabs for 'Application Settings', 'Display Options', 'Printing Options', and 'User Variable Options'. Under 'User Variable Options', there are fields for 'Dimension', 'User Variable Name', 'Scenario', 'Account', 'Entity', 'Period', 'Version', and 'Segments'. The 'Selected Member' field is currently set to 'Plan'.

In the foreground, a 'Member Selection Entity - Microsoft Internet Explorer' window is open, showing a tree view of 'Members in Entity'. The tree structure includes 'Entity', 'TotalGeography', 'E01', 'E01_0', 'E01_101', 'E01_101_1000', 'E01_101_2000', 'E01_101_3000', 'E01_102', 'E01_103', 'E02', 'E03', and 'E04'. The 'Selected Members' list on the right contains the value 'E01_101_1110'.



Data Form Designer – Select User Variables in Data Form Definition

- Use the User Variables in the data form definition
- Use functions like Children or Descendants for user variables



The screenshot displays the 'Member Selection Entity' configuration window in Microsoft Internet Explorer. The window is divided into several sections:

- Page Dimension(s):** Shows dimensions for Order (Entity, Year, Segments) and Members (IDescendants(&MyEntity), FY10,FY09, IDescendants(AllSegments)).
- Properties:** Includes options for Display, Display Member Formula, and Enable Dynamic User Variables.
- Point of View Dimension(s):** Lists various dimensions like Currency, Scenario, Version, and Properties.
- Members in Entity:** A tree view showing 'Entity' with sub-items 'TotalGeography' and 'Function'. Below this is a list of 'Substitution Variables' including 'MyEntity = [User Variable]' and 'MyRegion = [User Variable]', both of which are highlighted with red boxes.
- Selected Members:** A list containing 'IDescendants(&MyEntity)', also highlighted with a red box.
- Member Selection:** A dropdown menu labeled 'Member' with a selection icon.

At the bottom of the window, there are 'Help' and 'Submit' buttons. The text 'EVANT SOLUTIONS.' is visible in the bottom right corner of the slide.

Result – Filtered Member List for End Users

- Filtered for the user defined variable - NY

Page		NY	Bookshelf Audio System	Forecast	Working	Current Year	Go								
		NY						Jan	Feb	Mar	Apr	May	Jun	Jul	A
Distribution	-Gross Revenue		795,633	497,271	202,771	304,156	483,270	679,764	685,148	49					
	Operating Revenue		795,633	497,271	202,771	304,156	483,270	679,764	685,148	49					
	Revenue Synergies														
Government	-Gross Revenue														
	Operating Revenue														
	Revenue Synergies														
All Channels	Gross Profit		259,180	161,987	68,657	102,986	147,986	143,311	196,710	19					



Create dynamic forms, rules, loads and more with substitution variables

- Substitution variables – global placeholders for values that change regularly
 - Current Month
 - Current Qtr
 - Use for rolling forecasts
- Substitution variables are listed and available for:
 - Data forms
 - Member formulas
 - Business rules
 - Essbase load rules
 - Reports



Create dynamic forms, rules, loads and more with substitution variables

Properties Row/Column Layout Page/Point of View Layout Other Options Business Rules Preview

Page Dimension(s)

Order Dimension

- 1 Entities
- 2 Segments
- 3 Channels
- 4 Scenarios
- 5 Versions
- 6 Years

Members

- [IDescendants(TotalGeography)]
- [IDescendants(AllSegments)]
- [Children(All Channels)]
- Plan_Forecast_Actual
- Working MA
- [PriorYr,&CurrYr,&NextYr,&NextYr1]**

Properties

Display: Member Name Alias

Point of View Dimension(s)

Dimension Members

Currencies Local

Properties

Display: Member Name Alias

Enable Dynamic User Variables:

Page MA Bookshelf Audio System Distribution Forecast

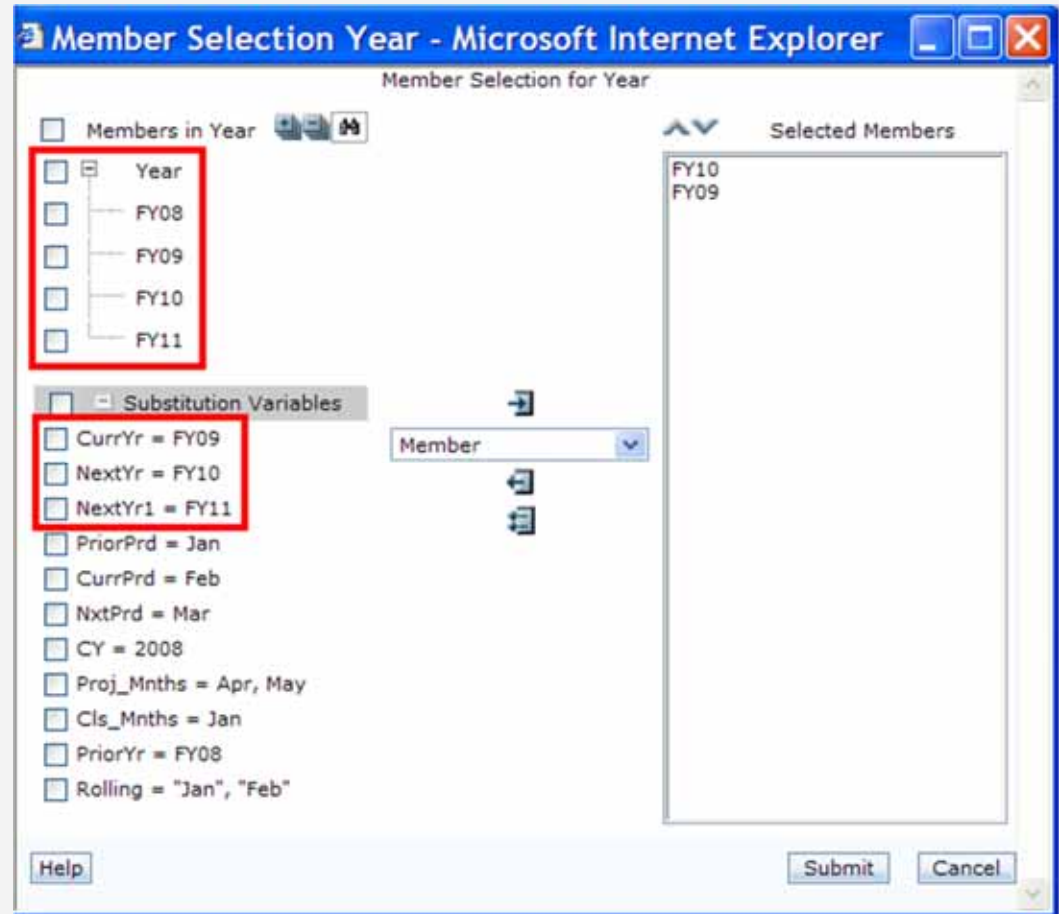
Working Current Year

		Feb	Mar	Apr	May	Jun	Jul	Aug
Units	74	4,359	1,778	2,666	4,236	5,958	5,899	
Price	73	73	73	73	73	73	74	
Sales Return %	5.9%	5.9%	5.8%	5.8%	6.1%	6.9%	7.0%	
Sales Allowance %	4.2%	4.2%	4.1%	4.1%	4.3%	4.9%	5.0%	
Operating Revenue	506,312	316,445	129,036	193,554	307,535	432,577	438,532	31
Sales Returns	(29,786)	(18,617)	(7,447)	(11,170)	(18,617)	(29,786)	(30,697)	(1
Sales Discounts	(21,143)	(13,214)	(5,286)	(7,929)	(13,214)	(21,143)	(21,927)	(1
- Returns and Allowances	(50,930)	(31,831)	(12,732)	(19,099)	(31,831)	(50,930)	(52,624)	(3
- Net Revenue	455,383	284,614	116,303	174,455	275,705	381,648	385,908	27
Operating COS	273,853	171,158	68,463	102,695	171,158	273,853	253,952	17
- Gross Profit	181,530	113,456	47,840	71,760	104,546	107,795	131,956	9



Substitution Variable Considerations

- Each substitution variable value is retrieved from Essbase every 5 minutes
 - Change the default value in the SUBST_VAR_CACHE_LIFETIME property in the HspJSHome.properties file
- Create and assign substitution variables in Essbase Administration Services or MaxL (automate)
- When selecting on a data form, the variable must match the dimension selected
- Planning checks validity of substitution variable when the form is run



Member Selection Year - Microsoft Internet Explorer

Member Selection for Year

Members in Year

- Year
 - FY08
 - FY09
 - FY10
 - FY11

Substitution Variables

- CurrYr = FY09
- NextYr = FY10
- NextYr1 = FY11
- PriorPrd = Jan
- CurrPrd = Feb
- NxtPrd = Mar
- CY = 2008
- Proj_Mnths = Apr, May
- Cls_Mnths = Jan
- PriorYr = FY08
- Rolling = "Jan", "Feb"

Member

Selected Members

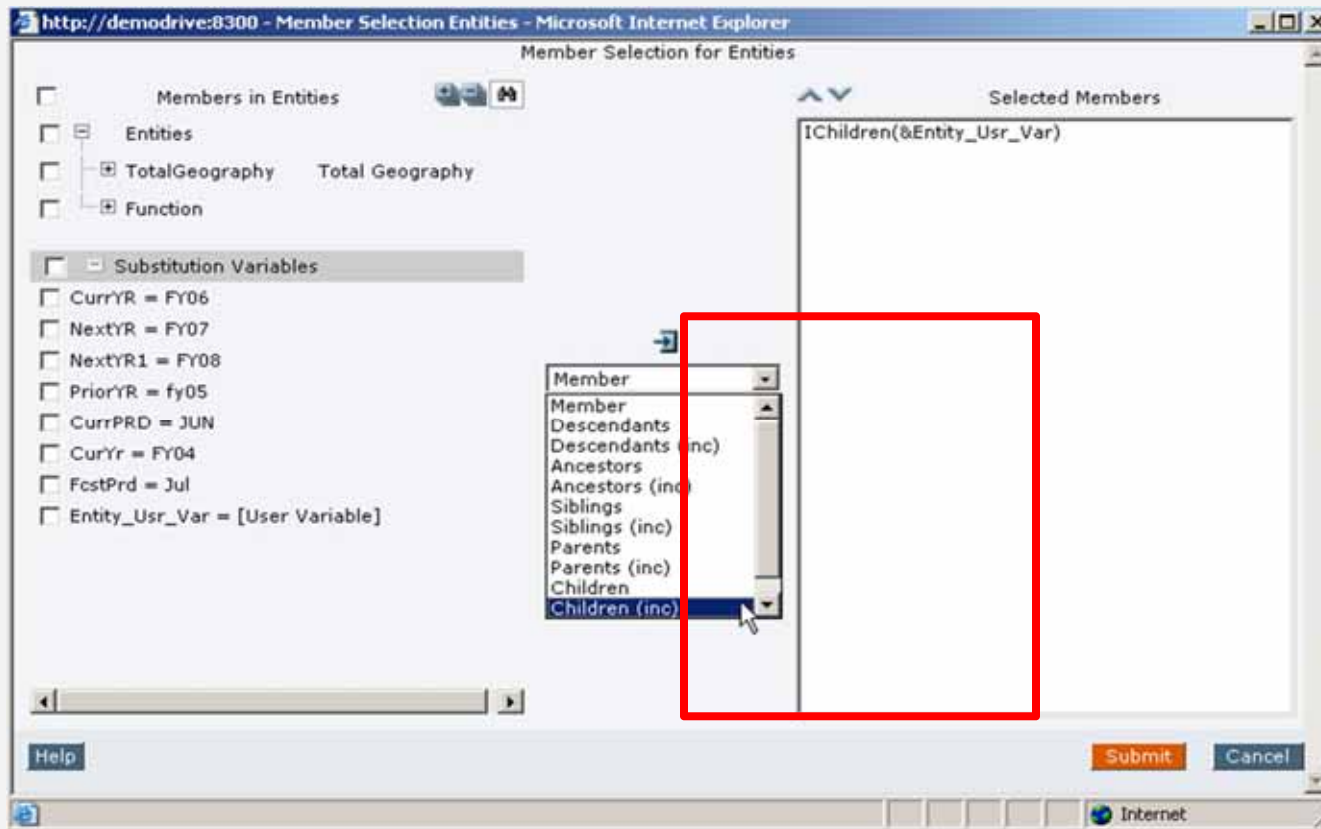
FY10
FY09

Help Submit Cancel



Create dynamic forms with member functions

- Use functions in form definitions (and reports) over individual member selections
- As outline changes, data forms are automatically updated



Create dynamic business rules with run time prompts.

- Create a business rule once and then use run time prompts to filter the logic for user selected members



Run Time Prompts - Eden Product Revenue

Select Scenario
"Forecast" 

Select Version
"Working" 

select Channel
"Distribution" 

Select Year
"FY06" 

Select Segment
"BAS" 

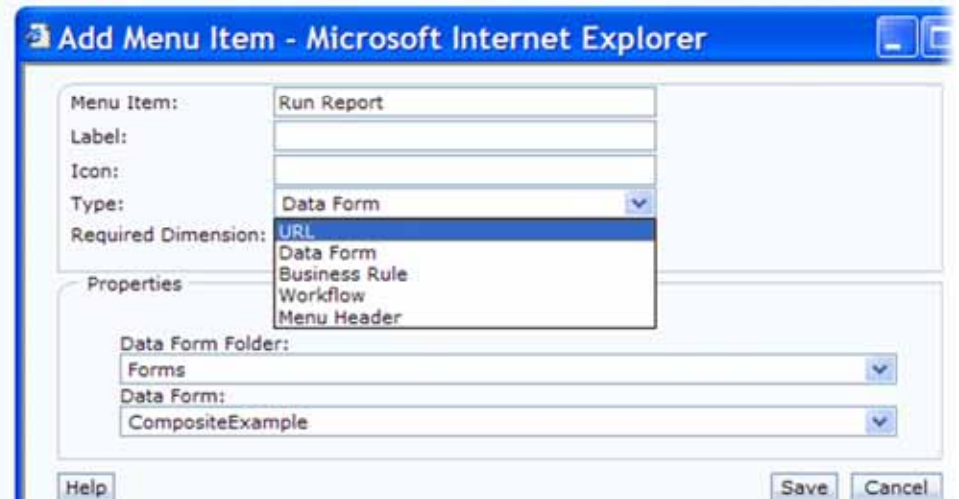
Launch Go Back



Other Don't Miss Planning Data Form Tips

Add planning steps within a form using right click menus

- Right click menus are defined by the Planning administrator
- Simply right click in the row or column members and choose a menu option
- Menu options could include links to data forms, business rules, etc.



Page Plan Bookshelf Audio System

	+Q1	
Units	24437	
Price	49	59
Operating Revenue		
Sales Returns		
Sales Discounts		
-Returns and Allowances	-112907	-121926

Right-click context menu options:

- Revenue Assumptions
- Cost of Sales Rate
- Show member properties in outline
- Hide rows with no data
- Hide rows with zeros and no data

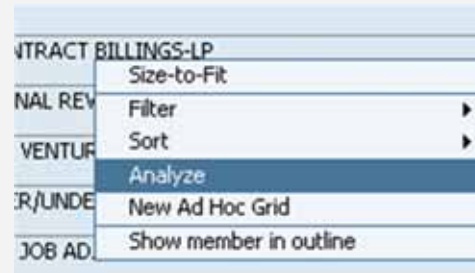
- Users can right click and link to quick set of related activities

- Users can save as to their personal form
- Any one can access adhoc (no additional Shared Services roles)

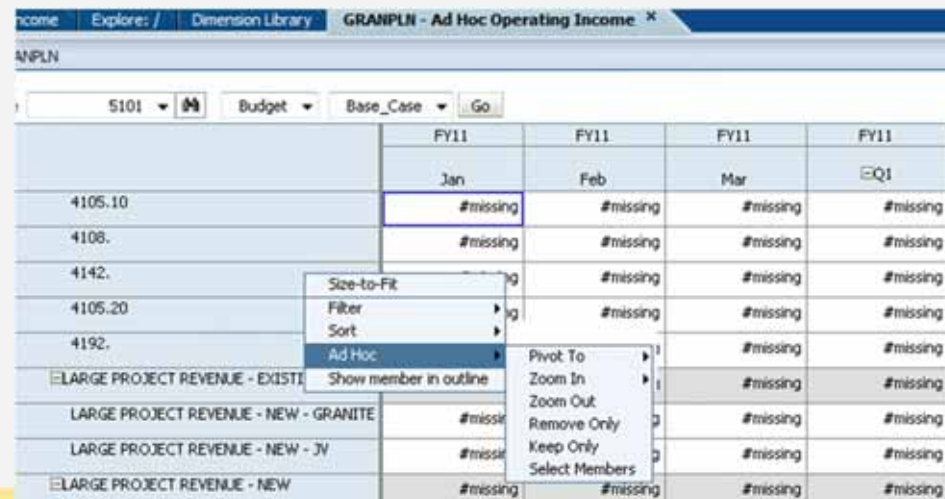


Analyze

- To perform adhoc analysis within a data form, right click and choose Analyze



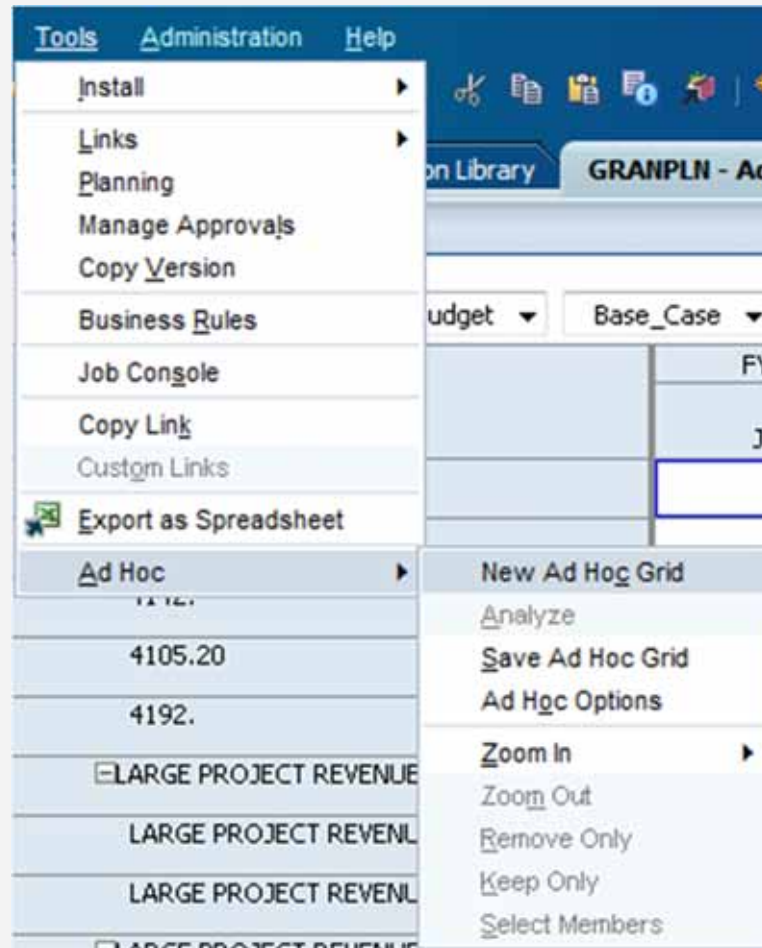
- This will open an “Adhoc Form” where you can zoom, pivot, etc.



	FY11	FY11	FY11	FY11
	Jan	Feb	Mar	EQ1
4105.10	#missing	#missing	#missing	#missing
4108.	#missing	#missing	#missing	#missing
4142.	#missing	#missing	#missing	#missing
4105.20	#missing	#missing	#missing	#missing
4192.	#missing	#missing	#missing	#missing
LARGE PROJECT REVENUE - EXISTE	#missing	#missing	#missing	#missing
LARGE PROJECT REVENUE - NEW - GRANITE	#missing	#missing	#missing	#missing
LARGE PROJECT REVENUE - NEW - JV	#missing	#missing	#missing	#missing
LARGE PROJECT REVENUE - NEW	#missing	#missing	#missing	#missing



New Ad Hoc Menu Actions



New Adhoc Grids

- Users can create and personalize focused data slices for content they access frequently
- Adhoc grids can be shared with other users
- Must have Ad Hoc user role to open grids and change them
- Must have Ad Hoc Grid Creator to create and save adhoc grids for themselves and others
 - Should everyone have these roles? Probably not...
- Steps are similar to defining Smart Slices in Smart View
- Not confined to data form definition
- You are confined to members for which you have security
- Can navigate all the way from Root to lower levels



New Ad Hoc Grids

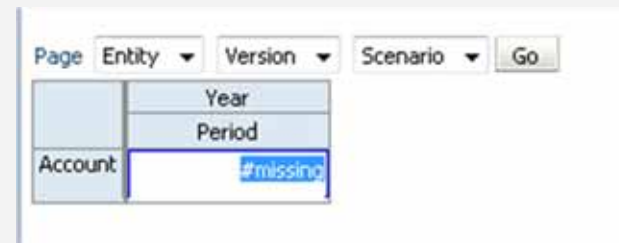
- Tools >> Adhoc >> New Ad Hoc Grid



Select Plan Type:

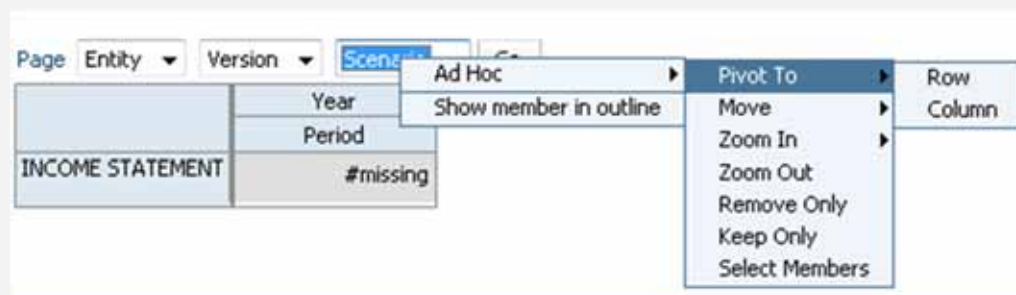
Plan Type: COA [Go]

[Help] [Close]



Page	Entity	Version	Scenario	[Go]
		Year		
		Period		
Account			#missing	

- Default Grid will display
- Use right click options to Zoom, pivot , keep only...
- May be better to start with an existing data form



Page	Entity	Version	Scenario	[Go]
		Year		
		Period		
INCOME STATEMENT			#missing	

- Ad Hoc
 - Show member in outline
 - Pivot To
 - Row
 - Column
 - Move
 - Zoom In
 - Zoom Out
 - Remove Only
 - Keep Only
 - Select Members



Show Member Formula Icon

- Users can now understand how a member is calculated

The screenshot displays a financial software interface. The main window shows a data table for 'CurrentScenario: Forecast' with columns for Q1 and Q2, and rows for various financial metrics. The 'Gross Profit Margin' row is highlighted with a red box, and a small 'f' icon is visible next to it. A dialog box titled 'Member Formula - Microsoft Internet Explorer' is open, showing the formula:
$$\text{Gross Profit} / \text{Net Revenue}$$

	Q1		Q2		FY09
	Forecast	Plan	Forecast	Plan	
	Gross Revenue	26796367.66	31278918	28088950	
+ Pretax Income From Operations	7639064	12156596	8413873	13616222	
Net Income	7639064	12156596	8413873	13616222	
Change in Cash	7639064	12156596	8413873	13616222	
Gross Profit Margin <i>f</i>					



Last Tips...

- Use data flags with “suppress” missing option to show relevant intersections
- Use Start up message option to direct users on what to do when no data exists
 - E.g. Right click to run business rule and populate data
- Don't forget about attributes



In Summary....

11.1.2 is really exciting...

- With many new features to help us deliver easy to use budgeting and forecasting interfaces
- Design depends on a number of factors
 - SV or web
 - Basic end user or more advanced
- Patch due out some time in March





RELEVANT ANALYSIS. RELEVANT SOLUTIONS.

Thank you!!

Questions & Answers

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