

# 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):

TABLE OF CONTENTS			
LIST OF SCREENS	→		2
1.0 OBJECTIVES	→		3
2.0 WINDOW	→		4
3.0 PAGE BANNER	→		5
4.0 NAVIGATION	→		6
5.0 DATE STAMP	→		11
6.0 VERSION CONTROL	→		12
7.0 BODY OF DATA	→		12

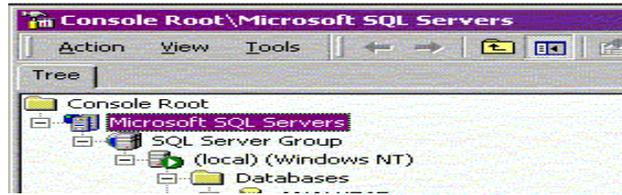
## TIP #2: Design a Template for All Screens

- 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

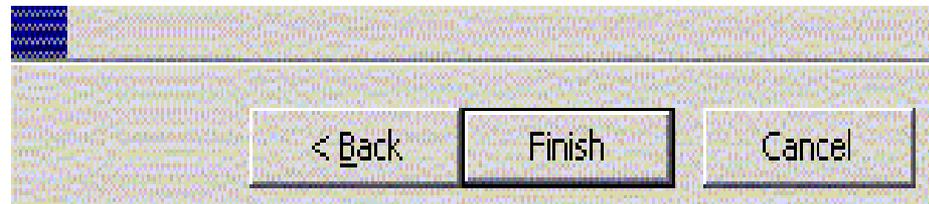
- Enterprise



- 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

The screenshot shows an Oracle Executive Dashboard interface. At the top, there is a blue header with the text "EXECUTIVE DASHBOARD" and a "PRINT" button. Below the header, the dashboard is divided into three main sections: "Financials", "Human Resources", and "Operational Metrics".

The "Financials" section is expanded to show a list of reports:
 

- Profit & Loss
  - Consumer Electronics
    - Revenue
    - Expense
    - Profitability
  - Consolidated Publishing
  - Cable
- Balance Sheet
- Cash Flow
- Financial Metrics

The "Human Resources" and "Operational Metrics" sections both display "Under Construction".

A dropdown menu is open on the left side of the dashboard, showing the following options:
 

- None
- Home Page
- Report Group
- Report

 Below the radio buttons, the text "Report Group / Report" is visible. A search box contains the text "Home Page... / 1.0 Home Page".

At the bottom left of the dashboard, there is a "Logout" button. At the bottom right, the text "Development - V2.0 - Date: 01.10.2005" is displayed.

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

A Better Decision

**OneWorld Reporting System** MyWorld!> Report Card (Financials)

My World!	<b>Financials</b>	Sales / Medical Mgmt	Provider Relations
Report Card	Commercial vs Medicare	Medicare / Associates	Operations
Membership		Jan	Feb

Refresh View! Home Page> PCAT: Budget v. Actual

Total Products ▼

Customers ▼

FY06

Home Page...

Return To Efficiency...

Time Phased...

All Offices Total Western Division San Diego Orange County Ontario Roseville Denver Colorado Springs Portland Bellevue  
Phoenix Total Eastern Division Chicago New Haven Cherry Hill Philadelphia Providence New York Richmond Atlanta Houston  
Dallas Tampa Orlando Fort Lauderdale Charlotte Minneapolis Total Non-Branch Western Division Eastern Division Corporate

	Dec.03	Page 1 of 1	Bk Ct
SMITH, BRAD	Bk Ct		
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# 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

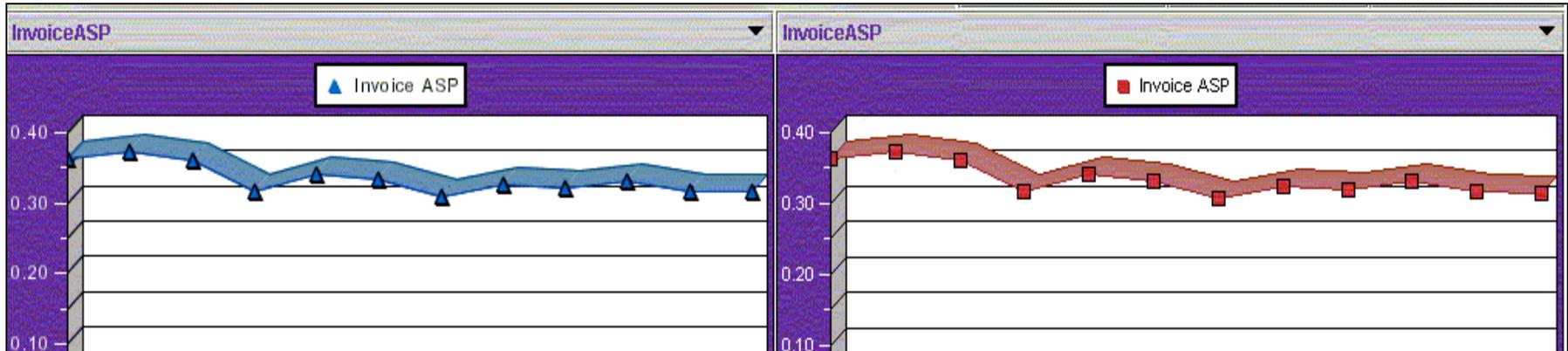
**Medical Management.**

		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				
	Goal	100	100	100	100	100	100	100	100				

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%
Planet Earth	Net Sales	2,127	n/a	1,371	756	0	2,127	n/a	2,127
	Gross Profit	400	n/a	673	474	0	400	n/a	400

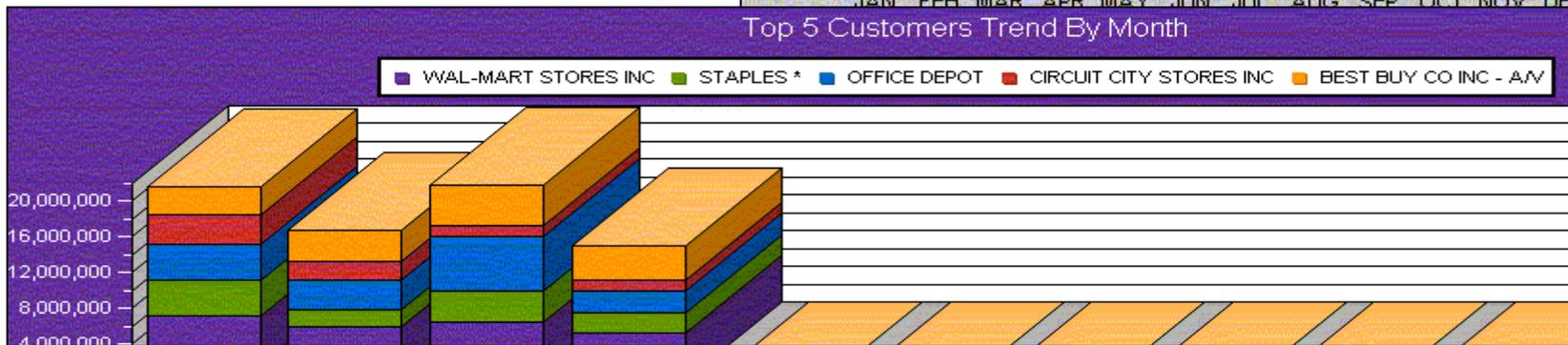
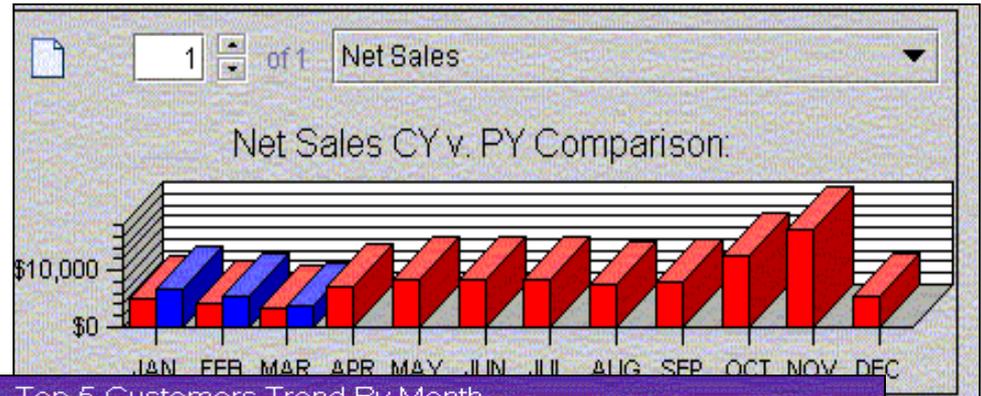
# TIP #7: Graph Objects Data Displays

- Line objects are best used as a comparison of trend (even side by side):



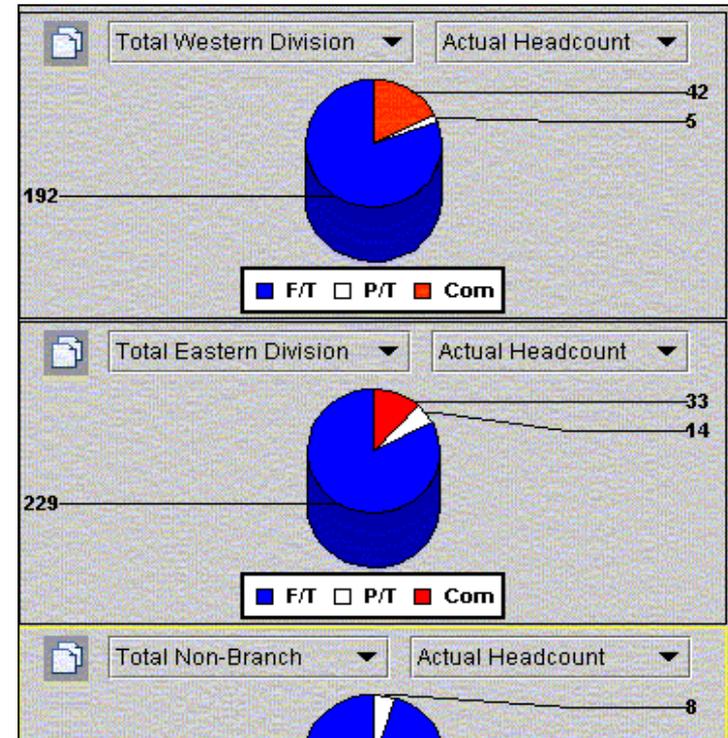
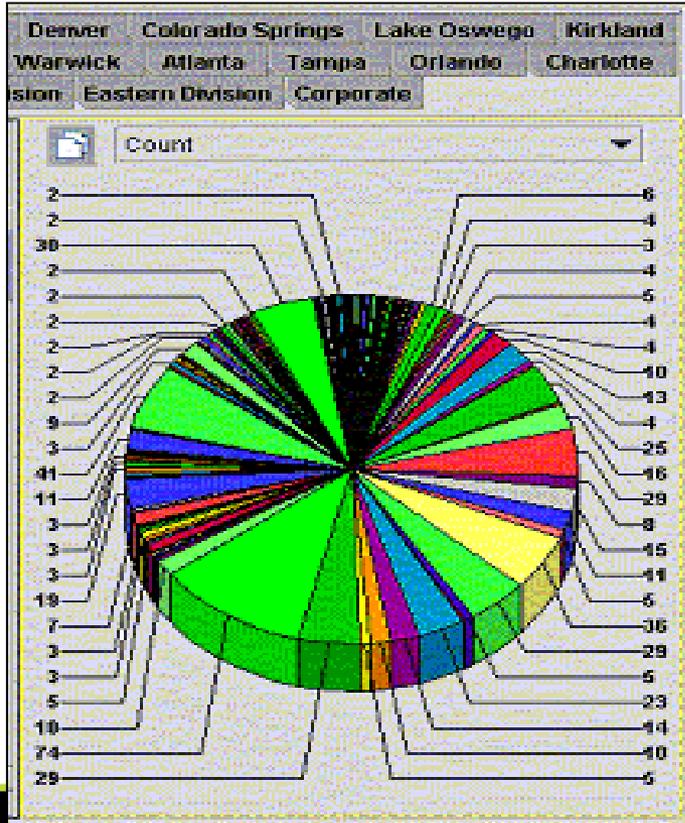
# TIP #7: Graph Objects Data Displays (continued)

- 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:

Y-2005 ▼ USD ▼ Invoiced ▼ All Project Types ▼										
	January	February	March	April	May	June	July	August	September	October
<b>Americas</b>	14,586.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>ATLANTA (USA)</b>	967.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>BOSTON (USA)</b>	666.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>CHICAGO (USA)</b>	2,398.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>CLEVELAND (USA)</b>	1,895.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

# 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)

<a href="#">Refresh View!</a>	<a href="#">Home Page</a> > <b>PCAT: Trends</b>												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

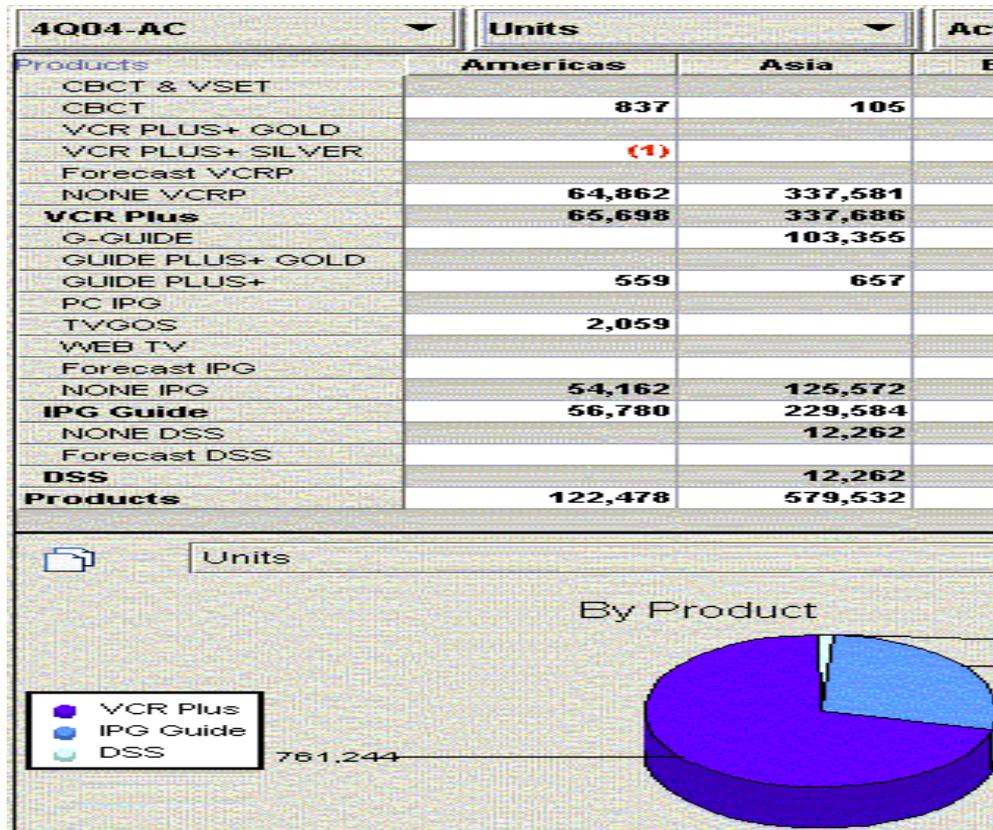
<i>Ship To...</i>		Customers...	Products...	Ship-To
		MTD: ACT	MTD: PLAN	Ship-To
Products	Net Sales	6,700		North America
	Gross Profit	2,585		USA
	Gross Profit %	38.6%		Southeast
Products	Net Sales	n/a		Alabama(AL)
	Gross Profit	n/a		Arkansas(AR)
	Gross Profit %	n/a		Florida(FL)
Products	Net Sales	n/a		Georgia(GA)
	Gross Profit	n/a		
	Gross Profit %	n/a		

Top Customers:				Top Products:			
	MTD: ACT	MTD: PY		MTD: ACT	MTD: PY	QTD: ACT	
WAL-MART STORES INC.(1034815)(1034815)	4,711	3,224	▲	VL MR-Marker	1,809	238	1,809
K-MART CORP.(1017119)(1017119)	373	n/a		BE PB-Paintballs	1,546	1,391	1,546
SPORTSMAN DISTRIBUTORS DB(1030071)(1030071)	197	90		BE MR-Marker	1,102	899	1,102

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

- Multiple Drop Downs are used to drive Grid / Graph Objects



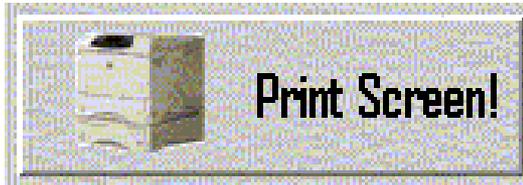
# TIP #9: Best Use of the "Radio Button" Object

- Radio Buttons define column details within the Grid Objects

	Top Customers:				Top Products:				
		MTD:	MTD:			MTD:	MTD:	QTD:	
		ACT	PY			ACT	PY	ACT	
<input checked="" type="radio"/> Gross Sales	WAL-MART STORES INC.(1034815)(1034815)	4,711	3,224	▲	VL MR-Marker	1,809	238	1,809	▲
<input type="radio"/> Discounts	K-MART CORP.(1017119)(1017119)	373	n/a		BE PB-Paintballs	1,546	1,391	1,546	
<input type="radio"/> Returns	SPORTSMAN DISTRIBUTORS DB(1030071)(1030071)	197	90		BE MR-Marker	1,102	899	1,102	
<input type="radio"/> Net Sales	NATIONAL PAINTBALL SUPPLY(1021065)(1021065)	162	81		JT MA-Masks	681	652	681	

# 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?