

Analytic Vision, Inc.

Providing Business Insight for a Competitive Edge

4/15/2010

Today's Agenda



- ❖ Introductions
- ❖ Hyperion Planning Overview
- ❖ Web Form and Smart View for Office Design Considerations
 - ✧ Considerations in the beginning
 - ✧ General issues impacting performance
 - ✧ Enhance the end-user experience
 - ✧ Ease of administration
- ❖ Demonstration
- ❖ Questions and Answers

Analytic Vision Introduction

- ❖ Analytic Vision is a Data Warehousing, Business Intelligence, Performance Management consulting firm
 - ❖ Data Warehouse design and development
 - ❖ Oracle Business Intelligence Enterprise Edition (OBIEE)
 - ❖ OBIEE pre-built applications over Oracle EBS, PeopleSoft, JDEdwards
 - ❖ Hyperion Essbase and related build and reporting products
 - ❖ Hyperion Planning and Financial Management (HFM)
- ❖ Founded in 2001, currently a team of 50 consultants
- ❖ Headquartered in Charlotte, NC; Serving Eastern United States
- ❖ Extensive business experience across many verticals:
 - ❖ Retail, Financial Services, Manufacturing, Distribution, Health Sciences, Communications, and Healthcare
- ❖ Oracle Platinum Partner



What is Oracle Hyperion Planning

- ❖ Oracle Hyperion Planning is a Web and Microsoft Office based planning application that supports enterprise wide planning, budgeting, and forecasting
- ❖ Oracle Hyperion Planning provides a planning and modeling framework that supports driver based planning to help connect operational assumptions to financial outcomes
- ❖ It supports a hierarchical planning process encompassing both corporate finance and the lines of business within an enterprise
- ❖ A Enterprise Planning tool for the Business Analyst and Power User, with Infrastructure technology support from IT.

Planning Key Features

- ❖ Helps track business plans and forecasts and translate strategic objectives into operational goals and targets
- ❖ Flexible workflow and plan management capabilities
- ❖ Comprehensive Microsoft Office integration
- ❖ Easy to use Web interface and End User driven creation of reports and dashboards
- ❖ Proven and scalable architecture for IT
- ❖ Integration with ERP systems and other sources including ERP drill-through
- ❖ Full set of administrative tools for application management

Planning Key Benefits

- ❖ Reduce budgeting and forecasting cycles by weeks or months
- ❖ Improve forecast accuracy
- ❖ Appeal to a wider business user community through an intuitive Web user interface
- ❖ Shrink the learning curve for users by leveraging Microsoft Office products as an interface into Oracle Hyperion Planning
- ❖ Eliminate time lag between when plans are updated and reports are refreshed
- ❖ Reduce cost of ownership and eliminate manual tasks
- ❖ Lay the foundation for making the transition to Enterprise Business Planning and the integration all planning business processes and functional areas

Planning 11.1.2 – Just Released Enhancements



❖ End User Experience

- ❖ Improved Usability in Web Forms including ad-hoc on the web
- ❖ Data driven visual exceptions and validation notifications

❖ Workflow

- ❖ Increased granularity in workflow by adding one or more dimensions to the entity dimension
- ❖ Support for different workflow process by scenario/version
- ❖ Pre-defined and data driven promotional paths

❖ Microsoft Office

- ❖ Manage workflow through Outlook calendar
- ❖ Task based workflow through Office
- ❖ Full support for online and offline planning
- ❖ All key Planning Web capabilities available through Office

Planning 11.1.2 – Just Released Enhancements



❖ Budget Books

- ❖ Define budget books with sections, subsections and table of contents
- ❖ Supports any file type as sections or attachments within books
- ❖ Templates provided for HTML web site, layout and page customization
- ❖ Supports table of contents edits and web site navigation links
- ❖ Integration with Document Management System (Stellent)

❖ New Modules

- ❖ Public Sector Planning and Budgeting (Position Budgeting)
- ❖ Balance Sheet Planning for Financial Services

Planning Web Form and Smart View for Office Design Considerations

Web Form Design Considerations



Web Forms = Planning! End-users equate forms with Planning.

- ❖ Set realistic expectations
- ❖ Performance – control the size of the form. The number of rows and columns
- ❖ Think about how many members you have in the Page
- ❖ Forms are a vehicle for data entry, review and validation
- ❖ Forms are not reports.
- ❖ Use good overall project planning and solid application design to help control the overall number of forms.
- ❖ Consider impact of security

Web Form Design Considerations



Design Considerations for Performance – General

- ❖ Break forms into meaningful groupings
- ❖ Limit number of cells in forms
- ❖ Use dense members in body of form or “on-grid” and sparse members in page / POV, where possible
- ❖ Use functions for member selections, as appropriate
- ❖ Select functions used carefully when working with large web forms--functions used can impact performance
- ❖ Suppress missing rows, if possible
- ❖ Carefully consider use of business rules - truly needed
- ❖ Use large forms in SmartView
- ❖ Change the default RAM allocated to Planning web

Web Form Design Considerations



Design Considerations for the End-User Experience

- ❖ Consider using user variables to narrow selections
- ❖ Use substitution variables to narrow selections
- ❖ Consider using custom menus
- ❖ Use composite forms
- ❖ Create a numbering scheme for forms
- ❖ Have a logical folder scheme
- ❖ Determine if member names and/or aliases should be used
- ❖ Use consistency in metadata naming conventions
- ❖ Add instructions for web forms
- ❖ Consider how dollars vs. statistics should be displayed

Web Form Design Considerations



Design Considerations for the End-User Experience

- ❖ Keep dense dimensions in rows and columns.
- ❖ Please sparse dimensions in the Page and Point of View (POV).
- ❖ Place static dimensions in POV and hide these dimensions where not relevant to the form.
- ❖ Place Scenario, Version, and Year dimensions in the Page wherever possible.
- ❖ Use dynamic user variables and substitution variables as much as possible.
- ❖ When using Run on Save/Run on Load for business rules, be sure execution time is tolerable.

Web Form Design Considerations



Design Considerations for Administrators

- ❖ Use substitution variables
- ❖ Use functions within web forms
- ❖ Allow for “future items” in numbering scheme
- ❖ Use groups for security assignment
- ❖ Use software functionality and security assignments to minimize the number of forms
- ❖ Set long-running business rules to run in the background.
- ❖ Limit composite data forms to two data forms where possible
- ❖ Use the Suppress Missing Data option to skip #MISSING values from resultant data forms.

Web Form Design Considerations



Design Considerations for Administrators

- ❖ Split single larger data forms into multiple smaller data forms with fewer rows and columns.
- ❖ Minimize using account annotations on data forms.
- ❖ Use caution when enabling Mass Allocate. This feature may impact data values at intersections to which the end user may not have access.

Questions or Comments?



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