



HYPERION® SYSTEM™ 9 PLANNING™

RELEASE 4.X AND 9.2

USING THE NEW USER INTERFACE



In the previous release of Planning, Release 4.0, significant enhancements were made to the Web user interface. Release 4.0 provided a user experience consistent with other Hyperion products. This document describes the key user interface changes made for Planning Release 4.0, 4.1.1, and 9.2.

Planning Release 4.0 represents the first major user interface redesign in several years. A primary goal of the design is to reflect more closely work processes and interaction with the system. The new user interface is the result of a user-centered design process that relied heavily on customer input.

Hyperion thanks everyone who participated in the design process and welcomes additional feedback to help drive future incremental enhancements. To send us your comments, please contact Hyperion Support.

CONTENTS IN BRIEF

New and Improved User Interface	2
Navigating in Planning	2
Summary of Changes to Key Tasks	5
Where to Get More Information	7

NEW AND IMPROVED USER INTERFACE

In the previous release, Planning Release 4.0, Hyperion introduced a new Web user interface, which more closely follows the way users interact with the application. It provides easier navigation and the ability to customize the application experience by user type. It also provides several consistent user interface elements across Hyperion products. These are some of the elements:

- **Masthead**—The masthead is the top section of the Web client. It displays information about the application and the user. You can minimize the masthead by selecting VIEW > Masthead from the menu bar.
- **Menu Bar**—The menu bar provides access to key functionality of Planning.
- **Toolbar**—The toolbar provides access to key functionality of Planning with buttons that you click.
- **View Pane**—The view pane is the vertical navigation frame on the left side of the Web client. You use the view pane to access all system documents, and it represents the navigation framework for the Web client. You can resize the view pane by dragging its border or selecting the Maximize Content Pane button.
- **Content Frame**—The content frame is immediately to the right of the view pane. It displays what you have selected from the view pane. This is also the area where you perform your primary activities (entering data, managing dimensions, setting up users, designing data forms, and so on).
- **Basic and Advanced Modes**—Depending on your tasks and how you prefer to work, you can work in Advanced mode or Basic mode. Advanced mode gives you more flexibility in selecting and working with the product. Basic mode enables you to focus on a task list that your administrator sets up for you, and it provides status indicators for each of your tasks.

NAVIGATING IN PLANNING

After you log on, you see the last page that you had visited before logging out previously (screen persistence). Use the top of the page to select menu commands and click shortcut buttons. You can work in the start page using Advanced mode or Basic mode. Use Advanced mode when you want to select forms from form folders. Use Basic mode when you want to focus on task lists that your administrator sets up. To switch to a different mode, select a command from the VIEW menu.

Figure 1 shows the Planning start page.

Figure 1 Planning Start Page

Task	Complete	Complete Due Date	Completed Date	Instructions
1.0 Review CY Performance	<input type="checkbox"/>	7/10/05 12:28 PM	●	
2.0 Operating Expenses	<input type="checkbox"/>	8/20/05 12:32 PM	!	
2.1 Enter Salary Related Costs	<input type="checkbox"/>			
2.2 Enter Other Expenses	<input type="checkbox"/>			
2.3 Launch OpEx Allocations	<input type="checkbox"/>			
3.0 Revenues	<input type="checkbox"/>	9/5/05 12:33 PM	●	
3.1 Input Sales Volumes	<input type="checkbox"/>			
3.2 Add Selling Price Assumptions	<input type="checkbox"/>			
3.3 Launch Revenue Business Rule	<input type="checkbox"/>			
4.0 Promote Plan to Manager	<input type="checkbox"/>	9/15/05 12:34 PM	●	
5.0 Send Fax to European Manager	<input type="checkbox"/>			

TASK LISTS

Task lists are a powerful new method of managing and guiding users through a planning process by providing lists of specific activities to complete within and outside Planning. An administrator or interactive user can set up task lists and predefined tasks to guide any user through the steps required to complete a budget and forecast cycle. Task lists facilitate the planning process by listing tasks that must be completed.

For example, a task list might help a user enter data in appropriate forms, launch required business rules, and submit numbers for approval within a workflow. Task lists display information about due dates, and they can include traffic lights that indicate if a task list is approaching its due date or is overdue. Tasks can also include instructions.

Figure 2 shows a task list.

Figure 2 Planning Task List

Task	Complete	Complete Due Date	Completed Date	Instructions
1.0 Review CY Performance	<input type="checkbox"/>	7/10/05 12:28 PM		
2.0 Operating Expenses	<input type="checkbox"/>	8/20/05 12:32 PM		
2.1 Enter Salary Related Costs	<input type="checkbox"/>			
2.2 Enter Other Expenses	<input type="checkbox"/>			
2.3 Launch OpEx Allocations	<input type="checkbox"/>			
3.0 Revenues	<input type="checkbox"/>	9/5/05 12:33 PM		
3.1 Input Sales Volumes	<input type="checkbox"/>			
3.2 Add Selling Price Assumptions	<input type="checkbox"/>			
3.3 Launch Revenue Business Rule	<input type="checkbox"/>			
4.0 Promote Plan to Manager	<input type="checkbox"/>	9/15/05 12:34 PM		
5.0 Send Fax to European Manager	<input type="checkbox"/>			

Using task lists within Planning provides these primary benefits:

- More systematic guidance to end users during planning cycles
- Reduced burden on administrators managing the planning process
- Reduced total cost of ownership
- Improved communication and usability among users for a more integrated and collaborative planning process

BUSINESS RULES

With the previous release, Planning 4.0, a new generation of Hyperion System 9 Business Rules™ has been developed to accompany the familiar graphical rule builder. Enhancements to Business Rules include new administration and designing capabilities supported by a new user interface within the Hyperion System 9 BI+™ Analytic Administration Services™ (AAS), as well as launching functionality. For more information about the Business Rules user interface, see *Hyperion Business Rules: Using the New User Interface*.

SMART LISTS

With the release of Planning 4.1.1, Smart Lists have been added for data forms. Smart Lists can be alphanumeric values that are associated with dimension members in the Planning design. They allow for modification of data or data types across dimensions, for example time, by entering textual or numeric values on a data form. For example, a Position Smart List allows users to modify an employees position as a result of a promotion to a Staff member, a Manager, or a Director over time. For more information, see *Hyperion System 9 Workforce Planning Administrator's Guide*.

SUMMARY OF CHANGES TO KEY TASKS

Table 1 summarizes the changes to key tasks in Planning.

Table 1 Changes to Key Tasks in Hyperion Planning

Module	Release 4.x	Release 3.x	Key Difference
User Modes	Supports Advanced and Basic operating modes. Advanced mode provides more flexibility in selecting which data forms and other components to work with as well as full administrative capabilities (for Administrators). Basic mode enables you to focus on a task list that guides you through planning activities.	Depending on user type and access rights, users navigated to specific Planning data forms from the home page or other pages.	Different operating modes provide more navigational options for users. The introduction of task lists also provides more systematic guidance.
Launching Folders and Data Forms	The view pane contains several frames that display a user's available folder structure and related data forms or tasks (Basic Mode). Data forms selected from the view pane are launched and displayed in the content frame. You can quickly select another folder or form from the view pane without closing the document or task that is currently open.	You selected and launched data forms from the Input page, or by selecting another tab on a displayed data form. You had to return to these areas within the application to select another item to view.	The view pane is always displayed by default. This provides for quicker navigation to data forms or associated business rules.
Launching Business Rules	Business rules that are associated with a data form are displayed within the view pane when the Form is launched. You can launch any business rule directly from the view pane.	Business rules were launched from a separate business rule dialog box, which was accessed through a data form.	Displaying business rules directly on the view pane makes Planning easier to use.
Data Form Actions	Menu commands and toolbar buttons have replaced all action buttons (Save, Adjust, Add Cell Note, and so on).	All action buttons were displayed as textual buttons within a data form.	Data form actions are now available as menu commands or toolbar buttons.

Table 1 Changes to Key Tasks in Hyperion Planning (*Continued*)

Module	Release 4.x	Release 3.x	Key Difference
Data Form Design	You can define form properties at the individual demission level and display custom attributes for columns and rows. You can add properties to segments of the forms such as making them read only, hiding segments, or adding separator bars for easier viewing. You can also customize the predefined WFP forms.	You could define form properties only for an entire column or row. You could use custom attributes only for filtering purposes and not for display. You could not modify the definition of a form.	New features make it easier to plan and view data forms.
Hyperion System 9 Smart View for Office™	Smart View provides one common Excel add-in for all Hyperion products. It also enables you to take forms offline, retaining most online functionality, and sync back to the system later.	Planning and Analytic Services had separate Excel add-ins that supported only online work.	A common Excel add-in for all Hyperion products provides a single user interface for cross-product data access and analysis. Connectivity uses HTTP rather than DCOM, and you have the option of working offline.

Table 1 Changes to Key Tasks in Hyperion Planning (*Continued*)

Module	Release 4.x	Release 3.x	Key Difference
Hyperion System 9 Workforce Planning™	<p>Release 4.1.1 introduces an enhanced Workforce Planning module that leverages existing Planning functionality and offers these additional features that are unique to Workforce Planning:</p> <ul style="list-style-type: none"> ● Preloaded, context sensitive views or forms ● Preloaded, right-click menus for easier navigation and interaction with the system ● Preloaded, Workforce Planning account structure ● Preloaded Smart Lists for quicker implementation ● Prebuilt Workforce Planning related expense calculations ● Structure to support transfer functionality ● HAL Planning Adapter enhancements to support Workforce Planning 	Workforce Planning capabilities had to be custom built.	New Workforce Planning capabilities extend Planning domain intelligence by supporting powerful headcount and salary planning functionality.

WHERE TO GET MORE INFORMATION

Except for the most recent information, each topic in this booklet is described in more detail in the documentation.

For answers to questions about Hyperion products, contact your authorized technical support provider or visit the Hyperion Solutions Web site.

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