



What's In It for Me?

Hyperion Planning

11.1.2.4



Shannon Burket
Lead Consultant

Agenda

- Introduction
- Audience Poll
- What's In It for Me?
 - Hyperion Planning
 - Smart View
- EPM Product Development Focus
- Questions

About MindStream Analytics

- Headquartered in Boston, Massachusetts
- Specialize in the implementation, optimization and support of best in breed Performance Management, BI and Data Analytic solutions
- Oracle Platinum Partner with focused practices in Planning, Consolidations, Analytics / BI, Infrastructure , EPM Strategy and Training and Hyperion Managed Services
- Our people average over 9 years of BI or EPM experience
- Visit us at www.mindstreamanalytics.com

Shannon Burket

- 17+ years of EPM experience
- Extensive experience in all phases of system development
- Lead Consultant – MindStream Analytics

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Audience Poll

- How many of you are evaluating an upgrade to 11.1.2.4?
- What version of Planning are you currently using?
 - 11.1.2.x
 - 11.1.1.4.x
 - 11.1.1.0 to 11.1.1.3.x
 - An earlier release



What's In It for Me?

Continued Focus on Enhancing the Simplified User Interface

Hyperion Planning

- Classic UI No Longer Supported
- Simplified Interface Enhancements
 - Extended to some admin activities
 - Create dashboards and robust ad-hoc grids
 - “Real” form formatting
 - New form design options
 - New shortcut keys
- Dynamic Dimension Members
- Improved Form Performance
- Support for Essbase Hybrid BSO
- Other Enhancements
 - EPM mobile
 - Project Financial Planning
 - Predictive Planning

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Simplified Interface Enhancements

Some Admin Activities Now Available in the Simplified UI

- Visual Overview of the Application
- Application Actions
- Manage Dimensions
 - Does not include adding members
- Schedule Jobs



Simplified Interface Enhancements

Some Admin Activities Now Available in the Simplified UI

Visual Overview of the Application

- # Dimensions per Plan Type
- Total # of Tasks, Plans, Rules and Approval Hierarchies

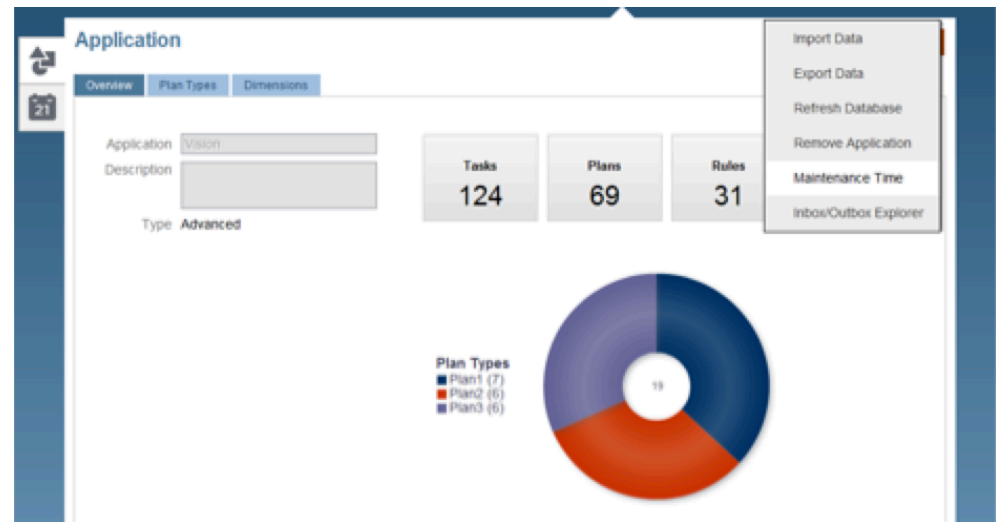


Simplified Interface Enhancements

Some Admin Activities Now Available in the Simplified UI

Application Actions

- Import Data
- Export Data
- Refresh Database
- Remove Application
- Maintenance Time
- Inbox/Outbox Explorer



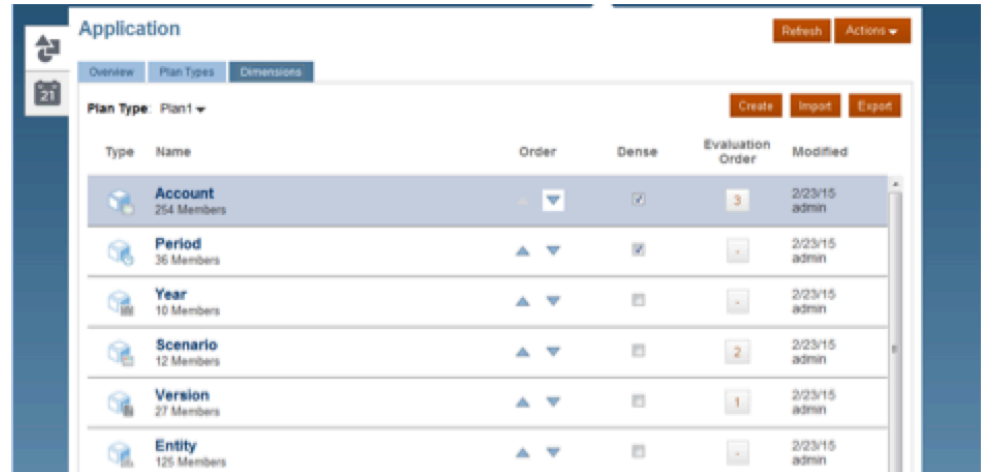
Simplified Interface Enhancements

Some Admin Activities Now Available in the Simplified UI

Manage Dimensions

- Create or Rename Dimensions
- View Dimension Details
- Modify Storage Settings / Dimension Order
- Change Evaluation Order

Note: Does Not Include Adding Members



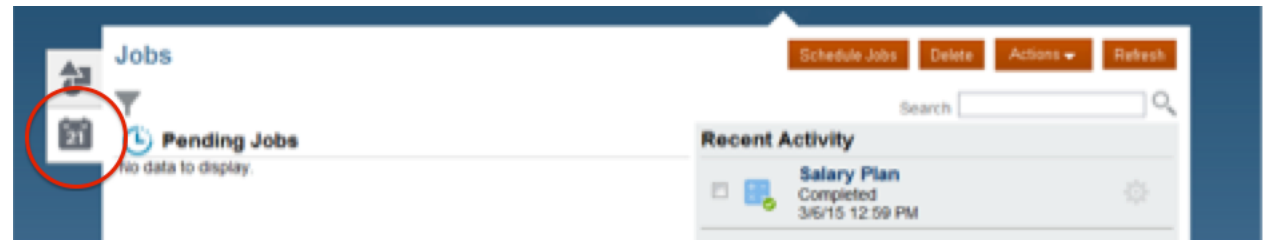
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Account	254 Members		<input checked="" type="checkbox"/>	3	2/23/15 admin
Period	36 Members		<input checked="" type="checkbox"/>		2/23/15 admin
Year	10 Members		<input type="checkbox"/>		2/23/15 admin
Scenario	12 Members		<input type="checkbox"/>	2	2/23/15 admin
Version	27 Members		<input type="checkbox"/>	1	2/23/15 admin
Entity	125 Members		<input type="checkbox"/>		2/23/15 admin

Simplified Interface Enhancements

Some Admin Activities Now Available in the Simplified UI

Schedule Jobs

- Type, Timing and Frequency
- Job Details
- Review



Schedule Job Cancel Previous Next Finish

Jobs are actions that you can start now or schedule to run at intervals. Follow the steps below to set up this new job.

General Job Details Review

What type of job is this?

- ☒ Rules
- ☐ Import Data
- ☐ Import Metadata
- ☐ Export Data
- ☐ Export Metadata
- ☐ Refresh Database
- ☐ Plan Type Map

When do you want to run this job?

☐ Run Now

☒ Schedule starting from

3/5/15 11:02 AM

(UTC-05:00) Chicago - Central Time (CT)

How often do you want to run this job?

Name *

Recurrence pattern Daily

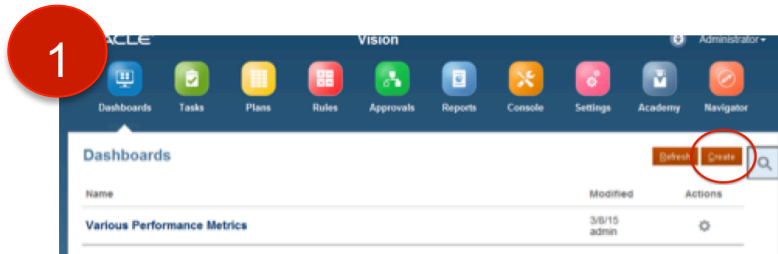
End Date ☐

A Wizard Guides You
Through the Process

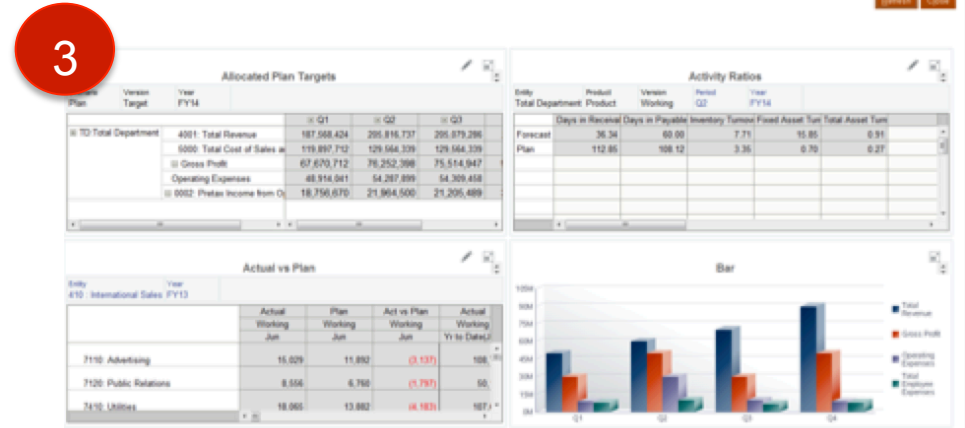
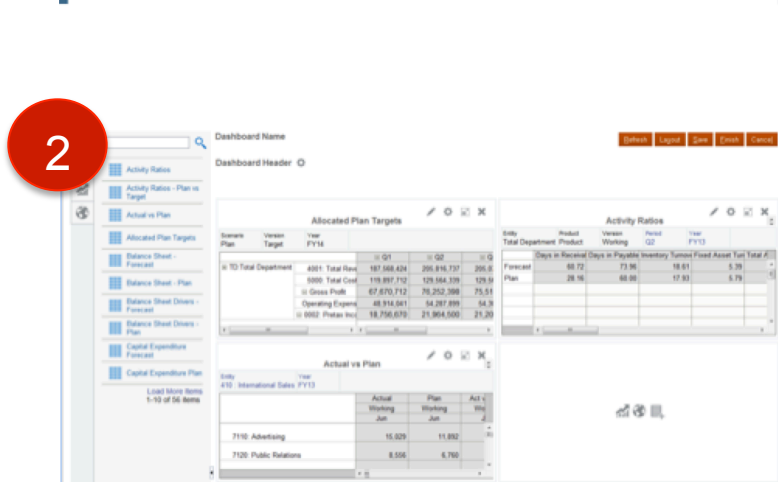
Simplified Interface Enhancements

It Took Less Than 2 Minutes to Create a Dashboard

1



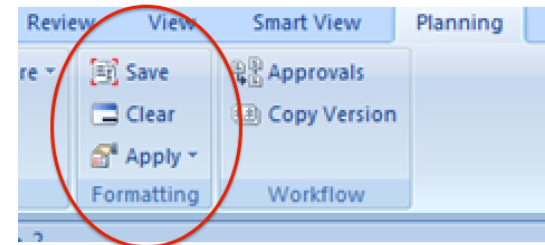
2



Simplified Interface Enhancements

It's About Time... "Real" Form Formatting

1. Open Simple Form in Smart View
2. Apply Excel Formatting to Form
3. From Planning Ribbon
 - a. Save Formatting
 - b. Apply 'Custom Styles' or 'Custom and Cell Styles'



POV Headcount and Salary Plan - 192.155.245.198_Vision_1

410:International Sales Working FY14 Plan Refresh

A20

	A	B	C	D	E
		Jan	Feb	Mar	-Q1
1					
2	9000: Headcount	5	4	4	
3	Average Salaries	27,289	26,907	23,273	25,156
4	Employee Benefits %	33%	33%	33%	33%
5	5800: Salaries	136,447	107,626	93,091	337,164
6	6100: Miscellaneous Employee Expenses	45,027	35,517	30,720	111,264
7	-6000: Total Employee Expenses	181,474	143,143	123,811	448,428
8					
9					

POV Headcount and Salary Plan (Format Change) - 192.155.245.198_Vision_2

410:International Sales Working FY14 Plan Refresh

A1

	A	B	C	D	E	F
		Jan	Feb	Mar	-Q1	Apr
1						
2	9000: Headcount	5	4	4	4	4
3	Average Salaries	27,289	26,907	23,273	25,823	25,871
4	Employee Benefits %	33%	33%	33%	33%	33%
5	5800: Salaries	136,447	107,626	93,091	337,164	103,483
6	6100: Miscellaneous Employee Expenses	45,027	35,517	30,720	111,264	34,149
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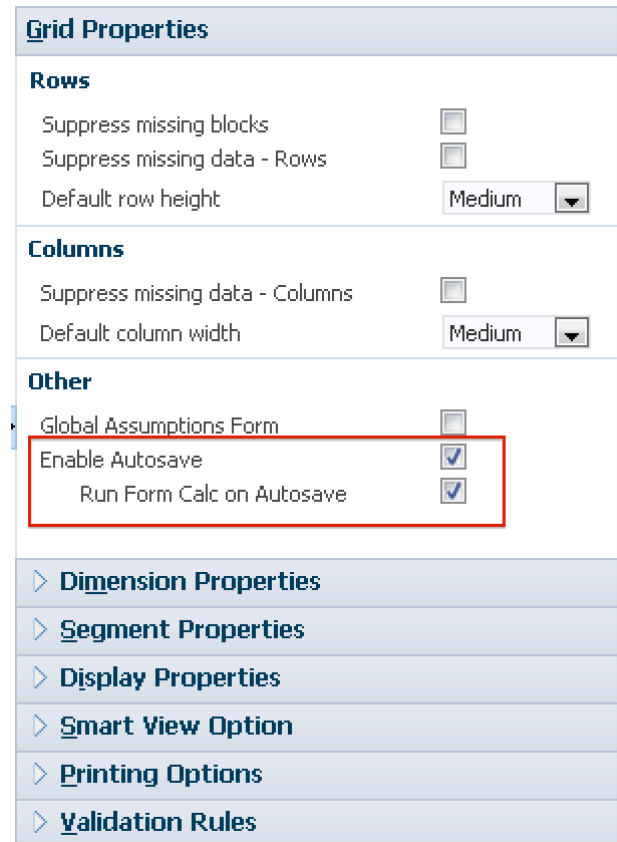
Simplified Interface Enhancements

Enable New Form Features with Grid Options

- Undo Feature – Undo actions by pressing Ctrl + Z or clicking 'Undo' on the Data tab. Press Ctrl + Z repeatedly to undo actions taken since the form was last opened or refreshed
- Instant Save – Built-in intelligence quickly saves new or modified data when 'Save' is clicked
- Automatic Save – Data is automatically saved and aggregated when a new cell is selected

Notes:

- A) 'Run Form Calc on Autosave' must be enabled for automatic agg
- B) Automatic Save only worked in the simplified UI



Grid Properties	
Rows	
Suppress missing blocks	<input type="checkbox"/>
Suppress missing data - Rows	<input type="checkbox"/>
Default row height	Medium ▼
Columns	
Suppress missing data - Columns	<input type="checkbox"/>
Default column width	Medium ▼
Other	
Global Assumptions Form	<input type="checkbox"/>
Enable Autosave	<input checked="" type="checkbox"/>
Run Form Calc on Autosave	<input checked="" type="checkbox"/>
▶ Dimension Properties	
▶ Segment Properties	
▶ Display Properties	
▶ Smart View Option	
▶ Printing Options	
▶ Validation Rules	

Simplified Interface Enhancements

New Shortcut Keys Available in Simple Forms

- The New Shortcuts are Divided into 3 Groups
 - Navigation
 - Data Entry
 - Formatting
- Examples Include
 - Ctrl + Home –navigate to the first cell in the form
 - # + K – use to enter the value in thousands
 - Ctrl + Alt + B – bold a value
- See Appendices A-C for a full list of shortcuts

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Dynamic Dimension Members

Create “On the Fly Members”

- Administrators Enable Members for Dynamic Children
 - A database refresh is required to create the placeholder members in Essbase
- Users Create “On the Fly Members” Through Run-Time Prompts
- Subsequent Database Refreshes Rename Used Dynamic Children and Re-Creates Placeholders

Dimensions

Edit Member : P_TP1

Member Properties LUDA Member Formula

Name	P_TP1
Description	
Alias Table	Default
Alias	Computer Equipment
Data Storage	Never Share
Two Pass Calculation	<input type="checkbox"/>
Plan Type	Plan1 <input checked="" type="checkbox"/> Addition Plan2 <input type="checkbox"/> Addition Plan3 <input type="checkbox"/> Addition
Data Type	Unspecified
Smart Lists	<None>
Enable for Dynamic Children	<input checked="" type="checkbox"/>
Number of Possible Dynamic Children	10
Access Granted to Member Creator	Inherit

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Other Planning Enhancements

- Improved Form Performance
 - New client-scripting technologies
 - Faster scrolling, data entry and tabbing
 - 33% more load with the same response times
 - Enable compression in the web server or load balancer configuration
- EPM Mobile
 - Supports *critical* Close Manager and Oracle Data Relationship Governance functionality
- Project Financial Planning
 - Integration with Oracle Primavera P6
 - Incremental deployment of features
 - Support for vendor dimension

What's In It for Me?

Continued Focus on Enhancing the Simplified User Interface

Hyperion Planning

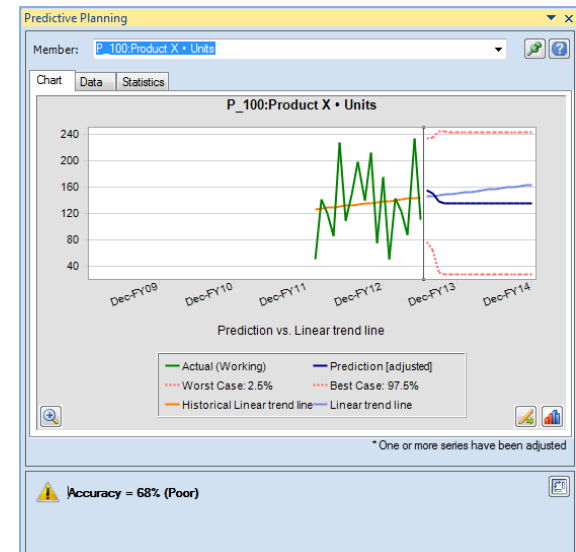
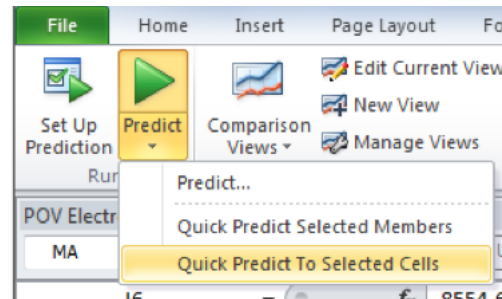
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Other Planning Enhancements, Cont.

Advanced Scenario Modeling and Increased Accuracy

Predictive Planning

- Quick Predict
- Chart Series Manipulation
- Supports Ad-hoc Grids
- Planning ASO as a Source
- New Time-Series Methods
 - Damped Trend Smoothing Non-Seasonal
 - Damped Trend Additive Seasonal
 - Damped Trend Multiplicative Season



What's In It for Me?

Smart View

- Enhanced Submit Data Options
 - Submit without refresh
 - Submit data range
- POV and Pivot Enhancements
 - Pivot multiple members
 - Single dimension on POV toolbar
- New Diagnostic Tools
- Improved Extension Updates
- New Member Selection Dialog Box for Business Rules
- User Name and Password Support for Drill-Through Reports
- OBIEE Enhancements
 - Filters, prompts and measure label flexibility
- Sheet Information Improvements



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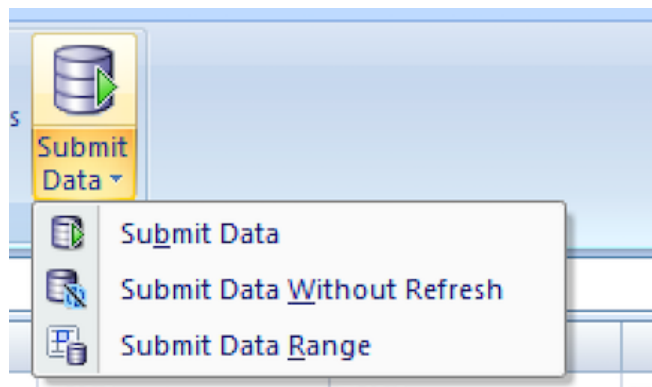
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Smart View: Enhanced Submit Options

Finally....Submit WITHOUT Refresh

- New Submit Options Available with Essbase and Planning / HFM Ad-Hoc
- Submit Data Without Refresh
 - Submit modified cells without first refreshing
 - Previously only available for Essbase
- Submit Data Range
 - Submit selected single cells and/or data ranges
 - Non-selected cells are not submitted



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POV and Pivot Enhancements

- POV and Pivot Enhancements Available with 11.1.2.4 or Later
 - Pivot Multiple Members from Grid to POV
 - Pivot Multiple Members from POV to Grid
 - Supports A Single Dimension on the POV

What's In It for Me?

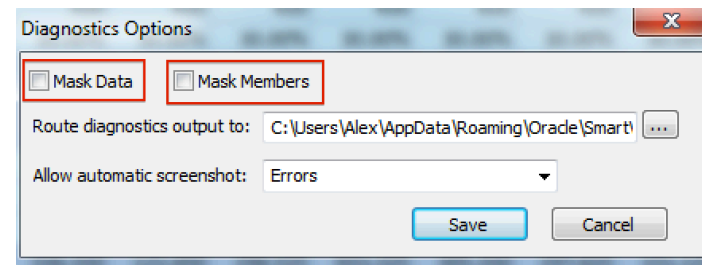
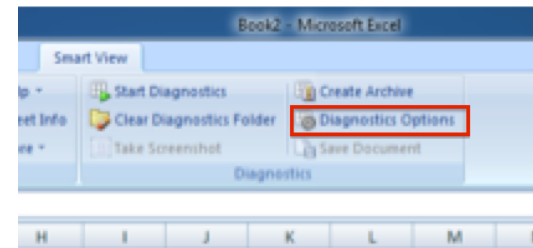
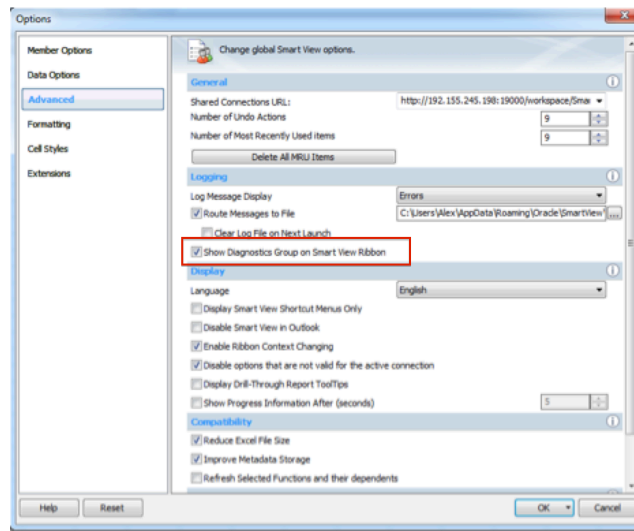
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New Diagnostic Tools

- Diagnostic Tools Available For Smart View Issues
 - Create and collect log files and screenshots
 - Zip evidence and submit file to Oracle Support for analysis
- Customize Diagnostic Tools
 - Hide data values and member names
 - Select the diagnostic output folder location
 - Allow for automatic screenshots for warnings and error messages



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Improved Extension Updates

- Administrators Can Customize the Extension Update Process
 - Users control when they install, update and remove extensions
 - Administrators update attributes in the UpdateList.xml manifest file
 - Attribute settings include the provider and per-user extensions available and the options for installing, updating and removing extensions
 - Without updates existing auto-update process will remain

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Other Smart View Enhancements

- New Member Selection Dialog Box for Business Rules
 - The member selection dialog box for business rules and user variables are the same as the standard member selection dialog box in Smart View
 - Requires Planning 11.1.2.4 or later
- User Name and Password Support for Drill-Through Reports
 - User name and password prompts are now displayed if required to access the data source
- OBIEE Enhancements
 - Value selector presented in groups
 - Measure label elements can be re-ordered for pivot data display style
- Sheet Information Improvements
 - The sheet information dialog box in Excel now contains consistent information for Essbase, Planning and HFM

EPM Product Development Focus



- Deliver the Full Range of EPM Applications in the Cloud
- Innovate with New EPM Applications
- Continue to Extend the Lead in Existing Applications
- Exploit Mobile and Social Capabilities to Attract New EPM Users

Questions

For More Information Contact:

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VP of Sales

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Appendix A: Navigation Shortcuts

Key or Key Combination	Result
Tab	Moves to the next cell. When focus is on the last cell of a row, Tab moves to the next row.
Shift+Tab	Moves to the previous cell.
Up Arrow, Down Arrow	Moves up or down to the previous or next row.
Ctrl+Home	Moves to the first cell in the form.
Ctrl+End	Moves to the last cell in the form.
Ctrl+Left Arrow	Moves to the first cell in the current row.
Ctrl+Right Arrow	Moves to the last cell in the current row.
Shift+End	Moves to the last cell of the first row.
Ctrl+A	Selects all cells.
Shift+Space	Selects the row.
Ctrl+Space	Selects the column.
Ctrl+Alt+E	Moves out of the form to the previously selected item. Use Tab to return to the form.
Esc	Discards the current changes in the cell, restoring the previous state.

Appendix B: Data Shortcuts

Keys or Symbol	Result	Example
K	Enters the value in thousands.	Enter 5K for 5,000.
M	Enters the value in millions.	Enter 5M for 5,000,000.
Add or +	Adds a number to the cell value.	If the cell value is 100, entering Add10 after 100 results in results in 110.
Sub or ~	Subtracts a number from the cell value.	If the cell value is 100, entering Sub10 after 100 results in 90.
Percent or per	Multiplies the cell value by a number added as a percentage.	If the cell value is 100, entering per10 after 100 results in 10% of the current cell value, or 10.
Increase or inc	Increases the cell value by a number added as a percentage.	In a cell whose value is 200, entering inc10 after 200 increases the cell value by 10%, to 220.
Decrease or dec	Decreases the cell value by a number added as a percentage.	In a cell whose value is 200, entering dec10 after 200, decreases the cell value by 10%, to 180.
Power or pow	Changes the cell value to the number, added as an exponent.	In a cell whose value is 100, entering pow2 after 100 results in 10,000.
gr	Grows a cell by a percentage.	In a cell whose value is 200, entering gr50 after 200 results in 300.

Appendix C: Formatting Shortcuts

Key Combination	Result
Ctrl+Alt+B	Bolds the value.
Ctrl+Alt+I	Italicizes the value.
Ctrl+Alt+U	Underlines the value.