# Session #2145553311—Top 10 Tips for Designing and Building Your Hyperion Web Analysis Application

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# Resume of Presenter

- Over 11 years Hyperion design experience
  - Hyperion Essbase (Hyperion Certified Professional)
  - Hyperion Planning
  - Hyperion Financial Management
  - Hyperion Reports / Hyperion Application Link
  - Hyperion Analyzer / Web Analysis
- Over 13 additional years in program/project management in One Design (OD) and Commercial Off the Shelf (COTS) software deliverables
  - Project Management Institute (Project Management Professional)
  - National Contract Management Association (Certification in Contract Administration)
  - Institute of Management Consultants (Certified Management Consultant)
  - Software Engineering Institute/ CMM: Level 4 (Management)

# Rationalization of Your Executive Dashboard

- Typically an evolution of needs / desires of both financial administrators and executive management
  - Desire to push information "up" the corporate ladder without granular assistance
  - Top to bottom, single version of the truth from a single source repository
  - Simple, so a Big Purple Dinosaur who lacks opposable thumbs can use effectively
  - An executive "Bang for the Bucks" deliverable provided with their tenure (time to market)

# TIP #1: Create a "Style Guide" for All Objects

- Major categories of Style Guide considerations (typically requires several meetings / chalk talks to evolve the document):

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# TIP #2: Design a Template for All Screens

- Where does the source come from (lots of places)?
  - Current company Web site
  - Unique design
  - Comparing a marketing to a financial Web site

# TIP #3: Deciding on a Navigational Design Approach

- There are three types of navigational design options
  - Enterprise
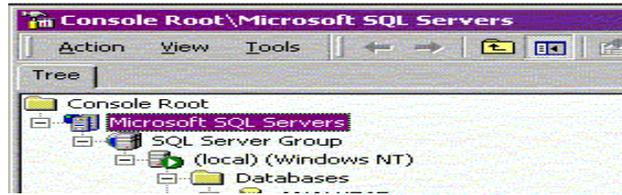
  - Hierarchical

  - Single Pass (Installation Style Approach using Left / Right arrows – Typical of a Budgeting Style approach as you see in Hyperion Planning)
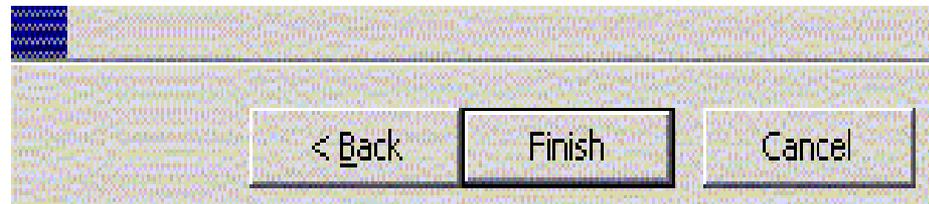
# TIP #4: Create a "Home Page" Start Point

- Turn off the Tabs and within User Preferences, General, set up a Report Group / Report to be the Home Page

# TIP #5: Navigating with the "Open Report" Service Object

# TIP #6:  Grid Object Data Displays

- Remember the big purple dinosaur?  Mind their vision when defining Grid Object Displays.  General Rule: The more Grey the background the less bold the text of the rows / columns:

|  |  | Jan.02 | Feb.02 | Mar.02 | Apr.02 | May.02 | Jun.02 | Jul.02 | Aug.02 | Sep.02 | Oct.02 | Nov.02 | Dec.02 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| All Offices | Conv/Conf | 393 | 679 | 860 | 759 | 1,072 | 1,003 | 1,444 | 1,984 | 2,137 | 2,992 | 2,624 | 3,075 |
|  | Govt | 20 | 49 | 68 | 77 | 88 | 92 | 129 | 235 | 274 | 461 | 364 | 457 |
|  | Jumbo/NonConf | 1 | 12 | 22 | 25 | 36 | 44 | 89 | 156 | 206 | 272 | 208 | 246 |
|  | Other | N/A | N/A | N/A | N/A | 10 | 27 | 44 | 60 | 41 | 35 | 52 | 66 |

Medical Management.

|  |  | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Admits/000 | Actual | 47 | 48 | 50 | 48 | 43 | 42 | 48 | 45 |  |  |  |  |
|  | Goal | 49 | 49 | 49 | 49 | 49 | 49 | 49 | 49 |  |  |  |  |
| Days/000 | Actual | 150 | 155 | 171 | 168 | 146 | 134 | 179 | 168 |  |  |  |  |

| K2 Sports | Gross Profit | 943 | n/a | 490 | 453 | 0 | 943 | n/a | 943 |
|---|---|---|---|---|---|---|---|---|---|
|  | Gross Profit % | 17.3% | n/a | 17.2% | 17.4% | 0.6% | 17.3% | n/a | 17.3% |
|  | Net Sales | 2,127 | n/a | 1,371 | 756 | 0 | 2,127 | n/a | 2,127 |
| Planet Earth | Gross Profit | 490 | n/a | 673 | 474 | 0 | 490 | n/a | 490 |

# TIP #7: Graph Objects Data Displays

- Line objects are best used as a comparison of trend (even side by side):
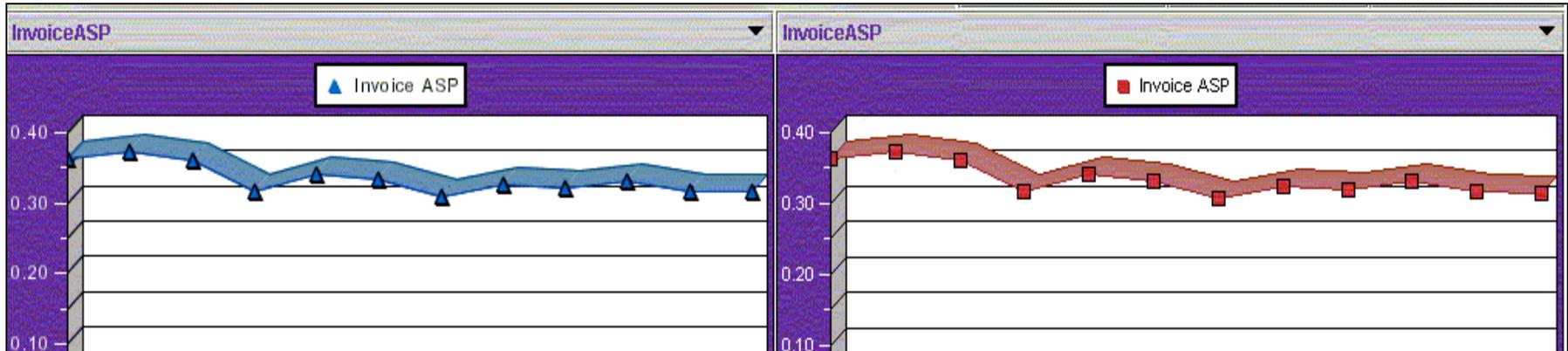
# TIP #7: Graph Objects Data Displays (continued)

- Bar objects are typically used for both time-phased comparison and stacked / top providers comparisons
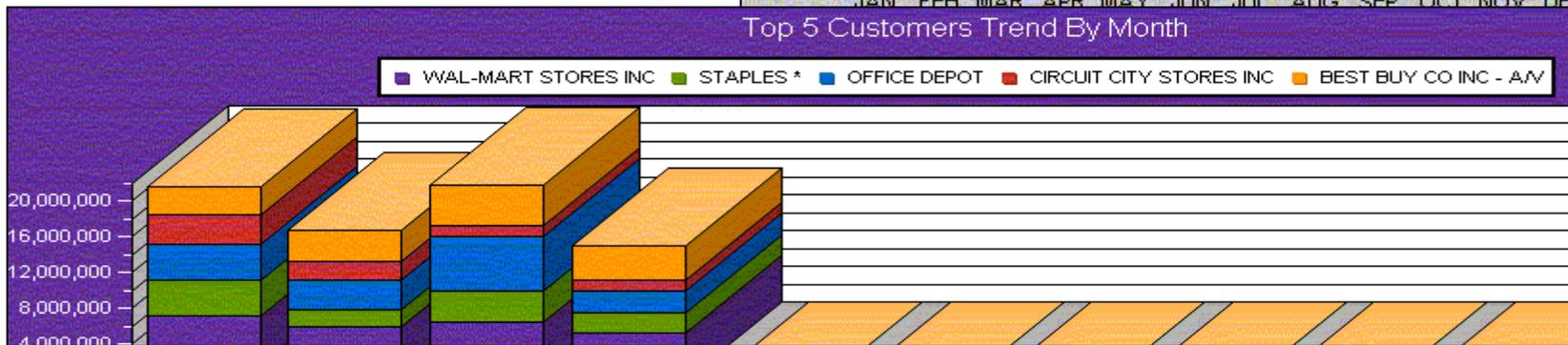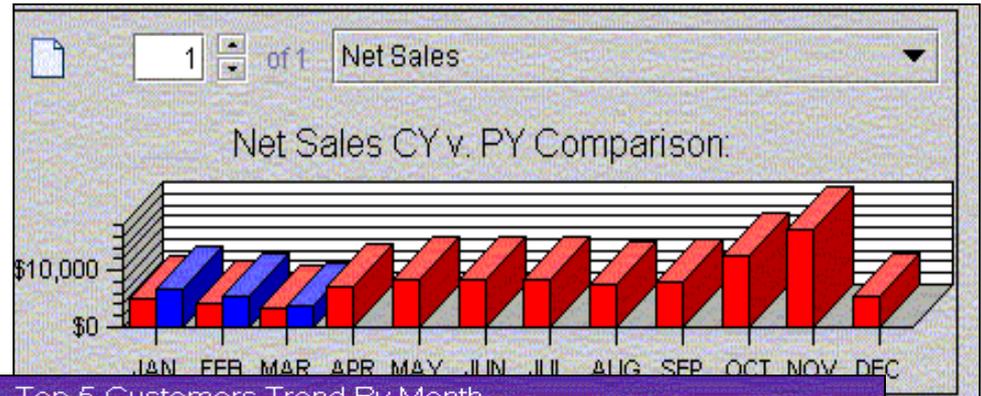
# TIP #7: Graph Objects Data Displays (continued)

- Pie is best used for a single point in time comparison (usually driven by Tab / Drop Down / Radio Button selections)
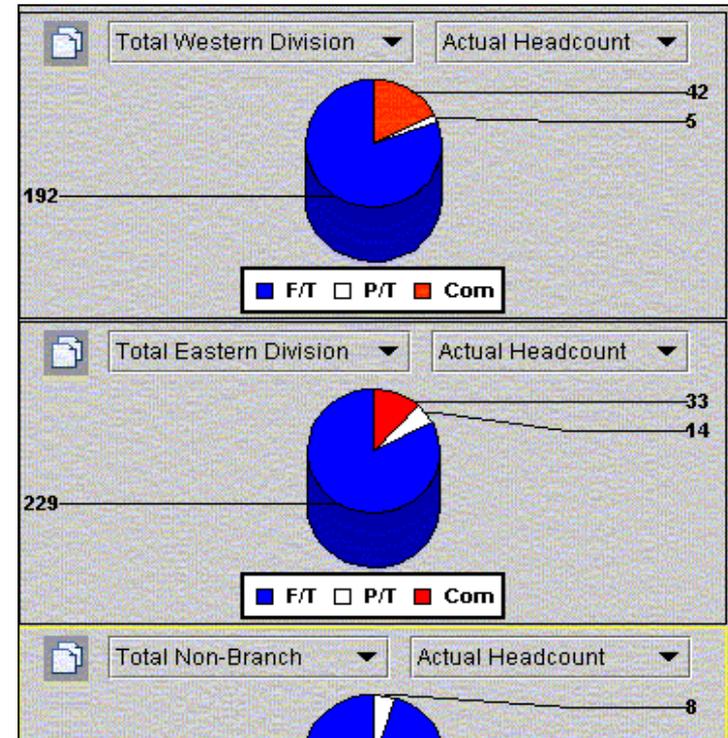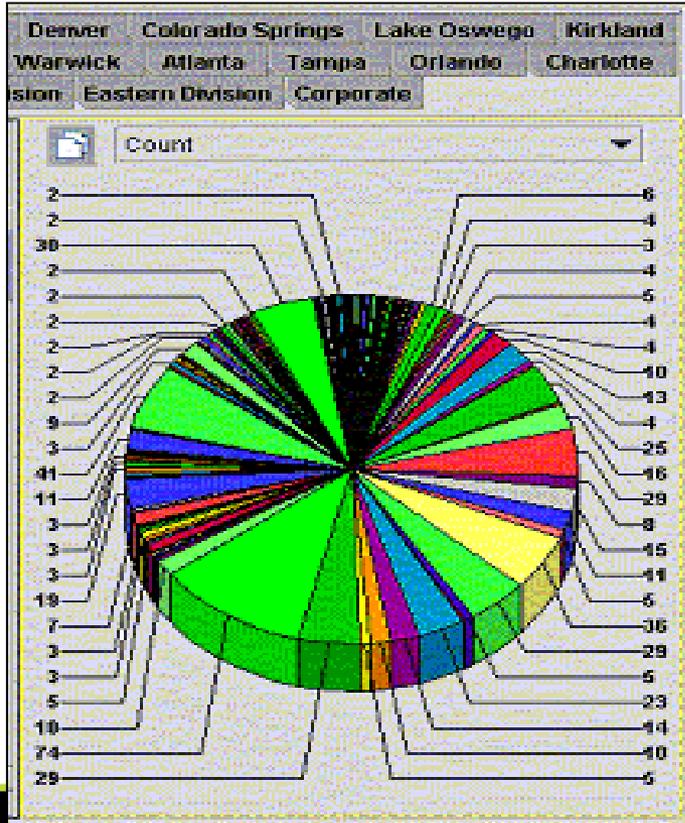
# TIP #8: Best Use of the "Drop Down" Object

- Multiple Drop Downs are used to drive a Grid Object:

# TIP #8: Best Use of the "Drop Down" Object (continued)

- Multiple Drop Downs are used to drive a Grid Object (but the selections are placed as column headers)

| Refresh View! | Home Page>PCAT: Trends | | | | | | | | Total Products ▼ | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | Customers ▼ | | | |
| | | | | | | | | | FY06 ▼ | | Trend By Month ▼ | |

|  | FY06 | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Total Products | | | | | | | | | | | |
|  | Total Customers | | | | | | | | | | | |
|  | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Trend By Month |
| Net Equivalent Units | 112,180,914 | 109,102,436 | 134,837,589 | 97,347,164 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 453,468,103 |
| Invoice Price Per Equivalent Unit | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

# TIP #8: Best Use of the "Drop Down" Object (continued)

- Single Drop Downs are used to drive multiple Grid Objects

# TIP #8: Best Use of the "Drop Down" Object (continued)

- Multiple Drop Downs are used to drive Grid / Graph Objects
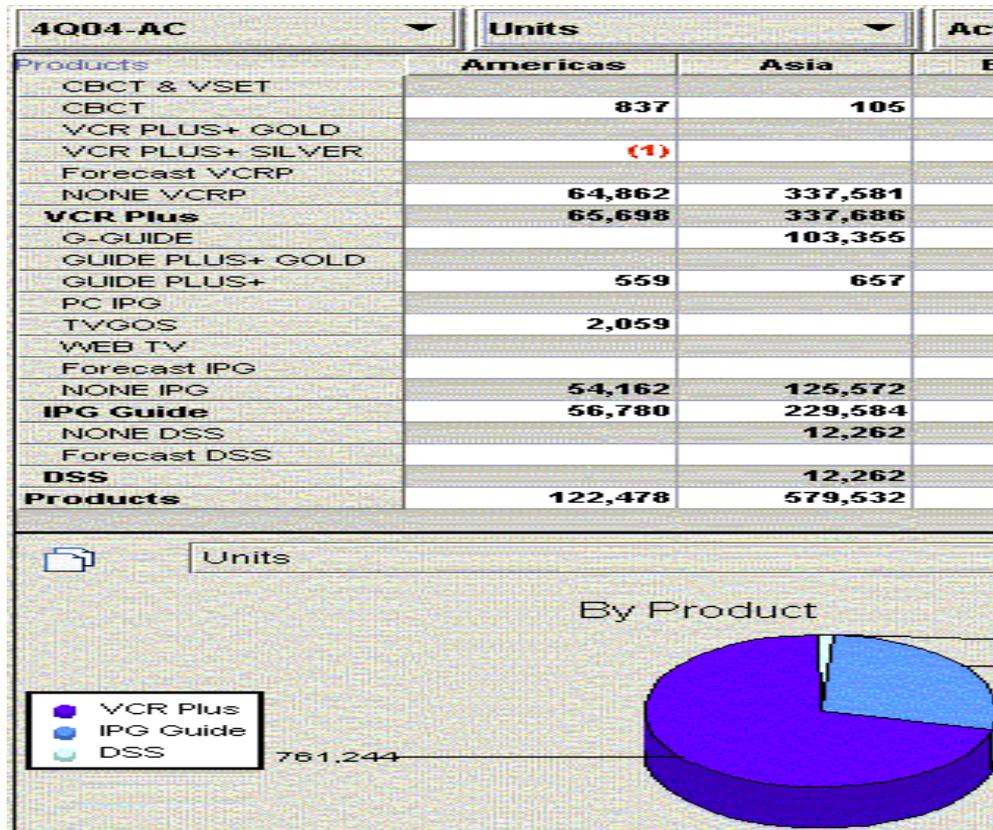
# TIP #9: Best Use of the "Radio Button" Object

- Radio Buttons define column details within the Grid Objects

# TIP #10: "Print Page" Versus "Print" Service Object

- Print Page literally prints the page currently viewed by the user
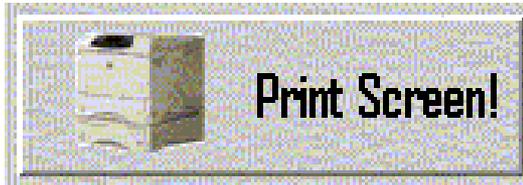




- Print Object (Service Object Selection) will print the Highlighted (Grid or Graph)

| | | | | FY06 | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Total Products | | | | | | |
| | | | | Customers | | | | | | |
| | MTD Actual | MTD Plan | MTD Plan% | MTD PY | QTD Actual | QTD Plan | QTD Plan% | QTD PY | YTD Actual | YTD Plan | YTD Plan% |
| Net Equivalent Units | 453,468,103 | 1,489,174,394 | (69.5)% | 1,263,253,268 | 981,626,695 | 2,941,356,336 | (66.6)% | 0 | 4,770,798,130 | 9,227,072,091 | (48.3)% |
| Invoice Price Per Equivalent Unit | 0 | 1,049 | (100.0)% | 0 | 0 | 2,067 | (100.0)% | 0 | 0 | 2,807 | (100.0)% |
| Net ASP | 0.2536 | 0.2720 | 1.0% | 0.2709 | 0.2528 | 0.2709 | 1.0% | 0.0000 | 0.2534 | 0.2680 | 1.1% |

# Thank You! and Questions?