

Hyperion® Analyzer

Release 5.0.1

Getting Started



Hyperion®

Hyperion Solutions Corporation

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Contents

| | |
|--|-------------|
| Preface | vi |
| Conventions | vi |
| Related Documentation | vii |
| Technical Support | viii |
| Web Site | viii |
| <hr/> | |
| Introducing Hyperion Analysis Tools | 1 |
| Hyperion Analyzer | 1 |
| Hyperion Analyzer API Toolkit..... | 1 |
| Hyperion Reports | 2 |
| Hyperion Enterprise Reporting | 2 |
| Hyperion Analysis Portal | 3 |
| Hyperion Application Builder | 3 |
| <hr/> | |
| Installing Hyperion Analyzer | 5 |
| Before Installation | 5 |
| Supported OLAP Servers | 5 |
| Supported Operating Systems | 5 |
| Memory Requirements | 5 |

| | |
|--|-----------|
| Supported Web Browsers..... | 6 |
| Additional Requirements | 6 |
| Installation Options..... | 8 |
| Complete Installation | 8 |
| Custom Installation | 8 |
| Evaluation Installation..... | 8 |
| Running the Installation..... | 8 |
| Importing the Sample View Group..... | 9 |
| <hr/> | |
| Product Components and Naming | 11 |
| | |
| Starting Hyperion Analyzer | 12 |
| Starting the Hyperion Analyzer Windows Client..... | 13 |
| <hr/> | |
| Touring the Sample View Group | 15 |
| The Desktop | 15 |
| The User Interface | 15 |
| Main Menu | 16 |
| Sales Chart..... | 18 |
| Profit Analysis..... | 20 |
| Regional Analysis | 22 |
| KPI Scorecard..... | 24 |
| Quadrant Chart..... | 26 |

Best States 28

High/Low Products 30

State Rank 32

Sales Forecast..... 34

Product Share..... 36

Margin Chart..... 38

Product Budget..... 40

Unlimited Creative Possibilities 40

Creating Your First View.....43

Saving Your View49

Formatting: Making a View Easy to Read.....51

Traffic Lighting: Creating Quick Comparisons53

Calculations: Adding Useful Metrics to Your View55

Using Hyperion Analyzer Web Clients.....58

Starting Hyperion Analyzer Web Clients 58

Glossary59

Index63

Preface

Hyperion Analyzer Getting Started explains documentation, product conventions, concepts, and procedures users need to install Hyperion Analyzer. While the tutorials offered are intended to get new Hyperion Analyzer users up to speed quickly, every user will benefit from the descriptions of new features and conceptual information.

Conventions

The following conventions are used in this document:

Table 1: Hyperion Document Conventions

| <i>Item</i> | <i>Meaning</i> |
|----------------------|--|
| ➤ | Arrows indicate the beginning of a procedure with sequential steps. |
| 1, 2, 3 . . . | Numbers indicate sequential step procedures. |
| • | Bulleted items indicate a list of related items. |
| Boldface text | Boldface text indicates an important application component name. |
| <i>Italic</i> text | Italic text highlights terms of special emphasis. |
| Courier text | Courier typeface indicates that the user should enter Courier text exactly as it appears. |
| Properties Caption | The Vertical bar indicates a menu sub-menu item. |

Related Documentation

The Hyperion Analyzer documentation set includes:

- The *Hyperion Analyzer Getting Started* (this guide), which describes installation, tours the sample view group and leads users through the creation of their first view using Hyperion Analyzer.
- The *Hyperion Analyzer Enterprise Guide*, which describes installation, deployment and product features essential to administrators. A profile of Hyperion Analyzer Administration Tools and the Hyperion Analyzer Analysis Server are included.
- Hyperion Analyzer Administration Tools Online Help, which explains the management of users, user groups, and database connections, as well as provides online help for Hyperion Analyzer Analysis Server administration. Help for the Repository Migration utility and Virtual Cube utility is also included.
- Hyperion Analyzer Design Tools Online Help, which contains information about creating and editing Forms, Pins, and Pinboards used to display composite views in Hyperion Analyzer.
- Hyperion Analyzer Windows Client Online Help, which provides detailed information about navigation, report creation, and advanced Windows-based client topics.
- Hyperion Analyzer Java Web Client Online Help, which provides detailed information about navigation, report creation, and advanced Java Web client topics.
- Hyperion Analyzer HTML Web Client Online Help, which describes navigation, report creation and the feature set available to Hyperion Analyzer HTML Web client users.
- Hyperion Analyzer API Toolkit Developer's Guide, which provides detailed information for developers including Hyperion Analyzer Web technology in custom HTML pages.
- Hyperion Analyzer Excel Add-in Online Help, which provides information needed to store Excel data in the central repository.
- Hyperion Analyzer Release Notes, which contains a comprehensive list of new features, fixes, and late-breaking product developments.

Order additional copies of printed documentation through your local Hyperion Sales office.

Technical Support

Hyperion Solutions provides telephone and Web-based support to resolve product issues quickly and accurately. Technical support is available to clients with a current maintenance agreement, or clients evaluating the product. Web-based support can be accessed via the application **Help** menu or the Hyperion Web site.

➤ To access online Support:

1. Select **Hyperion Analyzer on the Web** from the application **Help** menu.
2. Select **Online Support** from the sub-menu.

Web Site

Find up-to-date information on Hyperion service and support programs at our Web site:

www.hyperion.com

The Hyperion Web site offers an array of service and support information, including product news and updates, frequently asked questions and product download instructions.

Introducing Hyperion[®] Analysis Tools

Hyperion Analysis Tools help organizations around the world turn raw data into valuable business information. As a result, businesses anywhere, anytime, can quickly discover growth and profit opportunities, identify and correct problems, eliminate decision guesswork, improve execution and accountability, and stay focused on the most important goals.

Hyperion[®] Analyzer

Hyperion Analyzer delivers intuitive Web-based interactive analysis to all corners of the enterprise. Users benefit from its easy-to-use, highly graphical displays and robust analytics. Designed for widespread enterprise deployment, Hyperion Analyzer adapts to meet the needs of different types of users. It is ideal for a broad range of business analysis applications including sales analysis, product profitability, and key performance measurements.

Hyperion Analyzer leverages Hyperion Essbase OLAP Server, while also providing drill-through to relational data. A scalable mid-tier Hyperion Analyzer Analysis Server and repository enable analyses to be centrally shared and managed.

Creating new analyses is as simple as dragging and dropping data onto graphical templates. Formatting options include point-and-click color-coded exception alerts and calculated metrics. Use an array of filtering options to further restrict analyses, transforming data into insightful information and making it easy to make better-informed decisions.

Hyperion[®] Analyzer API Toolkit

Developers can use Hyperion Analyzer API Toolkit to leverage the power of Hyperion Analyzer in custom Web-based business analysis applications using open, mainstream development tools. Because the Hyperion Analyzer API Toolkit is based on open standards, developers are free to leverage their existing rapid application development skills using mainstream, Web-enabled programming languages such as JavaScript.

Hyperion[®] Reports

Hyperion Reports delivers highly formatted management reports to the enterprise.

Users benefit from a flexible range of output options that enable wide distribution via print, HTML Web pages, XML, PDF and on-line viewing.

A graphical, object-based interface enables the rapid creation of highly formatted reports that combine grids of data and text, charts, graphs and images. In addition to providing complete control over layouts, formatting, fonts, and colors, Hyperion Reports provides powerful business analytics, such as conditional suppression and automatic calculations which can be used to focus and filter reports. A library of re-usable report components simplifies the process of building and maintaining complex reports.

Tightly integrated with Hyperion Essbase OLAP Server, Hyperion Reports provides versatile query and reporting capabilities that allow users to create reports that unite data from multiple data sources. A scalable, cross-platform Report Server facilitates easy deployment to large user communities.

These features make Hyperion Reports an ideal solution for a wide range of enterprise reporting applications including profit-and-loss, balance sheets, and statutory reporting.

Hyperion Enterprise[®] Reporting

Hyperion Enterprise Reporting is the premier financial reporting solution for Hyperion Enterprise, the leading packaged analytic application for multi-source consolidation.

An intuitive graphical interface helps users create sophisticated production-quality financial reports for printing or on-line access. Powerful financial intelligence provides a built-in understanding of financial information, while a comprehensive library of financial functions and calculations allows users to derive new metrics.

Reports created using Hyperion Enterprise Reporting are highly interactive, enabling users to easily change report selections, view different sets of data, and drill down to underlying levels of detail. Reports can be grouped together into books and management briefings complete with tables of contents, exported to Lotus 123 or Microsoft Excel, or output to a PDF. Users are also able to perform data entry through reports, spreadsheets and HTML Web pages.

Hyperion Enterprise Reporting Web clients provide secure access to reports, enhanced with charts, graphical displays, and agents that watch data for variance conditions, such as a rise or fall in gross margin, and broadcast critical information to users via pager, fax, cell phones, Web pages and e-mail.

Hyperion[®] Analysis Portal

Hyperion[®] Analysis Portal delivers a personalized single point of access for business analysis.

Users enjoy fast, easy access to the right information, at the right time, through an intuitive Webtop that unifies Hyperion business analysis software with relevant external information.

Hyperion applications integrated into the Hyperion Analysis Portal include financial management, performance management, customer-relationship management, and business analysis applications based on Hyperion Essbase OLAP Server.

Users benefit from personalized points of entry, business process synchronization, and a single combined view of information that frees them from the tedious process of locating, navigating, combining and organizing data. As a result, users are able to focus entirely on business decision-making, equipped with all the information they need to make better business decisions.

Hyperion[®] Application Builder

Hyperion Application Builder enables the rapid creation, management, and deployment of Web-centric, enterprise-scalable, cross-platform business analysis applications.

Developers benefit from a comprehensive set of value-added APIs, components, services, repository, and application templates. These simplify data connectivity, data management, navigation, and the delivery of a wide range of analysis displays. As a result, application developers are free to focus on the unique aspects of their custom business analysis solutions, creating application-specific displays and other specialized functionality.

Built using the Java 2 Enterprise Edition (J2EE) specification, Hyperion Application Builder is able to work with leading application servers. To provide a complete solution, IBM WebSphere Advanced Server is included in the standard offering.

Web-downloadable sample application templates - such as data entry, reporting, and analysis – further accelerate the deployment of advanced, custom business analysis applications.

Installing Hyperion Analyzer

Hyperion Analyzer is easy to install. The installation program examines your hard disk, determines the programs you already have, and offers you corresponding installation options. You can choose between typical, complete and custom installation routines, and uninstall components you no longer need.

Before Installation

Your system must satisfy the following application-specific system requirements for Hyperion Analyzer. For a complete description of Hyperion Analyzer system requirements, see Hyperion Analyzer Administration Tools Online Help or the *Hyperion Analyzer Enterprise Guide*.

Supported OLAP Servers

- Hyperion Essbase 5, or later
- Microsoft SQL Server 7.0 OLAP Services, or later
- IBM DB2 OLAP Server 6, or later

Supported Operating Systems

- Microsoft Windows 95
- Microsoft Windows 98
- Microsoft Windows NT 4.0
- Microsoft Windows 2000

See the *Additional Requirements* section on page 6 for Hyperion Analyzer Analysis Server-specific operating system requirements.

Memory Requirements

- | | |
|-------------------------------------|------|
| • Hyperion Analyzer Windows client | 32MB |
| • Hyperion Analyzer Java Web client | 16MB |
| • Hyperion Analyzer HTML Web client | 16MB |
| • Hyperion Analyzer Analysis Server | 64MB |

- Hyperion Analyzer Administration Tools 16MB
- Hyperion Analyzer Design Tools 16MB
- Hyperion Analyzer Excel Add-in 16MB
- Hyperion Analyzer API Toolkit 16MB

Supported Web Browsers

Use one of the following Web browsers to download the installation program from the Hyperion Web site (unless you are installing from a CD-ROM).

- Microsoft Internet Explorer 4 or later
- Netscape Navigator 4.5 or later

Additional Requirements

Each installation site requires one license of the Hyperion Analyzer Windows client. Administrators define user IDs, user groups and database connections using Hyperion Analyzer Administration Tools (included in the Windows client).

Administrators must install Relational Database Management System (RDBMS) client connectivity software with the Hyperion Analyzer Windows client or Hyperion Analyzer Analysis Server.

Hyperion Analyzer Analysis Server

The Hyperion Analyzer Analysis Server is automatically installed as a service and started upon installation. Administrators must install one of the following operating systems: Microsoft Windows NT Server 4, Microsoft Windows NT Workstation 4 or later, or Microsoft Windows 2000.

Typically, administrators install a Hyperion Analyzer Windows client on the same machine as the Hyperion Analyzer Analysis Server.

Web client users require connectivity to the Hyperion Analyzer Analysis Server.

JDK, JVM and Web Server Requirements

The Hyperion Analyzer Java Web client and the Hyperion Analyzer Excel Add-in require a Java-capable Web browser or computing platform fully supporting the Java Development Kit (JDK) Version 1.1 or later. Examples include Microsoft Internet Explorer 4 or later, and Netscape Communicator/Navigator 4.5 or later.

The Hyperion Analyzer Java Web client requires no reserved disk space, unless you are installing it in the Web browser (for faster startups). In this case, 3MB hard disk space is required to store the applet and other files. The applet is approximately 1 MB in size.

Internet Explorer users who upgrade to the latest version of the Web browser and Java Virtual Machine (JVM) will enjoy dramatically improved performance. To check your JVM version, type **jview** at the command prompt, and press Enter. The JVM version displays at the top of the Command Prompt window. Versions 5.00.3186 and later offer the best performance.

A Web server is required to present the Web page from which Web clients are launched, deliver files containing Java components, and transport images generated at runtime. Upon launching, Java Web clients normally negotiate a direct TCP/IP connection to the Hyperion Analyzer Analysis Server (although they can also be configured to use HTTP). HTML-based Web clients always use a HTTP connection.

Data Connectivity Clients

Hyperion Analyzer Analysis Server and the Hyperion Analyzer Windows client require the appropriate database client connectivity software to access database servers. If you can access the database server using other software programs, you have this software. If not, you will need to install the client connectivity software that came with your database (if Hyperion Analyzer installation software does not offer to install it for you).

Installation Options

Hyperion Analyzer offers a selection of installations:

Complete Installation

If you choose Complete Installation, the Hyperion Analyzer products for which you are licensed are installed at C:\Program Files\Hyperion Analyzer\.

Custom Installation

Use Custom Installation to choose which specific Hyperion Analyzer components are installed, and where they should be located.

Evaluation Installation

Evaluation installation enables you to install and use all Hyperion Analyzer components for a thirty- day evaluation period. At the end of this period, you will not be able to use Hyperion Analyzer without licensing it. You can monitor the evaluation period expiration date by selecting Help | About Hyperion Analyzer. Evaluators who subsequently license Hyperion Analyzer can either run a registration application or reinstall Hyperion Analyzer using an unlock code.

Running the Installation

Users can install Hyperion Analyzer in either of the following ways:

- Downloading the software from the Hyperion Web site, www.hyperion.com.
- Running Setup.exe from the CD-ROM.

Importing the Sample View Group

It is highly recommended that you import the Sample view group following installation of the software. This will get you up to speed quickly and enable you to fully utilize the tours and tutorials offered in this guide.

The following instructions assume that you are able to access the Sample:Basic database from within Hyperion Analyzer. This database is included with Hyperion Essbase 6. If you are not sure whether it is installed, check with your Hyperion Essbase administrator. If the database is installed but you cannot access it from within Hyperion Analyzer, please refer to the Hyperion Analyzer Enterprise Guide for help setting up user IDs and database connections.

➤ To import the Sample view group:

1. Start the Hyperion Analyzer Windows client.

The Login window displays.

2. Log on using a valid Hyperion Analyzer user ID and password.

Note: If you do not have a valid Hyperion Analyzer user ID, use **system** and a password of **12345**.

3. Select the Sample database from the Databases window Connection Name list, and click **OK**.

Note: Database names vary by configuration. If you cannot find the “Sample” database, ask your administrator for the correct database name.

An empty Hyperion Analyzer application window opens.

4. Click the toolbar File icon.

The Hyperion Analyzer View Manager window displays.

5. Click **Import**.

The Import Views and Groups dialog box displays.

6. Set the Files of Type field to Analyzer Group (*.WGD).
7. Set the Look In drop-down list to **Hyperion Analyzer\Samples\Database and Views**.
8. Select the Sample.WGD file.
9. Click **Open**.

The View Group Properties window displays.
10. Enter **Sample** for the view group name.
11. Select **{system}** from the Owner drop-down list box.

Important! Do not leave the owner as un-bracketed **system** user ID.

12. Select an icon for the view group, by clicking Select..., navigating to **Hyperion Analyzer\Samples\Images\Group Pictures\Common Objects**, and selecting **Magnifying Glass.BMP**.

Make sure the Transparent Bitmap check box is deselected. Make sure the Show Group on Desktop check box is checked.

13. Click **OK**.

After a short pause for importation, the View Manager window displays the imported view group.

14. Click **Cancel**.

Congratulations! Now you can tour the Sample view group in the following chapters.

Product Components and Naming

Hyperion Analysis Tools benefit from new, simple, easy-to-understand naming.

- Hyperion Analyzer is the new name for Hyperion Wired for OLAP.
- The Professional and Standard Editions of Wired for OLAP have been combined into a single Hyperion Analyzer Windows client.
- The Web Interactive and Web Viewer Editions of Wired for OLAP have been combined into a single Hyperion Analyzer Java Web client.
- A new HTML-based Web client has been added, and is also included in the Hyperion Analyzer Web client license. Customers are free to choose between HTML-based and Java-based Web clients.
- Hyperion Wired Excel Add-in is now Hyperion Analyzer Excel Add-in.
- Hyperion Wired Application Server is now Hyperion Analyzer Analysis Server.
- Hyperion Wired Administrator is now Hyperion Analyzer Administration Tools.
- Hyperion Wired Designer is now Hyperion Analyzer Design Tools.
- A new Hyperion Analyzer API Toolkit enables developers to extend Hyperion Analyzer to create custom business analysis applications using open, mainstream development tools.

Starting Hyperion Analyzer

Hyperion Analyzer is a product family consisting of six applications, a server, a repository, and an API toolkit.

The repository centrally stores Hyperion Analyzer user settings and system data in relational database tables.

The Hyperion Analyzer Analysis Server communicates view definitions and system information between the repository, Web clients and the Hyperion Analyzer Excel Add-in.

There are three Hyperion Analyzer clients:

- **The Hyperion Analyzer HTML Web client** is an HTML thin client used via a Web browser. The Hyperion Analyzer HTML Web client connects to the repository and OLAP server via the Hyperion Analyzer Analysis Server.
- **The Hyperion Analyzer Java Web client** is used via a supported Java-capable Web browser, such as Microsoft Internet Explorer or Netscape Navigator. The Java Web client leverages a Java Run-time Environment (JRE) within a Web browser to offer more interactive functionality than the HTML thin client. The Hyperion Analyzer Java Web client connects to the repository and OLAP server via the Hyperion Analyzer Analysis Server.
- **The Hyperion Analyzer Windows client** operates via the 32-bit Windows operating system. The Hyperion Analyzer Windows client communicates directly with the repository and OLAP server.

There are two Hyperion Analyzer toolset applications for administrators:

- **Hyperion Analyzer Administration Tools** provide a graphical interface for managing user profiles, user groups, and database connections via a Microsoft Windows 32-bit operating system. It also provides access to several utilities and the Hyperion Analyzer Analysis Server Configuration utility.
- **Hyperion Analyzer Design Tools** provide a graphical interface for creating composite views called Forms, and two-dimensional graphic views called Pinboards via a Microsoft Windows 32-bit operating system.

The Hyperion Analyzer Excel Add-in provides Microsoft Excel users the ability to centrally store, retrieve, and distribute Excel worksheets to the repository using a menu item added to the Excel menu bar.

The **Hyperion Analyzer API Toolkit** provides developers the ability to include Hyperion Analyzer look, feel, and functionality in custom Web pages.

These components form a sophisticated, yet easy-to-use interface that reveals growth potentials, identifies profit opportunities, corrects problems, eliminates guesswork, improves execution and accountability, and allows users to focus time and attention on their most important goals.

This guide focuses on getting new users up and running with the Hyperion Analyzer Windows client. Consult the *Hyperion Analyzer Enterprise Guide*, or the online help systems for more information on using other Hyperion Analyzer components.

Starting the Hyperion Analyzer Windows Client

Note: You must first start Hyperion Essbase in order to access multidimensional data.

We recommend installing the Samples Database and view group prior to starting Hyperion Analyzer. Ask your Hyperion Analyzer administrator to verify your user ID and database connection using Hyperion Analyzer Administration Tools, or refer to the *Hyperion Analyzer Enterprise Guide* for installation instructions.

To start Hyperion Analyzer, click the Hyperion Solutions | Hyperion Analyzer | Hyperion Analyzer Windows client program group icon. If the Login window displays, enter a valid Hyperion Analyzer user ID and password, and click **OK**. If you do not have a valid Hyperion Analyzer user ID, use **system** and a password of **12345**. If the Databases window displays, select the “Sample” database from the Connection Name list and click **OK**. Database names vary by configuration. If the sample database is not listed, refer to the sample view group installation instructions, or download the database from the Web.

The screenshot shows the Hyperion Analyzer - Profit Analysis window. The title bar reads "Hyperion Analyzer - Profit Analysis". The menu bar includes "File", "Edit", "Display", "Go", "Tools", and "Help". The toolbar contains icons for "Back", "Forward", "Home", "New", "File", "Navigate", "Display", "Office", "Print", "Settings", and "Help". Below the toolbar, the window title is "Profit Performance by Market and Time". A dropdown menu shows "1 of 2" and "Bottle". The main data area is a table with columns for "Qtr1" and "Qtr2", each containing "Actual", "Budget", "% Total", and "Rank". The table data is as follows:

| | | Qtr1 | | | | Qtr2 | | | |
|-----------|---------|--------|--------|---------|------|--------|--------|---------|------|
| | | Actual | Budget | % Total | Rank | Actual | Budget | % Total | Rank |
| Colas | Central | 1,582 | 1,590 | 50% | 1 | 1,669 | 1,680 | 52% | |
| | West | 1,304 | 1,590 | 41% | 2 | 1,129 | 1,370 | 35% | 2 |
| | East | 301 | 270 | 9% | 3 | 384 | 350 | 12% | 3 |
| Root Beer | West | 8,278 | 7,700 | 31% | 1 | 8,524 | 7,970 | 31% | |
| | Central | 7,269 | 8,420 | 27% | 2 | 7,440 | 8,610 | 27% | |

At the bottom of the window, there are tabs for "Profit Analysis", "Regional Analysis", "KPI Scorecard", "Quadrant Chart", "Best States", and "High/Low Products". The status bar shows "Samples" and the date/time "5/27/00 3:58 PM".

The Hyperion Analyzer Windows Client Interface

Hyperion Analyzer Getting Started

Touring the Sample View Group

Hyperion Analyzer displays OLAP reports called views. Views are organized into groups of views called view groups. Views and view groups are controlled and distributed via ownership and sharing properties. View groups that you share or own display on your Desktop.

The Desktop

- To locate the Desktop, click the toolbar Home button. If the home page has been reset to another view, click the toolbar Home button drop down menu, and select Hyperion Analyzer Desktop.
- To open the Samples view group via the Desktop, click the Samples view group icon.

The User Interface

The Hyperion Analyzer Windows client interface has six bars, and a display panel. You can hide interface components, in order to maximize Main Display panel space. The user interface includes the following bars and panels:

- Application Window Title bar
 - Menu bar
 - Toolbar
 - Details bar
 - Main Display panel
 - View Tabs bar
 - Status bar
- To hide the Toolbar, click the Show/Hide Toolbar button.



Show/Hide Toolbar button

- To hide the Menu bar, right-click the Details bar and select the Show Main Menu item.

Main Menu

The Main Menu view is a composite Form view, containing a corporate departmental banner, a chart view and a graphic customized with hotspots.

There are several methods for moving between views:

Click a view tab on the View Tabs bar to display that view. If the View tabs exceed the length of the View Tabs bar, use the View Tabs Bar Control to scroll through the tabs.



View Tabs Bar Control

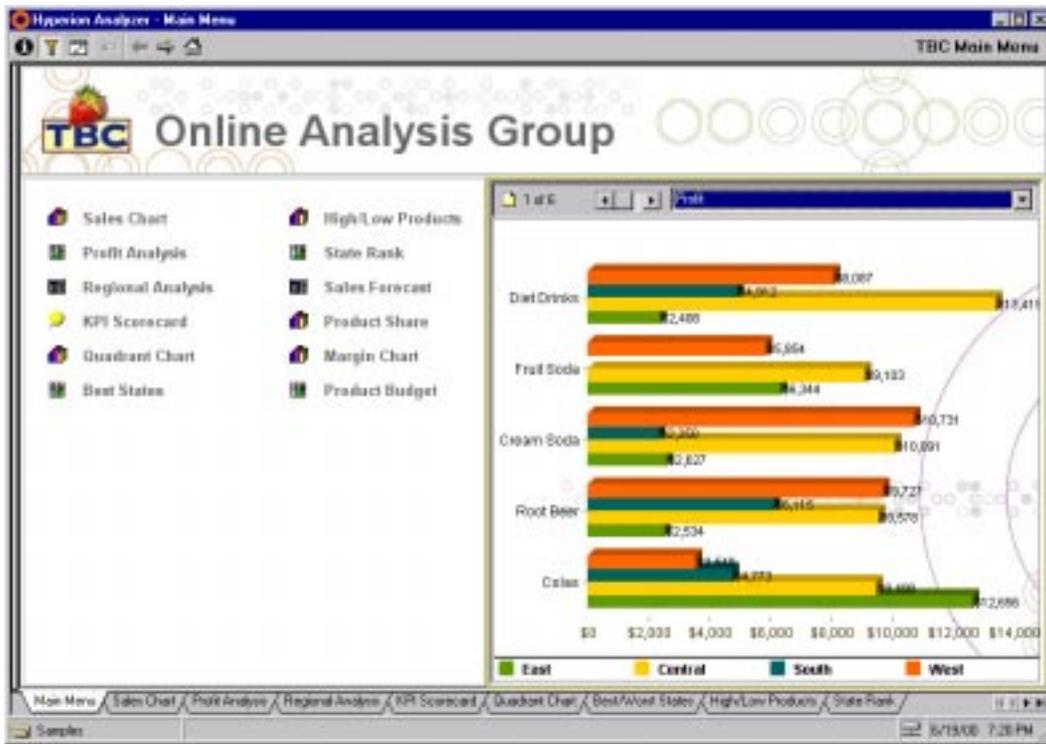
Toolbar Forward and Back buttons progress through the view series. If the Toolbar is hidden, the Forward and Back buttons display on the Details bar.

Views can contain links to other views. To jump to another view using a link, click the corresponding graphic hotspot.

- Click the Sales Chart menu item to jump to the Sales Chart view.



Sales Chart Menu Item



Main Menu View

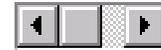
Sales Chart

The Sales Chart view displays multidimensional data in a Chart display type. It shows sales of five products by quarter. The data driving this view is retrieved “live” from an OLAP database.

All other Sample views are displayed as tabs on the View Tabs bar at the bottom of the screen.

The Page Control panel is located above the Main Display panel. Main display information is required to be relevant to the currently listed page dimension. In this case, pages represent geographical markets. To change the market displayed by the chart, click the scrollbar arrows or select from the drop-down list box. The Page Control panel provides an easy method for changing the relevance of the main display without changing the view.

- Click the Page Control panel scroll bar to page between Market dimension members.



*Page Control Panel
Scroll Bar*

- Click the Forward button to display the Profit Analysis view.



Forward Button



Sales Chart View

Profit Analysis

The Profit Analysis view displays a spreadsheet and features **Traffic Lighting** (color-coding). Traffic Lighting color criteria can be set through the comparison of two dimensions or against fixed limits.

In this example, Traffic Lighting applied to Actual figures highlights positive or negative variances from Budget figures. Other common uses of Traffic Lighting include month-to-month, or product performance comparisons.

Multidimensional layout can relate diverse dimensions to one another. Here, Market Regions are nested inside of Products, and Scenario is nested inside the Time dimension. Hyperion Analyzer's flexible layout enables these types of innovative analyses.

The Calculation Analysis Tool is used to insert calculated columns in the Profit Analysis view. The "% Total" column calculates each Market's percent of Total profit by Product. The Rank column assigns a ranking based on the "% Total" column. Hyperion Analyzer maintains these calculated members as the view is pivoted and changed, and dynamically updates the calculation when data values are reloaded.

- Click the Show/Hide Information panel button to display the Information panel.



*Show/Hide Information
Panel Button*

The Information panel is composed of segments summarizing the source and nature of the Main Display panel. Each segment features different controls and context sensitive right-click menus. Dragging and dropping dimensions in the Information panel modifies the main display.

Let's start "slicing and dicing" this report. Viewing the report from different perspectives allows us to gather details and gain insights about the data. First, arrange the view to better display the regional product mix:

- Drag and drop the East Market dimension label onto the Cola Product dimension label in order to swap their locations in the multidimensional layout.

The calculated metrics (% Total and Rank) are automatically adjusted to reflect the change. There's no limit to dimension columns or rows you can drag and drop. As you drag-and-drop, the cursor changes to a 'Move' or 'Swap' cursor. **Moving** indicates placement of the dragged cursor between other dimensions.

Hyperion Analyzer Getting Started

Swapping switches the dragged dimension with the dimension on which it is dropped.

Drilling down displays more detailed dimensional information. To drill down, double-click a member.

For example, double-clicking *East* will show you the States in the Eastern Region.

Swap chart dimensions by dragging and dropping axis labels over bars, and drill down on chart dimensions by double-clicking bars and axis labels. To experiment with Chart navigation, click the **Back** button. When you are done navigating the Sales Chart View, return here.

Hyperion Analyzer - Profit Analysis

Profit Performance by Market and Time

Filters: Sales

2 of 3 | Lin

| | | Qtr1 | | | | Qtr2 | | | | Qtr3 | | | |
|-------------|---------|--------|--------|---------|------|--------|--------|---------|------|--------|--------|---------|------|
| | | Actual | Budget | % Total | Rank | Actual | Budget | % Total | Rank | Actual | Budget | % Total | Rank |
| Coke | Central | 6492 | 6610 | 30% | 1 | 7032 | 7190 | 29% | 1 | 7080 | 7240 | 28% | |
| | East | 5991 | 5900 | 27% | 2 | 6646 | 6410 | 29% | 2 | 7348 | 6910 | 29% | |
| | West | 3646 | 6910 | 26% | 3 | 3049 | 7430 | 25% | 3 | 6465 | 7940 | 25% | |
| | South | 3713 | 4570 | 17% | 4 | 4073 | 5000 | 17% | 4 | 4467 | 5470 | 16% | |
| Cream Soda | Central | 4350 | 3730 | 49% | 1 | 4379 | 3770 | 48% | 1 | 4619 | 3980 | 48% | |
| | West | 3046 | 2620 | 34% | 2 | 3148 | 2710 | 35% | 2 | 3296 | 2830 | 35% | |
| | South | 1241 | 1140 | 14% | 3 | 1266 | 1160 | 14% | 3 | 1370 | 1290 | 14% | |
| | East | 333 | 240 | 4% | 4 | 323 | 240 | 4% | 4 | 366 | 180 | 3% | |
| Diet Drinks | Central | 7417 | 6950 | 46% | 1 | 7720 | 7190 | 45% | 1 | 8015 | 7440 | 46% | |
| | West | 5199 | 5230 | 32% | 2 | 5373 | 5420 | 31% | 2 | 5632 | 5690 | 32% | |
| | South | 2677 | 2890 | 16% | 3 | 2824 | 3070 | 17% | 3 | 2860 | 3100 | 16% | |
| | East | 952 | 820 | 6% | 4 | 1145 | 1000 | 7% | 4 | 1103 | 960 | 6% | |
| Product | Central | 10842 | 10340 | 35% | 1 | 11411 | 10960 | 34% | 1 | 11717 | 11220 | 34% | |
| | West | 8692 | 9530 | 20% | 2 | 9197 | 10140 | 20% | 2 | 9748 | 10770 | 20% | |
| | East | 6323 | 5840 | 21% | 3 | 7189 | 6660 | 22% | 3 | 7608 | 7080 | 22% | |

Non Menu | Sales Chart | Profit Analysis | Regional Analysis | KPI Scorecard | Dashboard Chart | Best/Worst States | High/Low Products | State Rank

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Profit Analysis View

- Click the Show/Hide Information panel button to hide the Information panel.



Show/Hide Information Panel Button

- Click the Regional Analysis view tab to display the Regional Analysis view.



View Tab

Regional Analysis

The Regional Analysis view is a custom view called a Form. Forms are composite views featuring multiple display types, controls and formats. They are created using Hyperion Analyzer Design Tools. A dashboard-style form coordinates multiple display panels and OLAP-aware controls.

Designers can customize views by including views, controls, visual components, and Web content in their Forms. Forms, though sophisticated, require no coding to create them. Designers can assemble Forms using the graphical Form Designer application.

The far left panel features three Attribute dimension option button sets. Clicking option buttons changes the three coordinated panels accordingly.

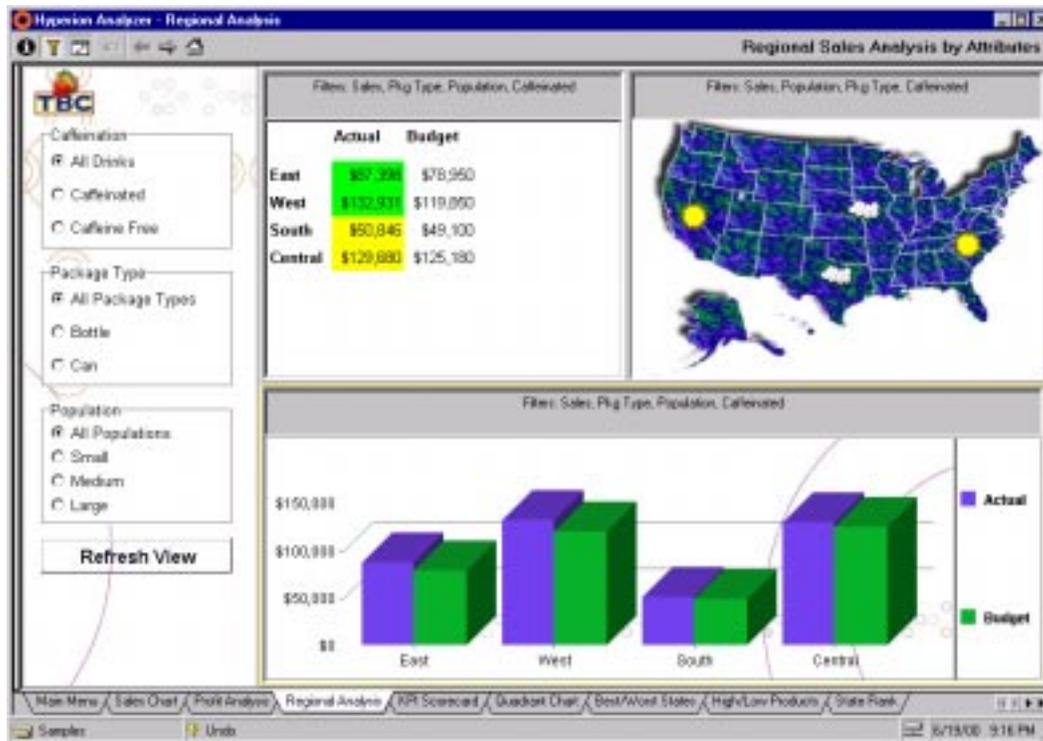
Hyperion Essbase 6 Attribute Dimensions are supported in Hyperion Analyzer. Attribute dimensions categorize members of regular dimensions. For example: Package Type is an attribute dimension that categorizes the Product dimension. Browse and select attribute dimensions just like conventional dimensions using the Dimension Browser window.

Linked Views maintain a coordinated dimension context. As one linked view is pivoted and drilled, views linked to it follow the course of multidimensional navigation, and present relevant information in a different display type, or using different analytical formatting.

Drilling increases (or decreases) the level of view detail by including or excluding members of the dimensional hierarchy in the display. Drilling methods can be customized via User Settings, allowing several different kinds of hierarchical navigation.

The sales map in this Form is a Pinboard. Pinboards are graphical information displays. These pins represent the four geographic dimension members. Their traffic lighting color is the result of a comparison between Actual and Budget measures. The graphic relates the traffic lighting to the geographic region. Regional performance compared to budget is thus displayed. Remember that the Information Panel can always display these traffic lighting settings.

- Double click the USA Pinboard East Pin (Sun) to drill to an Eastern States Pinboard.



Regional Analysis View

Services Buttons, like the Refresh View button, allow Hyperion Analyzer behavior to be presented in a customized manner that makes functions more easily accessible. The Refresh View service button retrieves view definitions from the repository and updates the Regional Analysis Form (a function usually accessed by right-clicking a View tab). The Designer can easily include services like Edit Data and Jump to View.

- Click the KPI Scorecard view tab.

KPI Scorecard

The Key Performance Indicator (KPI) Scorecard demonstrates another use of Pinboards. Pins display traffic lighting information representing a comparison of Actual to Budget. This view also links to corresponding views containing detailed information.

- Click the Page Control panel scroll bar to page between Product dimension members.



*Page Control Panel
Scroll Bar*

Pins change traffic lighting colors, to indicate performance, as you scroll through the product pages.

- Double-click the Sales Pin to jump to the corresponding spreadsheet Detail view.



Sales Pin

- Click the **Undo** button to redisplay the KPI Scorecard view.



Undo Button

- Double-click the Profit Pin to jump to the corresponding spreadsheet Detail view.



Profit Pin

- Click the **Undo** button to redisplay the KPI Scorecard view.

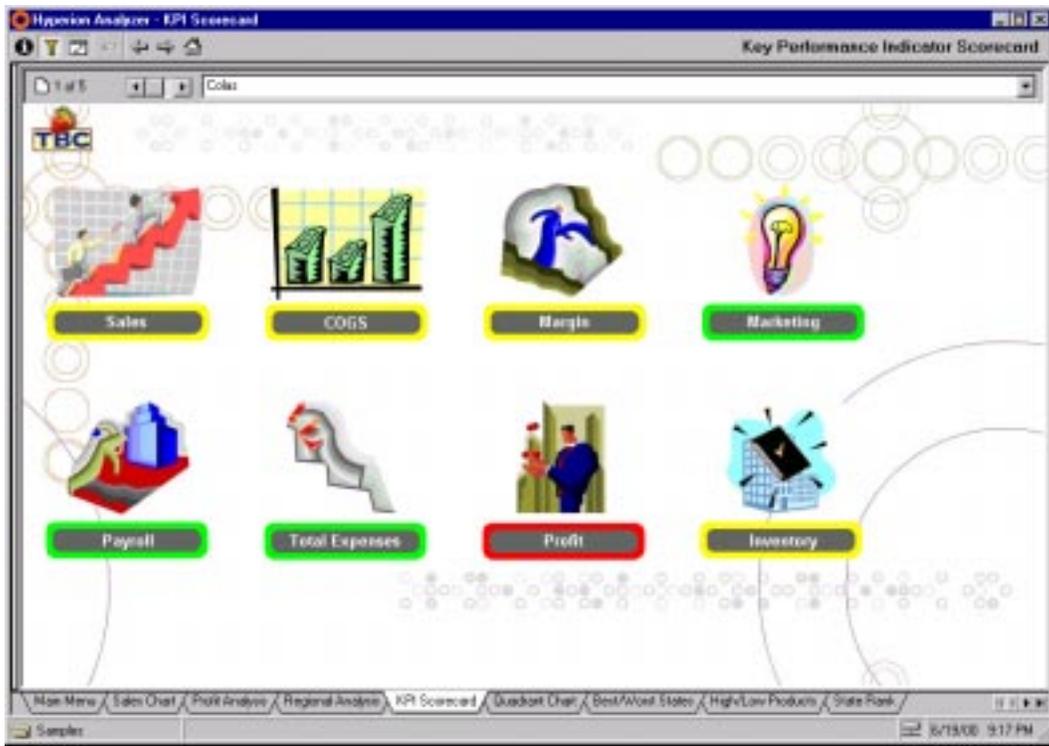


Undo Button

- Click the **Forward** button to display the Quadrant Chart view.



Forward Button



KPI Scorecard

Quadrant Chart

Use Quadrant Charts to compare two members of the same dimension against two other dimensions. In this Quadrant Chart each colored line represents a different product. Each point represents sales and profit performance over four quarters. Pop-up product-time values display when the cursor is placed over any point. The line connecting points reveals performance patterns over time.

The Quadrant Chart view shows that though the Eastern region and the Western regions have about the same number of cola product sales, the East is more profitable. Simultaneously, the Quadrant Chart shows that the Southern region is as profitable as the Western region, while having far fewer sales. Clearly, the Western region has the potential for far more profit than it is currently producing.

Pop-up values display when you click the chart background and hold the mouse button.

Crosshairs help compare distant points, while the pop-up boxes identify values.

Use the Page Control panel to chart product performance by clicking the page scroll bar.

Double-click axis labels to change them. Select new dimension members from the Axis Member dialog box and click OK.

- Click the Forward button to display the Best States view.



Forward Button



Quadrant Chart View

Hyperion Analyzer Getting Started

Best States

The Best States view uses calculated metrics to identify the best and worst performing states by Quarter for specific products.

The Maximum and Minimum Calculations select the “Top State” and “Bottom State” by Profit. They are the foundation for the Best/Worst Analysis demonstrated here. These metrics helpfully return member names (such as California) instead of numbers.

Hiding data values shows only the calculated metrics, instead of the underlying data values. This helps users focus their attention on the best and worst performing states.

- Click the Forward button to display the High/Low Products view.



Forward Button

Hyperion Analyzer - Best/Worst States

Top and Bottom States based on Profit

Filter: Profit

1 of 4

| | Product | Coke | Root Beer | Cream Soda | Fruit Soda | Diet Drinks | |
|------|--------------|------------|---------------|---------------|------------|-------------|------------|
| Year | Top State | California | Massachusetts | California | California | Iowa | Illinois |
| | Bottom State | New Mexico | Nevada | New Hampshire | Missouri | Nevada | New Mexico |
| Qtr1 | Top State | California | Massachusetts | California | California | Iowa | Illinois |
| | Bottom State | New Mexico | New Mexico | New Hampshire | Missouri | Nevada | New Mexico |
| Qtr2 | Top State | Illinois | Massachusetts | California | California | Iowa | Illinois |
| | Bottom State | New Mexico | Nevada | New Hampshire | Missouri | Nevada | New Mexico |
| Qtr3 | Top State | California | Massachusetts | California | California | Iowa | Illinois |
| | Bottom State | New Mexico | New Mexico | New York | Missouri | Nevada | New Mexico |
| Qtr4 | Top State | Illinois | Massachusetts | California | Iowa | Iowa | Illinois |
| | Bottom State | New Mexico | Nevada | New Hampshire | Missouri | Nevada | New Mexico |

[Home](#) [Sales Chart](#) [Profit Analysis](#) [Regional Analysis](#) [KPI Scorecard](#) [Dashboard Chart](#) [Best/Worst States](#) [High/Low Products](#) [State Rank](#)

Sampler Double-Click to drill, Right-click for menu, Drag to swap/resize 6/15/00 3:28 PM

Best States View

High/Low Products

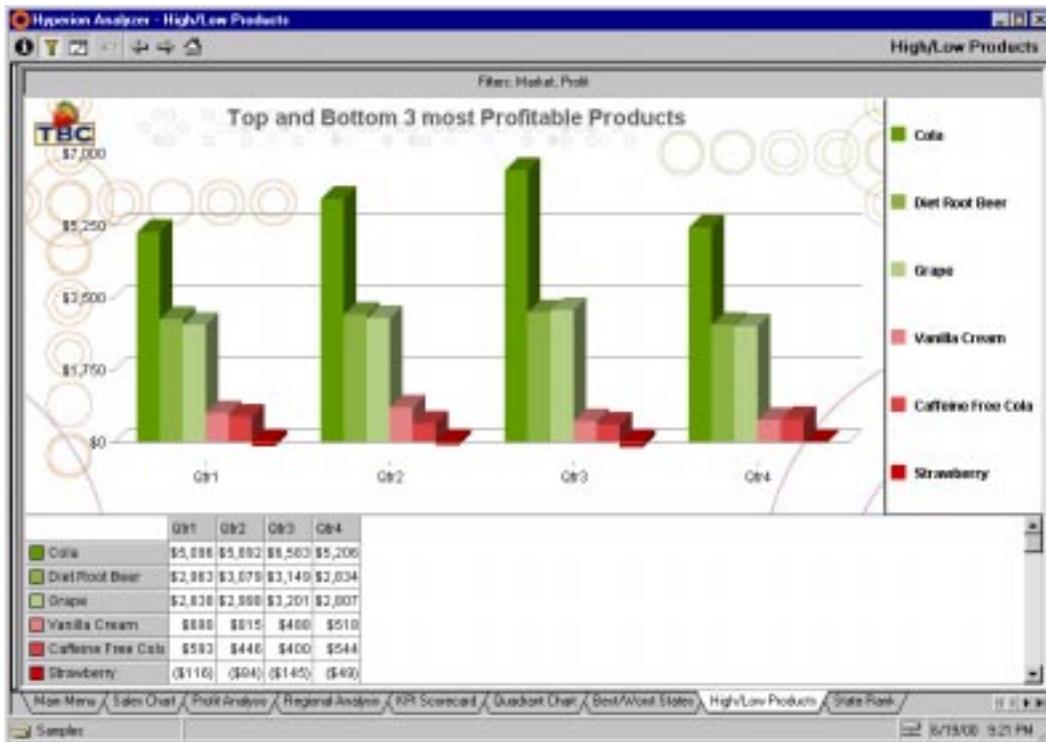
The High/Low Products view uses a Hyperion Essbase Retrieve Only Top Bottom calculation to identify the three most and least profitable products for the year. Determining which ranking and sorting features are currently applied to the view is as easy as consulting the Information panel.

A **“What If” data-entry module** is displayed at the bottom of the High/Low Product view when using the Hyperion Analyzer Windows client. This chart module allows ad hoc “What If” analysis that does not post changes back to the OLAP server. Simply double-click a cell, type a new value, and press Enter.

- Click the Forward button to display the State Rank view.



Forward Button



High/Low Products View

State Rank

The State Rank view uses Traffic Lighting, Calculations and Sorting to track fluctuating performance over time.

Traffic Lighting is set to compare each state's quarterly performance value to the previous quarter.

States whose quarterly performance declined from the previous quarter are colored red. States with no change in performance are colored yellow, and states with improving performance are colored green.

The Hide Only Analysis Tool provides you the ability to filter dimension members in the display by color, Traffic Lighting, data values, or dimension member.

- To filter the State Rank view by color:
 1. Right-click the Q2 dimension member label, and select Analysis Tools | Hide Only | Color...
 2. Click on each dimension member listed in the Traffic Lighted Items panel.
 3. Select the Show Any Type | Includes option button.
 4. Select the Traffic Colors | Colors option button.
 5. Select the color red from the corresponding drop-down list box.
 6. Click Add to apply the Show Only/Hide Only definition to the selected dimension members listed in the Traffic Lighted Items panel.
 7. Click OK.
 8. Click Yes to confirm and OK to refresh the view.

| Market | Q1 Rank | Q2 Rank | Q3 Rank | Q4 Rank |
|---------------|---------|---------|---------|---------|
| California | 1 | 1 | 1 | 1 |
| Illinois | 2 | 3 | 3 | 3 |
| New York | 3 | 2 | 2 | 2 |
| Nevada | 4 | 4 | 4 | 4 |
| Iowa | 5 | 5 | 5 | 5 |
| Colorado | 6 | 6 | 6 | 6 |
| Oregon | 7 | 7 | 8 | 7 |
| Washington | 8 | 9 | 10 | 8 |
| Texas | 9 | 10 | 9 | 10 |
| Ohio | 10 | 12 | 13 | 12 |
| Utah | 11 | 11 | 11 | 9 |
| Florida | 12 | 8 | 7 | 11 |
| Wisconsin | 13 | 13 | 13 | 13 |
| Massachusetts | 14 | 14 | 14 | 14 |
| Connecticut | 15 | 17 | 18 | 16 |
| Missouri | 16 | 16 | 10 | 18 |
| Oklahoma | 17 | 15 | 15 | 15 |

State Rank View

The State Rank view now includes only the nine states with red traffic lighting (declining performance) in at least one quarter, making it much easier to spot them.

- Click the Forward button to display the Sales Forecast view.



Forward Button

Sales Forecast

Use the Sales Forecast Form to project sales and budget figures, apply them to the OLAP cube and appraise their consequences in real-time. The Form contains an Edit Data control panel, a chart view, and a linked spreadsheet.

Click the Edit Data Services button to place the current view into Edit Data mode. Edit Data mode displays an interactive spreadsheet, which enables you to modify the view's data values on the spreadsheet and send them back to the OLAP server. Edit Data mode is essential in projecting figures and their consequences. You can use Edit Data mode to explore the impact of proposed actions.

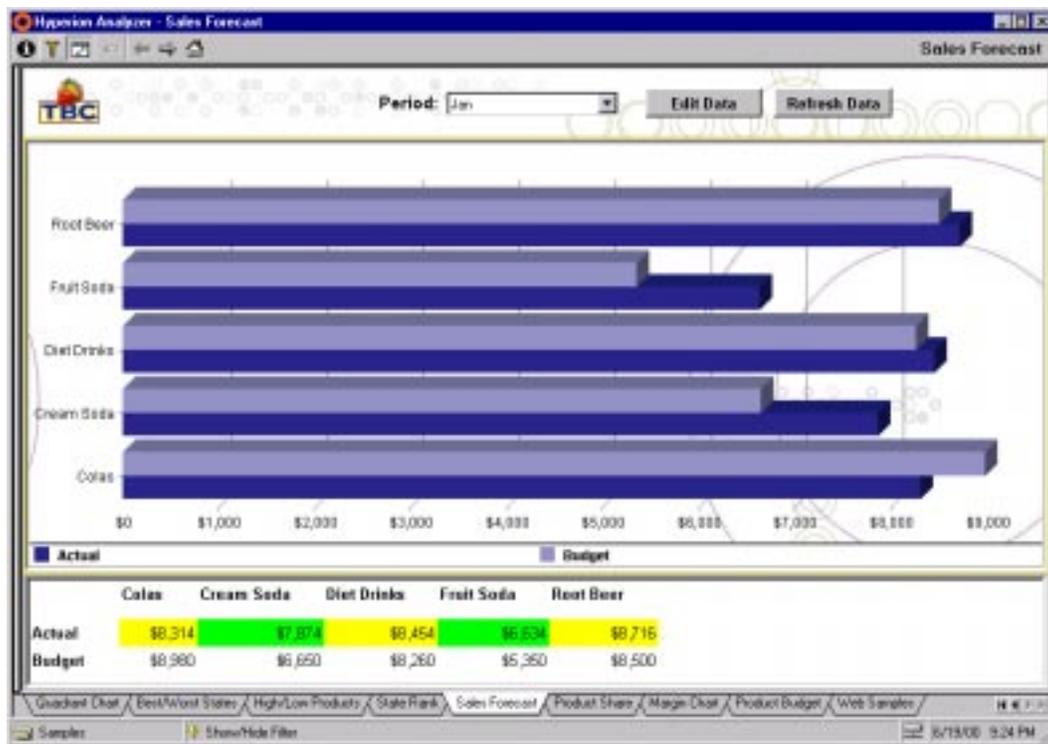
After modifying values, you can use the Lock/Send button to submit the data to the OLAP server. You can also change a calculation script to run on the OLAP server. This adjusts all data values that are dependent on the data values you modified.

The Refresh View Services button queries the OLAP server and updates the data values in the current view definition. Note how traffic lighting and sorting definitions accommodate the new data values.

- Click the Forward button to display the Product Share view.



Forward Button



Sales Forecast View

Product Share

The Product Share view demonstrates multiple charts on the same view.

You can display multiple pie charts on the same view using the Hyperion Analyzer Windows client. Hyperion Analyzer Web clients display multiple pie charts as a single vertically stacked bar chart.

- Click the Forward button to display the Margin Chart view.



Forward Button



Product Share View

Margin Chart

The Margin Chart view displays both sales figures and profit percentage by product. All Hyperion Analyzer clients have updated chart engines, and many new charting features:

A secondary y-axis, representing profit percentage rates, is displayed across from the y-axis representing sales values in dollars.

Multiple chart types are simultaneously displayed on this chart in the form of a cylindrical Bar chart and Line chart.

Enhanced chart legends maximize the main display for chart objects.

- Double-click empty space in the chart legend, to change the legend panel to a floating legend dialog box.
- Click the Forward button to display the Product Budget view.



Forward Button



Margin Chart View

Product Budget

To facilitate asymmetrical analysis, you can hide select columns and rows via the Hyperion Analyzer Windows client. While you cannot create asymmetrical views with the Hyperion Analyzer Web clients, you can display asymmetrical views created with the Windows client.

Hide Only Members Analysis Tool has been used in the Product Budget view to create an asymmetrical view. Scenario Actual dimension member values for the first three quarter are displayed, while the fourth quarter displays the Scenario Budget dimension member. The fourth quarter omits Actual dimension values, while the first three quarters simultaneously omit the Budget dimension.

- Right-click the Scenario Actual dimension header for Quarter 1 and select Analysis Tools | Hide Only | Members. Select the Year and Scenario dimensions from the Dimension Selections panel. Notice the selected member combinations in the Member Combinations panel. Click Cancel.

Unlimited Creative Possibilities

Hyperion Analyzer's intuitive ease-of-use, and powerful analytics transform data into insightful information, enabling faster, more informed business decisions.

Now that you are more familiar with the user interface, terminology and potential of Hyperion Analyzer, we encourage you to harness your creativity. Proceed to *Creating Your First View*.

| | | Qtr1 | Qtr2 | Qtr3 | Qtr4 |
|------------|-----------|----------|----------|----------|----------|
| | | Actual | Actual | Actual | Budget |
| Colas | Sales | \$25,048 | \$27,187 | \$28,544 | \$26,810 |
| | COGS | \$10,670 | \$11,613 | \$12,161 | \$11,270 |
| | Marketing | \$3,934 | \$4,262 | \$4,469 | \$3,150 |
| | Payroll | \$3,336 | \$3,394 | \$3,336 | \$2,340 |
| Root Beer | Sales | \$26,627 | \$27,401 | \$27,942 | \$26,640 |
| | COGS | \$11,879 | \$12,194 | \$12,555 | \$11,190 |
| | Marketing | \$4,651 | \$4,790 | \$4,995 | \$3,390 |
| | Payroll | \$3,309 | \$3,312 | \$3,309 | \$2,260 |
| Cream Soda | Sales | \$23,997 | \$25,736 | \$26,650 | \$20,550 |
| | COGS | \$11,010 | \$11,649 | \$12,353 | \$8,900 |
| | Marketing | \$4,039 | \$4,278 | \$4,574 | \$2,870 |
| | Payroll | \$2,961 | \$2,979 | \$2,961 | \$1,780 |
| Fruit Soda | Sales | \$20,148 | \$21,355 | \$22,079 | \$15,470 |
| | COGS | \$9,318 | \$9,906 | \$10,274 | \$6,700 |
| | Marketing | \$3,215 | \$3,396 | \$3,484 | \$2,140 |
| | Payroll | \$2,562 | \$2,568 | \$2,562 | \$1,530 |

Product Budget View

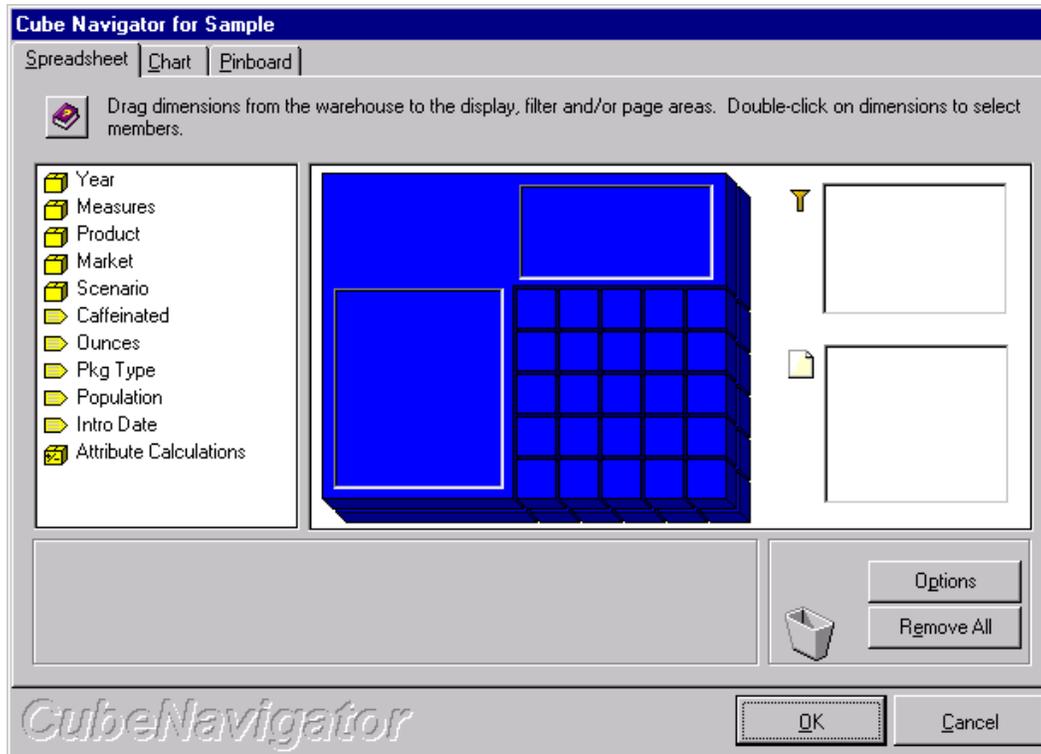
Creating Your First View

Note: Before you can create your first view you need to start Hyperion Analyzer and connect to the Sample database. See *Importing the Sample View Group* and *Starting the Hyperion Analyzer Windows client* for more information.

- Launch Hyperion Analyzer Windows client, and click the Show/Hide Toolbar button to display the main Toolbar.

- To create a new View:
 1. Click the New button.
 2. Select the “Sample” database from the Databases window Connection Name list.
 3. Click OK.

The Cube Navigator window displays.



Cube Navigator Window for the Sample Database

Note: To modify existing Views using Cube Navigator, click the Toolbar Navigate button.

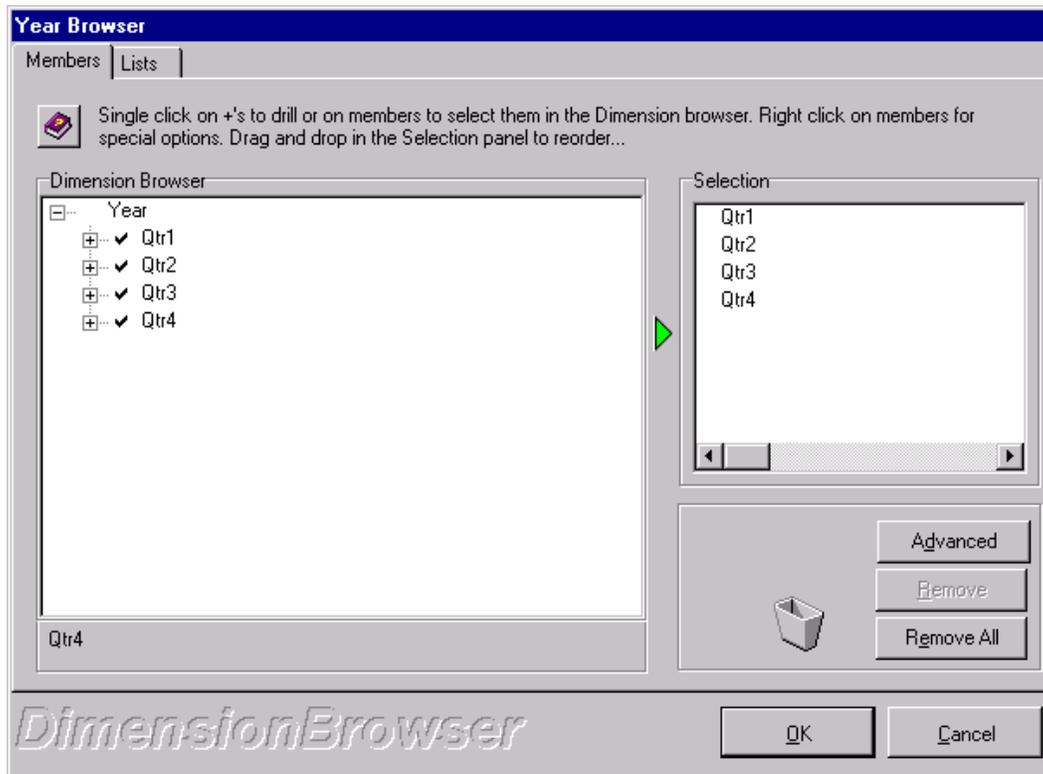
Tabs for laying out Spreadsheet, Chart and Pinboard display types are available at the top of the window. Use the Spreadsheet tab for this tutorial.

Yellow boxes and tags on the left side of the window represent unselected dimensions. The cube boxes represent spreadsheet Columns and Rows. Filter and Page Control boxes line the right side of the window. Drag and drop dimensions to specify the content and layout of your analyses.

4. Drag the Year dimension icon onto the spreadsheet column box (at the top of the cube).

Dropping dimensions on cube fields opens the Dimension Browser window.

Hyperion Analyzer Getting Started



The Year dimension Browser window

To select dimension members for display in the Dimension Browser window Members tab:

- Clicking any plus signs (+) expands the dimension hierarchy to display its children.
- Clicking any minus signs (-) collapses the dimension hierarchy.
- Clicking on the left of any member text selects that member for inclusion in the query.
- Selected member names display in the Selection group box and a check displays next to Dimension Browser group box member names.
- Note that you can revise member selections at any time by opening the Cube Navigator and double-clicking a placed dimension.

Expand the Year dimension and select Year dimension members:

5. Click the *Year* plus sign (+).

The Children of Year appear. Select all four quarters:

6. Click to the left of each Quarter.
7. Click OK.

The Cube Navigator window redisplay. Add another dimension to spreadsheet columns:

8. Drag *Scenario* into the spreadsheet column box.

The Scenario Dimension Browser displays.

9. Select *Actual* and *Budget* from the Scenario dimension (by clicking to the left of each).

Clicking is a simple way to select members. Now let's look at another, more powerful, way to select members:

10. Click OK.

The Cube Navigator window redisplay. Add another dimension to the spreadsheet:

11. Drag *Product* to the spreadsheet row box.
12. In the Product Dimension Browser, right-click *Product*.
13. Select "Also Select Children" from the right-click menu.

This selects the Product member and the members immediately beneath it in the dimension hierarchy. Right-clicking selections enable fast, dynamic selections by leveraging the power of Hyperion Essbase OLAP Server. Selections are faster because groups of related members can be selected with a single click. Selections are dynamic because selection rules (in this case, Also Select Children) are applied each time the view is opened. Because of this, your view will always show the members immediately below Product – even when members are added or removed from the database.

14. Click OK.
15. Drag *Market* to the spreadsheet row box.
16. Expand *Market* (by clicking Market's plus sign).

17. Right-click *Central*.

18. Select “Also Select Level” from the right-click menu.

19. Click OK.

This selection method selects Market dimension members at the same level as Central (all our Regions).

20. Drag *Measures* into the Filter box.

21. When the Measure Dimension Browser opens, select *Sales*.

The filter limits display to Sales figures.

22. Click OK.

23. Drag *Pkg Type* to the Page Area.

24. Right-click *Pkg Type*.

25. Select “Also Select Children” from the right-click menu.

This organizes data on pages by *Pkg Type* (One for Total *Pkg Type* and a page for each individual *Pkg Type*).

26. Click OK.

27. Click OK to exit Cube Navigator, and display the view.

The screenshot shows the Hyperion Analyzer interface with a data table for 'Bottle'. The table has columns for quarters (Qtr1, Qtr2, Qtr3, Qtr4) and sub-columns for Actual and Budget. The data is organized by product categories: Colas, Root Beer, Cream Soda, Fruit Soda, and Diet Drinks, each with sub-rows for East, West, South, and Central regions.

| | | Qtr1 | | Qtr2 | | Qtr3 | | Qtr4 | |
|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| | | Actual | Budget | Actual | Budget | Actual | Budget | Actual | Budget |
| Colas | East | \$301 | \$270 | \$384 | \$350 | \$422 | \$390 | \$360 | \$300 |
| | West | \$1,304 | \$1,590 | \$1,129 | \$1,370 | \$971 | \$1,160 | \$1,117 | \$1,370 |
| | Central | \$1,582 | \$1,590 | \$1,669 | \$1,680 | \$1,796 | \$1,820 | \$1,806 | \$1,710 |
| Root Beer | East | \$5,726 | \$5,460 | \$5,902 | \$5,650 | \$5,863 | \$5,600 | \$6,181 | \$5,780 |
| | West | \$8,278 | \$7,700 | \$8,524 | \$7,970 | \$8,885 | \$8,320 | \$8,513 | \$7,820 |
| | South | \$5,354 | \$4,430 | \$5,535 | \$4,580 | \$5,690 | \$4,680 | \$5,429 | \$3,780 |
| | Central | \$7,269 | \$8,420 | \$7,440 | \$8,610 | \$7,504 | \$8,680 | \$6,993 | \$9,260 |
| Cream Soda | East | \$4,536 | \$3,440 | \$5,004 | \$3,790 | \$4,882 | \$3,670 | \$4,745 | \$3,080 |
| | West | \$4,997 | \$4,270 | \$5,834 | \$5,010 | \$6,320 | \$5,470 | \$5,697 | \$4,950 |
| | South | \$1,786 | \$1,690 | \$1,734 | \$1,630 | \$1,830 | \$1,740 | \$1,741 | \$1,530 |
| | Central | \$3,709 | \$3,150 | \$4,059 | \$3,450 | \$4,065 | \$3,480 | \$3,497 | \$2,960 |
| Fruit Soda | East | \$3,735 | \$3,880 | \$3,990 | \$4,150 | \$4,201 | \$4,350 | \$3,819 | \$3,850 |
| | West | \$8,403 | \$5,540 | \$8,888 | \$5,840 | \$9,206 | \$6,070 | \$8,537 | \$5,280 |
| | Central | \$8,010 | \$6,830 | \$8,477 | \$7,250 | \$8,672 | \$7,420 | \$8,292 | \$6,340 |
| Diet Drinks | East | \$932 | \$880 | \$951 | \$900 | \$968 | \$920 | \$926 | \$860 |
| | West | \$3,621 | \$3,390 | \$3,713 | \$3,490 | \$3,886 | \$3,640 | \$3,737 | \$3,460 |

The Created View

Congratulations, you've created your first view! An intuitive view-building interface and ease of use are just two Hyperion Analyzer benefits.

Hyperion Analyzer Getting Started

Saving Your View

- Right-click the view tab and select Save or Save As to display the View Properties window.

View Properties

Specify the properties of the view using the boxes below. Identification is how the view is seen and described.

View Identification

View Name: First View
 Group: First Group
 Description: First View Description
 Display Type: Analysis Spreadsheet

View Settings

View Owner: dweinbre
 View Database: Sample

Properties

View Selectable
 View Active
 Restore Display
 Hyperion Analyzer Desktop View

View Lock
 Lock Options:
 Drill/Pivot
 Right-Click
 Display Change

Web Template File: [] Browse
 Publish To Web File: [] Browse

Select an existing group, or type a new one.

ViewProperties [OK] [Cancel]

View Properties Window

View properties determine the control, interaction and distribution of views. Enter the following information in the View Properties window:

View Name: First View

Description: First View Description

Group: First Group

Note: The View Owner drop-down list box contains your user ID. Only view owners can overwrite existing views. Information on sharing ownership is available in the *Hyperion Analyzer Enterprise Guide* or Hyperion Analyzer Administration Tools Online Help.

- To save the view, click OK.

The view is saved under the “First Group” view group. The view name displays on the View tab, and the View Description displays.

View Descriptions are a great way to provide other users with view information (describing the view as “Product Sales by Region” for instance).

Formatting: Making a View Easy to Read

Let's apply additional formatting to the View.

1. Right-click Qtr1, and select Spreadsheet Options.

The Spreadsheet Options window displays.

2. Click the Headers group Font button.

The Font window displays.

3. Select a 10 point, Bold font.

4. Click OK.

5. Click the Data group Cell Font button.

The Font window displays.

6. Select a 10 point, Bold font again.

7. Click OK.

8. Click OK.

Hyperion Analyzer - (Untitled)

Back Forward Home New File Navigate Display Office Print

1 of 2 Bottle

| | | Qtr1 | | Qtr2 | | Qtr3 | |
|------------|---------|---------|---------|---------|---------|---------|--------|
| | | Actual | Budget | Actual | Budget | Actual | Budget |
| Colas | East | \$301 | \$270 | \$384 | \$350 | \$422 | \$3 |
| | West | \$1,304 | \$1,590 | \$1,129 | \$1,370 | \$971 | \$1.1 |
| | Central | \$1,582 | \$1,590 | \$1,669 | \$1,680 | \$1,796 | \$1.8 |
| Root Beer | East | \$5,726 | \$5,460 | \$5,902 | \$5,650 | \$5,863 | \$5.6 |
| | West | \$8,278 | \$7,700 | \$8,524 | \$7,970 | \$8,885 | \$8.3 |
| | South | \$5,354 | \$4,430 | \$5,535 | \$4,580 | \$5,690 | \$4.6 |
| | Central | \$7,269 | \$8,420 | \$7,440 | \$8,610 | \$7,504 | \$8.6 |
| Cream Soda | East | \$4,536 | \$3,440 | \$5,004 | \$3,790 | \$4,882 | \$3.6 |
| | West | \$4,997 | \$4,270 | \$5,834 | \$5,010 | \$6,320 | \$5.4 |
| | South | \$1,786 | \$1,690 | \$1,734 | \$1,630 | \$1,830 | \$1.7 |
| | Central | \$3,709 | \$3,150 | \$4,059 | \$3,450 | \$4,065 | \$3.4 |
| Fruit Soda | East | \$3,735 | \$3,880 | \$3,990 | \$4,150 | \$4,201 | \$4.3 |
| | West | \$8,403 | \$5,540 | \$8,888 | \$5,840 | \$9,206 | \$6.0 |
| | Central | \$8,010 | \$6,830 | \$8,477 | \$7,250 | \$8,672 | \$7.4 |

Untitled2 Untitled3 Untitled4

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The Formatted View

Hyperion Analyzer Getting Started

Traffic Lighting: Creating Quick Comparisons

The previous chapter demonstrated how Traffic Lighting enables quick comparisons between Actual and Budgeted measures, or between quarters. Let's apply Traffic Lighting to this view to compare Actual to Budget for each quarter.

1. Right-click Actual, and select Analysis Tools | Traffic Light...

This opens the Traffic Light window and situates Actual in the "Apply traffic lighting to:" drop-down list box.

Traffic Lighting compares two dimension members, or a member against fixed limits. Since we want to compare Actual against Budget:

2. Click the "by comparing it to" option button, and select *Budget* from the drop-down list box.

Traffic Lighting color is determined by a Variance Limit. Variance Limits are set by value or percentage via option buttons at the bottom of the window.

3. Enter Variance Limit parameters:
 - 10 for the "is lower than" limit.
 - 10 for the "is higher than" limit.
 - Click the % radio button.
4. Click Add to add Traffic Light setting to the Traffic Lights Currently Applied list.
5. Click OK to apply the Traffic Lighting to the View.

Hyperion Analyzer - (Untitled)

1 of 2 | Bottle

| | | Qtr1 | | Qtr2 | | Qtr3 | |
|------------|---------|---------|---------|---------|---------|---------|---------|
| | | Actual | Budget | Actual | Budget | Actual | Budget |
| Colas | East | \$301 | \$270 | \$384 | \$350 | \$422 | \$384 |
| | West | \$1,304 | \$1,590 | \$1,129 | \$1,370 | \$971 | \$1,129 |
| | Central | \$1,582 | \$1,590 | \$1,669 | \$1,680 | \$1,796 | \$1,680 |
| Root Beer | East | \$5,726 | \$5,460 | \$5,902 | \$5,650 | \$5,863 | \$5,650 |
| | West | \$8,278 | \$7,700 | \$8,524 | \$7,970 | \$8,885 | \$8,340 |
| | South | \$5,354 | \$4,430 | \$5,535 | \$4,580 | \$5,690 | \$4,690 |
| | Central | \$7,269 | \$8,420 | \$7,440 | \$8,610 | \$7,504 | \$8,610 |
| Cream Soda | East | \$4,536 | \$3,440 | \$5,004 | \$3,790 | \$4,882 | \$3,690 |
| | West | \$4,997 | \$4,270 | \$5,834 | \$5,010 | \$6,320 | \$5,410 |
| | South | \$1,786 | \$1,690 | \$1,734 | \$1,630 | \$1,830 | \$1,730 |
| | Central | \$3,709 | \$3,150 | \$4,059 | \$3,450 | \$4,065 | \$3,450 |
| Fruit Soda | East | \$3,735 | \$3,880 | \$3,990 | \$4,150 | \$4,201 | \$4,300 |
| | West | \$8,403 | \$5,540 | \$8,888 | \$5,840 | \$9,206 | \$6,040 |
| | Central | \$8,010 | \$6,830 | \$8,477 | \$7,250 | \$8,672 | \$7,450 |

Next View | 6/19/00 9:55 PM

"First View" with Traffic Lighting

You just created Traffic Lights to compare Actual to Budget measures.

Use the Page control scroll bar to see the effect of Traffic Lighting on each Pkg Type page.

Hyperion Analyzer Getting Started

Calculations: Adding Useful Metrics to Your View

The View's Product Groups are organized by Market. To determine Market Rank and Market Percentage of Total Sales, let's create two calculated metrics:

1. Right-click *Actual*, and select Analysis Tools | Calculations from the pop-up menu.

The Calculation window displays.

2. Click Add to create a new calculation.

The Edit Calculation window displays.

3. Type % Total in the Name field.
4. Select *Actual* from the Dimension Member group box.

To position the calculation after Actual and Budget columns:

5. Click the "Insert After:" radio button in the Position/Formatting group box, and select All Members from its drop-down list box.

To display the value as a percent:

6. Click the Formatting button.

The Formatting window displays.

7. Click the Percentage check box.
8. Click OK to return to the Edit Calculation window.

Before finishing, select a calculation type.

9. Select "Percentage of Total" from the Type drop-down list box.
10. Click OK to return to the Calculations window.

While we're here, let's create the Ranking calculation.

11. Click Add again to open the Edit Calculation window.
12. Name this calculation Rank.

Since we want the rank based on “% Total”:

13. Select “% Total” from the Dimension Members group box.

Note that “% Total” displays like a dimension member, enabling calculations to be used in other calculations.

14. Click the “Insert After” radio button to position the Rank Calculation after “% Total.”
15. Select Rank from the calculation Type field.

This selection sets a ranking calculation. To place the highest Rank market at the top:

16. Select Descending.
17. Click OK to return to the Calculations window.
18. Click OK once more to apply calculations to the View.

To sort data based on the Rank calculation:

19. Right-click *Rank*.
20. Select Analysis Tools | Sorting from the pop-up menu.
21. Ensure that the Sort option is set to Ascending.
22. Click OK.

Markets are now ranked from top to bottom.

The screenshot shows the Hyperion Analyzer interface with a data table. The table has columns for product, region, quarter, actual values, budget values, percentage of total, and rank. The data is color-coded: yellow for positive variance, red for negative variance, and green for positive variance. The table is titled 'Bottle' and shows data for Qtr1 and Qtr2 across various products and regions.

| | | Qtr1 | | | | Qtr2 | |
|------------|---------|---------|---------|---------|------|---------|---------|
| | | Actual | Budget | % Total | Rank | Actual | Budget |
| Colas | Central | \$1,582 | \$1,590 | 50% | 1 | \$1,669 | \$1,669 |
| | West | \$1,304 | \$1,590 | 41% | 2 | \$1,129 | \$1,304 |
| | East | \$301 | \$270 | 9% | 3 | \$384 | \$301 |
| Root Beer | West | \$8,278 | \$7,700 | 31% | 1 | \$8,524 | \$7,700 |
| | Central | \$7,269 | \$8,420 | 27% | 2 | \$7,440 | \$8,420 |
| | East | \$5,726 | \$5,460 | 22% | 3 | \$5,902 | \$5,460 |
| | South | \$5,354 | \$4,430 | 20% | 4 | \$5,535 | \$4,430 |
| Cream Soda | West | \$4,997 | \$4,270 | 33% | 1 | \$5,834 | \$5,000 |
| | East | \$4,536 | \$3,440 | 30% | 2 | \$5,004 | \$3,700 |
| | Central | \$3,709 | \$3,150 | 25% | 3 | \$4,059 | \$3,400 |
| | South | \$1,786 | \$1,690 | 12% | 4 | \$1,734 | \$1,690 |
| Fruit Soda | West | \$8,403 | \$5,540 | 42% | 1 | \$8,888 | \$5,800 |
| | Central | \$8,010 | \$6,830 | 40% | 2 | \$8,477 | \$7,200 |
| | East | \$3,735 | \$3,880 | 19% | 3 | \$3,990 | \$4,100 |

Your First View With Calculated Metrics

Without any formulas, you've created two calculated metrics! It's easy to create views with Hyperion Analyzer and even easier to create calculations.

23. Right-click the view tab and select Save, to save your view.

Using Hyperion Analyzer Web Clients

You now have two choices for accessing Hyperion Analyzer content over the Internet. There are two Hyperion Analyzer Web clients:

- **The Hyperion Analyzer HTML Web client** is an HTML thin client used via a Web browser.
- **The Hyperion Analyzer Java Web client** provides more advanced functionality and runs via a supported Java-capable Web browser.

The Hyperion Analyzer Java Web client requires a Java-capable Web browser or computing platform fully supporting the JDK Version 1.1 or later. Examples include Microsoft Internet Explorer 4 or later, and Netscape Communicator/Navigator 4.5 or later.

A Web server is required to present the Web page from which Web clients are launched, deliver files, and transport images generated at runtime. Upon launching, Web clients negotiate a direct TCP/IP connection to the Hyperion Analyzer Analysis Server. All communication between the Web browser and server, excepting images, is via this socket.

All Hyperion Analyzer clients share similar intuitive user interface features, so you will feel very much at home if you have used the Hyperion Analyzer Windows client, or have reviewed the chapter on touring the Sample view group.

Starting Hyperion Analyzer Web Clients

Before starting the Hyperion Analyzer Web clients, you will need to get a valid user ID, password, and the URL of the Web client launch page from your administrator. You will also need one of the supported Web browsers. (See the *Before Installation* section for more information)

To start a Hyperion Analyzer Web client, start your Web browser and select File | Open from the menu bar. Enter the URL of the Web client launch page. Click the link launching the Hyperion Analyzer Web client. The Hyperion Analyzer application window displays inside the Web browser, followed by a Login window. Enter a valid user ID and password, and click OK. The default view displays the Hyperion Analyzer Web client Desktop.

Glossary

administrator. An individual who installs and maintains the Hyperion Analyzer system, including establishing user IDs, passwords, database connections and security. See also System Manager.

Analysis Server. Hyperion Analyzer Analysis Server. An application server that distributes view information, and enables Web clients to communicate with the OLAP server.

asymmetric analysis. A view characterized by groups of members that differ by at least one member across groups. There can be a difference in the number of members or the names of the members.

attribute. A dimension member classification. You can specify an attribute to select and group members who have the specified attribute associated with them, and to perform calculations and application-specific functions.

attribute dimension. A type of dimension that enables analysis based on the attributes or qualities of the members of its base dimension.

calculation. The process of aggregating data, or of running a calc script on a database.

calculation script. A set of instructions telling Hyperion Essbase how to calculate a database's values.

cell. A unit of data representing the intersection of dimensions in a multidimensional database. Also, the intersection of a row and column in a spreadsheet.

chart. One of the five view display types. Chart views also have a chart type property set for them. Charts are created using Hyperion Analyzer.

child. A member that has a parent above it in the database hierarchy. A child may have peers (siblings) that exist at the same level of the database hierarchy.

client. A client interface, such as Hyperion Analyzer, or a workstation on a local area network.

column. A vertical display of information in a grid or table. A column can contain data from a single field, derived data from a calculation, or textual information. Contrast with row.

database. A repository of data within Hyperion Essbase that contains a multidimensional data storage array. Each database consists of a storage structure definition (outline), data, security definitions, and optional scripts.

descendant. Any member below a parent in the database outline.

Desktop. An automatically generated view that dynamically presents buttons that enable groups of views to be accessed with a single click.

dimension. A data category that is used to organize business data for retrieval and consolidation of values. Each dimension contains a hierarchy of related members grouped within it.

display type. One of five Hyperion Analyzer formats saved to the repository: spreadsheet, chart, Pinboard, Form, and External View. See also view display type.

External View. One of five view display types. External Views are created when data from third-party application such as Microsoft Excel are saved to the Hyperion Analyzer repository.

Form. One of five view display types. Forms are composite views, composed of other views, text, graphics, and control components. Forms are created using Hyperion Analyzer Design Tools.

hierarchy. A set of multidimensional relationships in an outline, often created in a tree formation.

intersection. A unit of data representing the intersection of dimension in a multidimensional database. Also, a worksheet cell.

linked reporting object. (LRO) An external file that is linked to a data cell in a Hyperion Analyzer view.

member. A discrete item that forms part of a dimension.

missing data. A marker indicating that data in the labeled location does not exist, contains no meaningful value, or was never entered.

multidimensional database. (MDDDB) A method for referencing data through three or more dimensions. An individual record is the intersection of a point for a set of dimensions.

multithreading. A client-server process that enables multiple users to work on the same applications without interfering with each other.

online analytical processing. (OLAP) A multidimensional, multi-user, client-server computing environment for users who need to analyze consolidated enterprise data in real time. OLAP systems feature drill-down, data pivoting, complex calculations, trend analysis, and modeling.

parent. A member that has subordinate members below it in the hierarchy.

Pinboard. One of the five view display types. Pinboards are graphic views, composed of backgrounds and interactive icons called Pins. Pinboards are created using Hyperion Analyzer Design Tools.

Pins. Pins are interactive icons placed on graphic views called Pinboards. Pins are dynamic and can change image, and traffic lighting color based on the underlying data values, and analysis tools criteria.

repository. A set of relational database tables for storing view definitions and Hyperion Analyzer system information.

row. A horizontal display of information in a grid or table. A row can contain data from a single field, derived data from a calculation, or textual information. Contrast with column.

server. A multi-user database server that accesses data values based on the intersection of dimension members.

spreadsheet. One of the five view display types. Spreadsheets are tabular views of rows, columns and pages, created using Hyperion Analyzer.

subset. A group of members selected by specific criteria.

substitution variable. A variable that acts as a global placeholder for information that changes regularly. You set the variable and a corresponding string value; the value can be changed at any time.

System Manager. An individual who installs and maintains the Hyperion Analyzer system including establishing user IDs, passwords, database connections and security. See also administrator.

toolbar. A series of shortcut buttons providing quick access to the most frequently used commands.

Traffic Lighting. Color-coding of view cells, or Pins based on a comparison of two dimension members, or on fixed limits. Traffic Lighting definitions are created using the Hyperion Analyzer Traffic Light Analysis Tool.

URL. Uniform resource locator. An address for a resource in the World Wide Web, such as a document, an image, downloadable files, a service, or an electronic mailbox. URLs use a variety of naming conventions and access methods, such as HTTP, FTP and Internet mail. URLs can point to files on a local network drive, or to views in the Hyperion Analyzer repository.

view. A Hyperion Analyzer display, or report. A display of selected multidimensional cube dimensions and members. A view is both the content and the format of the display. Once saved to the repository a view becomes a multi-purpose file that users can display in numerous formats.

view display type. One of five Hyperion Analyzer formats saved to the repository: spreadsheet, chart, Pinboard, Form, and External View.

view group. A group of Hyperion Analyzer views.

Index

- Additional requirements, 6
- Administration Tools, 12
- Analysis Server, 12
- API Toolkit, 13
- Axis labels, changing, 26
- Best States View, 28
- Calculations, 55
- Closing the browser, 46
- Conventions, vi
- Creating your first view, 43
- Crosshairs and pop-up values, 26
- Cube Navigator window, 43
- Cube Navigator, Filter box, 47
- Cube Navigator, Page box, 47
- Design Tools, 12
- Desktop, 15
- Dimension Browser right-click menu, 46
- Dimension Browser window, 44
- Display the Information panel, 20, 21
- Documentation, vii
- Double-click axis labels, 26
- Drilling down, 21
- Edit Calculation window, 55
- Enhanced chart legends, 38
- Evaluation installation, 8
- Excel Add-in, 12
- Expand the dimension browser hierarchy, 45
- Filter box, 47
- Filter view by traffic light color, 32
- Formatting a view, 51
- Hide Only Members Analysis Tool, 40
- High/Low Products view, 30
- HTML Web client, 12, 58
- Hyperion Analyzer Administration Tools, 12
- Hyperion Analyzer Analysis Server, 12
- Hyperion Analyzer API Toolkit, 13
- Hyperion Analyzer Design Tools, 12
- Hyperion Analyzer Excel Add-in, 12
- Hyperion Analyzer HTML Web client, 12
- Hyperion Analyzer Java Web client, 12
- Hyperion Analyzer Web clients, 58
- Hyperion Analyzer Windows client, 12
- Hyperion Enterprise® Reporting, 2
- Hyperion® Analysis Portal, 3
- Hyperion® Analysis Tools, 1
- Hyperion® Analyzer API Toolkit, 1
- Hyperion® Analyzer, Description, 1
- Hyperion® Application Builder, 3
- Hyperion® Reports, 2
- Information panel, 20
- Installation, 8
- Installation options, 8
- Installing Hyperion Analyzer, 5
- Interface, 15
- Java Web client, 12, 58
- KPI Scorecard, 24
- Main Menu view, 16
- Margin Chart, 38
- Memory requirements, 5
- Moving, 20
- Moving between views, 16
- Multiple chart types, 38
- Navigate button, 44
- New button, 43
- Open a view group via the Desktop, 15
- Page box, 47
- Page Control panel, 18
- Product Budget, 40
- Product Shares, 36
- Profit Analysis View, 20
- Quadrant Charts, 26
- Regional Analysis View, 22
- Repository, 12
- Sales Chart, 18
- Sales Forecast, 34
- Saving Your View, 49
- Secondary y-axis, 38
- Show/Hide Information panel, 20, 21
- Show/Hide Toolbar, 43
- Slicing and dicing, 20
- Starting Hyperion Analyzer, 12
- Starting Hyperion Analyzer Web clients, 58

- Starting the Hyperion Analyzer Windows client, 13
- State rank, 32
- Supported OLAP servers, 5
- Supported operating systems, 5
- Supported Web browsers, 6
- Swapping, 21
- Technical Support, viii
- Touring the Sample view group, 15
- Traffic lighting, 53
- User interface, 15
- Variance limit, 53
- View description, 50
- View Owner drop down list box, 50
- View Properties window, 49
- Warehouse dimensions, 44
- Web clients, 58
- What If analysis, 30
- Worldwide Web Page, viii
- www.hyperion.com, viii