

Hyperion® Analyzer

Release 6.5



Getting Started



Hyperion®

Hyperion Solutions Corporation

P/N: D750065000

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Hyperion Solutions Corporation
1344 Crossman Avenue
Sunnyvale, CA 94089

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Contents

Chapter 1: About Hyperion Analyzer	19
Hyperion Analyzer Components.....	19
User Types	22
Evaluators	22
System Administrators	23
Power Users.....	24
Information Consumers	25
Developers.....	25
Chapter 2: Overview of Multidimensional Analysis	27
Online Analytical Processing.....	27
Dimensions and Members	27
Multidimensional Cubes.....	27
Dimensional Hierarchies	27
Familial Relationships	28
Generations and Levels	29
Nonaggregate Dimensions.....	30
Attributes	31
Sparse and Dense Dimensions.....	31
Organizing Reports	31
Reports.....	31
Report Groups	32
Properties	32
Chapter 3: Hyperion Analyzer Java Web Client Interface	33
Starting the Hyperion Analyzer Java Web Client	33
User Interface Modes	34

Hyperion Analyzer Desktop.....	35
Normal Mode	36
Application Window Title Bar	36
Menu Bar	37
Toolbar.....	37
Details Bar	38
Report Tabs Bar	38
Status Bar.....	38
Edit Data Mode	39
Design Report Mode	40
Main Display Panel Components	41
Information Panel.....	41
Page Control Panel.....	43
Filter Panel	43
Main Display Panel Right-click Menu.....	44
Displaying and Hiding User Interface Components	44
Hiding Interface Components	45
Chapter 4: Using the Java Web Client	47
Opening Reports	47
Navigating Between Reports	48
Display Types	48
Spreadsheets.....	49
Charts	50
Pinboards.....	51
Changing Display Types.....	51
Custom Reports.....	52
Navigating Reports	52
Paging.....	53
Swapping and Moving	53
Drilling.....	54
Drill Linking	55
Formatting Reports	55
Scope of Formatting Options	56
Saving Reports.....	57

Distributing Reports	58
Shared to User Group Report Group Property.....	58
Locking Reports.....	58
External Distribution of Reports and Report Groups	58
Chapter 5: Hyperion Analyzer HTML Web Client Interface	61
Starting the Hyperion Analyzer HTML Web Client	61
HTML Web Client User Interface.....	62
User Interface Modes	62
Hyperion Analyzer Desktop	63
Normal Mode.....	64
Toolbar.....	64
Edit Data Mode.....	66
Main Display Panel Components	68
Information Panel	68
Page Control Panel	69
Filter Panel.....	70
Report Manager Panel	71
Controlling User Interface Components.....	71
Hiding Interface Components.....	72
Resizing the Main Display Panel.....	72
Setting the Interface Style.....	73
Chapter 6: Using the HTML Web Client.....	75
Opening Reports.....	75
Navigating Between Reports	76
Display Types.....	76
Spreadsheets.....	77
Charts.....	77
Pinboards	78
Changing Display Types.....	79
Navigating Reports.....	79
Paging	80
Moving.....	80
Drilling.....	81
Drill Linking	82

Saving Reports.....	82
Distributing Reports.....	83
Shared to User Group Report Group Property.....	83
Creating a Report in the HTML Web Client	84
Editing Report Data	85
Printing Reports	86
Passing the Current Report to the Java Web Client.....	86
Logging Off	86
Chapter 7: Touring the Sample Report Group.....	87
Starting the Hyperion Analyzer Java Web Client.....	87
Opening the Sample Report Group.....	87
.....	88
Product Sales	88
Key Features	89
Product Profitability.....	90
Key Features	91
Regional Analysis.....	92
Key Features	93
KPI Scorecard.....	94
Key Features	95
Expense Analysis.....	97
Key Features	97
State Rankings	98
Key Features	99
High/Low States	100
Key Features	101
Margin Chart.....	102
Key Features	102
Product Share.....	103
Key Features	104
Product Budget	104
Key Features	105
Sales Forecast	106
Key Features	106

Chapter 8: Creating Your First Report	109
Overview of New Report Creation.....	109
Starting the Hyperion Analyzer Java Web Client	110
Starting the New Report Creation Wizard.....	110
Selecting a Display Type	110
Selecting a Database Connection.....	111
Cube Navigator.....	112
Defining Dimension Member Selections with the Dimension Browser.....	113
Dynamic Member Selection	115
Defining the Query	115
Defining the Year Dimension.....	116
Defining the Scenario Dimension	116
Defining the Product Dimension.....	116
Defining the Market Dimension.....	117
Defining the Measures Dimension	117
Defining the Package Type Dimension.....	118
Cube Navigator Options	119
Submitting the Query.....	119
Saving a Report	120
Formatting a Spreadsheet	121
Setting the Background Color	121
Setting the Row Banding Color.....	122
Setting the Header Font	122
Creating a Traffic Lighting Definition	122
Defining a Traffic Lighting Definition	123
Setting Traffic Lighting Range Colors	124
Setting Transparency for Traffic Lighting Ranges.....	124
Creating a Calculated Member.....	125
Defining a Variance Calculation Definition.....	126
Defining a Percent Variance Calculation Definition	126
Saving the Report as a Web Page.....	128
Setting Save As Web Page Parameters.....	129
Publishing the Report to the Web.....	129

Chapter 9: Creating a Dynamic Custom Report	131
Overview of Creating a Custom Report	131
Starting the Hyperion Analyzer Java Web Client.....	132
Starting Design Report Mode	132
Design Report Interface	134
Component Toolbar	135
Creating a Main Report Panel.....	137
Setting the Panel to Fill Slack Space	137
Selected Components	137
Adding a Spreadsheet Data Object	138
Moving a Component	138
Adding a Dynamic Text Label	139
Resizing Components	140
Adding a Chart Data Object	140
Aligning Components	140
Aligning Your Components	141
Creating a Selection Control.....	142
Formatting a Component Border	143
Creating a Hotspot	144
Creating an Image Panel	144
Creating a Services Button.....	145
Making the Services Button Transparent.....	145
Moving the Transparent Services Button Over the Image Panel.....	145
Returning to Normal Mode.....	146
Chapter 10: Overview of Advanced Features	147
Analyzing Anywhere	147
Highest Scalability and Performance	147
Open- and Cross-Platform	147
Completely Web-based	147
Java Application for Microsoft Windows	148
Sophisticated Graphical User Interfaces.....	148
Quick Report Creation	148
Report Creation Wizard	148
Cube Navigator	148

Dimension Browser	149
Custom Reports	149
Transparent Spreadsheets	150
Flexible Formatting	150
Spreadsheet Options	150
Pinboard Designer	150
Chart Properties	151
Asymmetrical Analysis	151
Multiple Charts	151
Secondary Y-axis.....	151
Personalizing Information	151
Personalized Look and Feel.....	151
Personalized Database Connections	151
Personal Variables	152
Point of View	152
Analysis Tools Manager.....	152
Enhanced Traffic Lighting.....	152
Calculations	153
Show/Hide Only	154
Hide Only Values	154
Hide Only Colors.....	154
Hide Only Members	154
Client-side Sorting	154
Retrieve Only Top/Bottom	155
Restrict Data	155
Using Hyperion Essbase Features	155
Edit Data	155
Suppress Missing Rows, Zeros and Shared Members.....	156
Label Mode.....	156
Show Selected Member	156
Drill Settings.....	156
Replace Members with Selections.....	156
Append Members with Selections.....	157
Accessing External Information	157
Analyzing Relational Data.....	157

Contents

Relational Drill-through.....	157
Essbase Integration Services Drill-through.....	157
Linking Reports.....	158
Linking to External Media	158
Distributing Analysis	158
Report Group Properties	158
Sharing, and Distributing Report Groups	158
Report Properties.....	159
Export to Microsoft Excel.....	159
Export to Clipboard.....	159
Enhanced Printing	159
Customizing and Extending Hyperion Analyzer.....	160
Glossary	161
Index	165

Preface

Welcome to Hyperion Analyzer Getting Started. This preface discusses the following topics:

- “Purpose” on page xi
- “Audience” on page xi
- “Document Structure” on page xi
- “Where to Find Documentation” on page xii
- “Conventions” on page xiv
- “Additional Support” on page xvi

Purpose

This guide assists new users in understanding and using the Hyperion Analyzer Java Web Client and Hyperion Analyzer HTML Web Client.

Audience

Although this guide is intended to help new users learn about Hyperion Analyzer quickly, every user can benefit from the feature descriptions and conceptual information.

Document Structure

This document contains the following information:

[Chapter 1, “About Hyperion Analyzer,”](#) introduces Hyperion Analyzer and the main user types.

Chapter 2, “Overview of Multidimensional Analysis,” gives a brief overview of multidimensional analysis.

Chapter 3, “Hyperion Analyzer Java Web Client Interface,” describes the Hyperion Analyzer Java Web Client user interface.

Chapter 4, “Using the Java Web Client,” describes how to open, format, save, and distribute Hyperion Analyzer Reports

Chapter 5, “Hyperion Analyzer HTML Web Client Interface,” describes the Hyperion Analyzer HTML Web Client user interface.

Chapter 6, “Using the HTML Web Client,” describes how to open, format, save, and distribute using the robust thin client.

Chapter 7, “Touring the Sample Report Group,” guides you through a set of fully functional reports and identifies product features you may want to leverage in your own reports.

Chapter 8, “Creating Your First Report,” guides you through the process of creating a simple Hyperion Analyzer report.

Chapter 9, “Creating a Dynamic Custom Report,” guides you through the process of creating an advanced custom report in Design Report mode.

Chapter 10, “Overview of Advanced Features,” describes many more advanced product features available in Hyperion Analyzer.

Glossary, contains a list of key terms and their definitions.

Index, contains a list of Hyperion Analyzer terms and their page references.

Where to Find Documentation

All Hyperion Analyzer documentation is accessible from the following locations:

- The HTML Information Map can be accessed by starting any Hyperion Analyzer client and selecting Information Map from the Help button or from the Help menu command.
- Online help is accessible from the component that it documents. Start the product and click the Help button or menu command.
- The Hyperion Solutions Web site is located at <http://www.hyperion.com>.

- Access to the Hyperion Download Center is through <http://hyperion.subscribenet.com>.

Available Documentation

The following documentation is included with Hyperion Analyzer.

- **Information Map** - lists and describes all Hyperion Analyzer documentation and its location.
 - **New Features** - describes all new features specific to this release of Hyperion Analyzer.
 - **Java Web Client Online Help** - provides detailed information about navigation, report creation and advanced Java Web Client topics.
 - **HTML Web Client Online Help** - provides detailed information about navigation, report creation and the features specific to the HTML Web Client.
 - **Installation Guide** - describes installation, migration, and installation options essential to installing and configuring Hyperion Analyzer. This guide includes procedures for establishing a Hyperion Analyzer repository, executing silent installations, and installing Hyperion Analyzer samples.
 - **Administrator's Guide** - describes installation, migration and product features essential to administrators. A profile of Hyperion Analyzer Administration Tools and the Hyperion Analyzer Analysis Server are included, as well as tips for configuring Hyperion Analyzer.
 - **Administration Tools Online Help** - explains the management of users, user groups, and database connections, as well as providing online help for Hyperion Analyzer Analysis Server administration. To access Administration Tools Online Help, start Hyperion Analyzer Administration Tools, and select Contents and Index from the Help button or Help menu command.
 - **Readme** - contains a comprehensive list of known issues, fixes and late-breaking product developments.
- ▶ To access the documentation from the Hyperion Solutions Web site:
1. Log on to <http://www.hyperion.com>.
 2. Select **Support** from the menu bar.

3. Enter your username and password, and click **Login**.

Tip: If you do not have a username and password, click **Register** on the login page to request them.

4. Select **Software/Documentation**.
5. From the **Product** list box, select **Hyperion Analyzer**.
6. From the **Display** list box, select **Documentation**, then click **Submit**.

► To access documentation from the Hyperion Download Center:

1. Log on to <http://hyperion.subscribenet.com>.
2. In the **Login ID** and **Password** text boxes, type your assigned login ID name and password. Then click **Login**.
3. If you are a member on multiple Download Center accounts, select the account that you want to use for the current session.
4. In the **Product List**, select **Hyperion Analyzer**.
5. In the **New Releases** tab, select **6.5**.

Additional Documentation

In addition to the documentation for Hyperion Analyzer, you may want to reference the following documentation:

- *Hyperion Essbase Database Administrator's Guide*
- Operating system documentation set
- Relational database documentation set

Conventions

The following table shows the conventions used in this document:

Table i: Conventions Used in This Document

Item	Meaning
►	Arrows indicate the beginning of a procedure consisting of sequential steps or one-step procedures.

Table i: Conventions Used in This Document (Continued)

Item	Meaning
Brackets []	In examples, brackets indicate that the enclosed elements are optional.
Bold	Bold in procedural steps highlights major interface elements.
CAPITAL LETTERS	Capital letters denote commands and various IDs. (Example: CLEARBLOCK command)
Ctrl + 0	Keystroke combinations shown with the plus sign (+) indicate that you should press the first key and hold it while you press the next key. Do not type the + sign.
Example text	Courier font indicates that the material shown is a code or syntax example.
<i>Courier italics</i>	Courier italic text indicates a variable field in command syntax. Substitute a value in place of the variable shown in Courier italics.
<i>ARBORPATH</i>	When you see the environment variable <i>ARBORPATH</i> in italics, substitute the value of <i>ARBORPATH</i> from your site.
<i>Italics</i>	Italics in a product-related term in the body of a book indicates that the term is also included in the glossary of the book.
<i>n, x</i>	Italic <i>n</i> stands for a variable number; italic <i>x</i> can stand for a variable number or an alphabet. These variables are sometimes found in formulas.
Ellipses (...)	Ellipsis points indicate that text has been omitted from an example.
Mouse orientation	This document provides examples and procedures using a right-handed mouse. If you use a left-handed mouse, adjust the procedures accordingly.
Menu options	Options in menus are shown in the following format. Substitute the appropriate option names in the placeholders, as indicated. <i>Menu name > Menu command > Extended menu command</i> For example: 1. Select File > Desktop > Accounts .

Additional Support

In addition to providing documentation and online help, Hyperion offers the following support for product information.

How to Order Printed Documentation

To order printed documentation:

- Visit the Hyperion Solutions Web site at <http://www.hyperion.com>.
- In the United States, call Hyperion Solutions Customer Support at 877-901-4975.
- From outside the United States, including Canada, call Hyperion Solutions Customer Support at 203-703-3600. Clients who are not serviced by support from North America should call their local support centers.

Education Services

Hyperion offers a variety of training options, including instructor-led training, custom training, and eTraining. This education covers all Hyperion applications and technologies and is geared to administrators, end users, and information systems (IS) professionals.

Instructor-led training is delivered in formats and in locations suited to Hyperion's diverse, global customers. Hyperion Authorized Training Centers are certified to deliver courses developed by Hyperion. Custom Education Services—training on the configured and tailored applications that employees use on the job—is another option to enhance user productivity and to ensure smooth day-to-day operations. A service called *eTraining*—including computer-based training, Web-based training, and interactive Virtual Classroom training—provides a cost-effective means of giving users a hands-on introduction to product features and functions. Computer-based training (CBT) and Web-based training (WBT) provide high-quality, self-paced training at the user's convenience, regardless of location.

For more information about training, contact your Regional Education Manager or visit the Hyperion Solutions Web site at <http://www.hyperion.com> to see a list of all training classes.

Consulting Services

Hyperion Consulting Services assists customers in maximizing the use of, and the return on investment in, Hyperion products. Experienced Hyperion consultants and Hyperion Alliance Partners assist organizations in tailoring solutions to their particular requirements, such as reporting, analysis, modeling, and planning. Specific services include implementation consulting, custom business solutions, data integration, and technical consulting. Additionally, Hyperion offers a variety of Services Packages and Reviews.

For more information about Consulting Services, Services Packages and Reviews, as well as the services offered by Alliance Partners, contact your local consulting services representative, or visit the Hyperion Solutions Web site at <http://www.hyperion.com> to see a list of all Hyperion Alliance Partners.

Technical Support

Hyperion provides Web-based and telephone support to ensure that clients resolve product issues quickly and accurately. This support is available for all Hyperion products at no additional cost to clients with a current maintenance agreement.

- For Web-based support, or to see complete information on available support options, visit the Hyperion Solutions Web site at <http://www.hyperion.com>.
- In the United States, call 877-901-4975 for Hyperion Solutions Customer Support.
- From outside the United States, including Canada, call Hyperion Solutions Customer Support at 203-703-3600. Clients who are not serviced by support from North America should call their local support centers.

Documentation Feedback

Hyperion strives to provide complete and accurate documentation. We value your opinions on this documentation and want to hear from you. Send us your comments by completing the survey available at <http://www.hyperion.com>.

About Hyperion Analyzer

Hyperion Analyzer enables organizations around the world to turn raw data into valuable business information.

With Hyperion Analyzer, you analyze sophisticated multidimensional and relational data in an easy-to-use graphical interface. This empowers you to explore enterprise data for growth and profit opportunities, to uncover emerging problems, and to test solutions before implementing them.

Hyperion Analyzer provides a set of advanced analysis tools, and enables you to leverage Hyperion Essbase server features simultaneously. You can also retrieve and analyze Hyperion Financial Management and relational data using Hyperion Analyzer.

Analysis reports can be distributed internally and externally, saved as HTML Web content, and referenced by URLs. Hyperion Analyzer is commonly used to conduct sales, and key performance, financial and forecasting analyses.

Hyperion Analyzer Components

Hyperion Analyzer consists of the following components:

- Four client applications
- An analysis server
- A repository
- An API Toolkit

The **repository** centrally stores Hyperion Analyzer system data, user IDs, user preferences, and report definitions in relational database tables.

The **Hyperion Analyzer Analysis Server** communicates report definitions and system information between the repository, Web clients, and Hyperion Analyzer Administration Tools.

The **Hyperion Analyzer Administration Tools** client provides a 100-percent Java graphical interface for managing users, users groups, and database connections using a supported Web browser. It also provides access to several administration utilities.

The **Hyperion Analyzer Java Web Client** is an easy-to-use graphical interface that enables online analysis of both Hyperion Essbase and relational data. You can design and format custom analysis applications without “coding.”

The **Hyperion Analyzer Windows Client** is the same easy-to-use Java Web Client interface and functionality delivered as a standalone Java application for supported Microsoft Windows operating systems.

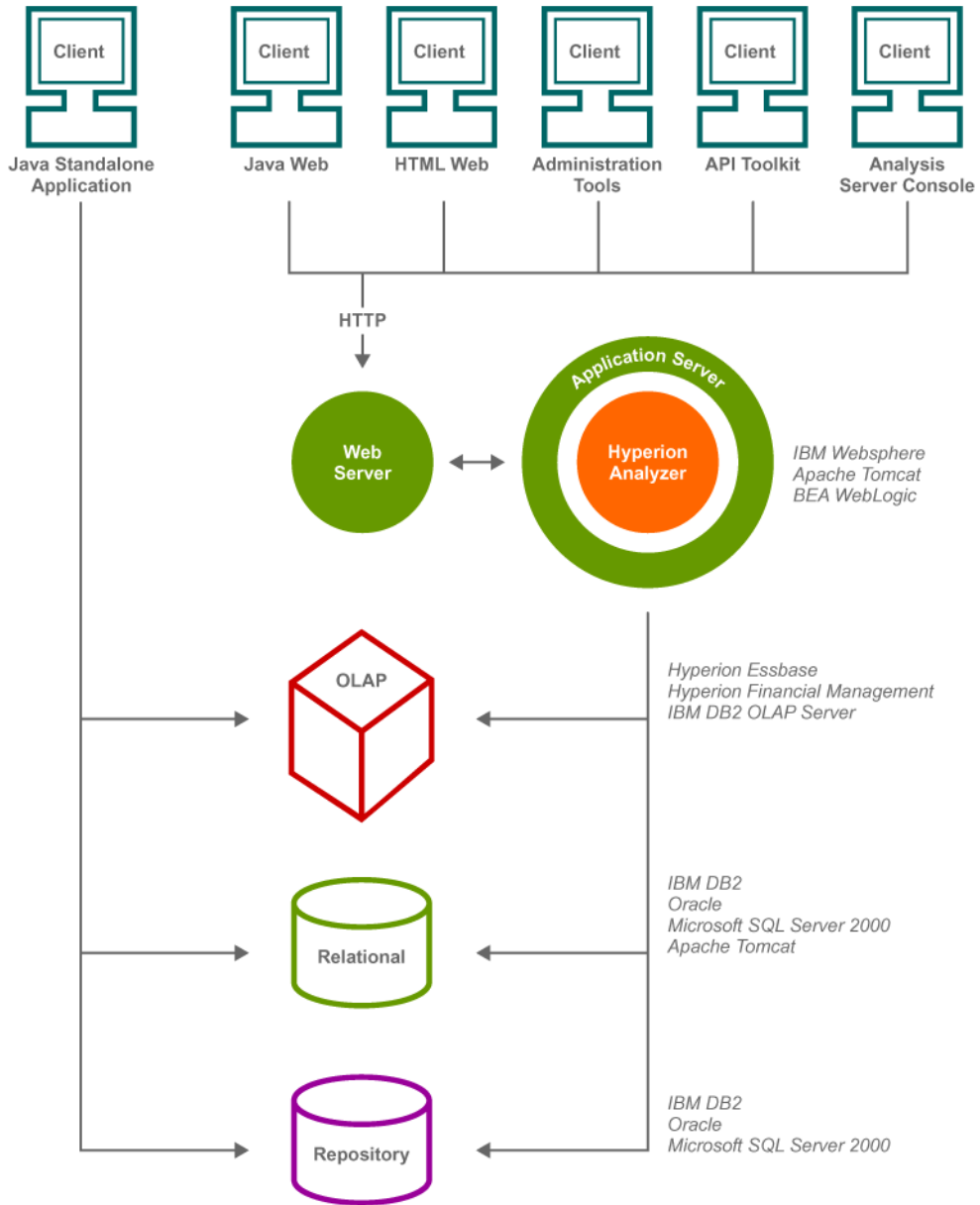
The **Hyperion Analyzer HTML Web Client** is a 100-percent HTML thin client used by way of a supported Web browser. It is engineered for information consumers who do not require advanced design and content-creation capabilities.

The **Hyperion Analyzer API Toolkit** enables developers to incorporate the Hyperion Analyzer Java Web Client look and feel and functionality into their own custom Web applications.

Hyperion Analyzer Architecture

The following illustration represents the architecture of Hyperion Analyzer and illustrates how the different components work together.

Figure 1: Hyperion Analyzer Architecture Diagram



User Types

Hyperion Analyzer users fit into five categories:

Table 1: Hyperion Analyzer Users

User	Description
System Administrator	Installs, configures, and maintains Hyperion Analyzer and its supporting platforms
Power User/ Standard User	Designs reports and establishes content for analysis and review; conducts and distributes analysis to information consumers
Information Consumer	Reviews analysis
Developer	Incorporates Hyperion Analyzer look, feel, and functionality in custom Web applications
Evaluators	Appraises the use and benefit of Hyperion Analyzer for the enterprise

The following tables recommend first steps for using Hyperion Analyzer based on the kind of user you are.

Evaluators

Table 2: First Steps for Evaluators

Objective	Resource
1. Download free evaluation software.	Download software from the Hyperion Web site: www.hyperion.com .
2. Familiarize yourself with Hyperion Analyzer concepts and procedures.	Read chapters 1 - 5 of this book for an introduction to both the Java Web Client, and the HTML Web Client.
3. Evaluate a working Hyperion Analyzer system.	Follow the procedures in chapters 6 - 8 for touring the sample report group and creating your first reports.

Table 2: First Steps for Evaluators(Continued)

Objective	Resource
4. Appraise the full potential and benefits of Hyperion Analyzer.	Finish reading this book. Chapter 9 includes an overview of advanced Hyperion Analyzer features.
5. Decide whether a more robust evaluation, using existing data sources is required.	If so, contact a system administrator, and follow the objectives for Hyperion Analyzer Administrators.

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 can either run a registration application or reinstall Hyperion Analyzer using an unlock code.

System Administrators

Table 3: First Steps for Hyperion Analyzer Administrators

Objective	Task
1. Download software.	Download software from the Hyperion Web site: www.hyperion.com .
2. Identify late-breaking issues specific to this release of Hyperion Analyzer.	Read the Hyperion Analyzer <i>Readme</i> .
3. Establish Hyperion Analyzer system requirements and weigh installation options.	Read the <i>Hyperion Analyzer Installation Guide</i> .
4. Install and configure Hyperion Analyzer.	Follow procedures in the <i>Hyperion Analyzer Installation Guide</i> .
5. Configure and deploy Hyperion Analyzer Samples.	See “Installing Hyperion Analyzer Samples” in the <i>Hyperion Analyzer Installation Guide</i> .
6. Test and verify the environment.	See <i>Hyperion Analyzer Administration Tools Online Help</i> and use the Hyperion Analyzer Administration Tools Console to optimize Hyperion Analyzer.

Table 3: First Steps for Hyperion Analyzer Administrators(Continued)

Objective	Task
7. Familiarize yourself with Hyperion Analyzer concepts and procedures.	Finish reading this book.
8. Establish an administration and maintenance strategy.	Read the <i>Hyperion Analyzer Administrator's Guide</i> for information and procedures for establishing user IDs, passwords, user groups, and database connections.
9. Deploy Hyperion Analyzer to users.	

Power Users

Table 4: First Steps for Power Users

Objective	Task
1. Familiarize yourself with Hyperion Analyzer concepts and procedures.	Read chapters 1 - 5 of this book for an introduction to both the Java Web Client, and the HTML Web Client.
2. Evaluate a working Hyperion Analyzer system.	Follow the procedures in chapters 6 - 8 for touring the sample report group and creating your first reports.
3. Appraise the full potential and benefits of Hyperion Analyzer.	Finish reading this book. Chapter 9 includes an overview of advanced Hyperion Analyzer features.
4. Locate additional information on Hyperion Analyzer Java Web Client.	Consult the <i>Hyperion Analyzer Information Map</i> for a complete documentation list. See <i>Hyperion Analyzer Java Web Client Online Help</i> .

Information Consumers

Table 5: First Steps for Information Consumers

Objective	Resource
1. Familiarize yourself with Hyperion Analyzer concepts and procedures.	Read chapters 1 - 5 of this book for an introduction to both the Java Web Client, and the HTML Web Client.
2. Evaluate a working Hyperion Analyzer system.	Follow the procedures in chapters 6 - 8 for touring the sample report group and creating your first reports.
3. Locate additional information on Hyperion Analyzer HTML Web Client.	Consult the <i>Hyperion Analyzer Information Map</i> for a complete documentation list. See <i>Hyperion Analyzer HTML Web Client Online Help</i> .

Developers

Table 6: First Steps for Developers

Objective	Resource
1. Familiarize yourself with fundamental Hyperion Analyzer concepts and procedures.	Read chapters 1 - 5 of this book for an introduction to both the Java Web Client, and the HTML Web Client.
2. Evaluate a working Hyperion Analyzer system.	Follow the procedures in chapters 6 - 8 for touring the sample report group and creating your first reports.
3. Familiarize yourself with the wide range of analysis tools available to advanced Hyperion Analyzer users.	Finish reading this book. Chapter 9 includes an overview of advanced Hyperion Analyzer features.

Table 6: First Steps for Developers(Continued)

Objective	Resource
4. Familiarize yourself with the Hyperion Analyzer API Toolkit.	Read the <i>Hyperion Analyzer API Toolkit Developer's Guide</i> .
5. Review examples of Hyperion Analyzer Web content as inspiration for your own Web pages.	Tour the Hyperion Analyzer API Toolkit samples.

Online Analytical Processing

Online Analytical Processing (OLAP) technology organizes key performance indicator data into models enabling speed-of-thought analysis.

Dimensions and Members

Business measurements, or values, are organized into arrays for consolidation and retrieval. These arrays, **dimensions**, are composed of values called **members**.

OLAP databases enable you to analyze multiple dimensions in relation to one another. Each data value represents the intersection of all the dimensions in a specific database.

Conventional spreadsheet users understand that cell values are related to the dimension headers of the corresponding rows and columns. They even understand conventions for displaying a third dimension, the z-axis, in a two-dimensional chart.

OLAP technology can however represent multiple dimensional intersections as a cell value in two-dimensional media.

Multidimensional Cubes

A cube is an array organizing multiple dimensions.

OLAP database **queries** request dimension member data from a cube.

Dimensional Hierarchies

There is a specific order, or **hierarchy**, to dimension members. It is specified by a database outline.

Dimensions of numeric values follow a hierarchy of numerical order, but consider other hierarchies:

- Centuries, Decades, Years, Quarters, Months, Weeks, Days, Hours, Minutes, and Seconds are elements of the time hierarchy.
- Continents, Countries, Regions, States, Cities, Neighborhoods, Locations, and Departments are elements of the Market hierarchy.

It is important to understand that multiple members can belong to a single dimensional hierarchy.

- For Example: Years, Quarters, and Months are members of the Time dimension.

A dimension can relate to different places in the hierarchy of another dimension.

- For Example: A Cost dimension can be evaluated against years, quarters, weeks, or days.

Dimensions are organized into cubes using these hierarchical relationships.

Familial Relationships

Elements of greater detail are referred to as **descendants** of more general elements.

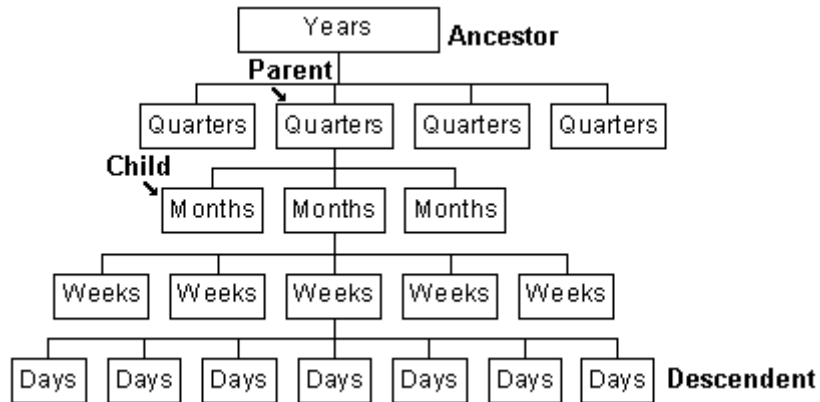
Elements of more generality are conversely referred to as **ancestors** of more detailed elements.

For Example: Months, Weeks, and Days are all descendants of Time. Weeks are ancestors to Days.

To simplify hierarchical relationships, the terms **parent** and **child** are used. A parent is the direct ancestor of an element in a hierarchy. A child is the direct descendant of an element in a hierarchy.

The following illustration shows a typical time hierarchy:

Figure 2: A Time Dimension Hierarchy



Generations and Levels

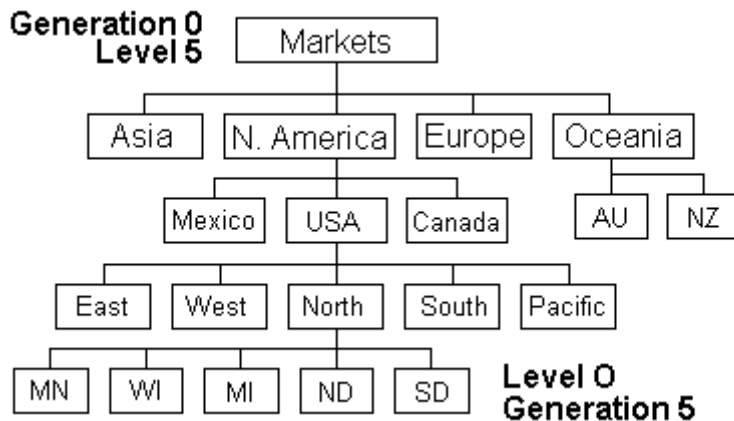
Dimension members on the same layer of the dimensional hierarchy are referred to collectively as **generations** or **levels**.

Generations are hierarchical layers counted down from the highest ancestor (generation 0).

Levels are hierarchical layers counted up from the lowest descendant (level 0).

Hyperion Essbase enables you to label and reference generations and levels.

Figure 3: Generations and Levels Diagram



Nonaggregate Dimensions

Previously mentioned dimension examples were aggregates of their members.

For Example: Twenty-four hours make a day. Seven days compose a week. Fifty-two weeks form a year, and so on. In these cases, the time dimension literally represents the sum of its components.

However, some dimensional hierarchies are not the sum of their components.

For Example: The Measures dimension is commonly composed of business measures such as Sales, Profit and Cost of Goods Sold. Relating these dimensions to other dimensions in the cube provides meaningful data.

For Example: The Scenario dimension is typically composed of measures such as Actual, Budget, Prior Year, and so on. These members cannot be combined to form a meaningful aggregate. The Scenario dimension is, therefore, only a descriptive label for the measures it contains.

When the dimension label cannot represent the sum of its contents, a protocol exists to use one member set in place of the dimension label. Hyperion Essbase uses the first child in the dimension outline as the implied share instead of nonaggregate dimension labels.

Attributes

In addition to dimension member names, locations, and relationships, Hyperion Essbase can store characteristics about specific members.

For Example: The product dimension may indicate that in Women's Apparel, Shirts and Blouses, there is a cotton T-shirt product. Attributes indicate that the cotton T-shirt is red, cyan, lime, or pink.

For Example: The Market dimension may indicate there is a franchise store in Biloxi, Mississippi. Attributes indicate that the store is 2500 square feet in size.

Hyperion Essbase does not store attribute dimensions as part of the OLAP cube, but instead dynamically calculates them upon request.

It is important to know that **attributes** are displayed in dimension hierarchies, in the same manner as dimension members, despite being stored differently.

Sparse and Dense Dimensions

Most multidimensional databases lack member values in every single dimension member of every single intersection.

For Example: All products may not be sold in all areas of a country.

To maximize database performance, dimensions are labeled either **sparse** or **dense**.

Sparse dimensions have a low percentage of member values for all possible cube intersections. Dense dimensions have a high percentage of member values for all possible cube intersections.

Labeling dimensions as sparse and dense enables Hyperion Essbase to expedite retrieval while minimizing memory and disk requirements.

Organizing Reports

Reports

Hyperion Analyzer abstracts multidimensional and relational information into a two-dimensional display called a **report**.

A report is both the content and the format of the display.

After they have been saved to the repository, reports become multi-purpose files that you can display in numerous formats.

Report Groups

Reports are organized into groups called **report groups**.

Report groups commonly contain reports relating to a single subject or common analytical purpose.

Report groups:

- Coordinate information
- Enable specific distributions
- Enable frequently updated reports to be located easily

Properties

Reports and report groups have properties governing their display and use.

Hyperion Analyzer Java Web Client Interface

The Hyperion Analyzer Java Web Client is an easy-to-use graphical interface that enables online analysis of both Hyperion Essbase and relational data. You can design and format custom analysis applications without “coding.” This chapter gives a brief overview of the main user interface elements of the Hyperion Analyzer Java Web Client.

Starting the Hyperion Analyzer Java Web Client

Before starting, a system administrator must provide a uniform resource locator (URL) for the Hyperion Analyzer Java Web Client launch page.

- ▶ To start the Hyperion Analyzer Java Web Client:
 1. Start a supported Web browser (such as Microsoft Internet Explorer 5.5 or 6.0 or Netscape Communicator, Netscape Navigator 6.2 or 7.0).
 2. Select **File > Open** from the menu.
 3. Enter the URL of the Hyperion Analyzer launch page, and press **Enter**.
 4. Click the link launching the Hyperion Analyzer Java Web Client.

The Hyperion Analyzer application window is displayed. The Login dialog box is displayed.
 5. Enter a valid user ID and password in the Login dialog box.

- 6. (Optional):** If prompted with a Domain drop down list box, select an authentication method.

Tip: Your administrator establishes methods for authenticating your user ID and password during installation and configuration. You always have the option of using Standard Security, but if you use Essbase Authentication or External Authentication, you do not have to log on again to other integrated applications and data sources.

- 7.** Click **OK**.

The report or desktop specified by the Startup Options user preferences is displayed.

User Interface Modes

The most important feature of Hyperion Analyzer is its easy-to-use interface. Hyperion Analyzer's methods and metaphors make sophisticated multidimensional and relational analysis as easy as surfing the Internet.

Hyperion Analyzer has four user interface modes. Each mode has a distinct interface and controls.

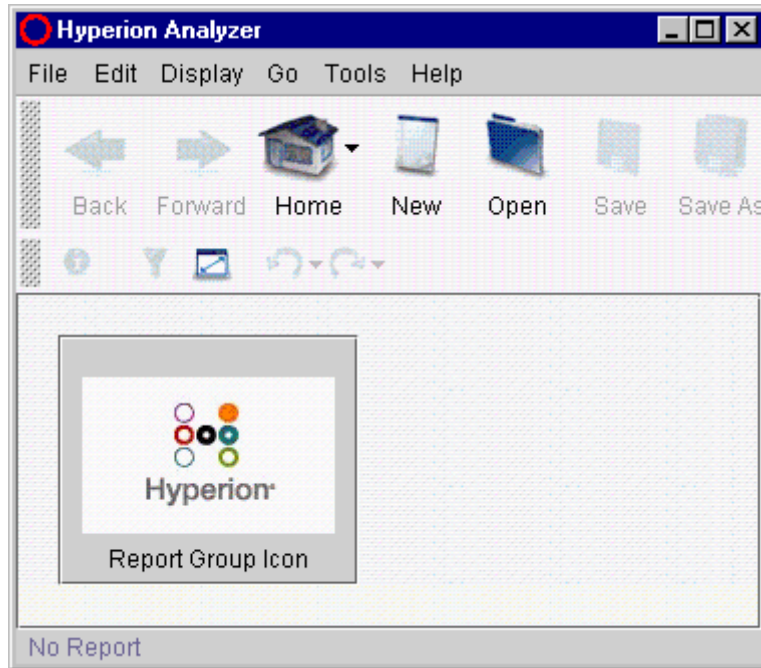
The modes are:

- Hyperion Analyzer Desktop - centrally collects and presents report group icons
- Normal Mode - fundamental analysis, presentation and reporting interface for Hyperion Analyzer
- Edit Data Mode - enables you to edit cell values and write these edits back to Hyperion Essbase
- Design Report Mode - an interface for creating custom reports

Hyperion Analyzer Desktop

The Hyperion Analyzer Desktop centrally collects and presents report group icons. Report group icons are similar to application shortcuts on the Windows desktop.

Figure 4: Hyperion Analyzer Desktop



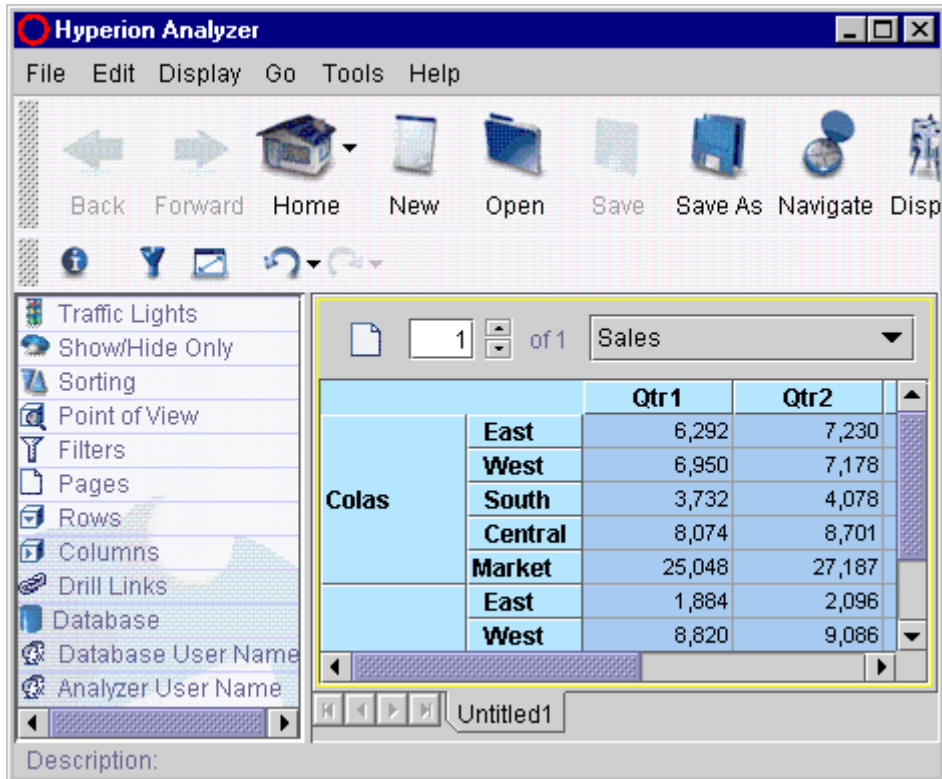
The Hyperion Analyzer Desktop displays only the report group icons to which you have access. You can customize the Hyperion Analyzer Desktop by hiding specific report group icons.

You can open all the reports in a report group by clicking the corresponding report group icon.

Normal Mode

Normal mode is the fundamental analysis, presentation and reporting interface for Hyperion Analyzer. Most of your work is done in Normal mode.

Figure 5: Hyperion Analyzer Normal Mode Interface

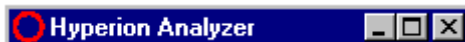


The Normal mode user interface is a composite of many components.

Application Window Title Bar

The application window contains all interface components. It features a title bar with Minimize, Restore and Close buttons.

Figure 6: Hyperion Analyzer Application Window Title Bar



The Application Window Title bar displays the current application name and features a conventional right-click menu.

Figure 7: Application Title Bar Right-click Menu



Menu Bar

The Menu bar is directly below the Application Window Title bar. The Menu bar organizes and provides access to principal Hyperion Analyzer tasks.

Figure 8: Hyperion Analyzer Menu Bar



You can hide the Menu bar to expand display panel space.

Toolbar

The Toolbar is located directly below the Menu bar and above the Details bar. The Toolbar provides single-click access to principal Hyperion Analyzer tasks.

You can also hide the Toolbar to expand display panel space.

Figure 9: Hyperion Analyzer Toolbar



Details Bar

The Details bar, above the Main Display panel, displays and hides interface components. The buttons, titles, and graphics displayed on the Details bar change, based on the specific report and user preferences.

Five default buttons are always displayed on the Details bar.

Figure 10: Hyperion Analyzer Details Bar

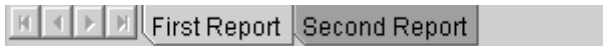


When the Toolbar is hidden, some Toolbar buttons dynamically display on the Details bar. For this reason, you cannot hide the Details bar.

Report Tabs Bar

The Report Tabs bar is at the bottom of the application window, above the Status bar and below the Main Display panel. Report tabs do not display all possible reports, only opened reports. The tab control for the current report is highlighted in the tab series.

Figure 11: Hyperion Analyzer Reports Tab Bar



There is a tab for every opened report, but the tab series may extend beyond the display area. For this reason, a tab series control is included at the far left of the Report Tabs bar.

Status Bar

The Status bar, at the very bottom of the application window, displays the report description.

Figure 12: Hyperion Analyzer Status Bar

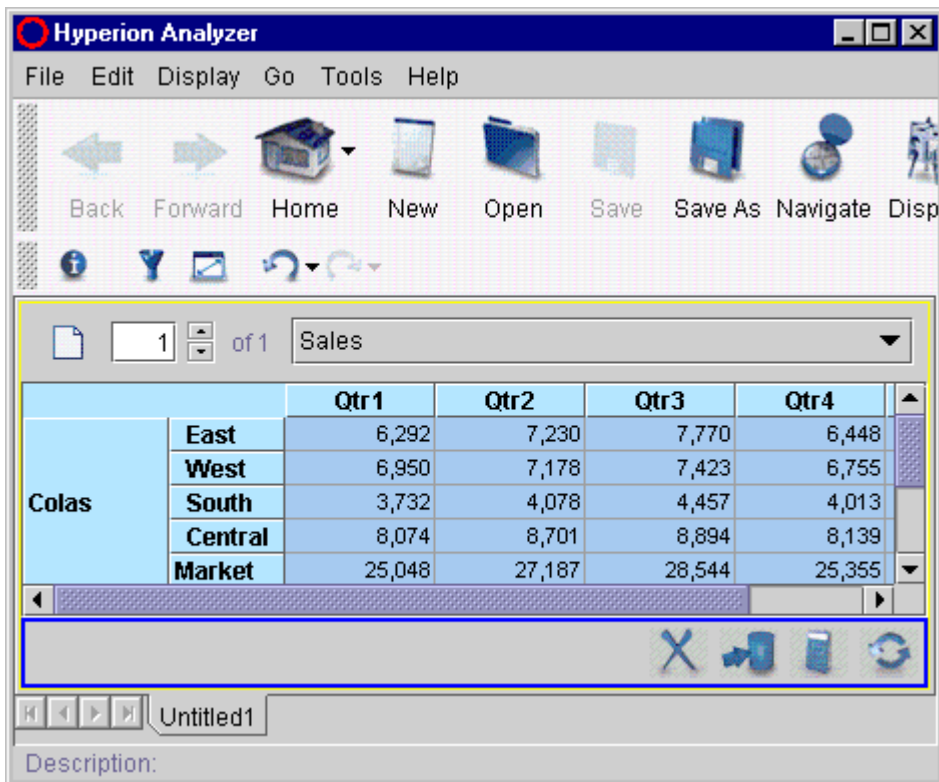


Edit Data Mode

Edit Data mode enables you to edit cell values and write these edits back to Hyperion Essbase.

Edit Data mode looks similar to Normal mode, but spreadsheet cells are editable.

Figure 13: Hyperion Analyzer Edit Data Mode



In addition, an Edit Data Bar is displayed at the bottom of the Main Display panel when you are in Edit Data mode.

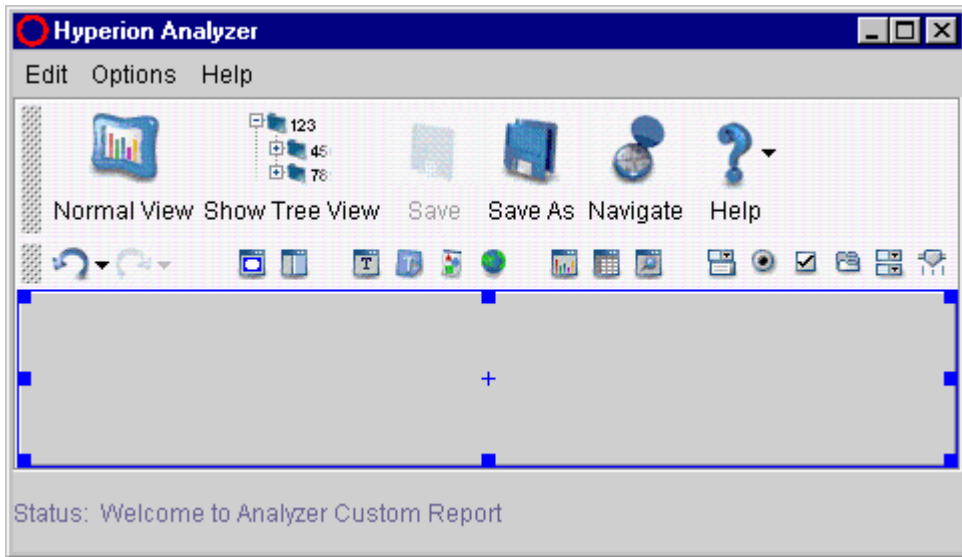
Figure 14: Edit Data Bar



Design Report Mode

Design Report mode is an interface for creating custom reports. For more information on Design Report mode, see [Chapter 9, “Creating a Dynamic Custom Report.”](#)

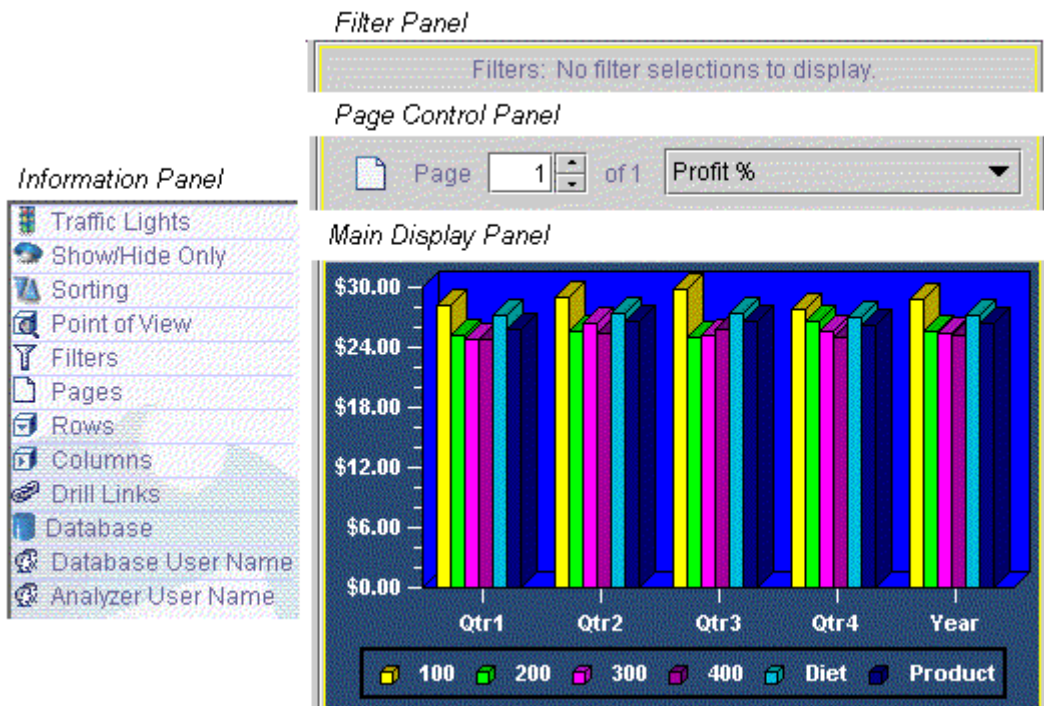
Figure 15: Hyperion Analyzer Design Report Mode



Main Display Panel Components

The Main Display panel is the largest area of the interface, located below the Details bar and above the Reports Tabs bar. The Main Display panel is a composite of four dynamic panels.

Figure 16: Exploded Main Display Panel



Information Panel

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.

You can perform the following tasks using the Information panel:

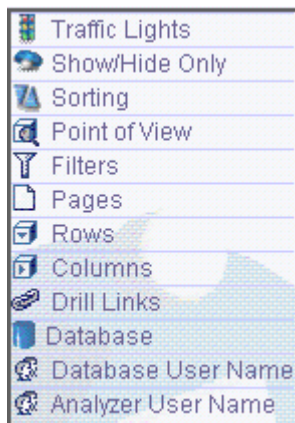
- The Information panel can be displayed or hidden by clicking the Details bar Show/Hide Information Panel button.

Figure 17: Show/Hide Information Panel button



- Double-clicking segment icons expands or collapses Information panel segments.

Figure 18: Collapsed Information Panel Segments

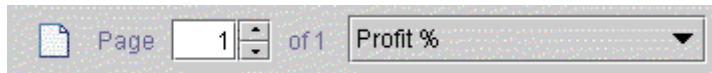


- Clicking plus and minus nodes expands or collapses Information panel content.
- Dragging dimensions and dropping them between Information panel axes segments modifies the Main Display panel.
- Right-clicking dimensions makes new Dimension Browser selections.
- Right-clicking the Information panel and selecting Expand All or Collapse All fully expands or collapses the Information panel segments.

Page Control Panel

The Page Control panel enables you to jump and scroll between Page dimension members.

Figure 19: Page Control Panel

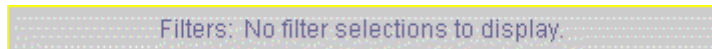


The intersections in the Main Display panel are organized with respect to the dimensions in the Page axis, and page control panel selections change the main display.

Filter Panel

The Filter panel indicates the dimensions assigned to the Filter axis. All Main Display panel intersections are relevant to Filter Dimension members.

Figure 20: Filter Panel



The Filter panel can be displayed or hidden by clicking the Details bar Show/Hide Filter Panel button.

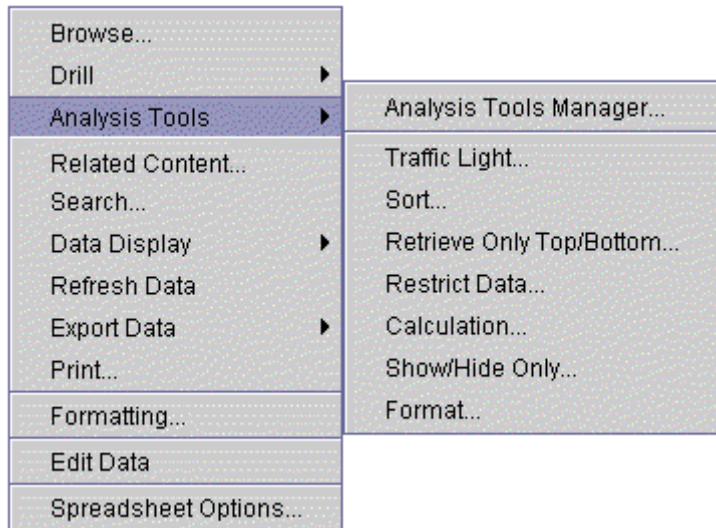
Figure 21: Show/Hide Filter Panel Button



Main Display Panel Right-click Menu

The Main Display panel right-click menu is context-sensitive, and menu options change based on the current selection.

Figure 22: Main Display Panel Right-click Menu



The most advanced Hyperion Analyzer features are typically accessed through the Main Display Panel right-click menu.




Displaying and Hiding User Interface Components

Every user can customize the Hyperion Analyzer interface to suit their needs and objectives. Analysts may want to display all interface components to reveal detailed information.

Presenters may hide interface components in order to fully expand the Main Display panel.

It is important to understand that the same report can display using a diverse combination of user interface components.

Hiding Interface Components

- ▶ To hide the Toolbar, click the **Show/Hide Toolbar** button. 
- ▶ To hide the Information panel, click the **Show/Hide Information Panel** button. 
- ▶ To hide the Filter panel, click the **Show/Hide Filter Panel** button. 
- ▶ To hide the Menu bar, right-click the **Details bar** and select the **Show Main Menu** right-click menu item.

Because the Details bar cannot be hidden, you can always redisplay hidden interface components.

Now that you understand the Hyperion Analyzer Java Web Client user interface, you are ready to learn more about Hyperion Analyzer functionality.

If you have not yet started the Hyperion Analyzer Java Web Client, see [“Starting the Hyperion Analyzer Java Web Client”](#) on page 33.

Opening Reports

There are several methods for opening report groups and specific reports.

The Report Manager dialog box enables you to manage reports and report groups.

- ▶ To open a report using Report Manager, perform one of the following tasks:
 - Select **File > Open**.
 - Click the **Toolbar Open** button.

Figure 23: Toolbar Open Button



You can also use the Hyperion Analyzer Desktop to open a report group. The Hyperion Analyzer Desktop displays only the report group icons to which you have access.

- ▶ To open a report group from the Hyperion Analyzer Desktop:
 1. Select Analyzer Desktop from the toolbar **Home** button down-down menu.
 2. Click the corresponding report group icon.

You can also open the Sample Report group from the Hyperion Analyzer Desktop.

- ▶ To open the Sample Report Group, click the Sample Report Group icon.

Navigating Between Reports

Opening a report group also opens all the reports in that group. The reports are represented as tabs across the Report Tabs bar.


Open reports form a series through which you can browse and scroll. If there are more reports than the Report Tabs bar can accommodate, a Report Tab Series control is displayed.

Figure 24: Hyperion Analyzer Reports Tab Bar



The report displayed in the Main Display panel is referred to as the “current report.” The name of the current report is highlighted on the Report Tabs bar.

- ▶ To navigate between open reports, use one of the following methods:

- Click the toolbar **Back** and **Forward** buttons. 
- Select the **Go > Back** or **Go > Forward**.
- Select a **Report tab** to make that report the current report.
- Click a report link leading to another report.

Display Types

You can present the same information in different formats. There are three fundamental display types:

- Spreadsheet
- Chart
- Pinboard

Each display type has prerequisites that must be satisfied.

Spreadsheets

Spreadsheets organize information into column, row, page, and filter axes.

Figure 25: Hyperion Analyzer Spreadsheet Display Type

The screenshot shows the Hyperion Analyzer interface with a spreadsheet titled 'Sales'. The spreadsheet is organized into a grid with columns for 'Qtr 1' and 'Qtr 2', each containing 'Actual', 'Budget', and 'Rank' sub-columns. Rows are grouped by product categories: Colas, Root Beer, Cream Soda, Fruit Soda, and Diet Drinks. Each product category has three rows representing different regions: Central, West, and South. The data is color-coded: red for negative variances (Actual vs Budget) and green for positive variances. The interface includes a menu bar (File, Edit, Display, Oo, Tools, Help), a toolbar, and a status bar at the bottom showing the current page (01 - Product Sales) and a description: 'Actual vs. Budget for Products'.

		Qtr 1			Qtr 2			Actual	Rank
		Actual	Budget	Rank	Actual	Budget	Rank		
Colas	Central	\$8,074	\$8,200	1	\$8,701	\$8,870	1	\$8,894	1
	West	\$8,850	\$8,500	2	\$1,178	\$8,800	3	\$1,453	1
	East	\$8,292	\$5,870	3	\$7,230	\$6,760	2	\$7,770	1
Root Beer	South	\$3,732	\$4,570	4	\$4,078	\$5,000	4	\$4,457	1
	West	\$8,278	\$7,700	1	\$8,524	\$7,970	1	\$8,885	1
	Central	\$7,269	\$8,420	2	\$7,440	\$8,810	2	\$7,504	1
Cream Soda	East	\$5,726	\$5,460	3	\$5,902	\$5,650	3	\$5,863	1
	South	\$5,354	\$4,430	4	\$5,535	\$4,580	4	\$5,890	1
	Central	\$8,059	\$6,880	1	\$8,438	\$7,220	2	\$8,894	1
Fruit Soda	West	\$8,043	\$8,890	2	\$8,988	\$7,720	1	\$9,816	1
	East	\$4,868	\$3,680	3	\$5,317	\$4,030	3	\$5,142	1
	South	\$3,027	\$2,830	4	\$2,989	\$2,790	4	\$3,208	1
Diet Drinks	West	\$8,403	\$5,540	1	\$8,888	\$5,840	1	\$9,206	1
	Central	\$8,010	\$6,830	2	\$8,477	\$7,250	2	\$8,872	1
	East	\$3,735	\$3,880	3	\$3,990	\$4,150	3	\$4,201	1
	Central	\$10,544	\$10,460	1	\$10,809	\$10,750	1	\$10,959	1
	West	\$8,820	\$8,620	2	\$9,086	\$8,910	2	\$9,518	1
	South	\$4,483	\$4,410	3	\$4,796	\$4,710	3	\$4,947	1
	East	\$1,884	\$1,700	4	\$2,086	\$1,900	4	\$2,871	1

Spreadsheet cells show the value assigned to an intersection of all dimensions, not just those in rows and columns.

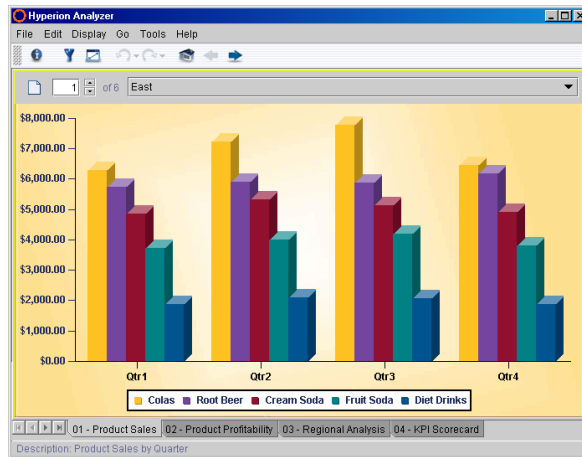
All cells in the cube are filtered according to dimensions assigned to the Filter axis. Dimensions assigned to rows and columns are then organized in terms of the dimensions assigned to the Pages axis.

The result is a multidimensional spreadsheet.

Charts

Hyperion Analyzer enables multidimensional spreadsheets to be displayed as charts.

Figure 26: Hyperion Analyzer Chart Display Type



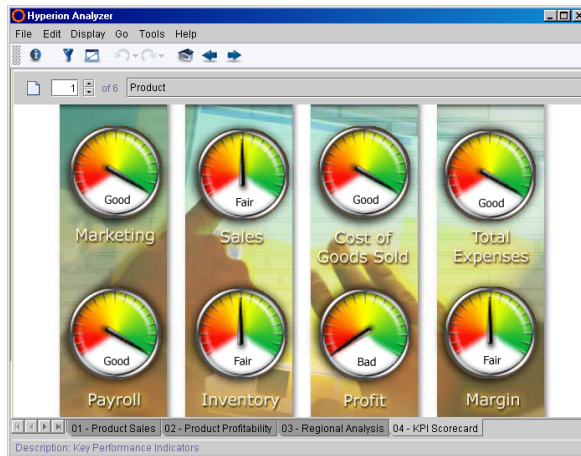
There are a variety of chart types from which to choose.

- Bar
- Line
- Spline
- Pie
- Area
- Curve Area
- Horizontal Bar
- Marks
- Pareto
- Box
- Quadrant
- Bubble

Pinboards

Pinboards are custom graphic representations of spreadsheets. Pinboard dimensions are represented by a graphic, pins located on the graphic, and the color or state of the pins.

Figure 27: Hyperion Analyzer Pinboard Display Type



Any graphic can be used as a pinboard enabling numerous creative opportunities.

You must create a multidimensional spreadsheet with a traffic lighting definition before you can create a pinboard because pins dynamically change image or color based on traffic lighting cues. For more information about Traffic Lighting, see [“Enhanced Traffic Lighting” on page 152](#).

Changing Display Types

You can change the display type to better present information, to facilitate comparisons, or to illustrate information graphically.

Figure 28: Toolbar Display Button

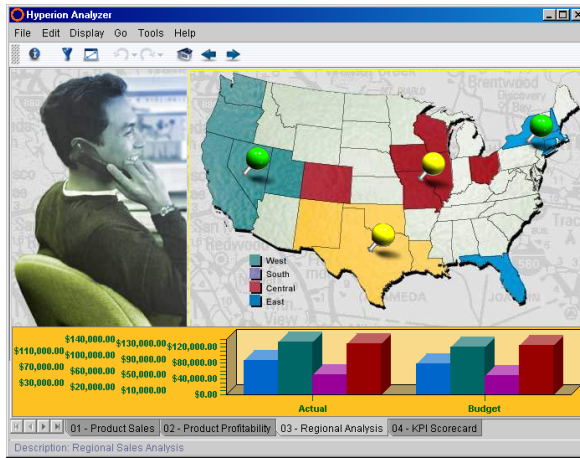


Report designers can also lock the Display Type report property to prevent subsequent users from changing the report.

Custom Reports

Hyperion Analyzer custom reports can contain multiple display types, a variety of controls, graphics, custom features and functionality.

Figure 29: Hyperion Analyzer Custom Report



There are infinite report creation possibilities.

Custom reports are designed in “Design Report” mode. For more information, see [Chapter 9, “Creating a Dynamic Custom Report.”](#)

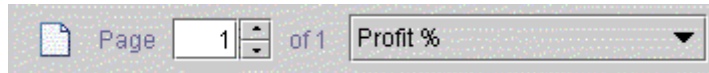
Navigating Reports

You can rearrange, expand, and concentrate OLAP intersections for focused analysis. Because these methods represent travel through an OLAP cube, they are called navigation methods. Hyperion Analyzer supports the following navigation methods:

Paging

The Page Control panel enables you to jump and scroll between Page dimension members.

Figure 30: Page Control Panel



The intersections in the Main Display panel are organized with respect to the dimensions in the Page axis, and page control panel selections change the main display.

You can perform the following tasks using the Page Control panel:

- Click the drop down list box to select a page dimension member combination.
- Click the scroll buttons to scroll through Page series combinations.
- Click the Page icon to separate dimension member combinations into multiple drop down list boxes.

The Page Control panel can display multiple page drop-down list boxes when working with page dimension combinations. Multiple page drop-down list boxes display all possible page combinations whether or not data exists. Single page drop-down list boxes omit page combinations that do not contain data.

Hyperion recommends using a single page drop-down list box when working with sparsely populated dimensions, as only populated pages are displayed.

Swapping and Moving

You can rearrange column and row dimensions, by swapping and moving.

- Swapping switches two dimensions in the Main Display panel, replacing one with the other.
- Moving relocates the selected dimension in the Main Display panel.

Swapping and moving procedures are nearly identical in their use of drag and drop methods. They differ only in where the dimension is dropped.

- ▶ To swap, drop a dimension on another dimension.
- ▶ To move, drop a dimension between other dimensions after the bold rule is displayed.

Display Types require you to have at least one dimension the column and row axis at all times.

Drilling

Drilling increases or decreases the level of report detail by changing the display of dimension members. Since drilling is customizable, using User Preferences and report properties, the term drilling can refer to almost any hierarchical navigation prompted by double-clicking a dimension label.

Hyperion Analyzer is delivered with default drilling behavior.

- **Drill Down** includes children of a member in the display.
- **Drill Up** includes a parent of a member in the display.
- **Drill to Top** includes the highest ancestor in the display.

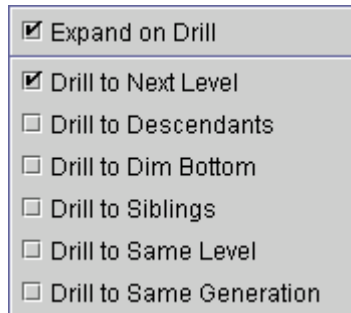
You can elect to add the drilling return set to the currently displayed dimension members, or to replace the currently displayed dimension members with the drilling return set.

- **Append Member Selections** drilling user preferences adds the drilling return set to currently displayed dimension members.
- **Replace Member Selections** drilling user preferences replaces the currently displayed dimension members with the drilling return set.

Drill Up and Drill to Top options are fixed however, you can override the Drill Down behavior by drilling report properties.

- ▶ To view a complete list of report-based drilling options, right-click the main display panel and select **Drill > Drill Options**.

Figure 31: Java Web Client Drilling Options



Selecting a drilling option sets hierarchical navigation for that specific report during the session. If the report is saved, the drilling option is recorded as a report property, and the hierarchical navigation persists when other users view the report.

The Expand on Drill drilling option duplicates the Append Member Selections and Replace Member Selections user preferences previously described.

Drill Linking

Drill linking navigates to other reports by double-clicking cells with pre-placed links.

It is important to differentiate between double-clicking headers and drilling down the dimension hierarchy, and double-clicking a cell with a drill link to navigate to another report.

Formatting Reports

There are numerous formatting options for Hyperion Analyzer reports. They are accessed through the Main Display Panel right-click menu, and User Preferences.

Each display type features unique formatting options:

- **Spreadsheet Options** enable you to format spreadsheet background, all headers, all data cells, and other spreadsheet specific options.

- **Chart Properties** enable you to set several different chart options for all types of charts, including the number of axes, the shape of chart objects, the number of chart series, the color of pie wedges, the font used for titles, the format of legends, and many others.
- **Pinboard properties** are set exclusively through the Pinboard Designer dialog box. The Pinboard Designer enables you to set background images, pin color, pin image and to associate pins with specific dimension members. You can also create pins for calculated members and set behavior for pins with null values.

Column Sizing enables you to format dimension headers on spreadsheet column axes.

Data Display Options enable you to specify report behavior, such as the label mode, how to order dimension headers, whether to display Linked Reporting Object indicators, and whether to display or suppress missing rows. These terms are discussed at length in later chapters. For now it is only important to understand that Data Display options control report behavior.

Formatting Options enable you to format specific dimension headers and specific ranges of data cells. You can restrict formatting based on dimension member selection, or data cell values. Formatting options include currency formatting and numeric formatting for positive and negative values.

Scope of Formatting Options

The scope of formatting varies depending on the source of the formatting definition. Because formatting definitions can be saved as database connection properties, user ID properties, or a report-based properties, they can be applied to any report using a particular database connection, all reports reviewed by a user, or to just a specific report.

The following table delineates the scope, nature and order of precedence by which different formatting options are applied:

Table i: Scope of Formatting Options and Order of Precedence

Formatting Definition	Formatting Option	Scope
Measures Formatting	Leading and Trailing, Currency Formatting, Numeric Formatting	Measures Formatting is saved as a database connection property and applied to all reports that use the database connection.
Default Formatting User Preferences	Spreadsheet Options, Chart Properties, Data Display, etc.	User Preferences are saved as properties of the user ID and applied as default settings to all reports reviewed by a user.
Formatting	Spreadsheet Options, Chart Properties, Data Display, etc.	Formatting is saved as a property of the specific report, and must be redefined for each report.
Formatting Analysis Tool	Data Formatting criteria used to identify subjects for analysis.	Data Formatting and Conditional Formatting are saved with the report, but are applied after almost all other formatting options.
Cell Formatting	Formats a specific range of cells.	Cell Formatting is applied last to a specific range of cells and saved with the report.

Saving Reports

There are multiple methods for saving a report:



- Click the **Toolbar Save** button.
- Select **File > Save**.
- Select **Save** from the Report tabs right-click menu

Saving stores the query, report properties, and formatting to the Hyperion Analyzer repository.

You can only save reports into report groups shared to them.

Distributing Reports

The routing and distribution of reports and the permission to open them are controlled by report group properties.

Shared to User Group Report Group Property

The **Shared to User Group** report group property controls the distribution of reports and report groups in the Hyperion Analyzer system.

Using this report group property, reports and report groups are assigned to user groups. Only users in the specified user group can open the report group. In addition, only user group members can alter report and report group properties.

Locking Reports

While report group properties determine access to and distribution of reports, you can lock reports to further restrict, or direct, exploration in reports, right-click menu options, and navigation methods.

External Distribution of Reports and Report Groups

Reports and Report Groups can be distributed externally:

- There are two printing contexts: **Print Screen** prints the current page of the current report, and **Print Select Object** prints the specified OLAP pages of the current data object.
- You can publish a Hyperion Analyzer report to the Web, by specifying a JSP template and an output file.
- You can export reports to Microsoft Excel spreadsheets.
- You can also export report selections to the operating system “clipboard” or to a file, in a tab-delimited format. This enables Hyperion Analyzer data to be pasted in other applications.
- You can export individual reports and entire report groups as discrete files (.ARD and .ARG respectively) that other Hyperion Analyzer users can review.

- You can e-mail other users the hyperlink to the URL of the current report, and specify whether to present the report in the HTML Web Client or the Java Web Client.

Hyperion Analyzer HTML Web Client Interface

The Hyperion Analyzer HTML Web Client is a 100-percent HTML thin client used by way of a supported Web browser. It is engineered for information consumers who do not require advanced design and content-creation capabilities.

Starting the Hyperion Analyzer HTML Web Client

Before starting, a system administrator must provide a uniform resource locator (URL) for the Hyperion Analyzer HTML Web Client launch page.

- ▶ To start the Hyperion Analyzer HTML Web Client:
 1. Start a supported Web browser (such as Microsoft Internet Explorer 5.5 or 6.0 or Netscape Communicator, Netscape Navigator 6.2 or 7.0).
 2. Select **File > Open** from the menu.
 3. Enter the URL of the Hyperion Analyzer launch page, and press **Enter**.
 4. Click the link launching the Hyperion Analyzer HTML Web Client.

The Hyperion Analyzer application window is displayed. The Login dialog box is displayed.
 5. Enter a valid user ID and password in the Login dialog box.
 6. **(Optional):** If prompted with a Domain drop down list box, select an authentication method.

Tip: Your administrator establishes methods for authenticating your user ID and password during installation and configuration. You always have the option of using Standard Security, but if you use for Essbase Authentication or External Authentication, you do not have to log on again to other integrated applications and data sources.

7. Click OK.

The report or desktop specified by the Startup Options user preferences is displayed.

HTML Web Client User Interface

The HTML Web Client interface features many differences from the Java Web Client interface because the HTML Web Client uses standard HTML technologies to present much of the same functionality provided by the Java Web Client applet.

For the same reason the HTML Web Client is completely customizable. Web developers can edit the JSP templates on the application server, or write their own interfaces. For more information on editing the Hyperion Analyzer JSP templates see the Administrator's Guide.

In this section we discuss the default interfaces delivered with Hyperion Analyzer.

User Interface Modes

The Hyperion Analyzer HTML Web Client presents three of the four modes used by the Java Web Client. Each mode has a distinct user interface and unique controls.

The modes are:

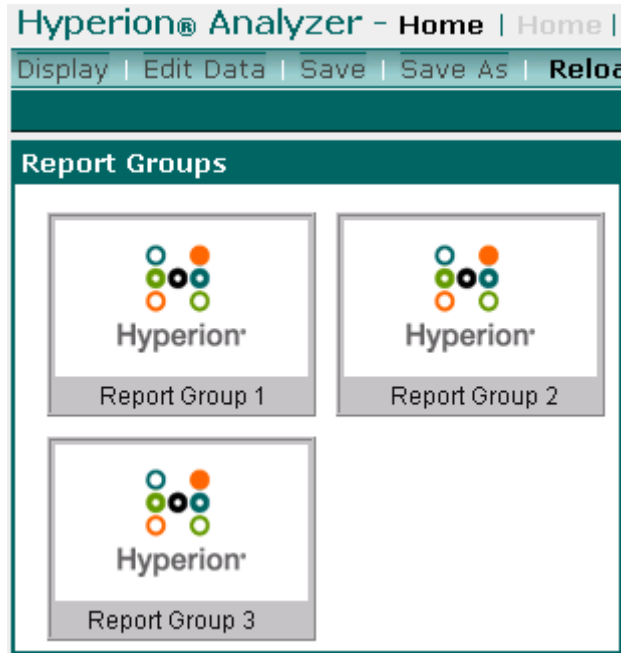
- Hyperion Analyzer Desktop - centrally collects and presents report group icons
- Normal Mode - fundamental analysis, presentation and reporting interface for Hyperion Analyzer
- Edit Data Mode - enables you to edit cell values and write these edits back to Hyperion Essbase

The absence of Design Report mode is one of the major differences between the HTML Web Client and Java Web Client. HTML Web Client users can display and use custom reports created by the Java Web Client, but they just cannot create custom reports in the HTML Web Client.

Hyperion Analyzer Desktop

The Hyperion Analyzer Desktop centrally collects and presents report group icons. Report group icons are similar to application shortcuts on the Windows desktop.

Figure 32: Hyperion Analyzer HTML Web Client Desktop



- To access the Desktop, click the **Home** hyperlink from the HTML Web Client toolbar.
- To open all the reports in a report group, click the corresponding report group icon hyperlink.

Normal Mode

Normal mode is the fundamental analysis, presentation and reporting interface for Hyperion Analyzer. Most of your work is done in Normal mode.

Figure 33: Hyperion Analyzer HTML Web Client Normal Mode Interface

Hyperion® Analyzer - First Report | [Home](#) | [New](#) | [Back](#) | [Forward](#)

Display | [Edit Data](#) | [Save](#) | [Save As](#) | [Reload](#) | [Analyze](#) | [Print](#)

| [Information Panel](#) | [Filters](#) | [Pages](#) | [Style](#) | Chart Type:

Filters **Pages**

Filters: No filter selections to display Page 1 of 3

	Qtr1	Qtr1	Qtr2	Qtr2	Qtr3	Qtr3	Qtr4	Qtr4	Year	Year
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
East	6,292	5,870	7,230	6,760	7,770	7,300	6,448	5,570	27,740	25,500
West	6,950	8,500	7,178	8,800	7,423	9,100	6,755	8,430	28,306	34,830
South	3,732	4,570	4,078	5,000	4,457	5,470	4,013	5,010	16,280	20,050
Central	8,074	8,200	8,701	8,870	8,894	9,060	8,139	7,800	33,808	33,930
Market	25,048	27,140	27,187	29,430	28,544	30,930	25,355	26,810	106,134	114,310

The following components comprise the Normal mode user interface.

Toolbar

The Toolbar is located at the top of the HTML Web Client Interface. The Toolbar provides single-click access to principal Hyperion Analyzer tasks.

Figure 34: Hyperion Analyzer HTML Web Client Toolbar

Hyperion® Analyzer - Report Name [Home](#) | [New](#) | [Back](#) | [Forward](#) | [Close](#) | [Logoff](#) | [Help](#)

Display | [Edit Data](#) | [Save](#) | [Save As](#) | [Reload](#) | [Analyze](#) | [Print](#) | [Drill/Browse:](#)

| [Information Panel](#) | [Filters](#) | [Pages](#) | [Style](#) | Chart Type: | [Resize:](#) [Auto](#) [Numeric](#)

The toolbar is organized into three rows of hyperlinks. The top row of hyperlinks lists the application name, the report name, and a series of report navigation controls.

Table 7: First Row of Hyperlinks from the HTML Web Client Toolbar

Hyperlinks	Description
Hyperion Analyzer	Clicking the Hyperion Analyzer product name displays the About dialog box, containing license and version information
Report Name	The top line of the Toolbar displays the name of the current report, when a report is open.
Home	Display the Hyperion Analyzer Desktop.
New	Displays the New Report dialog box (Select Layout).
Back	Navigates to the previous report in the report group series.
Forward	Navigates to the next report in the report group series.
Close	Shows/Hides the Report Manager panel.
Logoff	Ends the Hyperion Analyzer session.
Help	Displays the Information Map.

The second row of hyperlinks (gradiated background) controls the Hyperion Analyzer application.

Table 8: Second Row of Hyperlinks from the HTML Web Client Toolbar

Hyperlinks	Description
Edit Data	Initiates Edit Data mode.
Save	Saves the current report using its current name and location.
Save As	Displays the Save Report dialog box to save a report to a different name or report group location.
Reload	Displays the current report as it was last saved.
Analyze	Displays the current report in the Hyperion Analyzer Java Web Client.

Hyperlinks	Description
Print	Exports the current page of the current report to another window and displays the Web browser Print dialog box.
Drill/Browse:	Clicking the corresponding drop down list box enables you to select a drilling method for mouse-click events. Alternatively you can also display the Dimension Browser dialog box.

The last row of hyperlinks (dark teal) controls the display of the current report.

Table 9: Third Row of Hyperlinks from the HTML Web Client Toolbar

Hyperlinks	Description
Information Panel	Shows/Hides the Information panel.
Filters	Shows/Hides the Filter panel.
Pages	Shows/Hides the Page Control panel.
Style	Toggles between the JSP template that replicates the report style of the Java Web Client and the JSP template that uses the HTML Web Client report style.
Chart Type:	Clicking the corresponding drop down list box enables you to select a different (HTML Web Client-supported) display type or chart type.
Resize:	Label for two resizing methods.
Auto	Maximizes the report to the largest area possible.
Numeric	Shows/Hides the Resize Report panel, used to manually specify a height and width for the current report.

Edit Data Mode

Edit Data mode enables you to edit cell values and write these edits back to Hyperion Essbase.

Edit Data mode looks similar to Normal mode, but spreadsheet cells are editable.

Figure 35: Hyperion Analyzer Edit Data Mode

Hyperion® Analyzer - First Report | Home | New | Back | Forward |

Display | **Edit Data** | Save | Save As | Reload | Print | Drill: Not Available

Calculation: Default Run

Editing "First Report" in the "Report Group"

	Qtr1	Qtr1	Qtr2	Qtr2	Qtr3	Qtr3	Qtr4	Qtr4	Year	Year
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
East	6292.0	5870.0	7230.0	6760.0	7770.0	7300.0	6448.0	5570.0	27740	25500
West	6950.0	8500.0	7178.0	8800.0	7423.0	9100.0	6755.0	8430.0	28306	34830
South	3732.0	4570.0	4078.0	5000.0	4457.0	5470.0	4013.0	5010.0	16280	20050
Central	8074.0	8200.0	8701.0	8870.0	8894.0	9060.0	8139.0	7800.0	33808	33930
Market	25048	27140	27187	29430	28544	30930	25355	26810	10613	11431

Send Data Exit

There is no Edit Data Bar in the HTML Web Client. Spreadsheet cells instead transform into single line entry fields, and are accompanied by Send Data and Exit buttons.

Main Display Panel Components

The Main Display panel is the largest area of the interface, located below the Toolbar. The Main Display panel is a composite of four dynamic panels.

Figure 36: Main Display Panel

The screenshot shows the Main Display Panel with three main components: Information Panel, Filters, and Pages. The Information Panel includes sections for Traffic Lights, Show/Hide Only, Sorting, and Filters. The Filters component shows 'Filters: Colas'. The Pages component shows 'Page 1 of 1' and a dropdown menu set to 'Sales'. A data table is displayed in the center, with a label 'Main Display' pointing to it.

	Year	Year
	Actual	Budget
East	59,331	55,100
West	98,929	102,330
South	56,964	55,480
Central	105,674	111,440
Market	320,898	324,350

Information Panel

The Information panel is composed of segments summarizing the source and nature of the Main Display panel. Each segment features different context-sensitive controls and hyperlinks.

The Information Panel features icons that move dimension member selections between axes.

Figure 37: HTML Web Client Information Panel Move Icons



The example above shows icons for: Move Up In Current Axis Order, Move Down in Current Axis Order, Move to Rows, Move to Columns, Move to Filters, and Move to Pages.

You can perform the following tasks using the Information panel:

- Click the Information Panel hyperlink on the Toolbar to display or hide the Information Panel.
- Click icons in axes segments to move dimension member selections to another axis, and to modify the main display.
- Click the dimension member hyperlink to display the Dimension Browser dialog box, and define new dimension member selections.
- Click the Hide button to close the Information Panel.

Page Control Panel

The Page Control panel enables you to jump and scroll between Page dimension members.

Figure 38: HTML Web Client Page Control Panel



The intersections in the Main Display panel are organized with respect to the dimensions in the Page axis, and page control panel selections change the main display.

You can perform the following tasks using the Page Control panel:

- Click the Pages hyperlink on the bottom row of the Toolbar to display or hide the Page Control Panel.
- Click the drop down list box to select a page dimension member combination.
- Click the Back and Forward buttons to scroll the combinations in the Page series.
- Click the Multipage button to separate dimension member combinations into multiple drop down list boxes.

The Page Control panel can display multiple page drop-down list boxes when working with page dimension combinations. Multiple page drop-down list boxes display all possible page combinations whether or not data exists. Single page drop-down list boxes omit page combinations that do not contain data.

Hyperion recommends using a single page drop-down list box when working with sparsely populated dimensions, as only populated pages are displayed.

Filter Panel

The Filter panel indicates the dimensions assigned to the Filter axis. All Main Display panel intersections are relevant to Filter Dimension members.

Figure 39: HTML Web Client Filter Panel



The Filter panel can be displayed or hidden by clicking the Details bar Show/Hide Filter Panel button.

Report Manager Panel

The Report Manager provides a graphic interface for organizing and retrieving reports from the Hyperion Analyzer repository. Like the Hyperion Analyzer Desktop, it is used to locate report groups and open the reports inside.

Figure 40: Report Manager Panel

The screenshot displays the Hyperion Analyzer interface. On the left is the 'Report Manager' panel, which shows a hierarchical tree of report groups. The groups are: 'catherine', 'Marketing', 'Board Presentatio', 'Protected', 'Report Group' (which is expanded to show a sub-report 'First Report'), and 'Sample Reports II'. On the right is the 'Hyperion Analyzer - Information Panel', which contains a table with the following data:

	Year	Year
	Actual	Budget
East	27,740	25,500
West	28,306	34,830
South	16,280	20,050
Central	33,808	33,930
Market	106,134	114,310

You can perform the following tasks using the Report Manager:

- To display or hide the Report Manager panel, click the **Open/Close** hyperlink on the top row of the Toolbar.
- Click a report group hyperlink or a report group plus sign (+) node to display a list of reports in that group.
- Click a report hyperlink to open the report.

Controlling User Interface Components

You can customize the Hyperion Analyzer interface to suit your needs and objectives. Analysts may want to display all interface components to reveal detailed information. Presenters may hide interface components in order to fully expand the Main Display panel.

It is important to understand that the same report can display using a diverse combination of user interface components, styles, and templates.

Hiding Interface Components

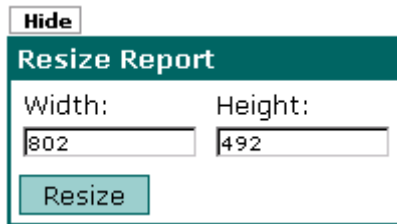
- ▶ To hide the Information panel, click the **Information Panel** hyperlink.
- ▶ To hide the Filter panel, click the **Filters** hyperlink.
- ▶ To hide the Page Control panel, click the **Pages** hyperlink.
- ▶ To hide the Report Manager panel, click the **Close** hyperlink on the top row of the Toolbar.

Resizing the Main Display Panel

There are two methods of sizing Hyperion Analyzer reports in the HTML Web Client:

The **Numeric** hyperlink on the bottom row of the HTML Web Client Toolbar displays the Resize Report panel.

Figure 41: HTML Web Client Resize Report Panel



Hide

Resize Report

Width: 802 Height: 492

Resize

The Resize Report panel enables you to enter height and width dimensions for the report. Clicking the Resize button resizes the report to the specified dimensions, and augments the report with a scroll bar (as needed).

The **Auto** hyperlink on the bottom row of the HTML Web Client Toolbar resizes current report to the largest area possible.

Setting the Interface Style

The HTML Web Client is delivered with JSP templates that enable reports to be displayed in two styles.

The default style replicates the Java Web Client look and feel for HTML Web Client users.

Figure 42: HTML Web Client: JWC Style

	<u>Year</u>	<u>Year</u>
	<u>Actual</u>	<u>Budget</u>
<u>East</u>	27,740	25,500
<u>West</u>	28,306	34,830
<u>South</u>	16,280	20,050
<u>Central</u>	33,808	33,930
<u>Market</u>	106,134	114,310

The formatting in the example above uses color, font, and style properties set using Java Web Client Spreadsheet Options.

You can select to display the same content using HTML Web Client report style by clicking the **Style** hyperlink on the bottom row of the Toolbar.

Figure 43: HTML Web Client: HTML Web Client Style

	<u>Year</u>	<u>Year</u>
	<u>Actual</u>	<u>Budget</u>
<u>East</u>	27,740	25,500
<u>West</u>	28,306	34,830
<u>South</u>	16,280	20,050
<u>Central</u>	33,808	33,930
<u>Market</u>	106,134	114,310

You can develop your own JSP pages and present a customized look and feel to your reports.

If you have not yet started the Hyperion Analyzer HTML Web Client, see [“Starting the Hyperion Analyzer HTML Web Client”](#) on page 61.

Opening Reports

There are two methods for opening report groups and specific reports: Report Manager and Hyperion Analyzer Desktop. The Report Manager panel enables you to organize and retrieve reports and report groups. The Hyperion Analyzer Desktop centrally locates report group icons. The Hyperion Analyzer Desktop displays only the report group icons to which you have access.

- ▶ To open a report, perform one of the following tasks:
 - To display or hide the Report Manager panel, click the **Open/Close** hyperlink on the top row of the Toolbar.

Figure 44: Report Manager Panel



- Click the **Home** hyperlink from the HTML Web Client toolbar and click the corresponding report group icon hyperlink.

You can also open the Sample Report group from the Desktop.

- ▶ To open the Sample Report Group, click the Sample Report Group icon.

Navigating Between Reports

Open reports form a series through which you can browse and scroll.

The report displayed in the Main Display panel is referred to as the “current report.” The name of the current report is displayed on the Toolbar.

- ▶ To navigate between open reports, use one of the following methods:
 - Click the Toolbar **Back** and **Forward** hyperlinks.
 - Click a report hyperlink leading to another report.

Display Types

You can present the same information in different formats. There are three fundamental display types:

- Spreadsheet
- Chart
- Pinboard

Each display type has prerequisites that must be satisfied.

Spreadsheets

Spreadsheets organize multiple dimensions into column, row, page, and filter axes.

Figure 45: Spreadsheet Display Type in HTML Web Client

		Qtr1			Qtr2			Actual
		Actual	Budget	Rank	Actual	Budget	Rank	
Colas	Central	\$8,074	\$8,200	1	\$8,701	\$8,870	1	\$8,894
	West	\$5,950	\$8,500	2	\$7,173	\$8,800	3	\$7,423
	East	\$6,292	\$5,870	3	\$7,230	\$8,760	2	\$7,770
	South	\$3,732	\$4,570	4	\$4,078	\$5,000	4	\$4,457
Root Beer	West	\$8,278	\$7,700	1	\$8,524	\$7,970	1	\$8,895
	Central	\$7,289	\$8,420	2	\$7,440	\$8,610	2	\$7,504
	East	\$5,726	\$5,460	3	\$5,902	\$5,850	3	\$5,863
	South	\$5,394	\$4,430	4	\$5,335	\$4,590	4	\$5,090
Cream Soda	Central	\$9,098	\$8,890	1	\$9,438	\$7,220	2	\$9,884
	West	\$9,043	\$9,890	2	\$9,992	\$7,720	1	\$9,616
	East	\$4,888	\$3,680	3	\$5,327	\$4,030	3	\$5,142
	South	\$3,027	\$2,830	4	\$2,989	\$2,790	4	\$3,208
Fruit Soda	West	\$8,403	\$5,540	1	\$8,888	\$5,840	1	\$9,206
	Central	\$8,010	\$6,830	2	\$8,477	\$7,250	2	\$8,672
	East	\$3,735	\$3,880	3	\$3,990	\$4,150	3	\$4,201
	Central	\$10,544	\$10,460	1	\$10,809	\$10,750	1	\$10,959
Diet Drinks	West	\$8,820	\$9,620	2	\$9,086	\$8,910	2	\$9,518
	South	\$4,483	\$4,410	3	\$4,796	\$4,710	3	\$4,947
	East	\$1,884	\$1,700	4	\$2,096	\$1,900	4	\$2,071

Spreadsheet cells show the value assigned to an intersection of all dimensions, not just those in rows and columns.

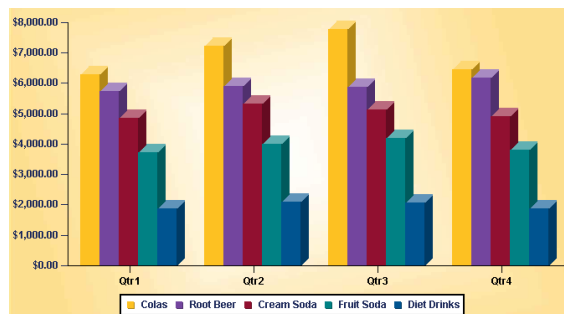
All cells in the cube are filtered according to dimensions assigned to the Filter axis. Dimensions assigned to rows and columns are then organized in terms of the dimensions assigned to the Pages axis.

The result is a multidimensional spreadsheet.

Charts

Hyperion Analyzer enables spreadsheets to be displayed as charts.

Figure 46: Chart Display Type in HTML Web Client



There are a variety of chart types from which to choose.

- Bar
- Line
- Spline
- Pie
- Area
- Curve Area
- Horizontal Bar
- Marks
- Pareto
- Box
- Quadrant
- Bubble

Pinboards

Pinboards are custom graphic representations of spreadsheets. Pinboard dimensions are represented by a graphic, pins located on the graphic, and the color or state of the pins.

Figure 47: Spreadsheet Display Type in HTML Web Client



Any graphic can be used as a pinboard enabling numerous creative opportunities.

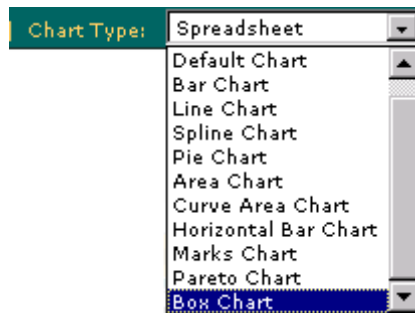
You must create a multidimensional spreadsheet with a traffic lighting definition before you can create a pinboard because pins dynamically change image or color based on traffic lighting cues. For more information about Traffic Lighting, see [“Enhanced Traffic Lighting” on page 152](#).

Changing Display Types

You can change the display type to better present information, to facilitate comparisons, or to illustrate information graphically.

- ▶ To change the display type of the current report, select a display type or chart type from the **Chart Type** drop down list box.

Figure 48: HTML Web Client Chart Type Drop Down List Box



You cannot select Pinboard as a display type in the HTML Web Client. While pinboards can be displayed by the HTML Web Client, they cannot be created using it.

Report designers can also lock the Display Type report property to prevent subsequent users from changing the report. So, it may not be an accident if you cannot change the display type on someone else's report.

Navigating Reports

You can rearrange, expand, and concentrate OLAP intersections for focused analysis. Because these methods represent travel through an OLAP cube, they are called navigation methods. Hyperion Analyzer supports the following navigation methods:

Paging

The Page Control panel enables you to jump and scroll between Page dimension members.

For Example, if the Time dimension is placed on the Pages axis and four calendar quarters are selected, then the same row and column dimensions can be compared over the course of four quarters.

Figure 49: HTML Web Client Page Control Panel



The intersections in the Main Display panel are organized with respect to the dimensions in the Page axis, and page control panel selections change the main display.

You can perform the following tasks using the Page Control panel:

- Click the Pages hyperlink on the bottom row of the Toolbar to display or hide the Page Control Panel.
- Click the drop down list box to select a page dimension member combination.
- Click the Back and Forward buttons to scroll the combinations in the Page series.
- Click the Multipage button to separate dimension member combinations into multiple drop down list boxes.

The Page Control panel can display multiple page drop-down list boxes when working with page dimension combinations. Multiple page drop-down list boxes display all possible page combinations whether or not data exists. Single page drop-down list boxes omit page combinations that do not contain data.

Hyperion recommends using a single page drop-down list box when working with sparsely populated dimensions, as only populated pages are displayed.

Moving

You can rearrange dimension member selections in the Main Display using Move icons in the Information Panel.

- ▶ To display or hide the Information Panel, click the **Information Panel** hyperlink on the Toolbar.
- ▶ To move dimension member selections within the current axis, or to another axis, click the Move icons in the axes segments.

Figure 50: HTML Web Client Information Panel Move Icons



The example above shows icons for: Move Up In Current Axis Order, Move Down in Current Axis Order, Move to Rows, Move to Columns, Move to Filters, and Move to Pages.

Display Types require you to have at least one dimension the column and row axis at all times.

Drilling

Drilling increases or decreases the level of report detail by changing the display of dimension members. Since drilling is customizable, using User Preferences and report properties, the term drilling can refer to almost any hierarchical navigation.

The HTML Web Client is delivered with three default drilling behaviors.

- **Drill Down** includes children of a member in the display.
- **Drill Up** includes the parent of a member in the display.
- **Drill to Top** includes the highest ancestor in the display.

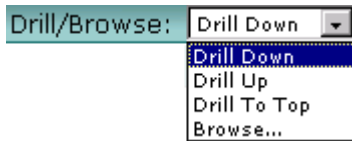
User Preferences also specify the drilling return set to augment the currently displayed dimension members, or to replace the currently displayed dimension members.

- **Append Member Selections** drilling user preferences adds the drilling return set to currently displayed dimension members.
- **Replace Member Selections** drilling user preferences replaces the currently displayed dimension members with the drilling return set.

Drill Up and Drill to Top options are fixed however, you can override the Drill Down behavior by drilling report properties.

- ▶ To drill on the current report, select a drilling method from the **Drill/Browse** drop down list box.

Figure 51: Drill/Browse Drop Down List Box



Drill Linking

Drill linking navigates to other reports using pre-placed links. It is important to differentiate between drilling, which is hierarchical navigation, and drill linking, which is report navigation.

Saving Reports

Saving stores the query, report properties, and formatting to the Hyperion Analyzer repository.

Users can only save reports into report groups shared to them.

- ▶ To save the current report, click the Toolbar **Save** hyperlink.

- ▶ To save the current report under a new name or to a new report group, click the Toolbar **Save As** hyperlink and complete the Save As dialog box.

Figure 52: HTML Web Client Save As Dialog Box

Save As...

You are attempting to save the existing report "First Report" from the "Report Group" report group.

Report Name

First Report

Report Description

Enter a Report Group name...

Report Group

... or select a Report Group from the list box.

Report Group

Save As Cancel

Distributing Reports

The routing and distribution of reports and the permission to open them are controlled by report group properties. Although HTML Web Client users cannot set report group properties, it is important that they understand who has access to the reports they create.

Shared to User Group Report Group Property

The **Shared to User Group** report group property controls the distribution of reports and report groups in the Hyperion Analyzer system.

Using this report group property, reports and report groups are assigned to user groups. Only users in the specified user group can open the report group. In addition, only user group members can alter report and report group properties.

Creating a Report in the HTML Web Client

- ▶ To create a new report using the HTML Web Client, do the following steps:
 1. Click the **New** hyperlink.

The New Report dialog box is displayed.
 2. Select a display type radio button.

You can select from Spreadsheet, Chart, a vertical chart and spreadsheet combination, or a horizontal chart and spreadsheet combination.
 3. Select a database connection name from the **Connection** drop down list box.

You may be prompted for login information.
 4. Click the **Create Report** button.

A report of the specified display type displays in the main display.

The first dimension in the outline is positioned on the rows axis, and remaining dimensions are positioned on the columns axis. To rearrange dimensions, you must display the Information Panel and use the move icons. To display the Dimension Browser and define specific dimension member selections, click the dimension name hyperlinks.

Editing Report Data

Hyperion Analyzer enables you to edit cell values and write these edits back to Hyperion Essbase. To do this you must be in Edit Data mode.

Figure 53: Hyperion Analyzer Edit Data Mode

The screenshot shows the Hyperion Analyzer interface in Edit Data mode. The title bar reads "Hyperion® Analyzer - First Report" with navigation links: Home | New | Back | Forward. The toolbar includes: Display | **Edit Data** | Save | Save As | Reload | Print | Drill: Not Available. Below the toolbar, it shows "Calculation: Default" and a "Run" button. The main area is titled "Editing 'First Report' in the 'Report Group'" and contains a spreadsheet table. At the bottom of the table are "Send Data" and "Exit" buttons.

	Qtr1	Qtr1	Qtr2	Qtr2	Qtr3	Qtr3	Qtr4	Qtr4	Year	Year
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
East	6292.1	5870.1	7230.1	6760.1	7770.1	7300.1	6448.1	5570.1	27740	25500
West	6950.1	8500.1	7178.1	8800.1	7423.1	9100.1	6755.1	8430.1	28306	34830
South	3732.1	4570.1	4078.1	5000.1	4457.1	5470.1	4013.1	5010.1	16280	20050
Central	8074.1	8200.1	8701.1	8870.1	8894.1	9060.1	8139.1	7800.1	33806	33930
Market	25046	27140	27187	29430	28544	30930	25355	26810	10613	11431

When a report is in Edit Data mode, spreadsheet cells transform into single line entry fields, and are accompanied by Send Data and Exit buttons.

When you select Edit Data mode for chart display types discover that the underlying spreadsheet for that chart is displayed.

- ▶ To edit report data values, do the following:
 1. Click the Toolbar **Edit Data** hyperlink to initiate Edit Data mode.
 2. Click the single line entry field for the cell you want to edit.
 3. Enter a new data value.
 4. If you are prepared to commit this edit back to the database, click the **Send Data** button.
 5. The change is applied.

6. Click the **Exit** button to end Edit Data mode.

Printing Reports

- ▶ To print the current report, click the Toolbar **Print** hyperlink.

Passing the Current Report to the Java Web Client

Because the all Hyperion Analyzer advanced analysis functionality is not extended to HTML Web Client users, you may want to pass the current report to the Java Web Client. You can always save the report to the repository, and proceed with logging out and then back into to the Java Web Client. However, you can also proceed to the Java Web Client in a single step:

- ▶ To pass the current report to the Java Web Client, click the Toolbar **Analyze** hyperlink.

Logging Off

- ▶ To end your HTML Web Client session, click the **Logoff** hyperlink.

Touring the Sample Report Group

Now that you are familiar with both the Java Web Client and the HTML Web Client, you are ready to learn more about Hyperion Analyzer.

This chapter leads you through a step-by-step tour of the Hyperion Analyzer Sample report group. You start the Hyperion Analyzer Java Web Client, open the Sample report group, and navigate the reports. Along the way, key features of each report and advanced Hyperion Analyzer functionality are explained.

- ▶ To follow this tutorial, complete the procedures indicated by the arrow at left.

Starting the Hyperion Analyzer Java Web Client

If you have not yet started the Hyperion Analyzer Java Web Client, see [“Starting the Hyperion Analyzer Java Web Client”](#) on page 33.

Opening the Sample Report Group

- ▶ To locate the Hyperion Analyzer Desktop, select **Analyzer Desktop** from the toolbar **Home** button drop-down menu.

Figure 54: Toolbar Home Button



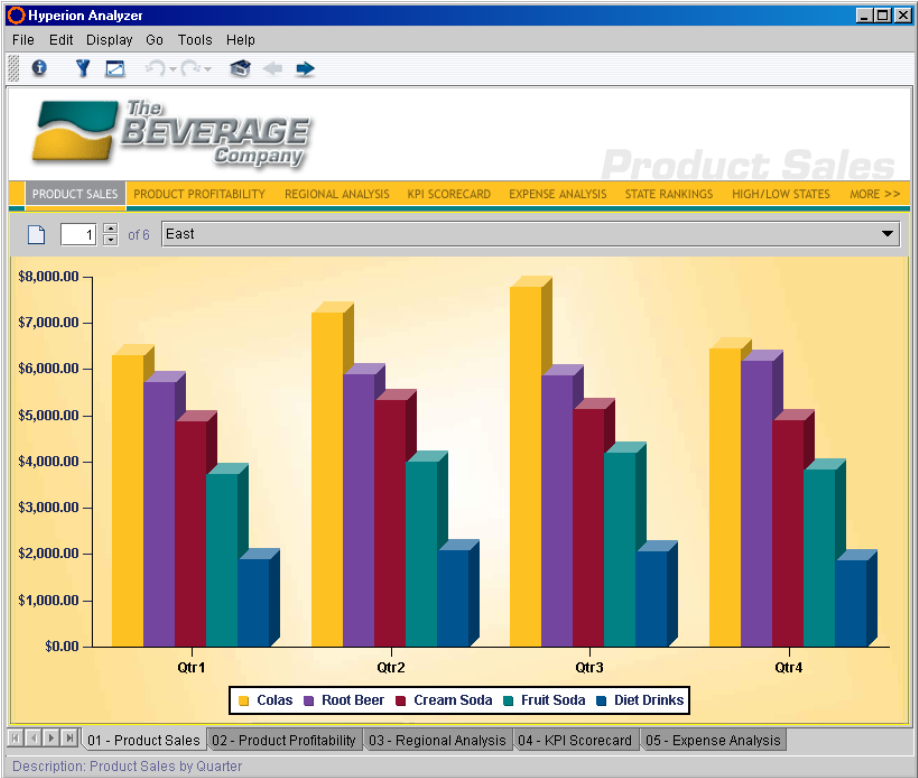
- ▶ To open the Sample report group, click the Sample Report Group icon.
The first report in the Sample report group is displayed in the Main Display panel. Report tabs for the other reports in the report group are displayed in order along the bottom of the interface.

Product Sales

The Product Sales report introduces the Sample report group and provides a starting point for OLAP and relational analysis.

The report charts product sales for each quarter organized with respect to their markets. With the Product Sales report, you can compare individual market performance, as well as review a summary for All Markets.

Figure 55: Product Sales Report



Key Features

- ▶ Click the Page control panel controls to page through the selected markets.
The Product Sales chart is a vertical bar chart. The chart display type provides you with twelve different chart options.

- ▶ Click the **Display** toolbar button drop-down menu for a complete list of display and chart types.
- ▶ Click and hold the cursor over the individual bar chart objects to display the product name and its corresponding data value.

The transparent chart background provides a strong graphical impact.

The sophistication of the chart engine reveals itself in chart details. Notice that the chart includes a custom legend and accommodates both currency symbols and decimals places.

- ▶ Click the **Product Profitability** report tab to proceed to the next report.

Product Profitability

The Product Profitability report is a multidimensional spreadsheet of product sales for each quarter, organized with respect to key business measures.

The nested dimensions on both the rows and columns axes specify the multiple dimensions involved in intersections. The most significant features in this report are the analysis tools.

Figure 56: Product Profitability Report

The screenshot shows the Hyperion Analyzer interface with a report titled 'Product Profitability' for 'The BEVERAGE Company'. The report is filtered for 'Sales' and displays a comparison of Actual vs. Budget for Products across three quarters (Qtr1, Qtr2, Qtr3) and four regions (Central, West, East, South). The data is color-coded: red for negative differences, yellow for small positive differences, and green for larger positive differences. The report includes a navigation bar at the bottom with tabs for '01 - Product Sales', '02 - Product Profitability', '03 - Regional Analysis', '04 - KPI Scorecard', and '05 - Expense Analysis'. The description at the bottom reads 'Description: Actual vs. Budget for Products'.

		Qtr1			Qtr2			Qtr3		
		Actual	Budget	Rank	Actual	Budget	Rank	Actual	Budget	Rank
Colas	Central	\$8,074	\$8,200	1	\$8,701	\$8,870	1	\$8,894	\$9,060	1
	West	\$6,950	\$8,500	2	\$7,178	\$8,800	3	\$7,423	\$9,100	3
	East	\$6,292	\$5,870	3	\$7,230	\$6,760	2	\$7,770	\$7,300	2
	South	\$3,732	\$4,570	4	\$4,079	\$5,000	4	\$4,457	\$5,470	4
Root Beer	West	\$8,278	\$7,700	1	\$8,524	\$7,970	1	\$8,885	\$8,320	1
	Central	\$7,269	\$8,420	2	\$7,440	\$8,610	2	\$7,504	\$8,680	2
	East	\$5,726	\$5,460	3	\$5,902	\$5,650	3	\$5,863	\$5,600	3
	South	\$5,354	\$4,430	4	\$5,535	\$4,580	4	\$5,690	\$4,680	4
Cream Soda	Central	\$8,059	\$6,880	1	\$8,438	\$7,220	2	\$8,684	\$7,460	2
	West	\$8,043	\$6,890	2	\$8,982	\$7,720	1	\$9,616	\$8,300	1
	East	\$4,868	\$3,680	3	\$5,327	\$4,030	3	\$5,142	\$3,850	3
	South	\$3,027	\$2,830	4	\$2,989	\$2,790	4	\$3,208	\$3,030	4
Fruit Soda	West	\$8,403	\$5,540	1	\$8,888	\$5,840	1	\$9,206	\$6,070	1
	Central	\$8,010	\$6,830	2	\$8,477	\$7,250	2	\$8,672	\$7,420	2
	East	\$3,735	\$3,880	3	\$3,990	\$4,150	3	\$4,201	\$4,350	3
	South	\$10,544	\$10,460	1	\$10,809	\$10,750	1	\$10,959	\$10,830	1
Diet Drinks	West	\$8,820	\$8,620	2	\$9,086	\$8,910	2	\$9,518	\$9,330	2
	South	\$4,483	\$4,410	3	\$4,796	\$4,710	3	\$4,947	\$4,830	3
	East	\$1,884	\$1,700	4	\$2,096	\$1,900	4	\$2,071	\$1,880	4

Key Features

The Product Profitability report features a traffic lighting definition that compares product Actuals to Budgets and color codes intersections red, yellow, and green based on percent differences.

Analysts can determine instantly the ranges into which members fall, and the areas in where problems lie.

The traffic lighting analysis tool color-codes dimension member values. you can base color-coding on a comparison of two dimension members, or by fixed limits on a single dimension member. Traffic lighting graphically associates member values, whether or not they are sorted or ranked.

The Calculations analysis tool inserts two calculated columns in the Product Profitability report.

The “% Total” column calculates percent of Total profit by Product for each market.

The “Rank” column assigns a ranking based on the “% Total” calculated column. The Calculations analysis tool enables analysts to build increasingly complex interdependent calculations.

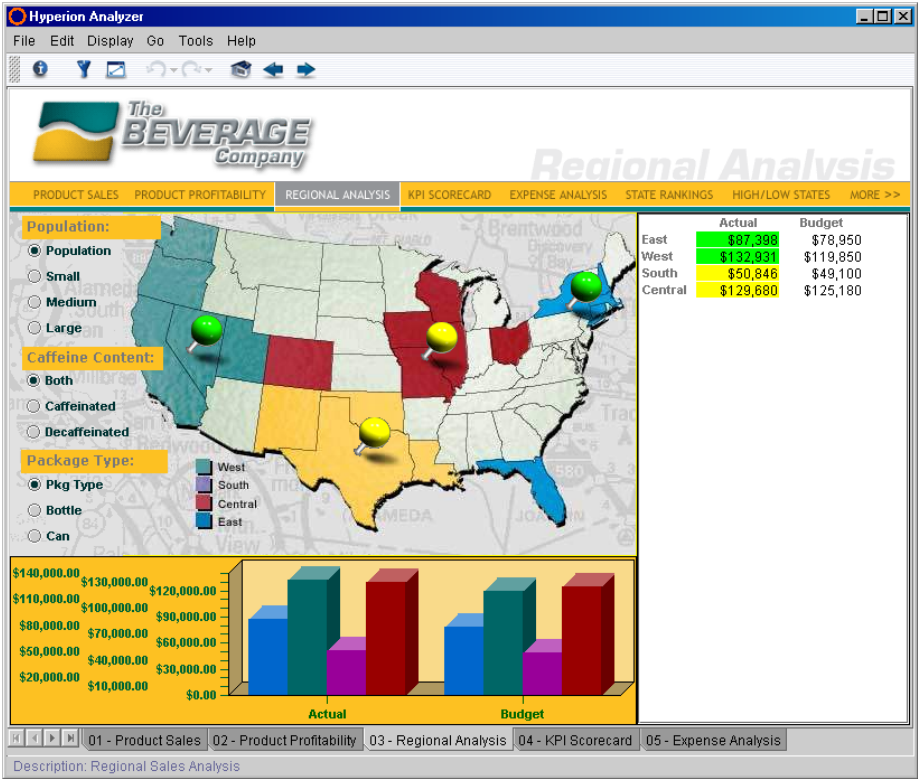
Calculated columns are maintained as the report is pivoted and changed, and dynamically update results and rankings when data values are reloaded.

- ▶ Click the **Regional Analysis** report tab to proceed to the next report.

Regional Analysis

The Regional Analysis report features a coordinated pinboard, chart, and spreadsheet that you can navigate using custom selection controls.

Figure 57: Regional Analysis Report



Key Features

The Regional Analysis report features a pinboard display type. Pinboards are custom graphic representations of multiple dimensions. Pinboard dimensions are represented by a graphic, pin icons located on the graphic, and the color (or state) of the pins.

In the case of the Regional Analysis pinboard, the map background represents the Markets dimension. The children of Markets are displayed and located as pin icons for East, South, Central, and West. Traffic lighting definitions comparing Actual to Budget determine the state of the traffic light pins.

The Regional Analysis report is an excellent example of a Hyperion Analyzer custom report. With the advent of Hyperion Analyzer 6.0, you can create sophisticated custom report layouts in a programming-free environment, without leaving the Hyperion Analyzer Java Web Client.

A nonvisual data source object stores the database query and client-based formatting for a named database connection. As a result, all the objects on the report using that data source are coordinated.

This means that the custom selection controls in the Regional Analysis report prompt navigation in the coordinated pinboard, spreadsheet, and chart objects.

Hyperion Analyzer supports Hyperion Essbase Attribute Dimensions. Attributes are characteristics of conventional dimensions. Caffeination and Package Type are characteristics of Product dimension members. you can browse and select attribute dimensions the same way they select conventional dimensions using the Dimension Browser.

Drilling increases or decreases the level of report detail by including or excluding members of the dimension hierarchy in the report display. Drilling methods can be customized in User Preferences, enabling a variety of hierarchical navigation.

- ▶ To drill down from All Markets to include Southern markets, double-click the South pin.

Notice that the chart and spreadsheet include the Southern markets.

- ▶ Click the **Can** option button under the Package Type selection control.

Once again, all report objects accommodate the selection.

- ▶ Click the **KPI Scorecard** report tab to proceed to the next report.

KPI Scorecard

The Key Performance Indicator (KPI) Scorecard report demonstrates another use of pinboards. Product dimension members have been organized into pages that display key business measure pin icons.

Figure 58: KPI Scorecard Report



Key Features

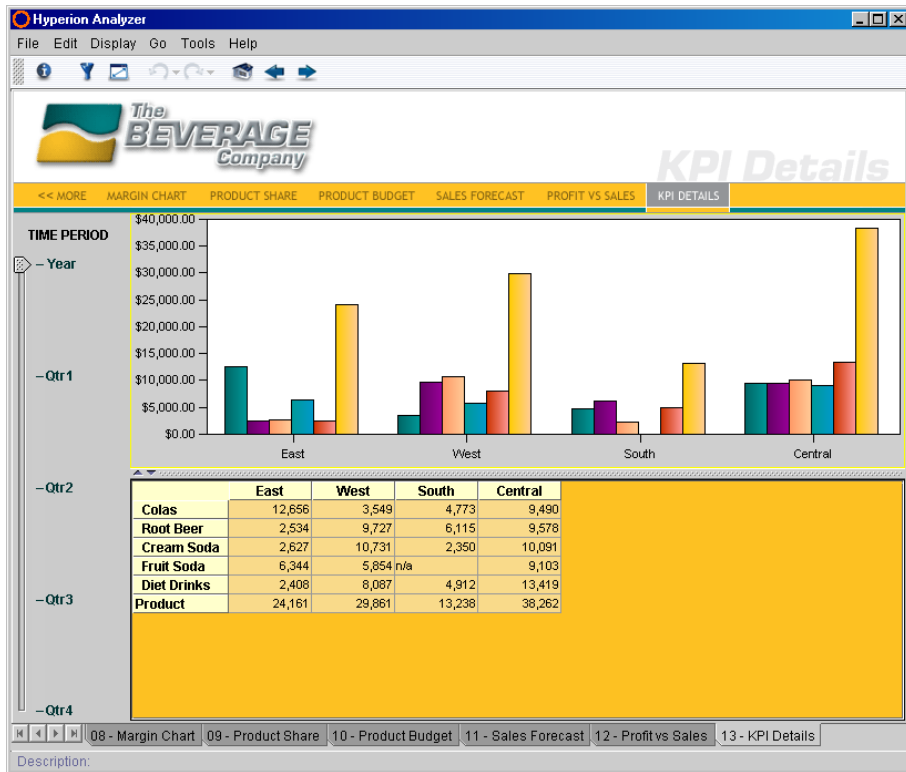
The pin icons are color-coded using a traffic lighting definition comparing Actual to Budget.

Instead of drilling down through the dimension hierarchy these pins have been set to drill-link to reports displaying detailed information about the nature of the Actual to Budget comparison.



- ▶ Double-click the Sales pin icon to drill link to the KPI Details report.

Figure 59: KPI Details Report



The KPI Details report is derived from a relational database. Hyperion Analyzer enables you to access and analyze relational data in the same way they analyze OLAP data.

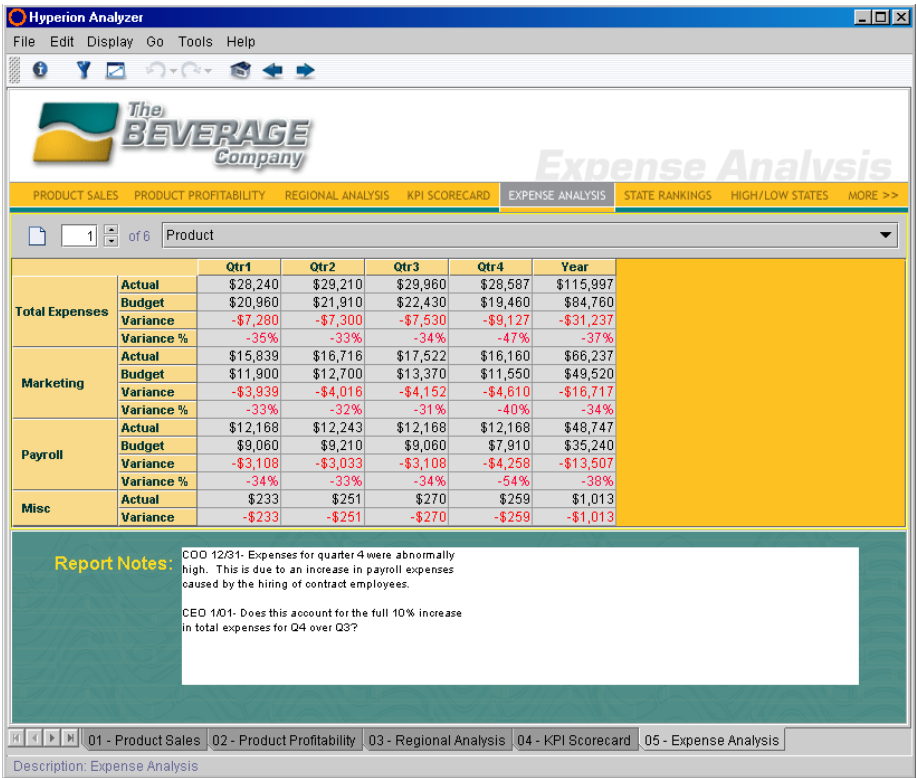
The interface for defining relational database access has been improved, and employs a relational database wizard. Now, you are able to access relational data, regardless of where it is located, and can merge relational and multidimensional data together on the same report.

- Click the first button on the Reports Tab scroll bar, to show the initial reports tabs in the series.
- Click the **Expense Analysis** report tab to proceed to the next report.

Expense Analysis

The Expense Analysis report details expenditures for the year as organized by product.

Figure 60: Expense Analysis Report



Key Features

Despite employing a conventional spreadsheet display type, the Expense Analysis report is a custom report.

The Expense Analysis report contains a dynamic text box used for annotating reports. Analysts can review these notes relating to specific expenditures and their long-term benefits.

- ▶ Click the Details bar **Show/Hide Information Panel** button to display the Information panel.

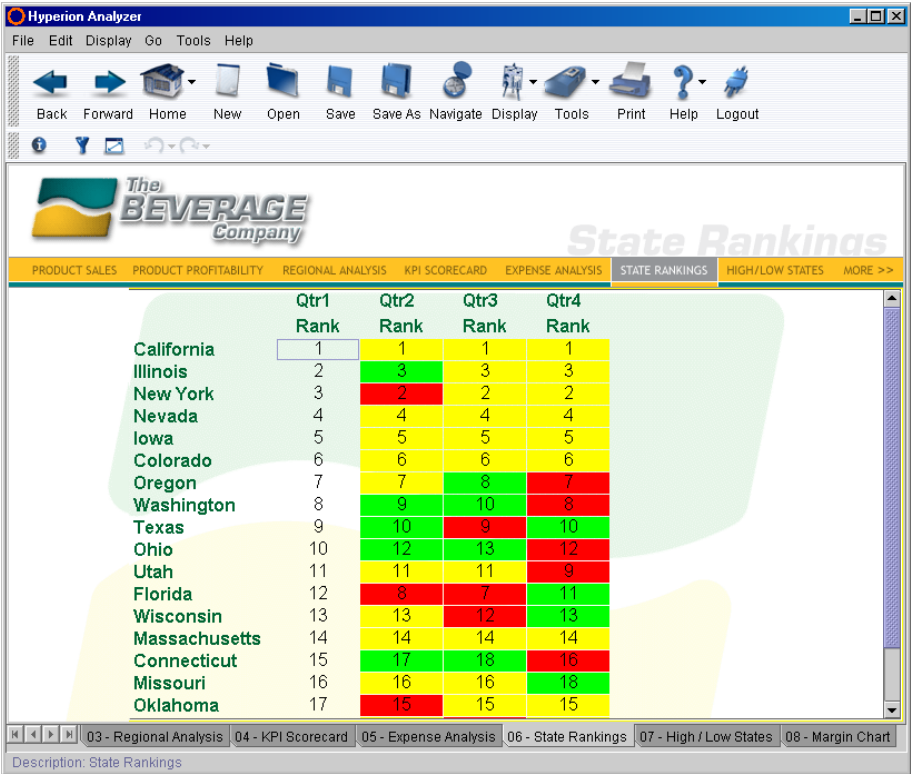
The Information panel is composed of segments summarizing the source and nature of the Main Display panel. Each segment features different controls and context-sensitive right-click menus. Dragging and dropping dimensions between Information panel axes segments modifies the Main Display panel. you can also right-click dimensions in the Information panel to make new Dimension Browser selections.

- ▶ Click the report tabs scroll button until the **State Rankings** report tab is displayed, and then click the **State Rankings** report tab.

State Rankings

The State Rankings report ranks state markets for the last year and, using a traffic lighting definition, color-codes intersections based on whether they have moved up or down in rank over time.

Figure 61: State Ranking Report



Key Features

Analysts can page through the different rankings for each member of the Measures dimension (Sales, Cost of Goods Sold, Margins, Total Expenses, and Profit).

Notice that the Information panel describes the traffic lighting criteria applied to the Q2, Q3, and Q4 columns separately. Analysts can then better understand the nature of the color-coding or decide if they would like to alter the traffic lighting definitions.

The Information panel also indicates that the Sorting analysis Tool has been employed to arrange markets in ascending order based on Q1 rank.

- ▶ Click the Details bar **Show/Hide Information Panel** button to hide the Information panel.

To focus your analysis, you can narrow the spreadsheet to those states demonstrating decreasing performance. Because traffic lighting definitions are already in place, you can accomplish this by filtering on traffic lighting color.

The Show/Hide Only analysis tool provides the ability to include or exclude dimension members from the main display panel using member name, traffic lighting color, or data value criteria. It is an excellent way to focus analysis on a discrete set of values.

- ▶ To create a Show/Hide Only definition, do the following:
 1. Right-click the **Q2** dimension member label, and select **Analysis Tools > Show/Hide Only**.
 2. Select the **Show** option button from the Select Method group.
 3. In the Where group, click the **Any Colors** option button.
 4. In the Set Condition group, select “Equal to” from the drop-down list box and click the **Color** button.
 5. Select Red (the color of decreasing performance) from the Select Color dialog box.
 6. Press the Ctrl key and click the **Q2 Rank**, **Q3 Rank**, and **Q4 Rank** member names from the Members panel.
 7. Click **Apply** and then **OK**

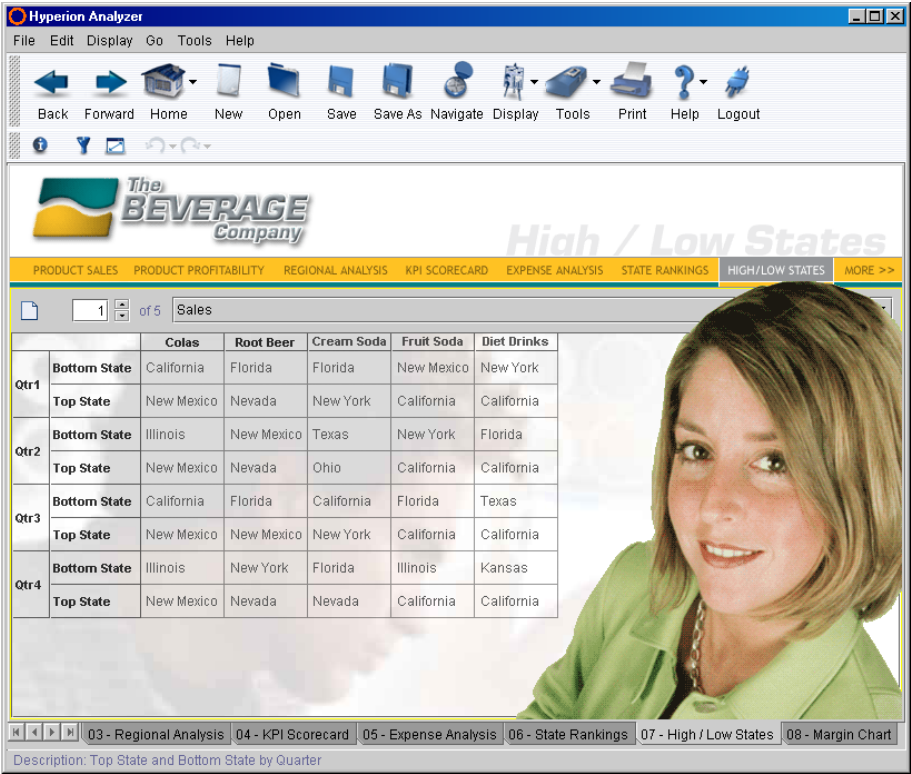
The spreadsheet now displays only Market dimension members with at least one red traffic light intersection. This makes it much easier to identify and address the problems behind these declines.

- ▶ Click the toolbar **Forward** button to proceed to the High/Low States report.

High/Low States

The High/Low States report summarizes the best and worst performing states by quarter for specific and overall Products.

Figure 62: High/Low States Report



Key Features

The entire report displays only calculated columns. All the dimension members and data value intersections have been hidden using the Show/Hide Only analysis tool.

The Top and Bottom states are determined using the Calculations analysis tool Max and Min calculations.

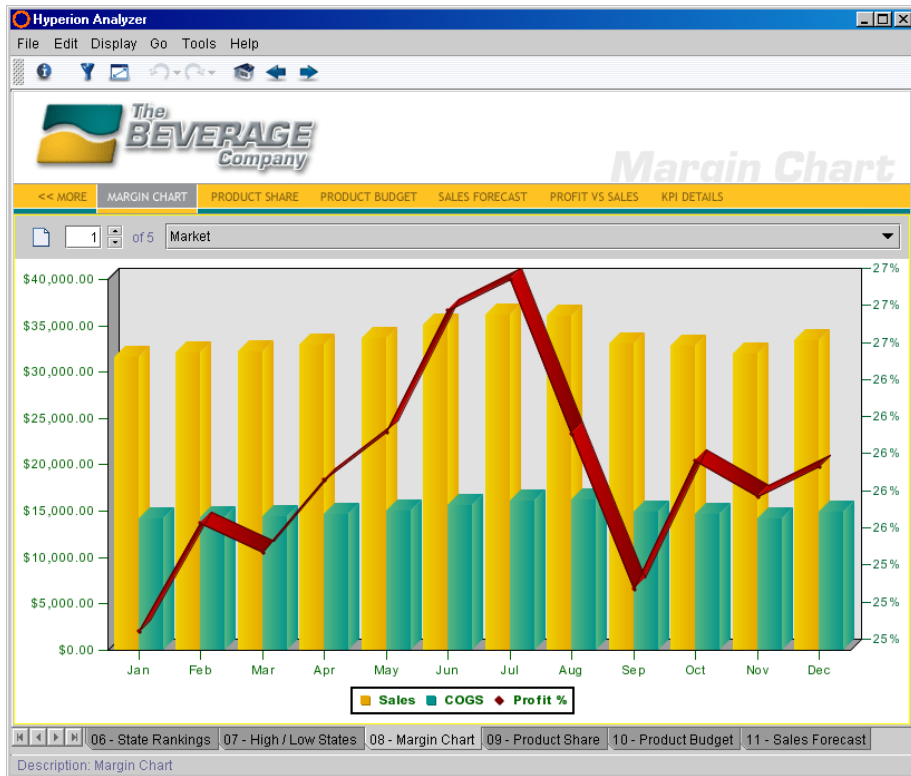


- ▶ Click the toolbar **Forward** button to display the Margin Chart report.

Margin Chart

The Margin Chart report displays both sales figures and profit percentage by product.

Figure 63: Margin Chart Report



Key Features

A new chart engine enables the simultaneous display of multiple chart types. In this case, both a bar and a 3-D line chart are employed at the same time.

Notice also that the line chart is relative to a secondary y-axis, representing profit percentage rates, across from the y-axis representing sales values in dollars.

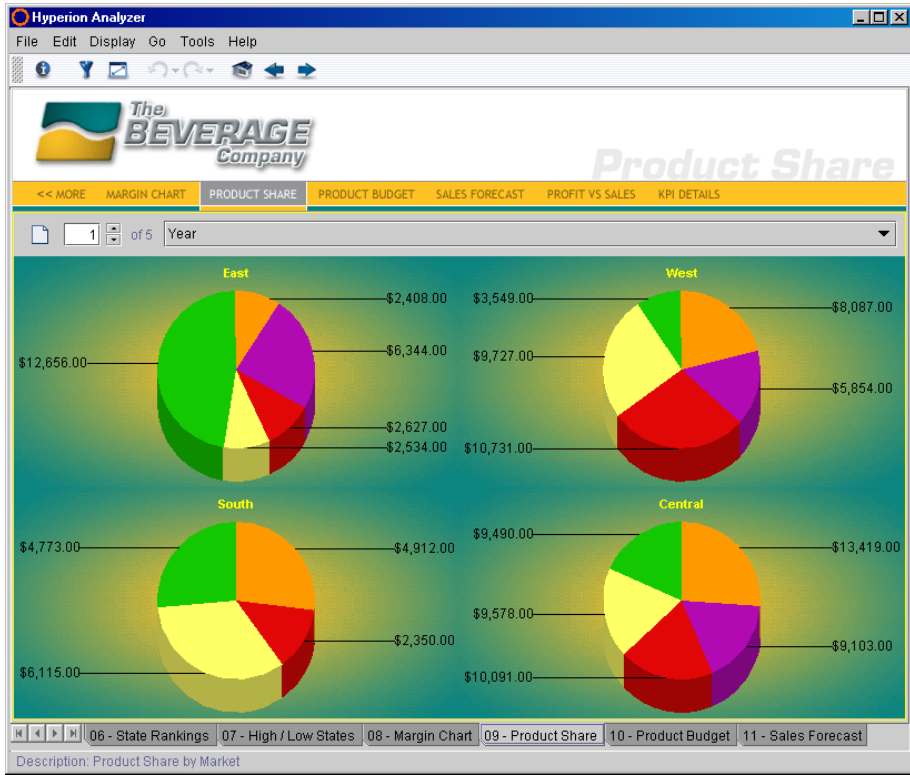
Parallel axes enable information to be scaled independently, but displayed alongside other dimensions. Where a y-axis of percentages plotted on the same axis as values ranging into the millions, percentage values ranging between 0 and 100 would hardly be noticeable. As you can see in the chart, separate y-axes allow percentages to carry comparable analytical weight.

- ▶ Click the **Product Share** report tab to proceed to the next report.

Product Share

The Product Share report feature uses multiple pie charts to illustrate product share in each market region. Reports of this nature are commonly used for Contribution analysis.

Figure 64: Product Share Report



Key Features

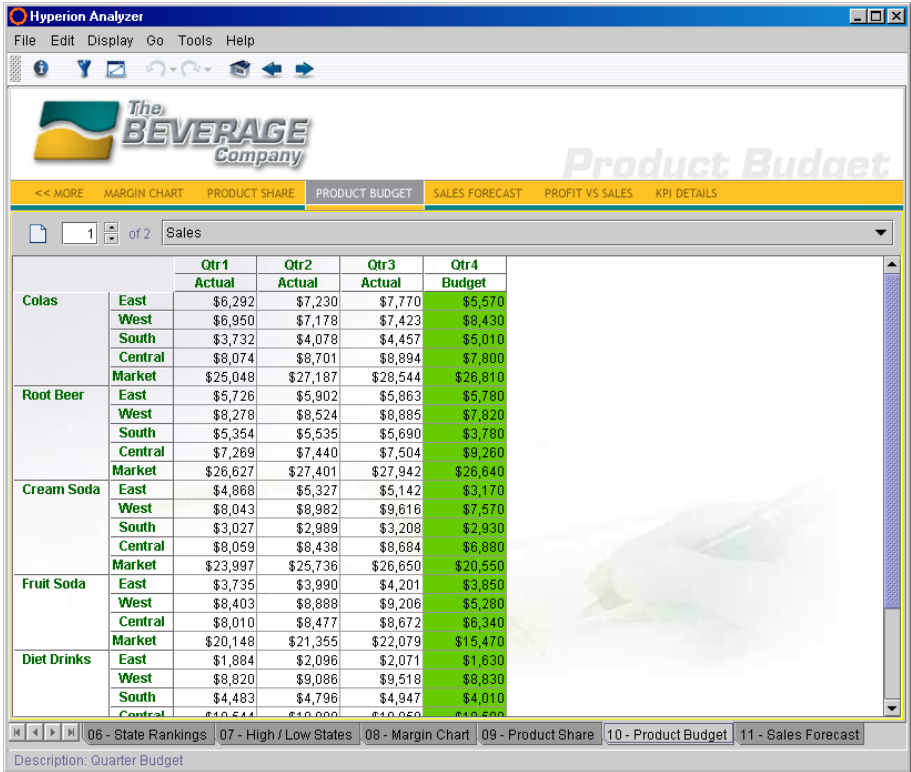
Simultaneously displaying many charts is significant, even when a single chart type is used.

- ▶ To rotate a pie chart, click and drag a pie wedge in a circular motion.
- ▶ To separate wedges, do one of the following steps:
 - Right-click and drag a pie wedge.
 - Select a pie chart and press Page Up, or Page Down.
- ▶ Double-click a wedge to drill down through the dimensional hierarchy.
- ▶ Click the **Product Budget** report tab to proceed to the next report.

Product Budget

The Product Budget report is a mid-year spreadsheet report combining Actual and Budget dimension members for a projection of the year. Significant in this report is the use of Asymmetrical analysis, a common aspect of financial reporting.

Figure 65: Product Budget Report



Key Features

Asymmetrical analysis reports feature nested dimensions that differ (by at least one member) across an axis. There can be a difference in the number of members or in the names of the members, but whatever the cause, dimension member symmetry has been abandoned.

Hyperion Analyzer accommodates asymmetrical analysis by enabling you to hide specified rows, columns, and chart objects.

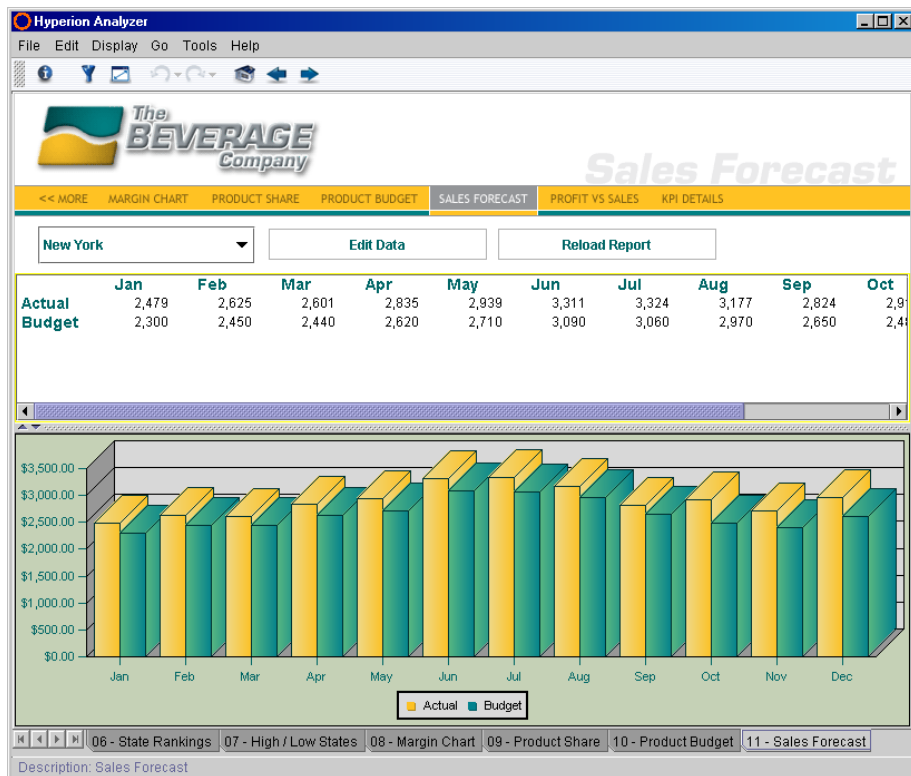


- ▶ Click the **Sales Forecast** report tab to proceed to the next report.

Sales Forecast

The Sales Forecast report contains a coordinated spreadsheet and chart that enable you to project sales and budget figures, apply them to the OLAP database, and appraise their consequences in real time.

Figure 66: Sales Forecast Report



Key Features

Users with permission can edit cell values and write edits back to Hyperion Essbase.

you can initiate Edit Data Mode only from the spreadsheet display type, however.

The Edit Data Bar is displayed at the bottom of the Main Display panel when you are in Edit Data Mode.

- ▶ To edit data values:
 1. Right-click any spreadsheet cell and select **Edit Data**.

The Edit Data Bar is displayed in the spreadsheet data object.
 2. Double-click a cell to edit its data value.

The cell border becomes gray, and cell formatting is disabled.
 3. Enter a new data value, and click outside the cell.
 4. Click the **Send/Commit** button on the Edit Data bar.

Only authorized users can successfully write changes to the database. The Confirmation dialog box is displayed if write-back is successful.

If the database contains calculated members, you may select to recalculate the database by clicking the Calculate button.
 5. Click the **Close/Disable** button to exit Edit Data mode.
- ▶ To close the entire report group with a single click, right-click any report tab and select the **Close All** menu item.

You have two options for creating new reports:

- Modify an existing report, and save the report under a new name or to a new report group (Save As).
- Use the new report creation wizard.

This chapter leads you through the process of creating a Hyperion Analyzer report using the Java Web Client.

For a description of creating a new report using the HTML Web Client, see [“Creating a Report in the HTML Web Client” on page 84](#).

Overview of New Report Creation

The creation of our new report includes the following procedures:

1. Starting the Hyperion Analyzer Java Web Client
2. Starting the New Report Creation Wizard
 - a. Selecting a display type
 - b. Selecting a database connection
 - c. Defining a query with the Cube Navigator
 - d. Defining dimension member selections with the Dimension Browser
3. Saving a report
4. Formatting a spreadsheet
5. Creating a Traffic Lighting definition
6. Creating a calculated member
7. Saving the report as a Web Page

Starting the Hyperion Analyzer Java Web Client

If you have not yet started the Hyperion Analyzer Java Web Client, see [“Starting the Hyperion Analyzer Java Web Client”](#) on page 33.

Starting the New Report Creation Wizard

Hyperion Analyzer provides an automated series of dialog boxes that steps you through the process of laying out a report, composing an OLAP query, and defining dimension member selections.

- ▶ To initiate the new report creation wizard, click the Toolbar **New** button.

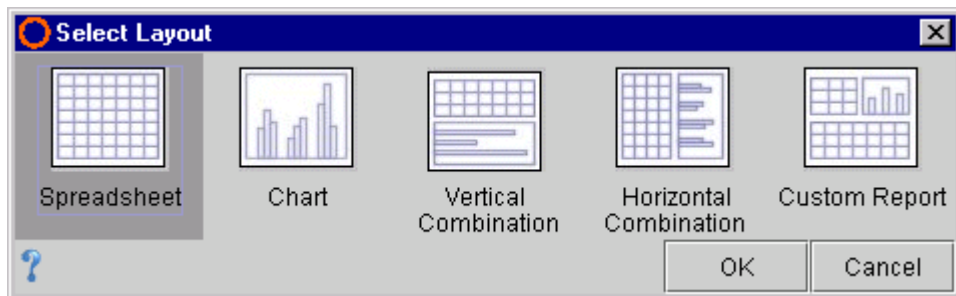
Figure 67: Toolbar New Button



Selecting a Display Type

The Select Layout dialog box, the first step in the wizard process, prompts you to select a display type for the report you are creating.

Figure 68: Select Layout Dialog Box



You can select spreadsheet and chart, but not pinboard. This is because pinboard display types require a spreadsheet with a traffic lighting definition to be created first. Pinboards are created using the Pinboard Designer.

There are also Vertical Combination and Horizontal Combination layout options. These options construct a report that has both a spreadsheet and chart.

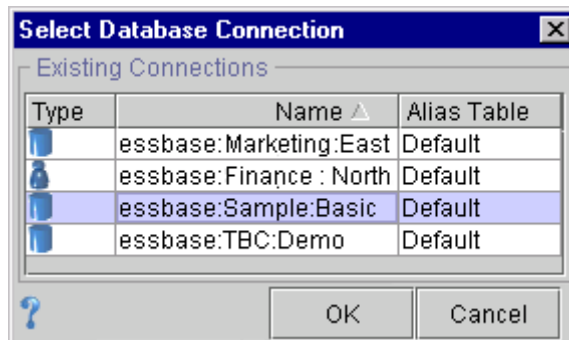
The last option is to create a Custom Report. For more information, see [Chapter 9, “Creating a Dynamic Custom Report”](#).

- ▶ To select the Spreadsheet display type, click the **Spreadsheet** icon and then click OK.

Selecting a Database Connection

The Select Database Connection dialog box, the second step in the wizard process, prompts you to select a Hyperion Essbase, Hyperion Financial Management, or relational database connection. The server you select is queried for report data values.

Figure 69: Select Database Connection Dialog Box



Each database connection type has a unique icon.

Figure 70: Global Database Connection and Personal Database Connection Icons



Global database connections are defined by Administrators and are available to all users with permission. You create personal database connections for your own analysis. Personal database connections are only available to you.

You can sort the list of database connection names in ascending or descending order by clicking the arrow in the Name column header.

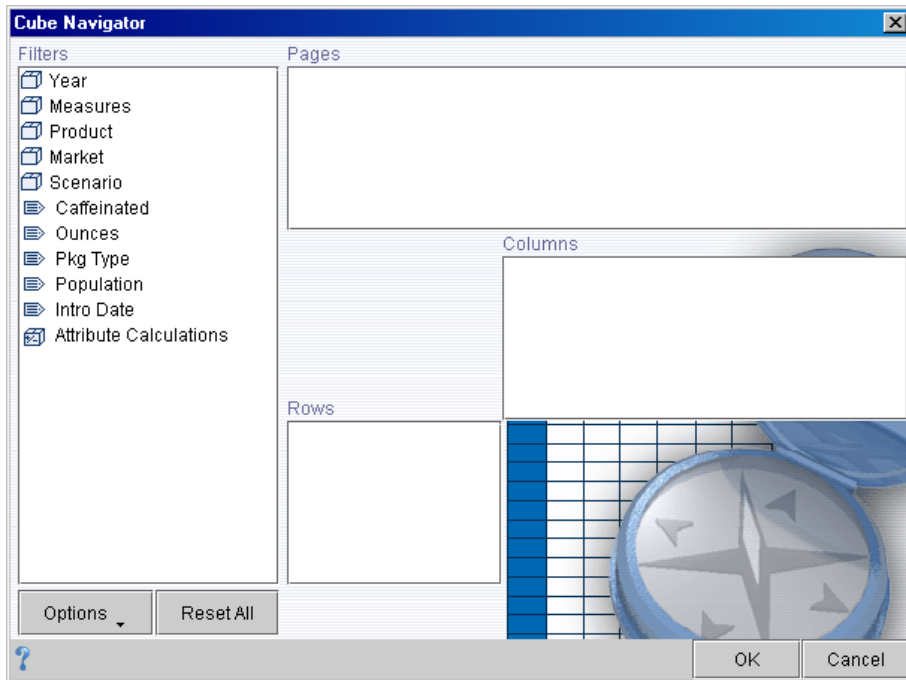
- ▶ To select a database connection, click the database connection name and then click OK.

Note: For the purposes of this tutorial, select the Hyperion Essbase Sample Basic global database connection. As Administrators can rename database connections, check with your Administrator if you are unsure of the database connection name.

Cube Navigator

The Cube Navigator dialog box, the third step in the wizard process, is a graphical interface for laying out a report and defining a database query.

Figure 71: Cube Navigator



When you select a database connection, Cube Navigator lists dimensions, attributes and calculations defined in that database outline.

Figure 72: Dimension, Attribute, and Calculated Dimension Icons



All dimensions are presented as aggregates on the Filters axis by default.

There are also panels for the Pages, Columns and Rows axes.

Dragging and dropping dimensions, attributes or calculated dimensions on to another axis initiates the process of creating a query, and assigns the dimension to that axis in the report layout.

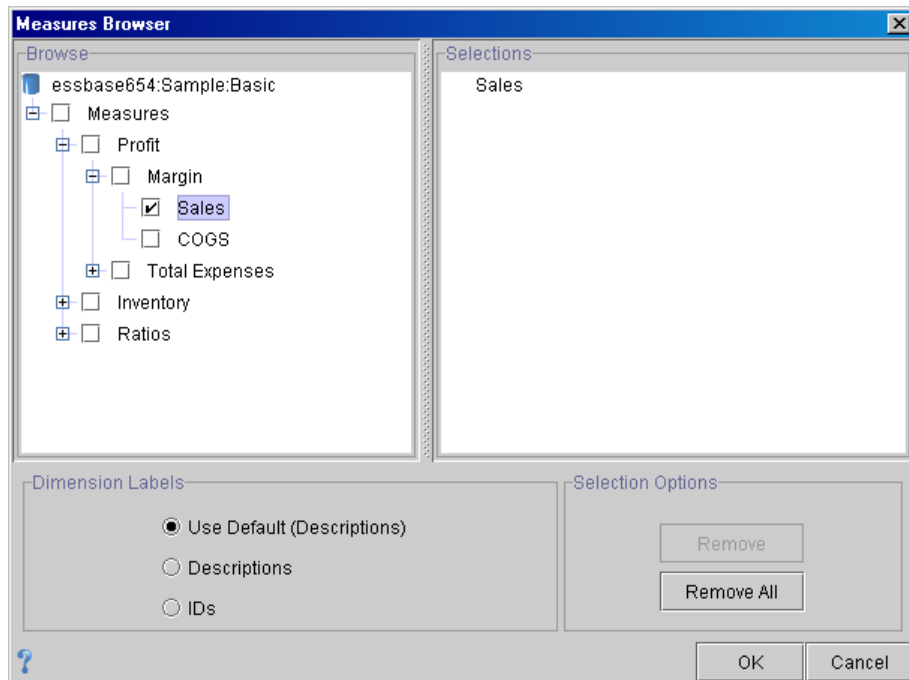
Defining Dimension Member Selections with the Dimension Browser

When a dimension is dragged and dropped onto another axis, the Dimension Browser dialog box is displayed.

The Dimension Browser dialog box is used for defining dimension member selections.

Selecting specific dimension members enables the query, and subsequently the report, to provide more detailed information.

Figure 73: Dimension Browser



You can perform the following tasks using the Dimension Browser:

- Expand and collapse the dimension hierarchy.
- Select individual dimension members.
- Select dimension members using familial relationships.
- Select dimension members in terms of the multidimensional hierarchy.
- Select dimension members from server-specific definitions.
- Select dimension members from pre-defined selection lists.
- Indicate a label mode for the dimension.
- Remove dimension members from the selection.

To expand or collapse the dimension hierarchy, click the plus sign (+) or minus sign (-), or double-click the dimension member name.

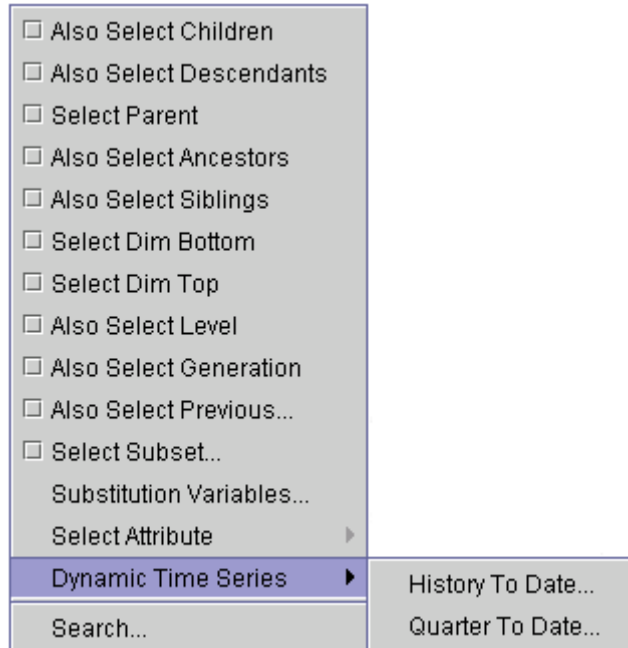
To make dimension member selections, expand the dimension hierarchy, and click to select a dimension member check box. Selected dimension members display in the Selections panel at right.

Dimension Browser enables you to select the label mode for the dimension, using a group of option buttons. You can display the member description, the unique ID, or defer to default user preferences.

Dynamic Member Selection

In dimensions with large member sets, you can easily define member selections using the Dimension Browser right-click menu. Right-clicking dimension member names enables selection by familial relationship and database-specific selection options.

Figure 74: Dimension Browser Right-click Menu (Essbase:Sample:Basic)



The advanced member selections are dynamic. This means that as long as the right-clicked dimension member exists in the database outline, the advanced member selection is applied regardless of how the outline grows, shrinks or is redefined. This prevents your work from becoming obsolete and enables changes in the data source to be reflected in the report.

Defining the Query

Now that you understand Cube Navigator and Dimension Browser, let's define the query and report used in this tutorial. You jump between Cube Navigator and Dimension Browser until you define all dimension positions and member selections:

Defining the Year Dimension

- ▶ To position the Year dimension in the report layout and define dimension member selections, do the following:
 1. Drag and drop the **Year** dimension onto the **Columns** panel.
Dropping the dimension on the axis panel opens the Year Dimension Browser.
 2. Click the Year plus sign (+), to expand the dimension hierarchy.
The children of Year are displayed.
 3. Click the check boxes to select the four quarters (**Q1**, **Q2**, **Q3**, and **Q4**).
 4. Click **OK**.
The Cube Navigator resumes focus.

Defining the Scenario Dimension

- ▶ To position the Scenario dimension in the report layout and define dimension member selections, do the following:
 1. Drag the **Scenario** dimension onto the **Columns** panel.
Dropping the dimension on the axis panel opens the Scenario Dimension Browser.
 2. Select **Actual** and **Budget** from the Scenario dimension.
 3. Click **OK**.
The Cube Navigator resumes focus.

Defining the Product Dimension

- ▶ To position the Product dimension in the report layout and define dimension member selections, do the following:
 1. Drag the **Product** dimension onto the **Rows** panel.
Dropping the dimension on the axis panel opens the Product Dimension Browser.
 2. Right-click the **Product** dimension name.

The advanced member selection right-click menu is displayed.

3. Select **Also Select Children** from the right-click menu.

This selection includes the Product member and members immediately beneath it in the dimension hierarchy.

4. Click the **Show Descriptions** option button.
5. Click **OK**.

The Cube Navigator resumes focus.

Defining the Market Dimension

- ▶ To position the Market dimension in the report layout and define dimension member selections, do the following:

1. Drag and drop the **Market** dimension onto the **Rows** panel.

The Market Dimension Browser displays.

2. Click the Market plus sign (+), to expand the dimension hierarchy.
3. Right-click the **Central** dimension member.

The advanced member selection right-click menu is displayed.

4. Select **Also Select Level** from the right-click menu.

All Market dimension members at the same level as Central (all regions) are selected.

5. Click **OK**.

The Cube Navigator resumes focus.

Defining the Measures Dimension

- ▶ To position the Measures dimension in the report layout and define dimension member selections, do the following:

1. Drag the **Measures** dimension onto the **Pages** panel.

The Measures Dimension Browser displays.

2. Select the **Sales** dimension member (+Measures > +Profit > +Margins > Sales).

Placing Sales measures on the page axis ensures that all report intersections are relevant to Sales figures.

3. Click **OK**.

The Cube Navigator resumes focus.

Defining the Package Type Dimension

- ▶ To position the Pkg Type dimension in the report layout and define dimension member selections, do the following:

1. Drag the **Pkg Type** dimension onto the **Pages** panel.

The Pkg Type Dimension Browser displays.

2. Right-click the **Pkg Type** and select **Also Select Children**.

This selection organizes the query result set into pages by the children of the Package Type attribute dimension. Because Sales measures are also on the Page axis, all report intersections are relevant to Sales figures and the current package type.

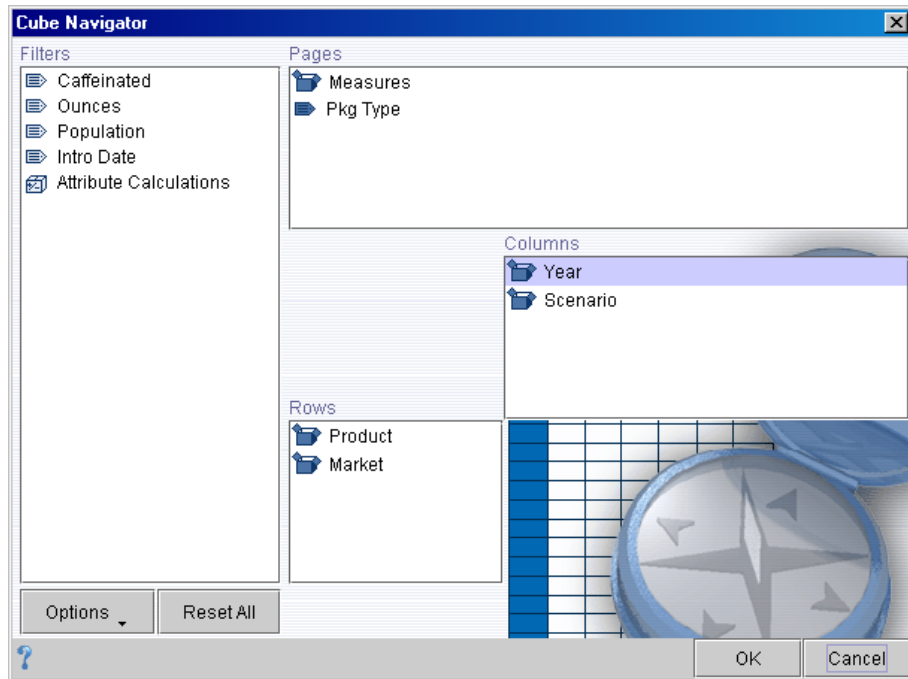
3. Click **OK**.

The Cube Navigator resumes focus.

Cube Navigator Options

There are several options under the Cube Navigator Options button menu. These options enable you to specify report parameters prior to submitting the database query.

Figure 75: Cube Navigator



Submitting the Query

All the dimensions are positioned and dimension member selections have been defined. It is time to submit the query to the data source, using the selected database connection:

- ▶ To submit the OLAP query to the multidimensional database, click the Cube Navigator **OK** button.

The requested data values are returned and presented per the query parameters.

Figure 76: The Created Report

The screenshot shows the Hyperion Analyzer interface with a report table. The table has a header with columns for Qtr1, Qtr2, Qtr3, and Qtr4. Each quarter column is further divided into Actual and Budget. The rows represent product categories and their regional breakdowns. The data is as follows:

		Qtr1		Qtr2		Qtr3		Qtr4
		Actual	Budget	Actual	Budget	Actual	Budget	Actual
Colas	East	6,292	5,870	7,230	6,760	7,770	7,300	6,448
	West	6,950	8,500	7,178	8,800	7,423	9,100	6,755
	South	3,732	4,570	4,078	5,000	4,457	5,470	4,013
	Central	8,074	8,200	8,701	8,870	8,894	9,060	8,139
Root Beer	East	5,726	5,460	5,902	5,650	5,863	5,600	6,181
	West	8,278	7,700	8,524	7,970	8,885	8,320	8,513
	South	5,354	4,430	5,535	4,580	5,690	4,680	5,429
	Central	7,269	8,420	7,440	8,610	7,504	8,680	6,993
Cream Soda	East	4,868	3,680	5,327	4,030	5,142	3,850	4,904
	West	8,043	6,890	8,982	7,720	9,616	8,300	8,750
	South	3,027	2,830	2,989	2,790	3,208	3,030	3,334
	Central	8,059	6,880	8,438	7,220	8,684	7,460	8,034
Fruit Soda	East	3,735	3,880	3,990	4,150	4,201	4,350	3,819
	West	8,403	5,540	8,888	5,840	9,206	6,070	8,537
	South	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Central	8,010	6,830	8,477	7,250	8,672	7,420	8,292

You have created your first report.

Saving a Report

To save the report you created to the Hyperion Analyzer repository, you must use the Save As command.

- ▶ To save the report you created, do one of the following tasks:
 - Click the **Save As** Toolbar button.
 - Select **Save As** from the Report Tab right-click menu.
 - Select **File > Save As** from the Menu bar.

The Save As command displays the Save Report dialog box that enables you to define a report name and report group location.

- ▶ Enter the following information in the Save Report dialog box, and click **OK**.

Report Name: **First Report**

Group: **First Report Group**

Saving a report stores the query, dimension member selections and formatting definitions that compose the report to the Hyperion Analyzer repository. The data values populating multidimensional intersections are returned from the database connection each time the report is opened.

Formatting a Spreadsheet

Use the Spreadsheet Options dialog box to apply formatting to the spreadsheet display type. You can do the following:

- Set the background color.
- Set the row banding color.
- Set the header font style.

Setting the Background Color

- ▶ To set the spreadsheet background color, perform the following tasks:
 1. Right-click the **Qtr1** dimension label, and select **Spreadsheet Options**.
The Spreadsheet Options dialog box is displayed.
 2. In the Display group box, click the **Background Color...** button.
The Select Color dialog box is displayed.
 3. On the Swatches tab, click a color you would like to use for the background color.
 4. Click **OK**.
The Spreadsheet Options dialog box resumes focus.
 5. Click **OK**.

Setting the Row Banding Color

- ▶ To set the spreadsheet row banding color, perform the following tasks:
 1. Right-click the **Qtr1** dimension label, and select **Spreadsheet Options**.
The Spreadsheet Options dialog box is displayed.
 2. In the Display group box, click the **Row Band Color...** button.
The Select Color dialog box is displayed.
 3. On the Swatches tab, click a color you would like to use for an alternating row band color.
 4. Click **OK**.
The Spreadsheet Options dialog box resumes focus.
 5. Click **OK**.

Setting the Header Font

- ▶ To set the font style for the dimension label headers, perform the following tasks:
 1. Right-click the **Qtr1** dimension label, and select **Spreadsheet Options**.
The Spreadsheet Options dialog box is displayed.
 2. In the Headers group box, click the **Header Font...** button.
The Font Properties dialog box is displayed.
 3. In the Font Style group box, click the **Bold** check box.
 4. In the Size entry field, enter **12** for the font point size.
 5. Click **OK**.
The Spreadsheet Options dialog box resumes focus.
 6. Click **OK**.

Creating a Traffic Lighting Definition

The Traffic Lighting Analysis Tool color codes dimension member cells, based on a comparison of two dimension members, or by fixed limits on a single dimension member.

Traffic lighting graphically associates member values, whether or not they are sorted or ranked.

Use the Traffic Lighting dialog box to perform the following tasks:

- Compare Actual measures to Budget measures.
- Set colors to identify percentage differences.
- Make the traffic lighting semi-transparent.

Defining a Traffic Lighting Definition

► To define a traffic lighting definition, perform the following tasks:

1. Right-click the **Actual** dimension member label and select **Analysis Tools > Traffic Light**.

The Traffic Lighting dialog box is displayed.

2. In the Apply Traffic Lighting To panel, click **Actual**.
3. In the Comparing It To panel, click **Budget**.

The traffic lighting definition now compares Actual measures to Budget measures.

Variance limits determine the thresholds and ranges to which traffic lighting colors are applied. These limits can be set by fixed differences, or by percentage differences.

4. In the Assign Limits group box, select the **% Differences** check box.

There are three default ranges and colors. You can enter values to define thresholds for the ranges.

5. In the Assign Limits group box, set the threshold for the top set-point to **10**.

This sets Budget data values greater than 10 percent of the Actual data values to have the cell background color used by the top range.

6. In the Assign Limits group box, set the threshold for the second set-point to **-10**.

This sets Budget data values greater than -10 percent of the Actual data values to have the cell background color used by the middle range. Budget data values less than -10 percent of the Actual data values have the cell background color used by the bottom range.

7. Click the **Apply** button.

Setting Traffic Lighting Range Colors

- ▶ To set traffic lighting range colors, perform the following tasks:
 1. Right-click the top color range and select **Set Color**.
The Select Color dialog box is displayed.
 2. On the Swatches tab, click a color you would like to use for the top range.
 3. Click **OK**.
The Traffic Lighting dialog box is displayed.
 4. Right-click the middle color range and select **Set Color**.
The Select Color dialog box is displayed.
 5. On the Swatches tab, click a color you would like to use for the middle range.
 6. Click **OK**.
The Traffic Lighting dialog box is displayed.
 7. Repeat these same steps for the bottom range.
When The Traffic Lighting dialog box is displayed, right-click a threshold arrow. You can include the threshold in the range above it or below it by selecting the corresponding range color.
 8. Click the **Apply** button.

Setting Transparency for Traffic Lighting Ranges

Controlling traffic lighting transparency is important, when you do not want a background image to be obscured by cell traffic lighting.

- ▶ To set transparency for traffic lighting ranges, perform the following tasks:
 1. Right-click the middle color range and select **Set Opacity**.
The Opacity dialog box features a slider controlling the percentage of transparency, and a Apply to All Colors check box. When the slider is set to 100, the range is opaque. When the slider is set to 0, the range is completely transparent.

2. Drag and drop the slider control to 50.
The traffic lighting range is 50% transparent.
3. Click the **Apply To All Colors** check box.
The 50% transparent setting is applied to all ranges.
4. Click **OK**.
The Traffic Lighting dialog box reflects the setting.
5. Click **OK**.
The traffic lighting definition is applied to the report.

Figure 77: Your First Report with Traffic Lighting

		Qtr1		Qtr2		Qtr3	
		Actual	Budget	Actual	Budget	Actual	Budget
Colas	East	6,292	5,870	7,230	6,760	7,770	7,30
	West	6,950	8,500	7,178	8,800	7,423	9,10
	South	3,732	4,570	4,078	5,000	4,457	5,47
	Central	8,074	8,200	8,701	8,870	8,894	9,06
Root Beer	East	5,726	5,460	5,902	5,650	5,863	5,60
	West	8,278	7,700	8,524	7,970	8,885	8,32
	South	5,354	4,430	5,535	4,580	5,690	4,68
	Central	7,269	8,420	7,440	8,610	7,504	8,68
Cream Soda	East	4,868	3,680	5,327	4,030	5,142	3,85
	West	8,043	6,890	8,982	7,720	9,616	8,30
	South	3,027	2,830	2,989	2,790	3,208	3,03

Creating a Calculated Member

Hyperion Analyzer enables you to define client-based calculations that are maintained as dimensions members and values fluctuate.

Use the Calculation Definition dialog box to create the following calculated members:

- Variance - The difference between Actual and Budget scenarios.

- %Variance - The percentage difference between Actual and Budget scenarios.

Defining a Variance Calculation Definition

- To define a variance calculation definition, perform the following tasks:
1. Right-click the **Actual** dimension member label and select **Analysis Tools > Calculation**.

The Calculation Definition dialog box is displayed.

2. Enter **variance** in the Name field.
3. Select **Subtract** from the Function drop-down list box.
4. In the Select Position group box, select the **Insert After** option button, and select **Budget** from the Insertion Point drop-down list box.

You have created a subtraction calculation called Variance and positioned the calculated member in the report after the Budget dimension.

Notice in the Equation panel at the bottom of the dialog box, that the subtraction function has two arguments. Two question mark placeholders occupy the Arguments panel. You must enter the arguments for the calculation.

5. In the Select Members panel, click **Actual** and then click the right-arrow.
Actual is moved to the Arguments panel as the first argument.
6. In the Select Members panel, click **Budget** and then click the right-arrow.
Budget is moved to the Arguments panel as the second argument. The Equation panel displays the subtraction function with both members as arguments.
7. Click **Apply**.
8. Click **OK**.

Defining a Percent Variance Calculation Definition

- To define a percent variance calculation definition, perform the following tasks:
1. Right-click the **Actual** dimension member label and select **Analysis Tools > Calculation**.

The Calculation Definition dialog box is displayed.

2. Enter **%Variance** in the Name field.
3. Select **Percent** from the Function drop-down list box.
4. In the Select Position group box, select **Insert After**, and select **Variance** from the Insertion Point drop-down list box.

You have created a percentage calculation called %Variance and positioned the calculated member in the report after the other calculated dimension.

The Equation panel requires two arguments for the percent calculation.

5. In the Select Members panel, click **Actual** and then click the right-arrow. Actual is moved to the Arguments panel as the first argument.
6. In the Select Members panel, click **Budget** and then click the right-arrow. Budget is moved to the Arguments panel as the second argument.
7. Click **Apply**.
8. Click **OK**.

Figure 78: Your First Report with Traffic Lighting and Calculations

		Qtr1					
		Actual	Budget	Variance	%Variance	Actual	Budget
Colas	East	6,292	5,870	422	107.189	7,230	6,76
	West	6,950	8,500	-1,550	81.765	7,178	8,80
	South	3,732	4,570	-838	81.663	4,078	5,00
	Central	8,074	8,200	-126	98.463	8,701	8,87
Root Beer	East	5,726	5,460	266	104.872	5,902	5,65
	West	8,278	7,700	578	107.506	8,524	7,97
	South	5,354	4,430	924	120.858	5,535	4,58
	Central	7,269	8,420	-1,151	86.33	7,440	8,61
Cream Soda	East	4,868	3,680	1,188	132.283	5,327	4,03
	West	8,043	6,890	1,153	116.734	8,982	7,72
	South	3,027	2,830	197	106.961	2,989	2,79

Your first report now displays two calculated columns.

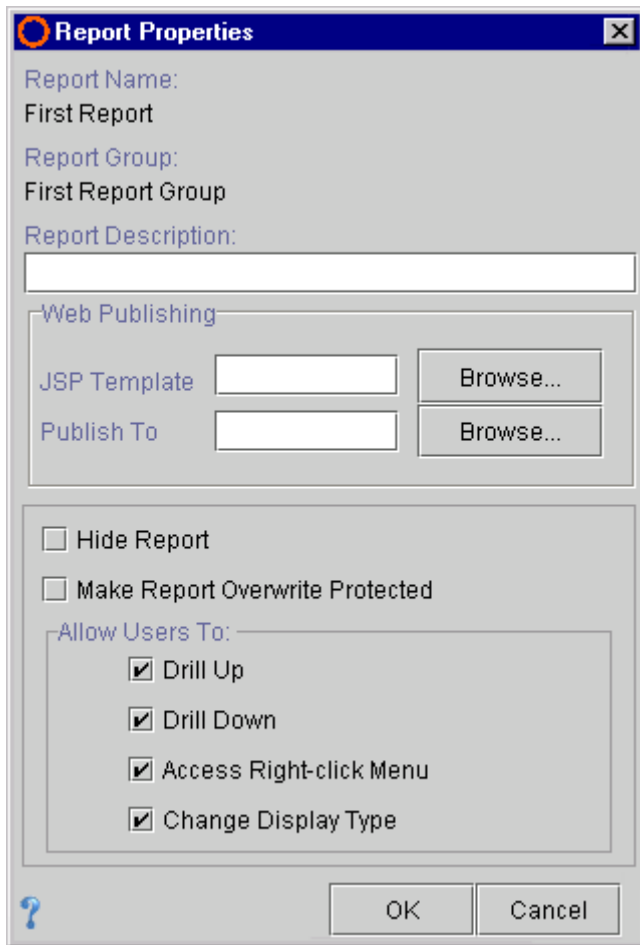
Saving the Report as a Web Page

Now that you have created your first report, you can share it with others. Your Hyperion Analyzer report can be easily saved to HTML.

You use the Report Properties dialog box to set parameters for the Save As Web Page process, and then you can publish to the Web.

You can use this same process to publish entire report groups to the Web.

Figure 79: Report Properties Dialog Box



Setting Save As Web Page Parameters

- ▶ To set parameters for the Save As Web Page process, perform the following tasks:
 1. Right-click the report tab for the current report and select **Report Properties**.
The Report Properties dialog box is displayed.
 2. Identify the JSP template used to generate the Web page by performing one of the following tasks:
 - In the **JSP Template** field, enter the name and file extension of a JSP template on the Hyperion Analyzer server.
 - Click the **Browse** button and navigate through the network to a JSP template on the Hyperion Analyzer server.
 - Leave the field blank to use the Hyperion Analyzer default JSP template.

Note: There is no need to specify an output directory for the Publish To field. The output directory is only used in conjunction with the Save as Web Page Batch Utility. See Hyperion Analyzer Administration Tools Online Help for more information.

3. Click **OK**.

The parameters for the Save As Web Page process are set, and are stored in the report definition upon the next save.

Publishing the Report to the Web

- ▶ To save the current report to HTML, perform the following tasks:
 1. Select **File > Web Publish > Current Report**.
The Save dialog box is displayed.
 2. Navigate to a network location where the HTML output can be saved, and click **OK**.
Hyperion Analyzer uses the parameters specified in the Report Properties dialog box to convert the report to HTML and locate the output.

You have successfully created and formatted your first report, applied advanced analysis tools, and distributed it to the world wide Web.

Creating a Dynamic Custom Report

You are not restricted to creating reports with the report creation wizard. Hyperion Analyzer also provides an innovative interface for designing custom reports.

This chapter leads you through the process of creating a Hyperion Analyzer custom report using the Java Web Client.

Although HTML Web Client users can review custom reports, they cannot create custom reports.

The following tutorial assumes you are familiar with multidimensional analysis, the Hyperion Analyzer interface, and the conventions associated with creating a standard Hyperion Analyzer report. If you are not familiar with these topics, review Chapter 2 through Chapter 7.

Overview of Creating a Custom Report

The creation of your custom report includes the following procedures:

1. Starting the Hyperion Analyzer Java Web Client
2. Starting Design Report Mode
3. Overview of the Design Report Interface
4. Overview of the Component Toolbar
5. Creating a Main Report Panel
6. Setting the Panel Background Color
7. Dragging and dropping a Spreadsheet Data Object
8. Moving a Component
9. Creating a Dynamic Text Label
10. Sizing a Component

11. Adding a Chart Data Object
12. Aligning Components
13. Creating a Selection Control
14. Formatting a Component Border
15. Creating a Hotspot
16. Returning to Normal Mode

Starting the Hyperion Analyzer Java Web Client

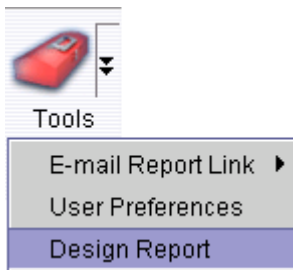
If you have not yet started the Hyperion Analyzer Java Web Client, see [“Starting the Hyperion Analyzer Java Web Client”](#) on page 33.

Starting Design Report Mode

Custom reports are created in Design Report mode. There are two methods for starting Design report mode:

- Import existing reports from Normal mode to Design Report mode, by selecting **Tools > Design Report** from the Tools Toolbar button drop down menu.

Figure 80: Toolbar Tools Button and Drop Down Menu



- Use the new report creation wizard to create a new custom report.

Figure 81: Toolbar New Button



You use the second option in this tutorial.

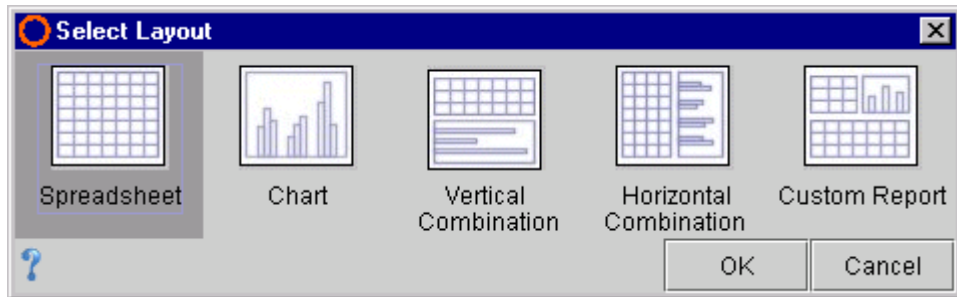
- ▶ To initiate Design Report mode using the new report creation wizard, perform the following tasks:

1. Click the Toolbar **New** button.

The Select Layout dialog box is displayed.

2. Click the **Custom Report** icon, and then click **OK**.

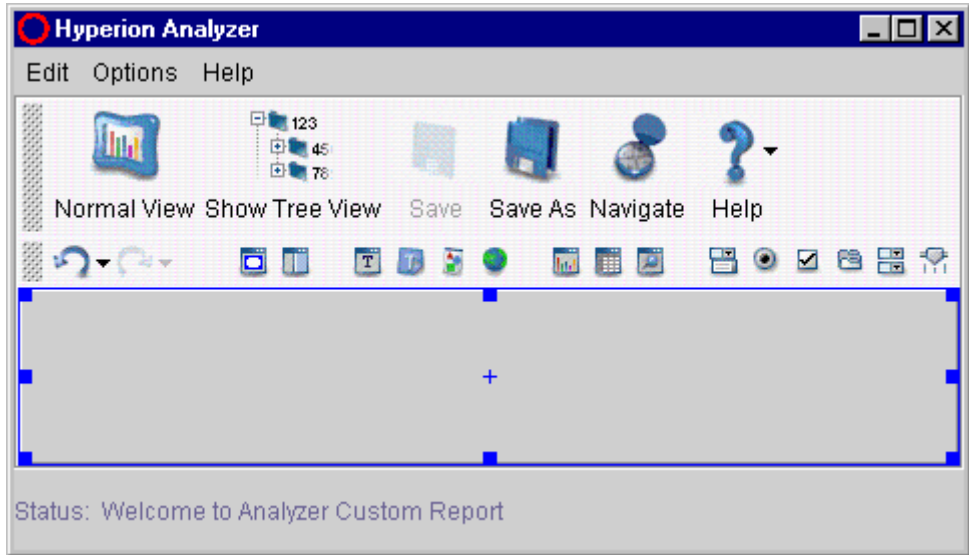
Figure 82: Select Layout Dialog Box



Design Report Interface

Design Report mode is an interface for creating custom reports.

Figure 83: Hyperion Analyzer Design Report Mode



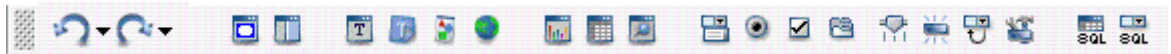
It is composed of the following components:

- Application window title bar
- Menu bar
- Design Report toolbar
- Component toolbar
- Report panel
- Status bar











Component Toolbar







Hyperion Analyzer provides an inventory of coding-free components that you can include in your custom report. There are nineteen different components that be used any number of times, and customized any number of ways. The combination of options provides almost unlimited creative opportunities for custom report designers.

Figure 84: Design Report Mode Component Toolbar



Each component is represented by an icon on the component toolbar:

Icon	Component	Description
	Panel	Creates an empty container for dividing space in the report.
	Split Panel	Creates two coordinated panels separated by a Splitter Bar.
	Label	Creates a transparent text label for use as a title, label, or caption.
	Text Area	Creates a dynamic text box used for annotating reports.
	Image	Creates a graphic panel, enabling you to include graphic backgrounds, pictures, illustrations and hotspots.
	HTML Browser	Creates a pane for browsing static HTML.
	Chart Data Object	Creates a data object and assigns the chart display type.
	Spreadsheet Data Object	Creates a data object and assigns the spreadsheet display type.
	Pinboard Data Object	Creates a data object and assigns the pinboard display type.
	Combo Box Subscription	Creates a combo box (drop-down list box) coordinated with other objects in the report.

Icon	Component	Description
	Radio Button Group Subscription	Creates a set of option buttons coordinated with other objects in the report.
	Checkbox Group Subscription	Creates a set of check boxes coordinated with other objects in the report.
	Tab Group Subscription	Creates a set of tab controls coordinated with other objects in the report.
	Multi-level Combo Box Subscription	Creates multiple cascading combo boxes coordinated with other objects in the report.
	Slider Subscription	Creates a Slider bar coordinated with other objects in the report.
	Selection Button Subscription	Creates a selection button coordinated with other objects in the report.
	Alias Controller	Creates a drop down list box enabling you to select the Label mode for a coordinated data object.
	Services Button	Creates a services button, enabling you to execute one of many Hyperion Analyzer actions.
	SQL Spreadsheet Data Object	Creates a spreadsheet data object for which you can compose their own relational SQL query.
	SQL Spreadsheet Subscription	Creates a combo box (drop-down list box) coordinated with a SQL spreadsheet object in the report.

You use several of these custom report components in this tutorial.

If you forget what the many icons mean, you can always float the cursor over a component icon and read the pop-up hint.

Creating a Main Report Panel

First, you create a main report panel. It serves as a container for all other report components.

- ▶ To create a main report panel, perform the following tasks:
 1. Drag and drop a Panel component from the component toolbar to the main display area.

Figure 85: Panel Component Icon



The Select Graphic dialog box is displayed, prompting you to select a graphic background for the container.

2. Click **Color**.
The Select Color dialog box is displayed.
3. On the Swatches tab, click a color cells for the report background.
4. Click **OK**.
5. On the Select Graphic dialog box, click **OK**.

The report now features a colored panel.

Setting the Panel to Fill Slack Space

- ▶ To size the panel to fill all slack space, right-click the panel component and select **Anchor > Slack**.

The colored panel now covers the entire report area. The Slack setting sets the panel component to fill all available space, regardless of the screen size or window size of subsequent users.

Selected Components

The panel is currently selected. When selected, custom report components feature a blue outline and handles at midpoints and corners.

Adding a Spreadsheet Data Object

- ▶ To create a spreadsheet data object, perform the following tasks:
 1. Drag and drop a Spreadsheet component from the component toolbar to the main display area.

Figure 86: Spreadsheet Component Icon



Data objects, such as this spreadsheet, require properties to be set. The Data Object Properties dialog box prompts you to perform the following tasks:

- Identify a data source (or query)
- Confirm the display type

Because no existing data source exists, you must create a new data source.

2. Click the **New Data Source** line item, and follow the new report creation wizard through the process of designing a query.

Because the Spreadsheet option button is selected, do not change the display type.

3. Click **OK**.

Clicking OK initiates the same new report creation wizard used in the last tutorial. You have to identify a database connection, use Cube Navigator to lay out the report and make dimension member selections with the Dimension Browser. For more information on the new report creation wizard, see [Chapter 8, “Creating Your First Report”](#).

After you click the Cube Navigator OK button, the Spreadsheet data object is displayed on the main report panel.

Moving a Component

- ▶ To move a custom report component:
 1. Click the component to give it focus.

Position the cursor over the component until the cursor changes to resemble a compass.

2. Drag and drop the component, being careful not to grab an outline handle.
Handles are used to resize the component. If you drag a handle, you change the shape of the spreadsheet data object.

Adding a Dynamic Text Label

You can create a label for the spreadsheet data object.

- ▶ To create a dynamic text label, perform the following tasks:
 1. Drag and drop a Label component from the component toolbar to the main display area.

Figure 87: Label Component Icon



The Insert Text dialog box is displayed, prompting you to enter the text for a static text label. Static text is entered text that remains fixed.

You can create a dynamic text label too. Dynamic text is text that updates to reflect the latest information.

Dynamic text is generated by including special tags in a text label. These tags are replaced with values when the report is displayed in Normal mode.

2. Enter the static text “**Report Name:**” and a space.
3. Right-click after the space and select **Report Name**.
4. Click **OK**.

A dynamic text label displays on the main report panel with the spreadsheet. Notice that it contains both the static text and the current name of this report. When you save the report under a new name, the dynamic text label reflects the change.

Resizing Components

- ▶ To resize the label, click to select the component and then drag and drop outline handles.

Adding a Chart Data Object

- ▶ To create a chart data object, perform the following tasks:
 1. Drag and drop a Chart component from the component toolbar to the main display area.

Figure 88: Chart Component Icon



Just like the Spreadsheet data object, the Data Object Properties dialog box prompts you to perform the following tasks:

- Identify a data source (or query)
- Confirm the display type

2. Click the same data source used by the spreadsheet data object.

Data objects that share common data sources are coordinated. This means that as you navigate one data object, coordinated data objects reflect the same navigation.

Note: If you are not sure if you have selected the same data source as the spreadsheet data object, you can right click the chart component, select Properties, and select a different data source.

Because the Chart option button is selected, do not change the display type.

3. Click **OK**.

The Chart data object displays on the main report panel with the spreadsheet and label.

Aligning Components

You can neaten the layout of these components using the following options:

- Component Right-click Menu > Anchor - fixes the component to an edge of the panel containing it. Also enables you to set the component to fill slack space, or have no fixed position.
- Component Right-click Menu > Alignment - positions components relative to specific edges or center points. Requires at least two components to be selected.
- Component Right-click Menu > Distribution - spaces components relative to specific edges or center points. Requires at least three components to be selected.
- Drag and Drop - manually moves the component on the report.
- Shift + Arrow Keys - moves the component in an ordinal direction (up, down, left, or right) one pixel at a time.

Aligning Your Components

► To align the three report components on your panel, perform the following tasks:

1. Press the Control Key (Ctrl) and simultaneously click the three components: label, spreadsheet and chart.

Make sure the main report panel is *not* selected. If it is, click to deselect it.

2. Right-click any of the selected components and select **Alignment > Left Edges**.

The left edge of all three components should align vertically.

You can move all three selected components as a set.

3. Locate the cursor over one of the components, until it changes to resemble a compass, then drag and drop the group of components to the left side of the main report panel.
4. Click to select one of the components.

The other two components are deselected.

5. Press Shift and the Up and Down Arrow Keys to move the component vertically.

In this way you maintain the relative position inside the panel, and the left edge alignment, but can space the overlapping components.

Movement is one pixel at a time, so you may have to press repeatedly to move components longer distances.

6. When the first component is in the position you want, click the second component and repeat the process of moving the component vertically (Press Shift and the Up and Down Arrow Keys).

If a component, completely obscures another component, right-click the component on top and select **Send to Back**.

7. Repeat this process for the third component.

The main report panel should now contain a chart, spreadsheet and label that are aligned on the left side of the panel.

Creating a Selection Control

You can create a control that enables you to specify the dimension members displayed in data objects.

- ▶ To create a radio button group subscription, perform the following tasks:
 1. Drag and drop a Radio Button Group component from the component toolbar to the right side of the main display area.

Figure 89: Radio Button Group Subscription Component Icon



Subscription and selection controls require many properties to be set. As a result the subscription button object uses a series of dialog boxes to perform the following tasks:

- Identify a data source (or query)
- Select a dimension
- Define dimension member selections
- Select subscription control options

The Select Data Source dialog box is displayed.

2. Click the same data source used by the spreadsheet and chart data objects, and click **OK**.

Remember that components that share common data sources are coordinated.

Note: If you are not sure if you have selected the same data source as the spreadsheet and chart data objects, you can right click the component, select Properties, and select a different data source.

The Select Dimension dialog box is displayed.

3. Click to select the **Product** dimension, and then click **OK**.

The Select Members dialog box is displayed.

4. Click the **Add** button to specify dimension member selections.

The Product Dimension Browser displays.

5. Expand the Product dimension hierarchy, by clicking the **plus sign (+)**.
6. Right-click **Colas** and select **Also Select Descendants**.
7. Right-click **Diet Drinks** and select **Also Select Descendants**.
8. Right-click **Root Beer** and select **Also Select Descendants**.
9. Click **OK**.

The Select Members dialog box is displayed again.

10. Click the three **Dynamic** check boxes in the Members panel.
11. Click the **Indent Members** check box at left.
12. Click **OK**.

The radio button group is displayed on the main report panel. You may need to size the panel to accommodate your dynamic member selections. Notice that the text labels are indented to reflect the dimension hierarchy.

Formatting a Component Border

You can give more emphasis to the radio button group subscription by formatting the component border.

- ▶ To format a component border, perform the following tasks:
 1. Right-click the radio button group and select **Border > Line**, to set the border style.
 2. Right-click the radio button group and select **Border > Set Border Color**.

The Select Color dialog box is displayed.

3. On the Swatches tab, click the cell of a color for the component border color, then click **OK**.
4. Right-click the radio button group and select **Border > Set Border Size**.

The Enter Border Thickness dialog box is displayed.

5. Enter a border width in pixels of **5**, and click **OK**.

The radio button group now has a line border that is five pixels wide and features the color you selected.

Creating a Hotspot

A hotspot is a graphic image used to trigger a Hyperion Analyzer action. Hotspots are constructed by positioning transparent Services buttons over a graphic image.

Creating an Image Panel

- ▶ To create an image panel, perform the following tasks.
 1. Drag and drop an Image component from the component toolbar to the right side of the main display area.

Figure 90: Image Component Icon



The Select Graphic dialog box is displayed.

2. Click **Load**.

The Open dialog box is displayed, prompting you to navigate and select a GIF or JPG format file.

3. Navigate to a GIF or JPG file and click **Open**.

The Select Graphic dialog box is displayed again, with the selected graphic displayed in a panel.

4. Click **OK**.

A panel containing the graphic displays on the main report panel.

Creating a Services Button

- ▶ To create a Services button, perform the following tasks.
 1. Drag and drop a Services component from the component toolbar to the right side of the main display area.

Figure 91: Services Component Icon



The Services Properties dialog box is displayed, enabling you to select from a wide variety of Hyperion Analyzer actions.

2. Click to select the **Open Report** option button.
The Report Manager dialog box is displayed.
3. Select the **First Report Group** at left, and the **First Report** report on the right, and click **OK**.

The Services Properties dialog box is displayed again. Notice that **open report** displays in the **Enter Text Label** field. You can edit this text as desired.

4. Click **OK**.

The Services button displays on the main report panel.

Making the Services Button Transparent

- ▶ To make the Services button transparent, right-click the Services button component and deselect the Opaque check box.

Moving the Transparent Services Button Over the Image Panel

- ▶ To complete the hotspot, do the following task:
 1. Click to select the transparent services button component.
Position the cursor over the component until the cursor changes to resemble a compass.
 2. Drag and drop the Services component over the Image panel.

If the Services button is not the top layer, right-click the Image panel and select **Send to Back**.

You have created a graphic hotspot that opens your First Report.

Returning to Normal Mode

When you are finished designing the custom report, you can return to the Normal mode and review your work.

- ▶ To return to Normal mode, click the **Normal View** toolbar button.

Figure 92: Design Report Mode Normal View Toolbar Button



Overview of Advanced Features

This chapter introduces and groups additional Hyperion Analyzer features that may interest you. See Hyperion Analyzer online help for more information.

Analyzing Anywhere

Now, more than ever, Hyperion Analyzer enables large numbers of users to access analysis applications anywhere they use a Web browser.

Highest Scalability and Performance

Hyperion Analyzer has been re-architected to run inside leading J2EE-compliant application servers. This provides Hyperion Analyzer users the highest level of reliability, stability, scalability, and performance in the industry, and leverages their existing enterprise application server technology.

Open- and Cross-Platform

Hyperion Analyzer harnesses the power and performance of open systems platforms, including Microsoft Windows NT, IBM AIX, Sun Solaris and HP-UX.

Completely Web-based

The powerful analysis functionality of Hyperion Analyzer is now available on the Web, using the 100-percent Java-based Hyperion Analyzer Java Web Client. Web-based functionality includes designing functionality previously offered by a separate Designer application, and the ability to leverage Hyperion Essbase server features using Hyperion Analyzer clients.

In keeping with this Web-based strategy, Hyperion Analyzer Administration Tools has been re-architected into a 100-percent Java application as well. This enables administrators to manage users, user groups, and database connections anywhere they can access the Internet.

There is also a 100-percent HTML thin client, the Hyperion Analyzer HTML Web Client.

Java Application for Microsoft Windows

The **Hyperion Analyzer Standalone Client** is the same easy-to-use Java Web Client interface and functionality delivered as a Java application for supported Microsoft Windows operating systems.

Sophisticated Graphical User Interfaces

The most important feature of Hyperion Analyzer is its new, sophisticated, yet easy-to-use graphical user interface.

Quick Report Creation

Report Creation Wizard

The Report Creation Wizard guides users through the process of creating reports by prompting them through a sequence of dialog boxes. To begin creating new reports, click the New toolbar button.

The Report Creation Wizard displays the Select Layout dialog box, the Select Database Connection, the Cube Navigator and the Dimension Browser in order, until a database query has been defined, submitted and returned.

Cube Navigator

Cube Navigator is a graphic interface for composing multidimensional queries.

To create a query, users drag and drop dimension icons onto report axes panels. When dimensions are located, the corresponding Dimension Browser is displayed to expedite dimension member selection.

Users can edit existing cubes with Cube Navigator or create entirely new cubes. Users can even query attribute dimensions in this same manner. Cube Navigator is displayed either as part of the Report Creation Wizard, or when users click the Navigate toolbar button.

Dimension Browser

The Dimension Browser is a graphic interface for composing dimension member selection statements. When dimensions are located to report axes panels, users are prompted to select specific dimension members for the query.

As with the Cube Navigator, there is nothing more to selecting dimension members than clicking member names.

The Dimension Browser right-click menu enables advanced member selection. Users can select members based on the following criteria:

- Familial relationships
- Database-specific selection options
- Member subsets
- Substitution variables
- Personal variables
- A member selection search

Using member selection statements also enables dynamic query result sets. When a report is loaded, all dimension members satisfying the member selection definition are returned, even as individual members are renamed, deleted, or added. This is particularly advantageous in large dimensions.

Custom Reports

Users can now create sophisticated custom reports in a programming-free environment, without leaving the Hyperion Analyzer Java Web Client.

To create a custom report, users initiate Design Report mode. Design Report mode is a graphic interface for designing custom reports, that enables users to drag and drop a selection of components onto an empty report panel.

Users can initiate Design Report mode from the Tools menu, the Tools toolbar button, or by selecting Custom from the Select Layout dialog box.

New Undo and Redo functionality in Design Report mode enables report designers to remove and recover interface components with the click of the mouse.

Text labels can be defined using dynamic tokens, variables that are replaced with actual values at run time. There are tokens for: cell reference, report description, report name, connection name, current time, user ID, user name, filter dimension, and page dimension.

Transparent Spreadsheets

Background graphics can now be added to Hyperion Analyzer spreadsheets, enabling a higher level of customization and design.

Flexible Formatting

Users can further customize and format reports using Spreadsheet Options, Pinboard Designer, and Chart Properties (located on the right-click menu).

Spreadsheet Options

The Spreadsheet Options dialogue box provides a central interface for formatting the spreadsheet display type.

Pinboard Designer

Pinboard options trigger a Pinboard Designer wizard, which prompts users through the process of creating a Pinboard display type.

Pinboard options include the following items:

- Background graphic
- Pin behavior
- Pin graphic
- Active Color
- Pin location
- Dimensions represented

Chart Properties

The Chart Properties dialog box provides a central interface for formatting all chart aspects.

Hyperion Analyzer chart objects now support gradation between two colors, using icon .GIF images as markers, and Spline, Box Plot, Bubble and Curve Area chart types.

Asymmetrical Analysis

Hyperion Analyzer accommodates asymmetrical analysis by enabling users to hide specified rows, columns, and chart objects.

Multiple Charts

Hyperion Analyzer enables multiple charts to be displayed inside a single chart object, thus simplifying chart comparisons.

Secondary Y-axis

Charts can display a second y-axis. Parallel axes enable information to be scaled independently, but displayed alongside other dimensions.

Personalizing Information

Hyperion Analyzer takes user-customization to a new level.

Personalized Look and Feel

Users can customize the Hyperion Analyzer display and behavior using User Preferences. User Preferences are global settings applied to all reports. These default settings are stored in Hyperion Analyzer repository tables.

Personalized Database Connections

Users can define their own user-friendly database aliases. In addition to simplifying long identifiers, database connection names enable databases to be maintained on multiple servers. Users can create, maintain, and edit database connections using Connections User Preferences.

Personal Variables

Personal Variables enable users to define and name complex member selections. Once defined, users can leverage personal variables any time they are presented with the corresponding dimension and database connection.

In addition, other users can create personal variables, using the same name, dimension, and database connection that contain different dimension member selections. This technique enables designers to create hybrid reports that feature both generic and user-specific content.

Point of View

Point of View User Preferences enable users to insert automatically the dimensions and members that are of interest to them into the reports of others.

Point of View expedites the process of member selection in complex dimensions, and ensures accurate standardized selections.

Users can also define POV settings using personal variable selections.

Analysis Tools Manager

Hyperion Analyzer provides an interface for managing the creation, activation, and order of application of server-based and client-based analysis tools. The Analysis Tools Manager is available through the main display panel right-click menu.

Analysis Tools further enhance the GUI by expediting comparisons, visually organizing data, and emphasizing structures and variances.

Enhanced Traffic Lighting

The Traffic Lighting Analysis Tool color-codes dimension member values.

Users can base color-coding on a comparison of two dimension members, or by fixed limits on a single dimension member. Colors graphically associate member values, whether or not they are sorted or ranked, and are commonly used to track profitability, highlight exceptions, and automate comparison analyses.

Traffic lighting definitions are maintained as the report is pivoted and changed.

Release 6.0 can color-code data fonts or cell backgrounds with an unlimited number of colors.

Calculations

Users can create calculated rows and columns in reports using the Calculations Analysis Tool.

The Calculations Analysis Tool interface enables users to select members, values, and operands using a simple point and click interface.

Over 20 mathematical and statistical calculations can be applied to query result sets:

- Average
- Percent
- Cumulative
- Percent Difference from Average
- Difference from average
- Percent of Difference
- Divide
- Percent of Total
- Linear Regression
- Rank Ascending
- Maximum
- Rank Descending
- Maximum Value
- Subtract
- Minimum
- Sum
- Minimum Value
- Trend
- Multiply
- Complex Calculations

Show/Hide Only

The Show/Hide Only Analysis Tool provides the ability to include or exclude dimension members from the main display panel using any of the following criteria:

- Member name
- Traffic lighting color
- Data value criteria

It is an excellent way to focus analysis on a discrete set of values.

Hide Only Values

Users can hide data outside prescribed threshold values, using the Hide Only Values Analysis Tool. This narrows analysis to a specific range of members using their data values.

Hide Only Colors

The Hide Only Colors Analysis Tool enables users to hide rows, columns, and objects based on their traffic lighting color. Sophisticated traffic lighting definitions further narrow the result set by setting thresholds for all or any dimension member values.

Hide Only Members

Users can also conceal or display specific dimensions, members, and member combinations using the Hide Only Members Analysis Tool.

Client-side Sorting

The Sorting Analysis Tool orders specified dimension member values in ascending or descending alphanumeric order. Sorting definitions are dynamic and are applied as the report is drilled, pivoted, and changed. Client-side sorting is especially important for sorting calculated columns or relational result sets.

Retrieve Only Top/Bottom

The Retrieve Only Top/Bottom Analysis Tool leverages Hyperion Essbase server-based sorting and ranking to control the size and order of an OLAP query result set. This protects the network server from transmitting, and the client from processing, large result sets.

Naturally, the Retrieve Only Top/Bottom Analysis Tool is central to Top/Bottom analysis.

Restrict Data

The Restrict Data Analysis Tool provides another means of narrowing the return set, by requiring that data values be relevant to specific rules and operands.

Applicable rules:

- Greater than (>) values in a column
- Less than (<) values in a column
- Equal to (=) values in a column

Applicable operands:

- AND
- OR

Data can be restricted by a comparison of another column or by using fixed limits on a single column.

Using Hyperion Essbase Features

Server-based features require Hyperion Essbase to execute labor-intensive processing, instead of the Hyperion Analyzer client. This improves query speed, reduces network traffic, and minimizes the information that Hyperion Analyzer must handle.

Edit Data

Users with permission can edit data values with Hyperion Analyzer and write edits back to the Hyperion Essbase database.

After edits have been applied, users can recalculate the database by using the client, and measure the impact of changed values.

Suppress Missing Rows, Zeros and Shared Members

Hyperion Analyzer leverages Hyperion Essbase to suppress missing rows, zeros, and shared members from the query result set. This prevents irrelevant information from being returned, reduces network traffic, and increases query speed.

Users can set suppress missing rows, zeros, and shared members as a user preference for all reports, or per individual reports as needed.

Label Mode

Using Label Mode, Hyperion Analyzer users can select to display member IDs or member descriptions, instead of full dimension member names. Even when descriptions are displayed, only member IDs are stored in the repository.

Show Selected Member

Hyperion Essbase enables users to preserve the display of selected dimension members during Hyperion Analyzer client navigation.

Drill Settings

Because drilling is customizable, drilling can refer to almost any hierarchical navigation prompted by double-clicking a dimension label.

Users can customize Hyperion Analyzer drilling in three ways:

- The nature of the hierarchical navigation
- Whether the current dimension members are replaced or augmented
- Whether the drilled dimension member is replaced or augmented

Replace Members with Selections

When the Replace Members with Selections drill setting is on, existing dimensions are replaced with the member selection set generated by drilling.

This process enables users to maintain the current level of report detail while navigating along hierarchical lines.

Append Members with Selections

When the Append Members with Selections drill setting is on, existing dimension members are retained through the course of navigation. That is, the current members are appended with additional selections.

This allows users to control the complexity of their reports.

Accessing External Information

Relationships between data and reports are as significant as relationships between dimensions. Hyperion Analyzer provides numerous methods for relating information.

Analyzing Relational Data

A new easy-to-use interface expedites the process of drawing relational data into Hyperion Analyzer, and analyzing this data using all the ad-hoc query capabilities of the product.

A relational database connection wizard directs users through the process of creating their own database connections.

Relational Drill-through

Hyperion Analyzer enables users to drill through to related relational data from the lowest level of the Hyperion Essbase outline, by defining a link on Essbase database connections. Users can pass pages, filters, and row limits to focus and control the relational query result set.

Essbase Integration Services Drill-through

Essbase Integration Services (EIS) enables users to organize, format, and present relational data as an OLAP cube in Hyperion Essbase.

Hyperion Analyzer users can access Essbase Integration Services report data through Hyperion Essbase Linked Reporting Objects by drilling on cells marked for EIS drill-through.

Essbase Integration Services drill-through makes relational data available for the same sophisticated analysis as conventional multidimensional data.

Linking Reports

Linking refers to navigation between reports and the transmission of member selections between reports.

Users can create links to other reports and executables using the Drill > Links right-click menu. After being established, double-clicking marked cells passes the users display and member selections to the prescribed destination.

Linking to External Media

Hyperion Essbase Linked Reporting Objects (LROs) enable users to annotate data values, by associating external media with a cell.

LROs types:

- Text documents
- Objects
- URLs

Double-clicking a cell marked with an LRO displays the associated media in the same manner as an HTML hyperlink.

Distributing Analysis

The value of analysis lies in its distribution. The people who produce, analyze and use OLAP data must be able to collaborate using OLAP data and tools.

Users can distribute Hyperion Analyzer reports internally and externally, present them as HTML Web content, export them to Microsoft Excel, and reference them using URLs.

Report Group Properties

Secure distribution paths can be prescribed for Hyperion Analyzer report groups using report group properties.

Sharing, and Distributing Report Groups

Report groups are distributed, or shared, to Administrator-defined user groups.

Users can share report groups only into user groups to which they belong.

When report groups are shared with user groups, the users in those groups can instantly review report group content.

Report Properties

Report Properties control report identification and report exploration. Report creators can limit the exploration of subsequent users when they save the report to a report group. Users can select the following report properties:

- Hide the report inside the report group.
- Protect the report from being overwritten.
- Prevent users from drilling up or down.
- Prevent users from accessing right-click menu items.
- Prevent user from changing display types.

Reports are automatically distributed as prescribed by report group properties, but individual report behavior is controlled by report properties.

Export to Microsoft Excel

As in previous releases of Hyperion Analyzer, users can export report data to Microsoft Excel instantly. This enables non-Hyperion Analyzer users to review information, and enables report data to be integrated into hundreds of other reporting tools.

Export to Clipboard

Users can copy row and column headers to the clipboard using the Export Data to Clipboard right-click menu item. This enables Hyperion Analyzer report data to be duplicated and distributed to numerous external applications.

Enhanced Printing

Hyperion Analyzer offers advanced print features, including report summary pages, print preview, fit-to-page printing and multidimensional page control. These enhancements enable users to print all or specific report aspects based on print criteria.

Customizing and Extending Hyperion Analyzer

The Hyperion Analyzer API Toolkit enables Web developers to incorporate the Hyperion Analyzer Java Web Client “look and feel,” and its functionality, into custom Web applications.

When developers can rapidly create custom analytical applications using proven components, dialogue boxes, and API calls, companies save money and time, and improve reliability.

Information on the Hyperion Analyzer API Toolkit is available in the *Hyperion Analyzer API Toolkit Developer's Guide*. In addition to profiling the API Toolkit, its methods, properties, and actions, the Developer's Guide describes samples that demonstrate the potential of the API Toolkit.

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 report information and enables Web clients to communicate with the OLAP server.

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

attribute. A dimension member classification. An attribute can be specified to select and group members that 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.

axis. A discrete aspect of the two-dimensional report on which multidimensional data is displayed, such as filters, pages, rows, and columns.

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

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

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 three report display types. Chart reports 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 siblings (peers) 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.

database connection. A user-friendly database alias used instead of a long database identifier (server name, application name, and database name) that enables database references to be more portable.

data source. A named client-side object connecting report components to databases, using database connections, queries, and other components.

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

Desktop. An automatically generated report that dynamically presents buttons that enable groups of reports 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 three Hyperion Analyzer formats saved to the repository: spreadsheet, chart, and Pinboard.

external authentication. The ability to log in to Hyperion applications using user information stored outside the application itself; user names and passwords are instead managed in a corporate authentication provider such as LDAP or Microsoft Windows NTLM.

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

implied share. A member with only one child, or a member with multiple children of which only one child is consolidated. For this reason the parent and child share the same value.

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

JDBC. Java Database Connectivity driver. Client-server communication agent between Java-based clients and databases.

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

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

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

multidimensional database (MDDB). 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.

personal variable. A means by which users define and name complex member selections.

pinboard. One of the three report display types. Pinboards are graphic reports, composed of backgrounds and interactive icons called Pins. Pinboards are created using Hyperion Analyzer Design Tools.

point of view (POV). A means by which users automatically insert dimensions and members that are of interest to them into the reports of others.

pins. Interactive icons placed on graphic reports called pinboards. Pins are dynamic. They can change images, and traffic lighting color based on the underlying data values and analysis tools criteria.

report. A Hyperion Analyzer display of selected multidimensional cube dimensions and members. A report is both the content and the format of the display. After it is saved to the repository, a report becomes a multipurpose file that users can display in numerous formats.

report group. A group of Hyperion Analyzer reports.

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

role. A user type label. Roles give or withhold the permissions needed for various Hyperion Analyzer tasks.

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.

query. A component of the data source. Queries are SQL statements submitted to the database, which return multidimensional intersection result sets.

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

single sign-on. The ability for a user to access multiple Hyperion Applications after logging on just once using external credentials.

spreadsheet. One of the three report display types. Spreadsheets are tabular reports 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 report 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.

Uniform Resource Locator (URL). 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 reports in the Hyperion Analyzer repository.

Index

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

A

- administration tools, Hyperion Analyzer, 20
- administrators, 23
- administrators, system, 23
- advanced users, 24
- analysis server, Hyperion Analyzer, 20
- analysis tool
 - calculations, 153
 - hide only, 154
 - hide only colors, 154
 - hide only members, 154
 - hide only values, 154
 - restrict data, 155
 - retrieve only top/bottom, 155
 - show/hide only, 154
 - sorting, 154
 - traffic lighting, 152
- api toolkit, 20

C

- calculations analysis tool, 153
- chart properties, 56
- charts, 50, 77
- clipboard, 159
- clipboard, copy to, 159
- clipboard, export to, 159
- column sizing, 56
- columns and rows, suppress missing, 156
- controlling report exploration, 159
- copy to clipboard, 159

D

- data display options, 56
- data, relational, 157
- design report mode, 40
- desktop, Hyperion Analyzer, 35, 63
- developers, 22, 25
- distributing reports, 158
- distribution, report, 158
- drill linking, 55, 82
- drill settings, 156
- drilling, 54, 81
- drill-through, his, 157
- drill-through, relational, 157

E

- edit data, 155
- edit data mode, 39, 66
- enhanced printing, 159
- evaluators, 22
- export to clipboard, 159
- export to microsoft excel, 159

F

- filter panel, 43, 70

H

- hide only analysis tool, 154
- hide only colors analysis tool, 154
- hide only members analysis tool, 154
- hide only values analysis tool, 154
- his drill-through, 157
- Hyperion Analyzer

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- about, 19
- advanced features, 147
- architecture, 20
- components, 19
- Hyperion Analyzer Administration Tools, 20
- Hyperion Analyzer Analysis Server, 20
- Hyperion Analyzer Desktop, 35, 63
- Hyperion Analyzer HTML Web Client
 - modes, 62
 - overview, 20
 - starting, 61
 - user interface, 62
- Hyperion Analyzer Java Web Client
 - modes, 34
 - overview, 20
 - starting, 33
- Hyperion Analyzer Windows Client, 20

I

- information consumers, 22, 25
- information panel, 41, 68

L

- label mode, 156
- Levels, 29
- linked reporting objects, 158
- linking reports, 158
- logging off, 86

M

- main display panel, 41, 68
 - resizing, 72
 - right-click, 44
- microsoft excel, 159
- microsoft excel, export to, 159
- microsoft excel, send to, 159
- missing columns and rows, suppressing, 156
- mode
 - design report, 40
 - edit data, 39, 66
 - label, 156
 - normal, 36, 64
- moving, 53, 80

N

- normal mode, 36, 64

O

- online guide
 - searching, xvii
- options, data display, 56
- options, spreadsheet, 55

P

- page control panel, 43, 69
- paging, 53, 80
- personal variables, 152
- pinboard properties, 56
- pinboards, 51, 78
- point of view, 152
- power user, 22
- print, 159
- printing, enhanced, 159
- printing, report, 159
- properties, chart, 56
- properties, pinboard, 56
- properties, report, 159
- properties, report group, 158

R

- relational data, 157
- relational drill-through, 157
- report data, editing, 85
- report designers, 24
- report display types, 76
 - changing, 51, 79
 - overview, 48
- report distribution, 158
- report exploration, controlling, 159
- report group properties, 158
- report manager, 71
- report printing, 159
- report properties, 159
- reports
 - creating, 109
 - creating a custom, 131

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- creating in HTML Web Client, 84
- distributing, 58, 83
- formatting, 55
- navigating between, 48, 76
- opening, 47
- passing to Java Web Client, 86
- printing, 86
- saving, 57, 82
- reports, distributing, 158
- reports, linking, 158
- repository, 19
- restrict data analysis tool, 155
- retrieve only top/bottom analysis tool, 155

S

- sample report group
 - tour, 87
- send to microsoft excel, 159
- settings, drill, 156
- sharing, 158
- show selected member, 156
- show/hide only analysis tool, 154
- sizing, column, 56
- sorting analysis tool, 154
- spreadsheet options, 55
- spreadsheets, 49, 77
- suppress missing columns and rows, 156
- swapping, 53
- system administrators, 23

T

- traffic lighting analysis tool, 152
- types, report display, 76
- types, user, 22

U

- user interface
 - hiding components HTML Web Client, 71
 - hiding components in Java Web Client, 44
 - setting style in HTML Web Client, 73
- user types, 22

V

- variables, personal, 152

Index

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z