

HYPERION® SYSTEM™ 9 BI+™

WORKSPACE™

RELEASE 9.2

GETTING STARTED GUIDE



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Hyperion Solutions Corporation
5450 Great America Parkway
Santa Clara, California 95054

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Preface

Welcome to the Hyperion System 9 BI + Workspace Getting Started Guide. This preface discusses the following topics:

- [“Purpose”](#) on page vii
- [“Audience”](#) on page vii
- [“Document Structure”](#) on page vii
- [“Where to Find Documentation”](#) on page viii
- [“Help Menu Commands”](#) on page viii
- [“Conventions”](#) on page ix
- [“Additional Support”](#) on page x
- [“Documentation Feedback”](#) on page x

Purpose

This guide provides information that you need to use with Workspace. It explains Workspace features and options and contains the concepts, processes, procedures, formats, tasks, and examples that you need to use the software.

Audience

This guide is for authors and consumers who are responsible for viewing and creating documents.

Document Structure

This document contains the following information:

- [Chapter 1, “Using Workspace,”](#) which introduces the functionality that Workspace provides
- [Chapter 2, “Viewing Documents in Workspace,”](#) which describes how a consumer can view documents from Workspace

- [Chapter 3, “Designing Documents in Workspace,”](#) which shows how to design reports from Workspace and from the studios
- [Glossary](#)
- [Index](#)

Where to Find Documentation

All Workspace documentation is accessible from the following locations:

- The HTML Information Map is available from Workspace Help for all operating systems and from the Start menu for Microsoft Windows systems.
- Online help is available from within Workspace. After you log on to the product, you can access online help by clicking the Help button or selecting Help from the menu bar.
- The Hyperion Download Center can be accessed from the Hyperion Solutions Web site.

➤ To access documentation from the Hyperion Download Center:

- 1 Go to the Hyperion Solutions Web site and navigate to **Services > WorldWide Support > Download Center**.

Note: Your Login ID for the Hyperion Download Center is your e-mail address. The Login ID and Password required for the Hyperion Download Center differ from the logon ID and password required for Hyperion Support Online through Hyperion.com. If you are not sure whether you have a Hyperion Download Center account, follow the on-screen instructions.

- 2 For **Login ID** and **Password** text boxes, enter your e-mail address and password.
- 3 For **Language** list box, select the appropriate language and click **Login**.
- 4 If you are a member on multiple Hyperion Solutions Download Center accounts, select an account.
- 5 To access documentation online, from the Product List, select a product and follow the on-screen instructions.

Help Menu Commands

The following commands are available from the Workspace Help menu

Table i Help Menu Commands

| Command | Description |
|--------------------|---|
| Help on This Topic | Launches a help topic specific to the window or Web page |
| Contents | Launches Workspace help |
| Information Map | Launches Workspace Information Map, which provides the following assistance. <ul style="list-style-type: none"> ● Online help in PDF and HTML format ● Links to related resources |

Table i Help Menu Commands (*Continued*)

| | |
|--|--|
| Technical Support | Launches the Hyperion Technical Support site, where you submit defects and contact Technical Support. |
| Hyperion Developer's Network | Launches the Hyperion Developer Network site, where you access information about known defects and best practices. This site also provides tools and information to assist you in getting starting using Hyperion products: <ul style="list-style-type: none"> • Sample models • A resource library containing FAQs, tips, and technical white papers • Demos and Webcasts demonstrating how Hyperion products are used |
| Hyperion.com | Launches Hyperion's corporate Web site, where you access information about Hyperion: <ul style="list-style-type: none"> • Office locations • The Hyperion Business Intelligence and Business Performance Management product suite • Consulting and partner programs • Customer and education services and technical support |
| About Hyperion System 9 BI + Workspace | Launches the About Hyperion System 9 BI + Workspace dialog box, which contains copyright and release information, along with version details. |

Conventions

The following conventions are used in this document:

Table ii Conventions Used in This Document


| Item | Meaning |
|---|---|
|  | Arrows indicate the beginning of procedures consisting of sequential steps or one-step procedures. |
| Brackets [] | In examples, brackets indicate that the enclosed elements are optional. |
| Bold | Bold in procedural steps highlights user interface elements on which the user must perform actions. |
| CAPITAL LETTERS | Capital letters denote commands and various IDs. (Example: CLEARBLOCK command) |
| Ctrl+O | 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 plus sign. |
| Ctrl+Q, Shift+Q | For consecutive keystroke combinations, a comma indicates that you press the combinations consecutively. |
| Example text | Courier font indicates that the example text is code or syntax. |
| <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 ARBORPATH from your site. |

Table ii Conventions Used in This Document (*Continued*)

| Item | Meaning |
|-------------------|---|
| <i>n, x</i> | Italic <i>n</i> stands for a variable number; italic <i>x</i> can stand for a variable number or a letter. 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. Menu name > Menu command > Extended menu command For example: 1. Select File > Desktop > Accounts . |

Additional Support

In addition to providing documentation and online help, Hyperion offers the following product information and support. For details on education, consulting, or support options, click the Services link at the Hyperion Solutions Web site.

Education Services

Hyperion offers instructor-led training, custom training, and e-Learning covering all Hyperion applications and technologies. Training is geared to administrators, end users, and information systems professionals.

Consulting Services

Experienced Hyperion consultants and partners implement software solutions tailored to clients' particular reporting, analysis, modeling, and planning requirements. Hyperion also offers specialized consulting packages, technical assessments, and integration solutions.

Technical Support

Hyperion provides enhanced telephone and electronic-based support to clients to resolve product issues quickly and accurately. This support is available for all Hyperion products at no additional cost to clients with current maintenance agreements.

Documentation Feedback

Hyperion strives to provide complete and accurate documentation. Your opinion on the documentation is of value, so please send your comments by going to http://www.hyperion.com/services/support_programs/doc_survey/index.cfm.

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Using Workspace

BI+, a modular business intelligence platform, provides management reporting, query, and analysis capabilities for a wide variety of data sources in a single coordinated environment.

BI+ includes:

- Workspace—a zero-footprint thin client that provides access to the following content:
 - Hyperion System 9 BI+ Enterprise Metrics—for management metrics and analysis presented in easy-to-use, personalized, interactive dynamic dashboards
 - Hyperion System 9 BI+ Financial Reporting—for scheduled or on-demand highly formatted financial and operational reporting from almost any data source, including Hyperion System 9 Planning and Hyperion System 9 Financial Management
 - Hyperion System 9 BI+ Interactive Reporting—for ad hoc, relational query, self-service reporting and dashboards against any ODBC data source
 - Hyperion System 9 BI+ Production Reporting—for high volume, enterprise-wide production reporting
 - Hyperion System 9 BI+ Web Analysis—for interactive ad hoc analysis, presentation, and reporting of multidimensional data
- Hyperion System 9 BI+ Essbase Analytics and Hyperion System 9 BI+ Enterprise Analytics (collectively called *Analytic Services*)—provides powerful OLAP capabilities for high performance multidimensional reporting, analysis, and modeling

Note: *Studio* refers to Java or Windows components that have a rich authoring environment. *Workspace* refers to Hyperion System 9 BI+ Workspace, the user thin client (UTC) or common user interface of the product.

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Preparing to Use Workspace

Prior to using Workspace, familiarize yourself with your documentation set. [Table 1](#) lists each high-level task typically associated with deploying Workspace and reference guide for each task. For each task, reference documentation is available as specified in [Table 4](#).

Additional information that you need:

- Browser information– See the *Hyperion System 9 BI + Installation Guide*.
- Workspace URL and domain
- User account – the user name and password assigned to you. See your system administrator.
- Logon information – “[Logging on to Workspace](#)” on page 31
- Access Control – “[Toolbars](#)” on page 48
- Preferences – “[Setting Preferences](#)” on page 32
- Hyperion System 9 Shared Services user name and password
- Database information

For Financial Reporting, Adobe Acrobat Reader must be installed on your computer. Before you can view reports in PDF, a PDF writer (Adobe Acrobat Distiller, GNU Ghostscript or AFPL Ghostscript) must be installed with your print server. If a PDF viewer is not available, only report names are listed.

➤ To enable the use of Microsoft Internet Explorer (IE) for viewing PDF reports on Workspace:

- 1 **Open Internet Explorer.**
- 2 **Select Tools > Internet Options.**
- 3 **In the Internet Options dialog box, select the General tab, and then in the Temporary Internet Files topic, select Settings.**
- 4 **In the Settings dialog box, in the Check for newer versions of stored pages topic, select Every visit to the page.**

Note: Hyperion recommends that you add Workspace to the exceptions for your Web pop-up blocker. When you perform some Workspace tasks on the Web such as loading data, a status window pops up showing the task status. If you have a pop-up blocker enabled on your computer, the status window is not displayed.

Note: The first time you access a database connection, you may be prompted to log on. This occurs if the user name and password you use to log on to the Web application differs from the user name and password for the database connection. Your administrator can provide you with the required database connection logon information.

For Internet Explorer, status information is displayed in the browsers status bar while interacting with Workspace. For Firefox, the status bar is disabled by default.

➤ To enable the status bar for Firefox for additional progress information:

- 1 **Select Tools > Options.**

- 2 Select **Web Features**.
- 3 Select **Advanced**.
- 4 From the Advanced Javascript Options dialog box, select **Change status bar text**.

Workspace Documentation Set

Workspace guides, online help, and reference material are listed and described in [Table 1](#). All getting started documents are available on the Download Center or product CD.

Table 1 Documentation Set

| Deliverable | Description |
|--|---|
| Getting Started Documents | |
| <i>Hyperion System 9 Installation Start Here (Read First)</i> | Lists high-level tasks for multiple-product installations |
| <i>Enterprise Metrics, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis readmes</i> | Contain late-breaking information about BI+ |
| <i>Hyperion System 9 Shared Services User Management Guide</i> | Describes how to set up and administer Hyperion users |
| <i>Hyperion System 9 Shared Services Installation Guide</i> | Describes how to install and set up Hyperion License Server, install and configure the Hyperion Shared Services server, and set up external authentication providers for use with Hyperion products |
| <i>Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Installation Guide for Windows</i> | Describes how to install Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis on Windows. |
| <i>Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Installation Guide for UNIX</i> | Describes how to install Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis on UNIX |
| <i>Enterprise Metrics Installation Guide</i> | Describes how to install Enterprise Metrics |
| <i>Enterprise Metrics, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis New Features</i> | Describes new features available in Enterprise Metrics, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis. Available on the Download Center or on the product CD. |
| <i>Enterprise Metrics, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Transition Guide</i> | Describes UI, feature, and functionality differences between prior releases and the current release |
| <i>Enterprise Metrics, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Migration Guide</i> | Describes how to use the Migration Utility |
| <i>Hyperion System 9 BI+ Workspace Getting Started Guide</i> | Helps new users use BI+ |

Table 1 Documentation Set (Continued)

| Deliverable | Description |
|--|--|
| Online Help | |
| <i>Hyperion System 9 BI+ Workspace User's Online Help</i> | Describes how to use Workspace |
| <i>Hyperion System 9 BI+ Workspace Administrator's Online Help</i> | Describes how to administer Workspace, Enterprise Metrics, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis |
| <i>Financial Reporting Studio Online Help</i> | Describes how to create, view, and print reports in Financial Reporting Studio |
| <i>Web Analysis Studio Online Help</i> | Describes how to create, view, and print reports in Web Analysis Studio |
| <i>Web Analysis API Javadoc</i> | Describes the Web Analysis Java API |
| <i>Interactive Reporting Studio Online Help</i> | Reviews the user interface and basic commands and explains how to retrieve data, query new data, query relational and multidimensional databases, and work with query results |
| <i>Dashboard Studio Online Help</i> | Describes Dashboard Studio, the wizard-driven application builder that enables you to develop dashboards without programming, significantly reducing development and maintenance |
| <i>Dashboard Architect Online Help</i> | Describes Dashboard Architect, an integrated development environment for Interactive Reporting Studio |
| <i>Dashboard Studio Javadoc</i> | Describes the Dashboard Studio Java API |
| <i>Interactive Reporting Web Client Online Help</i> | Reviews the user interface and basic commands and explains how to retrieve data, query new data, query relational and multidimensional databases, and work with query results |
| Reference Material | |
| <i>Hyperion System 9 BI+ Workspace User's Guide</i> | Describes how to use Workspace |
| <i>Hyperion System 9 BI+ Workspace Administrator's Guide</i> | Describes how to administer Enterprise Metrics, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis |
| <i>Financial Reporting Studio User's Guide</i> | Describes how to create, view, and print reports in Financial Reporting Studio |
| <i>Web Analysis Studio User's Guide</i> | Describes how to create, view, and print reports in Web Analysis Studio |
| <i>Interactive Reporting Studio User's Guide</i> | Reviews the user interface and basic commands and explains how to retrieve data, query new data, query relational and multidimensional databases, and work with query results |

Table 1 Documentation Set (Continued)

| Deliverable | Description |
|--|---|
| <i>Interactive Reporting Object Model and Dashboard Development Services Developer's Guide, Volume 1, Volume 2, Volume 3, Volume 4, Volume 5, and Volume 6</i> | Describes how to use Dashboard Development Services to create custom dashboards, use JavaScript to script and control Hyperion Intelligence client and Web client documents, and interpret and use Impact Reporting Object Mode to control dynamically an impact reporting document |
| <i>Dashboard Component Reference Guide</i> | Provides information needed to configure and use plug-and-play Dashboard Development Services components (designed for dashboard developers responsible for creating, using, and extending the functionality of Dashboard Studio templates and dashboards) |

Deployment Workflow

Table 2 lists the high-level tasks typically associated with deploying Hyperion products and identifies the task deployment phases and references. For deployment-phase information, see *Hyperion Business Performance Management Deployment Guidelines*.

Table 2 Deployment Workflow

| Deployment Phase | Deployment Task | Reference |
|------------------|--|---|
| Analyze | Examine Hyperion Business Performance Management and how it impacts your deployment | <i>Hyperion Business Performance Management Deployment Guidelines</i> |
| | Examine your domain and determine its impact on deployment | <ul style="list-style-type: none"> ● Installation guide and checklist for your Hyperion product ● Third-party documentation |
| Plan | <ul style="list-style-type: none"> ● Determine technical and business goals ● Develop checklist of deployment planning tasks ● Review system requirements ● Review system architecture ● Review data and metadata integration requirements ● Review requirements for third-party components ● Create a deployment timeline ● Create an infrastructure plan ● Create an integration plan ● Create a capacity and performance testing plan | <ul style="list-style-type: none"> ● <i>Hyperion Business Performance Management Deployment Guidelines</i> ● For detailed, product-feature information, the product documentation set |

Table 2 Deployment Workflow (Continued)

| Deployment Phase | Deployment Task | Reference |
|-------------------|---|--|
| Design | Develop key performance drivers: <ul style="list-style-type: none"> Analyze product components and their impact on performance and scalability Determine how your company compares to a typical use case Determine application design and security suggestions Evaluate hardware decisions, performance impact, and scalability | <ul style="list-style-type: none"> <i>Hyperion Business Performance Management Deployment Guidelines</i> Installation Guide and checklist Third-party documentation For detailed, product-feature information, the product documentation set |
| Build | Develop an application that meets business, performance, and reporting needs and develop reports | <ul style="list-style-type: none"> <i>Hyperion Business Performance Management Deployment Guidelines</i> Documentation set for your Hyperion product |
| Test | Validate application and report design in a test environment: <ul style="list-style-type: none"> Perform tests on certain hardware, design, and user loads Verify test results against Key Performance Drivers Modify and update application and report design to achieve optimal performance | <i>Hyperion Business Performance Management Deployment Guidelines</i> |
| Rollout | Create a plan to migrate applications and reports to a production environment | Documentation set for your Hyperion product |
| Review | <ul style="list-style-type: none"> Post rollout review Ongoing performance and maintenance monitoring Future implementation phases | Documentation set for your Hyperion product |
| Change Management | <ul style="list-style-type: none"> Define a process for handling changes related to your Business Performance Management solution Track and monitor change requests and implemented changes | Documentation set for your Hyperion product |

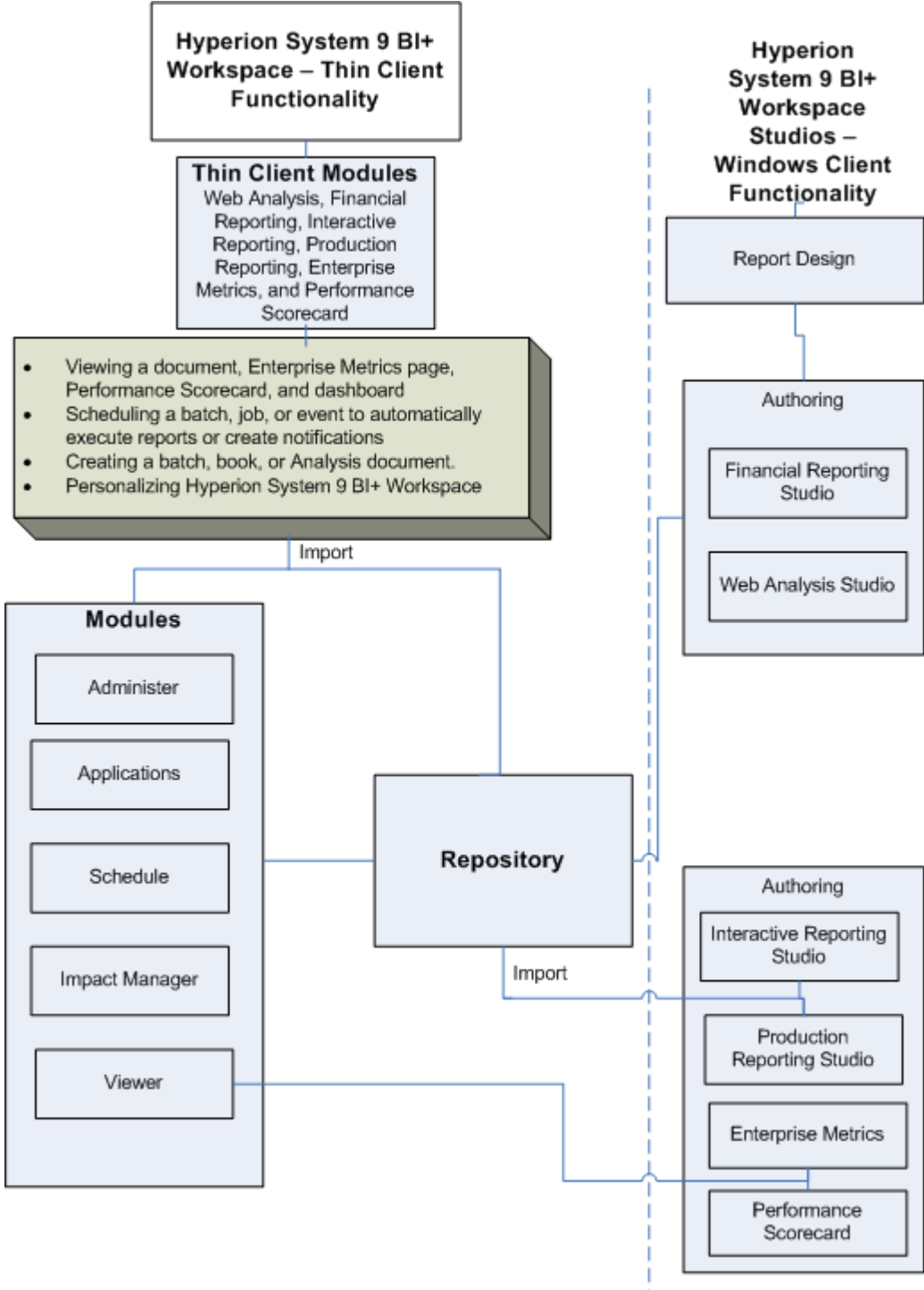
Workspace

Workspace, the user thin client framework, features five modules:

- Viewer enables you to display many kinds of repository documents and Hyperion System 9 Performance Scorecard and Enterprise Metrics documents. Documents are displayed in the content area. Explore enables you to list and navigate repository contents; manage and control files and folders; and use elements, like the Open dialog box, that present the repository as a file management system.
- Schedule enables you to manage jobs and schedule batches and events for automated processing.
- Administer enables you to manage users, user groups, user preferences, roles, and authentication methods.
- Impact Manager enables you to update Interactive Reporting documents when database structures, database connections, or links to external data sources change.
- Applications enables you to access Hyperion System 9 Financial Management and Hyperion System 9 Planning applications. Applications is only displayed when a user has rights and applications are available. See *Hyperion System 9 BI + Workspace User's Guide*.

You can switch between modules in a work area without losing context. For example, use Viewer to view documents and Explore to view a list of repository files. For detailed information on the Workspace modules, see [“Module Tasks” on page 24](#).

Figure 1 Workspace - Author and Consumer Overview



Workspace can also be installed with the following thin client modules: Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis, Enterprise Metrics, and Performance Scorecard. You use these additional modules to create documents and modify document elements. These installed components determine your available features. For example, the Web Analysis module must be installed to view Web Analysis documents. For information on tasks performed in these modules, see [“Module Tasks”](#) on page 24.

The main function of the repository is to store files. Every repository file features properties that identify the file and control user and user group access. Your access privileges, set by your system administrator, determine which repository items you can view, modify, run, and delete. See “[Repository](#)” on page 30.

Workspace Capabilities

Tasks with which Workspace assists you:

- Viewing documents, Enterprise Metrics reports, Performance Scorecard scorecards and maps, and dashboards
- Scheduling batches, jobs, or events to automatically execute reports or create notifications
- Create Web Analysis and Interactive Reporting documents, books, or batches
- Personalizing Workspace and thus manage information delivery by using a start page, personal pages, favorites, and a desktop folder

From Workspace, you use menus, buttons, and modules to perform tasks. Based on the following criteria, menus and toolbar buttons are updated as you use the system:

- The roles granted you by the administrator. Roles determine which modules are displayed in the view pane and toolbar.
- The module being used and the task being performed. For example, if you use Viewer, the menu contains active-document tasks. If you use Explore, the menu contains file tasks.

Note: Generally, module buttons are displayed in the middle of the toolbar.

Modules Used to Perform Tasks

You use Workspace modules to perform user tasks:

- Viewer– view documents, scorecards, maps
- Explore– view, manage, and secure documents or document groups (called *collections*)
- Schedule– automatically run and manage documents, such as batches, jobs, and events

Note: The Administer and Impact Manager modules are used only by administrators. See the *Hyperion System 9 BI+ Workspace Administrator's Guide*.

Accessing Modules

To access a module, perform an action:

- From the view pane, click the *<module name>*.
- From the menu, select Tools > *<sub module name>*.
- From the toolbar, select the *<module name>* button.






The variable *<module name>* is replaced by Viewer, Schedule, or Explore.

Using View Pane Buttons

Module features are accessed by the buttons displayed on the top right of the view pane.



Table 3 View Pane Buttons

| Name | Description |
|---|--|
| Navigate,  | Switch between modules |
| Document,  | Access current-document information or sections Note: Available only for certain modules; for example, used to display the user POV for Financial Reporting documents |
| Folder,  | Display repository folders from the view pane Note: Available only for Explore |
| Search,  | Display the Search dialog box, which is used to search for files and folders by character string and file type. The search is not case sensitive and starts in the folder specified in the Look in: text box and searches all sub-folders recursively. Note: Available only for Explore |
| Tips,  | Access another button: <ul style="list-style-type: none"> ● Tasks—Displays a list of tasks relevant to the content pane ● Tips- Displays a list of Help topics Note: Details- Displays a list of properties and details (available only when in Explore, desktop, search, or listing) |

User Types and Tasks

Table 4 describes user types and tasks and lists references.

Table 4 User Types and Tasks

| User Type | Task | Reference . |
|---|--|--|
| <p>Author- Creates documents and conducts and distributes analysis to consumers</p> | <ul style="list-style-type: none"> ● Create, design, and edit documents ● Create books using Book Editor ● Use the Batch Scheduler and Batch Editor to create a batch ● Select Members ● Set preferences ● Import and export ● Change the database connection ● Create e-mail links ● Set up user and grid POVs ● Customize charts and grids ● Format reports ● Set browse preferences ● Subscribe to documents ● Import documents to the repository ● Run and schedule BQY jobs ● Run and schedule SQR jobs ● View job output ● Use SQR custom parameter forms ● Create BQYs ● Work with Query Options ● Encrypt documents ● Process queries ● Query ● Work with documents, tables and results ● Work with pivots, charts, OLAP data, reports, limits, variables, sorts, and computed items ● Create dashboard sections <p>For Hyperion Intelligence advanced users:</p> <ul style="list-style-type: none"> ● Working with OCEs, connections, and data models ● Working with metatopics and metadata ● Managing document repositories ● Creating audit tables ● Registering and administering documents to IBM Information Catalog ● Running dbgprint | <ul style="list-style-type: none"> ● <i>Hyperion System 9 BI+ Workspace User's Guide</i> ● <i>Hyperion System 9 BI+ Workspace Getting Started Guide</i> ● <i>Web Analysis Studio User's Guide</i> ● <i>Financial Reporting Studio User's Guide</i> ● <i>Hyperion System 9 BI+ Workspace Administrator's Guide</i> |

Table 4 User Types and Tasks (Continued)

| User Type | Task | Reference . |
|---|--|--|
| Consumer- Views and modifies limited content in a document | <ul style="list-style-type: none"> ● Viewing reports, snapshot reports, books, and snapshot books ● Viewing scorecards and Accountability Strategy, and Cause and Effect maps ● Use Print, Web, and PDF Preview ● Respond to prompts | <ul style="list-style-type: none"> ● <i>Hyperion System 9 BI+ Workspace User's Guide</i> ● <i>Hyperion System 9 BI+ Workspace Getting Started Guide</i> ● <i>Web Analysis Studio User's Guide</i> ● <i>Financial Reporting Studio User's Guide</i> |
| Administrator- configures and maintains Workspace and its supporting platforms and administers user provisioning and other administrative and system settings | <ul style="list-style-type: none"> ● Change passwords ● File Permissions ● Register with Shared Services ● Maintain users, groups, and roles ● Create or modify printers or directories for job output ● Configure and modify system properties ● Create or modify a MIME type ● Create custom calendars ● Define database servers ● Configure, modify, and delete services ● Configure servlets ● Add hosts | <ul style="list-style-type: none"> ● <i>Hyperion System 9 BI+ Workspace Administrator's Guide</i> ● <i>Web Analysis Studio User's Guide</i> ● <i>Financial Reporting Studio User's Guide</i> |

Table 4 User Types and Tasks (Continued)

| User Type | Task | Reference . |
|--|---|---|
| Installer- installs and deploys Hyperion products | <ul style="list-style-type: none"> ● Install Workspace, default or custom ● Configure Workspace, automatically or manually ● Install diagnostics ● e-licensing | <ul style="list-style-type: none"> ● <i>Hyperion System 9 BI+ Workspace for Windows or UNIX Installation Guide</i> |
| Developer- Uses Hyperion APIs or coding techniques (Javascript) to create custom solutions | <ul style="list-style-type: none"> ● Use APIs ● Customize e-mail notifications ● Customize templates ● Understand JSPs ● Customize SmartCuts ● Integrate extended services ● Configure the architect environment ● Create projects ● Create BQYs ● Edit JavaScript Code in BQYs ● Edit using Find, Replace, Match Brace, Print, Auto-code, macros, and Import sections ● Test and debug code ● Use breakpoints ● Add and remove objects ● Resynchronize to incorporate new objects ● Document code ● Update dashboard sections | <ul style="list-style-type: none"> ● <i>Hyperion System 9 BI+ Workspace Developer's Guide</i> |

Module Tasks

Table 5 lists module tasks. The available tasks depend on the roles and permissions assigned to you by the system administrator. For information on roles, see the *Hyperion System 9 Shared Services User Management Guide*.

Table 5 Modules and Tasks

| Modules | Permissions Granted by Roles | Tasks |
|----------------------|--|--|
| Web Analysis | <ul style="list-style-type: none"> ● Access the Design Documents interface ● Create Web Analysis documents ● Open Web Analysis documents ● Save Web Analysis documents ● Create and manage database connections ● Send edited Analytic Services data values back to the database ● Lay out data, then specify and submit queries ● Define Point of View definitions for a database connection ● Define Personal Variables for a database connection ● Create links | <p>Users assigned a role can log on to any client.</p> <p>All roles:</p> <ul style="list-style-type: none"> ● Access User Preferences ● Use Favorites Manager to access own Favorites folder ● Access presentations on own desktop ● Access own personal pages ● Print content that can be accessed <p>Viewer role: review Web Analysis documents</p> <p>Explorer role: list and access repository content</p> <p>Data Editor role: write data values back to Analytic Services</p> <p>Personal Parameter role: define point of view and personal variables for database connections</p> <p>Favorites Distributor role: distribute content to other users' Favorites folders</p> <p>Analyst role: lay out data and specify queries.</p> <p>Content Publisher role: create and save Web Analysis documents</p> <p>Data Source Publisher role: create and manage database connections</p> <p>Report Designer role: access Design Documents interface</p> <p>Content Manager role: create and manage all content</p> |
| Production Reporting | <ul style="list-style-type: none"> ● Content Publisher ● Explorer ● Scheduler ● Global Administrator ● Any Role | <ul style="list-style-type: none"> ● Working with query options ● Encrypting documents ● Processing queries ● Querying |

Table 5 Modules and Tasks (Continued)

| Modules | Permissions Granted by Roles | Tasks |
|-----------------------|--|---|
| Interactive Reporting | <ul style="list-style-type: none"> ● Viewer ● Explorer ● Data Editor ● Favorites Distributor ● Interactive Reporting Viewer ● Dynamic Viewer ● Analyst ● Content Publisher ● Report Designer ● Data Source Publisher ● Content Manager ● BI+ Administrator ● BI+ Global Administrator | <ul style="list-style-type: none"> ● Review static content ● List repository content ● Write data values back to Analytic Services ● Distribute content to Favorites folders ● Review and print static BQY content ● Review, re-query, and print static BQY content ● Review full interactive analytical content for Interactive Reporting, Web Analysis, and Financial Reporting ● Edit queries ● Modify interactive WA, FR, EM and static IR, PR content and save back to the repository ● Create custom documents and use advanced Financial Reporting features ● Distribute connectivity files ● Create and manage all content ● Use conditional administrative access and functionality ● Use universal, unrestricted access and functionality |

Table 5 Modules and Tasks (Continued)

| Modules | Permissions Granted by Roles | Tasks |
|---------------------|---|--|
| Financial Reporting | <ul style="list-style-type: none"> ● Any role ● Explorer ● Scheduler ● Content Publisher ● Report Designer ● Global Administrator | <ul style="list-style-type: none"> ● Previewing report in HTML ● Previewing report in PDF ● Previewing current user POV settings for reports or books ● Setting Preview preferences ● Previewing in Web browsers ● Previewing printed reports from Report Designer ● Printing reports and books ● Using Batch Editor: <ul style="list-style-type: none"> ○ Define batches ○ Schedule batches to run ● Using Batch Scheduler: <ul style="list-style-type: none"> ○ View scheduled batch status ○ Open batches ○ Schedule batches to run ○ Delete batches ● Assigning or removing access to snapshots and snapshot books ● Setting up e-mail notifications ● Retrieving exported output ● Viewing scheduled batch status ● Preparing batch files for Command Line Scheduler ● Using Book Editor: <ul style="list-style-type: none"> ○ Creating books ○ Previewing and printing books and snapshot books ○ Saving books and snapshot books ● Previewing books in HTML ● Previewing books in PDF ● Opening books or snapshot books ● Previewing and printing books and snapshot books |

Table 5 Modules and Tasks (Continued)

| Modules | Permissions Granted by Roles | Tasks |
|---|---|---|
| Enterprise Metrics Note: You can access Enterprise Metrics Personalization Workspace through the Tools menu. See the <i>Hyperion System 9 BI+ Enterprise Metrics User's Guide</i> . | Metrics Viewer | <ul style="list-style-type: none"> ● Monitor section <ul style="list-style-type: none"> ○ Viewing the section ○ Zooming in on section charts ○ Using hyperlinks ○ Viewing chart and mini report descriptions ● Investigate section <ul style="list-style-type: none"> ○ Viewing the section ○ Zooming in on charts ○ Using chart hyperlinks ○ Changing the point of view ○ Sorting chart columns ○ Using drill buttons ○ Searching and using fast scroll ● Report section <ul style="list-style-type: none"> ○ Viewing the section ○ Using report hyperlinks ○ Changing the point of view ○ Sorting report information ○ Viewing report descriptions ● Dictionary section <ul style="list-style-type: none"> ○ Viewing the section ○ Displaying chart information ○ Displaying report information ○ Using section links |
| Scorecard Studio | <ul style="list-style-type: none"> ● User, as authorized ● Designer | <ul style="list-style-type: none"> ● View employee scorecards ● View Accountability maps and scorecards for map elements ● View Strategy maps and scorecards for map elements ● View Cause and Effect maps, associated perspectives, and strategy elements |

Workspace User Interface

When you log on, the default Workspace start page is displayed. Here you can open and work with Workspace elements.

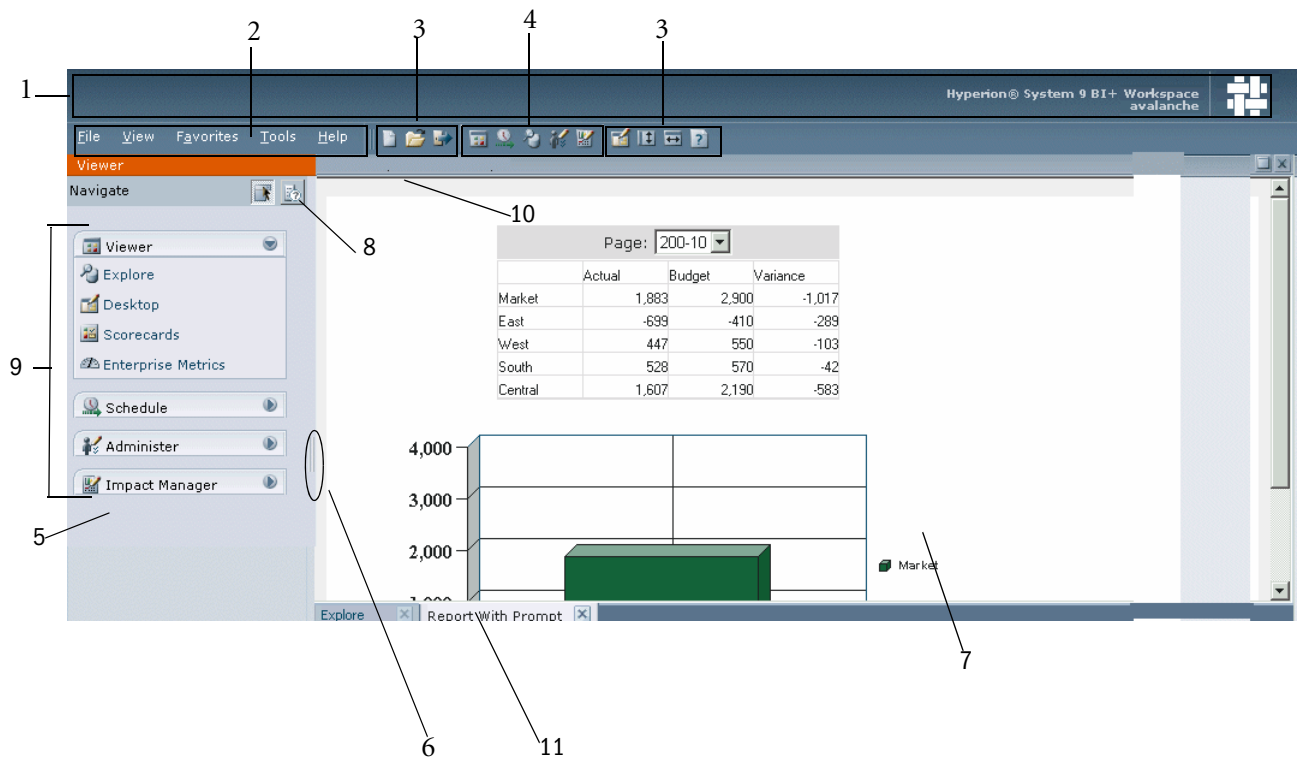


Table 6 Workspace Elements

| Number | Name | Description |
|--------|-----------------------------------|---|
| 1 | Masthead | Area that includes the Hyperion logo, product name, user name, identifies the current Hyperion product, and enables companies to customize and co-brand part of the user interface |
| 2 | Menu Bar | Commands and sub-commands that organize tasks and modules (See “Menus” on page 54.) |
| 3 | Standard toolbar | Buttons for performing tasks (See “Toolbars” on page 48.) |
| 4 | Module toolbar | Buttons for accessing modules (See “Toolbars” on page 48.) |
| 5 | View pane | Area that provides buttons that enable jumps between panels (each panel having a specific use and corresponding controls) and displays the list of documents and modules (Hiding this pane provides a larger content frame in which to use Workspace. Select View > View Pane to hide and display.) |
| 6 | ViewPane or Content Area Adjuster | Setting to adjust the size of the view pane and content area |
| 7 | Content area | Area in which you view active-module documents, tasks, or files |
| 8 | Buttons | Buttons for performing module tasks |
| 9 | Modules | Names that you select to access module functionality; see “Workspace” on page 17. |

Table 6 Workspace Elements (Continued)

| Number | Name | Description |
|--------|------------------|---|
| 10 | Process bar | Location of the current folder, document, or step (The orange end of the bar indicates the current Workspace module.) |
| 11 | Document tab bar | Information bar specific to the current module (If multiple documents are open, the current document tab is highlighted.) |

Repository

The repository is used to store, access, and share documents and files. You can access items such as documents, files, and folders in various ways, including browsing or searching for documents, subscribing to folders, and using dashboards. You make documents, files, and folders available to others by importing documents to the repository.

Documents show information and data in a predefined format. You can use jobs and batches to generate documents automatically. You can run jobs and batches at any time or schedule them to run automatically.

Note: Your file permissions determine which repository items you can view, modify, run, and delete.

Actions

- Documents, files, and folders can be opened in four formats:
 - Interactive HTML
 - Portable Document Format (PDF), displayed by Adobe Reader
 - Text files
 - Operation messages, which are generated by applications or services and stored in logs
- Interactive Reporting, Production Reporting, and Financial Reporting users can subscribe to documents. When the documents are changed or updated, the users are informed.
- Interactive Reporting, Production Reporting, and Financial Reporting users must import documents before the documents can be accessed by other users. Importing distributes previously private information for public consumption.

Locations

User preferences specify default startup options:

- The Content area can be Explore, documents, repository locations, or Enterprise Metrics or Scorecard documents. Startup options are loaded and displayed when users log on to Workspace.

- The Desktop folder, the content of which is displayed in the user interface, contains frequently sought repository content.
- A Favorites folder contains a user's most frequently sought repository content. All user profiles feature Favorites folders, the files of which are accessed through the Favorites menu. Favorites Publisher can push content to users' Favorites folders, providing one access point for certain content.

File Permissions

Workspace file permissions determine who has access to what files or folders and what operations can be performed. You obtain access items as a user, as a group member, or through a role given you by the system administrator. For information on roles, see the *Hyperion System 9 BI+ Workspace Administrator's Guide*. The level at which you can access items and perform tasks is called *access privilege*.

Access to specific repository items is controlled by the document owner. Access to operations, such as importing, running jobs, or updating document POV, is controlled through roles. For example, the owner gives you the modify and run access privilege to Job A, but you can run the job only if you have the Job Runner role. The owner gives you the full control access privilege to Document B, so you can open and update the file. For information on setting file permissions, see the *Hyperion System 9 BI + Workspace User's Guide*.

When you import a file, you become the file owner, and you specify the access level of other users. You might specify that all users can read the file, your group can modify the file, and only you can delete, change access for, and move the file.

Logging on to Workspace

You can access Workspace in two ways: through a URL provided by your administrator and through a Hyperion application link.

Note: Access through Hyperion application links requires that single sign-on be enabled.

- ▶ To start a Workspace session:
 - 1 In your Web browser, go to Workspace Web page.
 - 2 Enter user name and password.

Tip: The user name and password are case sensitive.

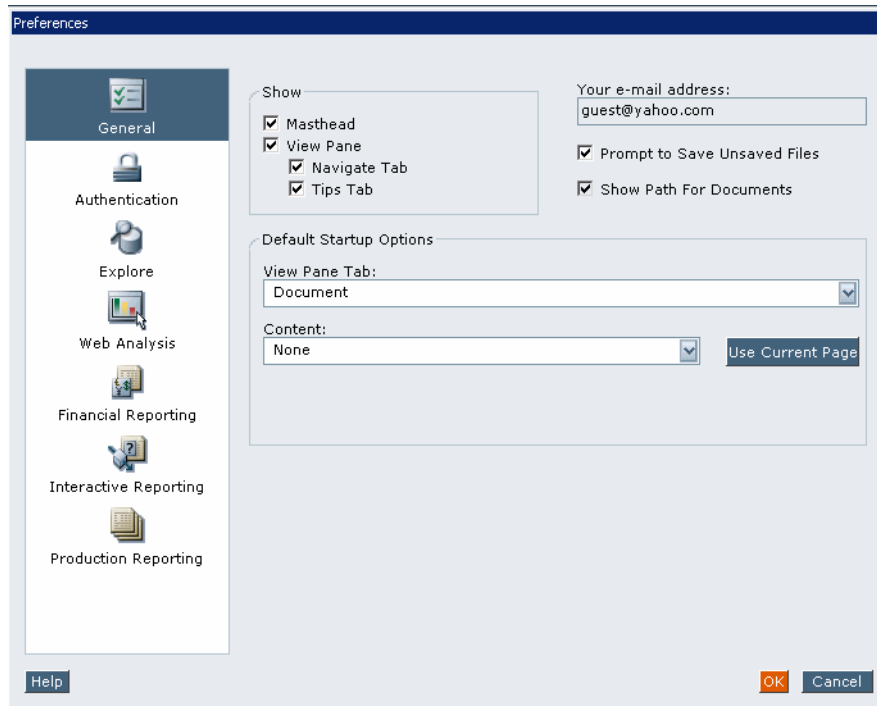
- 3 Click **Log On**.

Your start page is displayed. For more information on setting your start page, see the *Hyperion System 9 BI + Workspace User's Guide*.

Setting Preferences

As a designer, you can set defaults for the general appearance of Workspace user interface, Explore, studios, and authentication for changing user passwords. Default startup options can be set for the view pane and content area. Some settings can be overridden through menu options. For example, from Preferences, you set not to show the masthead, and then, from the View menu, you select to display the masthead. See the *Hyperion System 9 BI+ Workspace User's Guide*.

Note: Your e-mail address, which you cannot update, defaults to the e-mail address registered in your user security settings.



Using Data Source Elements

Data sources (generic data storage mechanisms) can be multidimensional databases, relational databases, or files. Database connections, portable files stored in the repository, define the terms, conditions, and methods for connecting to data sources. In Workspace, you cannot create or modify database connections; rather, you must use the applicable studio. You see only database connections that you own and to which you are granted permissions. Multiple permissions are needed to read, write, edit, and change database-connection file properties. For permission descriptions, see the *Hyperion System 9 BI + Administrator's Guide*.

Database servers typically use server, application, and database names to create unique identifiers. Such identifiers make database references not readily portable. The studios use database aliases, instead of long identifiers. Aliases are easier to remember and more economical to employ and enable a database to be maintained on multiple servers.

Repository documents are dependent on a database-connection file to query data sources for values. A document can use only one database connection but can use any of several data sources.

Table 7 Supported Data Sources and Relational Databases by Studios

| | Web Analysis Studio | Interactive Reporting Studio | Financial Reporting Studio | Production Reporting Studio |
|---|----------------------------|-------------------------------------|-----------------------------------|---|
| Data Source | | | | |
| Analytic Services | x | x | x | x |
| IBM DB2 OLAP Server | x | x | | x |
| MS Analysis Server | | x | | x |
| SAP BW | x | x | x | x |
| SAP R3 | | | | x |
| Financial Management | x | | x | |
| Planning | x | | x | |
| Relational Database Connection | | | | |
| IBM DB2 | x | x | | x |
| Microsoft SQL Server | x | x | | x |
| Oracle | x | x | | x |
| Teradata | x | x | | x |
| Informix | x | x | | x |
| Sybase | x | x | | x |
| Sybase IQ | | x | | Note: Supported by Production Reporting, not by Production Reporting Studio |
| Red Brick | | x | | x |
| XML | | | | x |
| ODBC(DB2, SQL Server, Oracle, Informix, Sybase) | | x | | x |

Table 7 Supported Data Sources and Relational Databases by Studios (*Continued*)

| | Web Analysis Studio | Interactive Reporting Studio | Financial Reporting Studio | Production Reporting Studio |
|--|----------------------------|-------------------------------------|-----------------------------------|------------------------------------|
| JDBC (DB2, SQL Server, Oracle, Informix, Sybase) | | | | x |
| MySQL | x | | | |

- Different data sources have different system requirements. See the *Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting and Web Analysis Installation Guide for Windows or UNIX* for descriptions of system requirements.
- The view pane Information tab displays the database connection used by the current data object. The tab features two database connection segments for Web Analysis:
 - The Database segment displays the database connection name for the current data object.
 - The Database User Name segment displays the user name by which access to the database connection was granted.

Web Analysis Studio

Web Analysis Studio users can construct seamless liaisons between OLAP data and relational data sources. Navigation from OLAP to relational data is typically called relational drill-through.

After relational drill-through is configured, users can navigate to level 0 (the bottom) of the OLAP database and drill down to relational data. Relational drill-through, a client-based integration solution, is comparable to the server-based Analytic Integration Services drill-through.

Relational drill-through supports an array of JDBC relational data sources but does not support queries by level, generation, or previously selected member. Relational drill-through definitions are saved as a property of the database-connection file.

Financial Reporting Studio

For Financial Reporting Studio, you must be defined as a user, with a user name and password, in the data source that your document uses. For example, if you want to view documents that use Analytic Services, you must log on to the database connections with a user account defined in Analytic Services. Logging on usually occurs automatically. However, if you are not registered in the database, you are prompted for logon credentials.

Interactive Reporting Studio

Interactive Reporting documents can contain multiple Query sections, each of which can access a range of data sources (relational databases, OLAP servers, imported data sets, and local joins). Each section can reference zero (if using only local joins) or one database-connection file. The file can reference only one data source. When a query section associated with a relational-database connection or using only local joins is processed, a corresponding Results section is produced. If the database-connection file is associated with a multidimensional database connection, results are shown in the Query section.

Production Reporting Studio

With Production Reporting Studio, users can easily develop a range of reports, from small ad hoc reports to mission-critical operational reports. Various data sources can be used; for example, relational databases, OLAP servers, and transactional systems.

After you create a data source connection, you can use the Production Reporting Studio wizard, layout editor, and explorers to design and customize enterprise reports. You can also insert and update database tables to incorporate data transformations into report processing.

Whether you are creating budgets, building exception reports, producing invoices from millions of records, or distributing Web-based reports to help end-users make quick, effective decisions, Production Reporting manages the secure delivery of content across the enterprise.

Analytic Services Features Available to the Studios

Analytic Services integrates data from multiple sources, meets user needs across an enterprise, adds value to previously inaccessible data, and transforms data into actionable information.

Analytic Services features available to studios:

- Data restriction
- Top and bottom only retrieval
- Data edits
- Suppression of rows that contain #MISSING values, zero values, and shared members
- Label mode and alias tables
- Drill settings specific to Analytic Services
- Linked reporting objects
- Relational drill-through
- Analytic Integration Services drill-through
- Advanced member selection
- Attribute dimensions and attribute calculations

For feature details, see the *Hyperion System 9 BI + Workspace User's Guide*.

Financial Management Features Available to the Studios

Hyperion System 9 Financial Management is a centralized, scalable, financial management and reporting solution. Financial Management features that are extended through Workspace:

- Organization by period
- Advanced member selection specific to Financial Management
- Cell text – related content
- Line item, detail-related content
- Advanced member selection
- User-defined fields
- Entity currency display

For Financial Management convention and feature information, see the *Hyperion System 9 BI + Workspace User's Guide*.

Planning Details as a Database Connection

After you install the Planning Details ADM driver, you can choose Planning Details as a database connection for Financial Reporting Studio. The Planning Details ADM driver is optimized as a data source to provide Hyperion System 9 Planning features such as supporting details, planning unit annotations, and metadata filtering. If your report grid does not use Planning features, for optimal performance, choose Analytic Services as the database connection. See the *Hyperion System 9 BI+ Financial Reporting Studio User's Guide*.

SAP BW Data Sources

You can use the studios to access SAP BW data sources. Using the custom-report, free-form grid component, you can present OLAP, relational, and manually entered data on a data object and leverage all data sources in integrated dynamic calculations. The studios offer visually compelling SAP BW reports that satisfy the presentation, reporting and distribution requirements of information consumers.

SAP BW Prerequisites

To access SAP BW data sources, you must install the SAP BW client on the server. After installation, you must define the SAP Logon parameters used to communicate with the SAP data source.

SAP BW Conventions

SAP data sources differ from other data sources. For example, level 0 is the highest ancestor in SAP and the lowest descendant in Analytic Services. SAP member properties are analogous to Analytic Services attribute dimensions.

SAP InfoProviders supported by BI+:

- InfoCubes
- ODS objects
- InfoSets
- BEx query cubes
- Multiproviders

SAP BW offers a smaller set of advanced member selection methods than does Analytic Services.

SAP BW features:

- Variables
- Period-to-date values
- Top and bottom retrieval
- Member properties
- Searches for SAP BW characteristic values
- Currency conversion
- Unit of measure conversion

See the *Hyperion System 9 BI + Workspace User's Guide*.

Relational Access Methods

Some documents, such as Web Analysis documents, can access OLAP, Hyperion, and supported relational databases.

Methods for accessing relational data from Web Analysis:

- Custom document SQL spreadsheet
- Custom document free-form grid
- Relational drill-through
- Relational database connection
- Analytic Integration Services drill-through
- Repository

For feature information, see the *Hyperion System 9 BI + Workspace User's Guide*.

Controlling the Size of the Query Result Set

Query governors vary for relational access methods. Custom document SQL spreadsheets and relational drill-through methods enable users to declare query governors as they create SQL queries or relational drill-through definitions.

When you drill from OLAP to relational data, passing only the drilled OLAP dimension member to the relational data source may result in a large query result set. To reduce and simplify the query result set, you can pass the page and filter dimensions specified in the OLAP document.

In Interactive Reporting documents, Query section properties can govern the number of rows returned from relational data sources and impose time limits on queries. Users can cancel queries through the keyboard in some cases.

Starting Tasks

Most tasks in Workspace start the same way.

Note: The following procedure describes how to use modules to perform tasks. Tasks can also be performed using the toolbar, menus, and shortcut menus. For a list of all toolbars, menus, and shortcut menus, see [“Toolbars” on page 48](#).

➤ To begin a task:

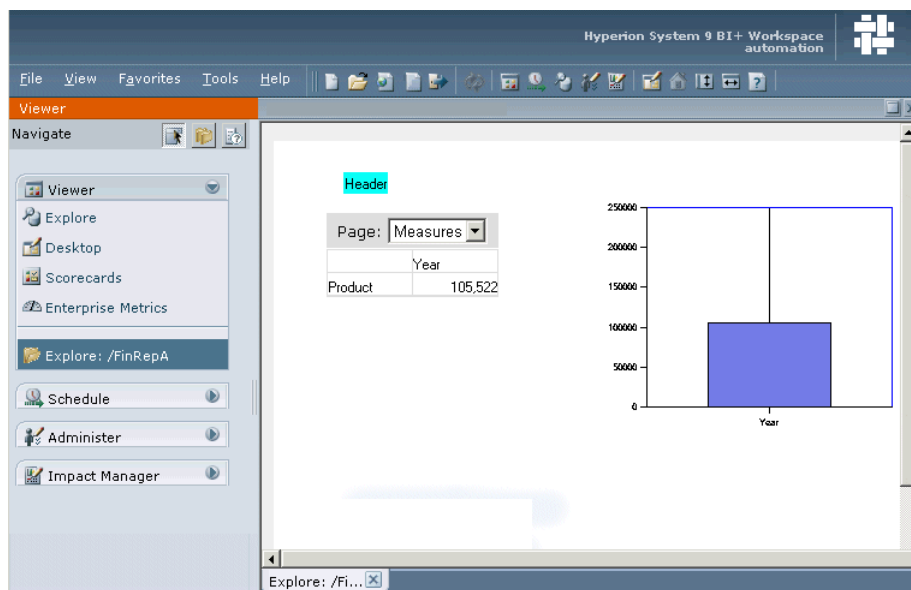
1 From the view pane, select a module and then a button or item.

- The view pane displays module information such as, depending on the module, a list of folders or document sections. The Content pane displays information that corresponds to the view pane, such as a file list or document content.

2 Perform one of three actions:

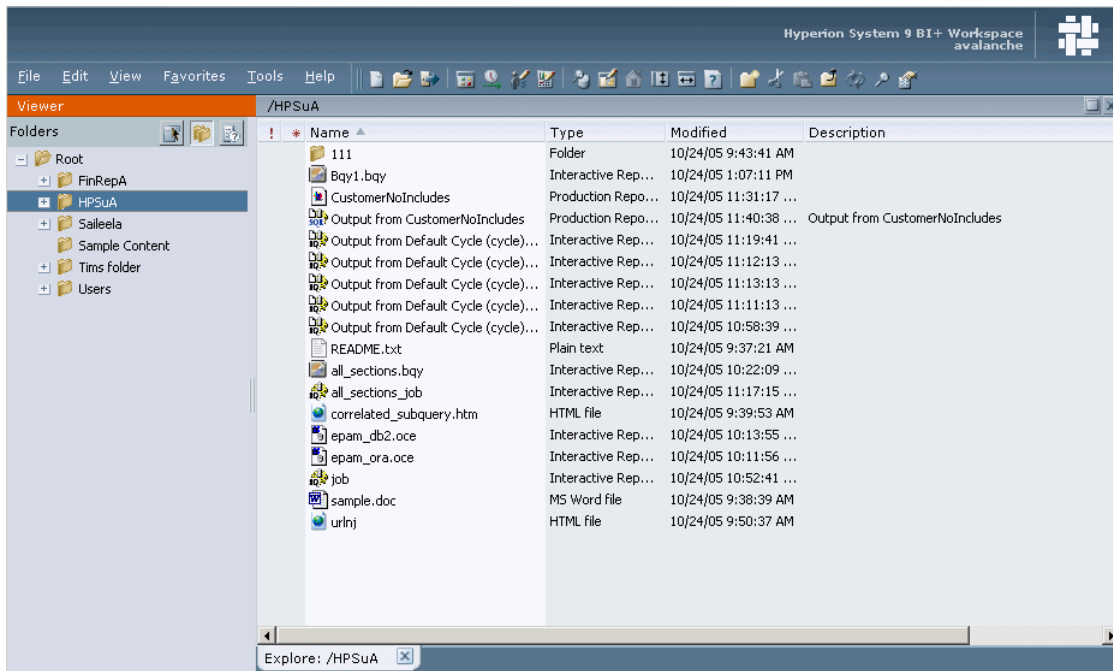
- If the content area displays a document, change the POV or view a section.
In the following example, you can change the POV:

Figure 2 View module showing sample Financial Reporting document.



- If the content area displays a list, locate and double-click the item with which you want to work.

Figure 3 Explore showing a list of files in the repository



- If a dialog box is displayed in the content area, view or modify the information.

Creating Documents

With Workspace, you can use the new document wizard to create a Web Analysis or Interactive Reporting document, Financial Reporting book or batch.

- To create a Web Analysis or Interactive Reporting document, or a Financial Reporting book or batch:

1 Select File > New Document.

Step 1: Select a Task, of the new document wizard is displayed.

2 Select an option:

- Create a document
- Collect reports into a book
- Batch reports for scheduling

See the *Hyperion System 9 BI+ Workspace User's Guide*.

Selecting a Data Source for a Document


To create a document, you must specify a data source. The data source determines the document type.

- To create a Web Analysis document, specify a Web Analysis database connection.
- To create an Interactive Reporting document based on an existing document, specify the existing document.

See the *Hyperion System 9 BI+ Workspace User's Guide*.

Note: In the following procedures, <module name> is Viewer, Explore, or Schedule.

Accessing Modules

- To access a module, perform an action:
 - From the view pane, click the <module name> button.
 - In a module, click , and then click the <module name> button.
 - From the menubar, select **Tools** > < module name>.
 - From the toolbar, click the <module name> button.

Opening and Printing Documents or URLs

- To open a document:
 - 1 **Select File > Open > Document.**

The Open dialog box is displayed.
 - 2 **Select the document.**

The list of open documents is displayed in the view pane and in tabs at the bottom of the document in the content area. You can toggle between open documents.
- To open a URL:
 - 1 **Select File > Open > URL.**

The URL dialog is displayed.
 - 2 **Enter the URL name.**
 - 3 **Select Ok.**
- To print a document:

Note: This procedure applies only to Financial Reporting, Web Analysis, or Production Reporting documents.

- 1 From the view pane, select **Explore**.
- 2 Open a document, for example, a Financial Reporting document.

Note: You may need to open the document as HTML or PDF.

- 3 Select **File > Print > HTML** or **File > Print > PDF**.

Setting File Properties and Moving Files

► To set file properties:

- 1 From **Explore**, select a document.
- 2 Select **File > Properties**.

The Properties Dialog is displayed. The General Properties option is selected by default.

You can modify the file name and description and set user permissions (select **Edit Permissions**). See the *Hyperion System 9 BI+ Workspace User's Guide*.

► To move files or folders in Explore:

- 1 From **Explore**, select a document or folder.
- 2 Select **Edit > Cut**.
- 3 Select a repository location, and select **Edit > Paste**.

Renaming Files

► To rename files:

- 1 From **Explore**, select a document or folder.
- 2 Select **Edit > Rename**.

The Rename dialog is displayed.

- 3 Enter a name.
- 4 Select **Save**.

Adding and Removing Documents from Favorites

► To add a document or folder to favorites:

- 1 From **Explore**, select a document or folder.
- 2 Select **Favorites > Add to Favorites**.

3 Select Favorites.

The document or folder that you added is displayed as a menu option.

- To remove a document or folder from Favorites:

1 Select Favorites > Manage Favorites.

The Favorites Manager dialog box is displayed.

2 Clear Show, or select Remove.

- To create a shortcut to a Production Reporting document:

1 From Explore, select the document.

2 Right-click the document, and select Create Shortcut.

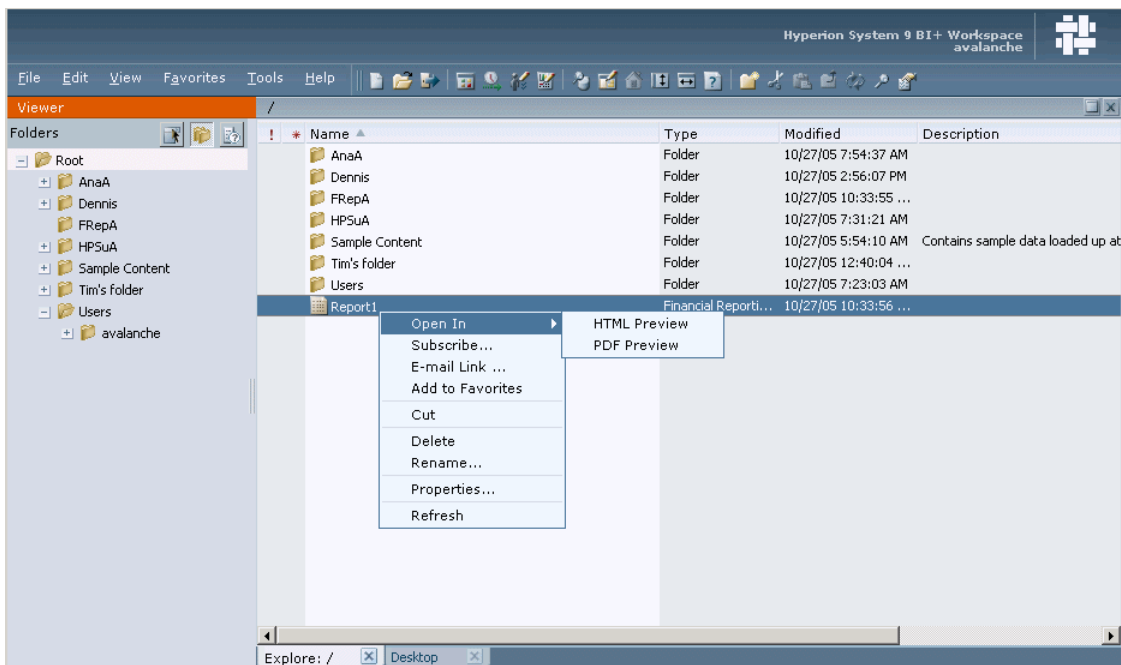
3 Complete the General Properties dialog box, and select OK

For instructions, see the *Hyperion System 9 BI + Workspace User's Guide*.

Using Explore

In Explore, you organize, search for, or assign access privileges to files. When you select Explore, the view pane shows folders, and the content pane shows files and folders. The following figure shows the Explore page and an example of the options available for Financial Reporting documents.

Note: To display additional options, the highlighted document was selected along with the right-click option.

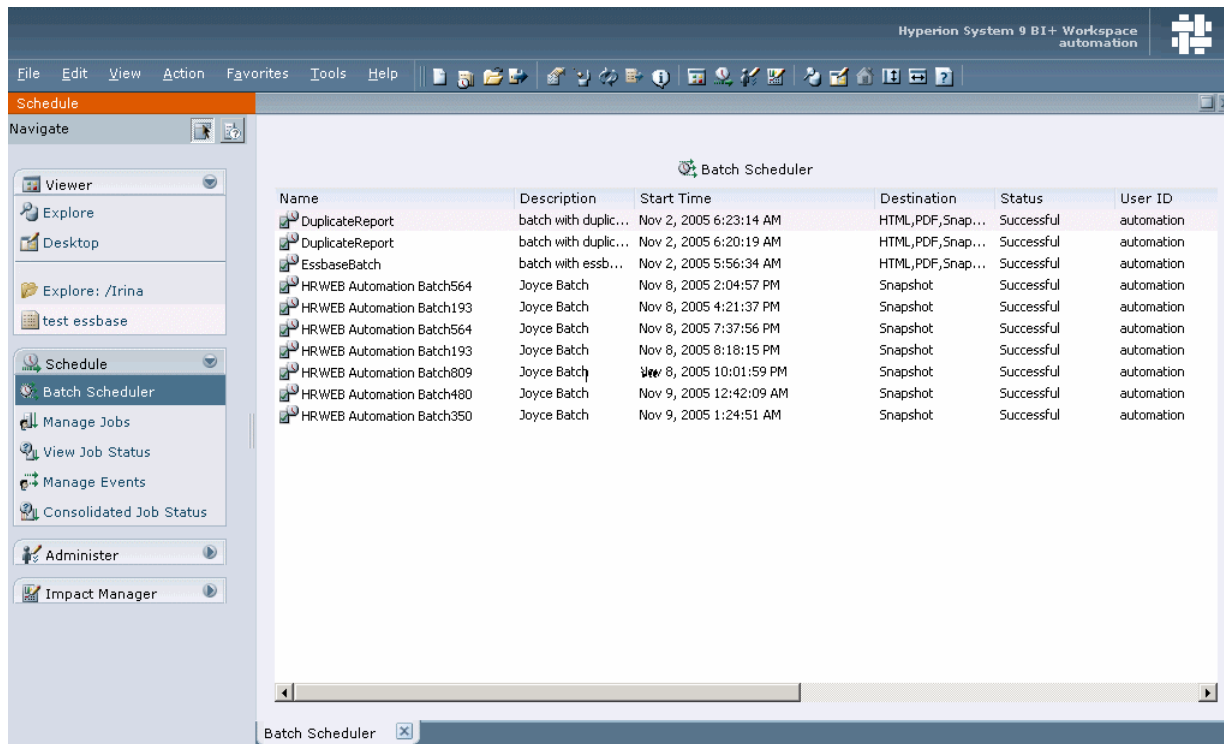


Explore features:

- **Folder tree**—Navigate through Workspace folders
- **View File Properties**—View file information, such as type, author, creation date, access control, modified date, and description
- **Search**—Search for files and folders by character string and file type

Using Schedule

Use Schedule to manage and schedule batches, jobs, and events and to view status. Schedule is primarily used by Financial Reporting, Interactive Reporting, and Production Reporting. The following Batch Scheduler example is used by Financial Reporting.



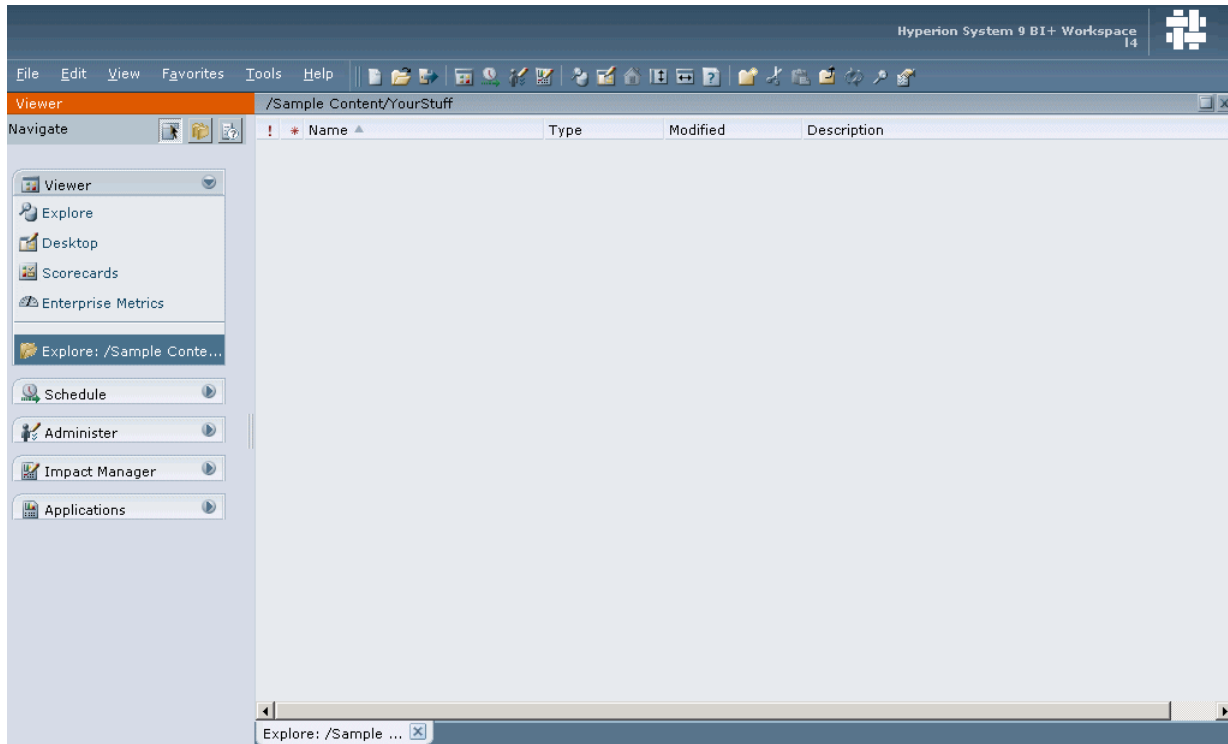
Schedule features:

- Batch Scheduler
- Manage Jobs
- View Job Status
- Manage Events
- Consolidated Job Status

See “Scheduling Jobs and Batches” in the *Hyperion System 9 BI+ Workspace User’s Guide*.

Using Viewer

Viewer displays many types of documents and maintains a list of opened documents, so you can quickly switch between documents.



Viewer features:

- **View pane**—Use buttons along the top to jump between panels
- **View pane list**—Select a desktop or document to access
- **Content area**—View, interact with, and modify documents
- **Content area tab bar**—View the names of the contents of the open document

Using Hyperion System 9 Smart View for Office

Smart View provides a common Microsoft Office interface for Analytic Services, Financial Management, Planning, and four Workspace components:

- Financial Reporting
- Production Reporting
- Web Analysis
- Interactive Reporting (Smart View export options not enabled)

The centralized interface enables simultaneous use of multiple Hyperion products and improves integration with Microsoft Office (2000, 2002, and 2003). The Smart View implementation provides the following Workspace functionality:

- Exports the current page of the current data object to Excel, Word, or PowerPoint
- Exposes Financial Management and Analytic Services functions in Excel, Word, and PowerPoint content
- Notifies you when you can upgrade to new releases of Smart View

Smart View enables two export options:

- You can export the current page of the current data object to Word, PowerPoint, or Excel as an image, and, later, re-query the Web application to refresh the image.
- You can export documents to Excel as query-ready or formatted HTML.

When you export content as query-ready HTML, the current page of the current data object is converted to HTML, and Hyperion-specific formatting is removed. Thus, Smart View can re-query the data source independent of the Web application.

When you export content as formatted HTML, the current page of the current data object is converted to HTML, and Hyperion formatting definitions and calculated members are retained. Thus, Smart View cannot directly query the data source, but Hyperion content can be leveraged by Microsoft Office applications. Not all export options are supported by all data sources and Web applications. See the *Hyperion System 9 BI + Workspace User's Guide*.

Personalizing Workspace

You can use Workspace desktop, favorites, and personal pages to personalize the process of organizing, accessing, and viewing documents. See the *Hyperion System 9 BI + Workspace User's Guide*.

Using the Desktop

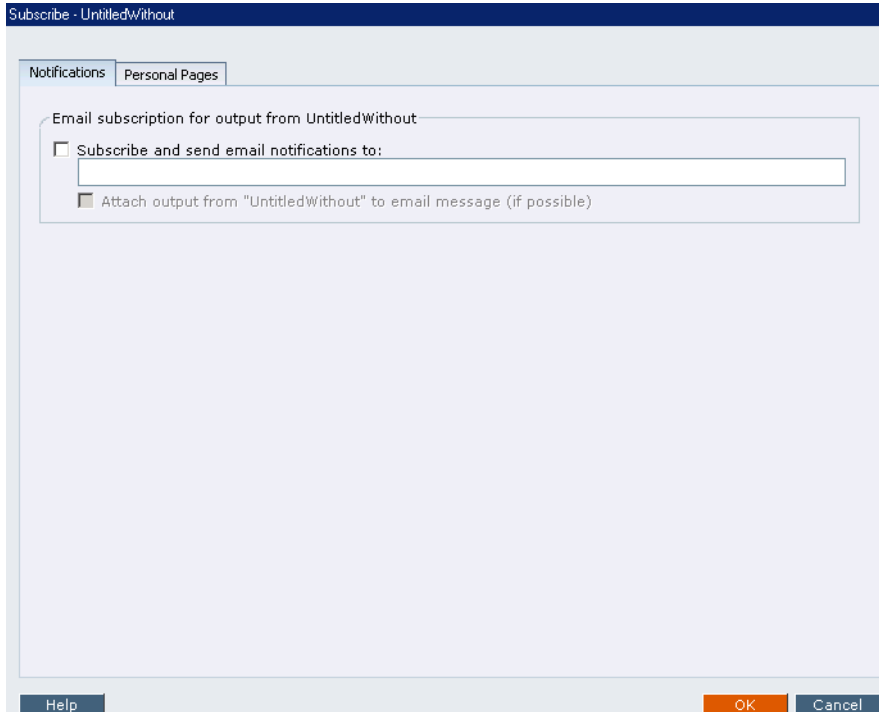
You set up desktop folders in user preferences, where desktop items are displayed as buttons. You can view desktop folders in Explore; however, desktop folders and documents are listed without the name *Desktop*. You access the desktop in Viewer, where desktop items are displayed as icons. For desktop set-up instructions, see the *Hyperion System 9 BI + Workspace User's Guide*.

Subscribing to Documents

When documents are changed or updated, subscribing users can be informed:

- By e-mail notifications with attached files
- By bookmarked personal pages
- By images that represent bookmarks

Figure 4 Subscribe Dialog Box



For information on Subscribe, see the *Hyperion System 9 BI + Workspace User's Guide*.

Working with Favorites

Favorites provide quick access to frequently used items and documents. With appropriate access privileges and permissions, you can add items (push items) to other users' favorites.

Using Personal Pages

Personal pages provide a way to view frequently used information. You can have multiple personal pages and can choose a default personal page, which is displayed when you start the Personal Pages module. You can customize personal page content and layout, create personal pages, and copy and customize imported personal pages.

The following figure shows the types of content that can be displayed on personal pages. A personal page can have some or all of these types.

Broadcast Messages

No messages.

Sample Personal Page ✕

[MSND logo](#)
[MSND Sales](#)
[MSND Script](#)
[Page Footer](#)
[Unit Sales 1597 Chart](#)
[Unit Sales 1597 Pie](#)
[Unit Sales 1597 Trend](#)
[William Shakespeare Bio](#)

My Bookmarks ✕

[report](#)
[hyperion website](#)
[Text File Sample](#)

Exceptions Dashboard ✕

No monitored exceptions

MSND Sales

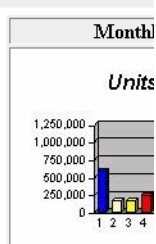
A Midsummer Nights

by William Shakespeare

Sales Report for Year 1597 by Script and Folio D

Media formats: Play folio, musical score, video. **Retail for**
Internet

After a highly successful launch of [William Shakespeare's](#) new play, *A Midsummer Night's Dream* in January of 1597 (see *Units by Month* chart) sales increased steadily, building up to the seasonal rush at the end of the year (see *Units by Quarter* chart).



Personal page features:

- **Broadcast Messages**—A link to a folder, the contents of which are set up and managed by the administrator. Folder contents are displayed as one or more content windows, which are displayed to every user. The Broadcast Messages folder contains two sub-folders:
 - Personal Page Content —published personal pages
 - Sample Personal Page—content set up by the administrator and content added by subscription
- **My Bookmarks**—Links to Web pages or repository items.
- **Image bookmarks**—Graphic links to Web pages or repository items.
- **HTML file or job output displayed as a file content window**—Workspace HTML items and URLs
- **Exceptions Dashboard**—Traffic light indicators. If the traffic light is red, the item is flagged as an exception or the job generated an exception. If the traffic light is green, the job did not generate an exception.
- **Displayable Q&R sections**—Sections from Q&R documents and job output that you can access.

For details on the following tasks, see the *Hyperion System 9 BI + Workspace User's Guide*:








- Adding personal page contents
- Modifying personal page layout
- Changing personal page colors
- Displaying HTML content on personal pages
- Creating bookmarks
- Using exception notifications
- Embedding Interactive Reporting document sections in personal pages

Toolbars

Toolbars provide quick, context-sensitive access to commonly used features. Button availability is determined by the content-area module.

Note: Your role determines which toolbars, menus, shortcut menus, and modules are displayed on the user interface. For example, if your role enables you to create documents, the toolbar menu item File > New is displayed.








Table 8 Standard Toolbar Buttons

| Button | Menu Command | Description |
|---|---------------------------|--|
|  | File > New Document | Create documents, such as books, batches, analysis documents, and scheduled batch jobs |
|  | File > Open | Select, open, and use repository documents |
|  | File > Logoff | End the current session |
|  | Tools > Viewer > Desktop | Display the desktop in the content area |
|  | NA | Displays the default startup option for content area |
|  | View > Masthead | Display or hide the masthead |
|  | View > view pane | Display or hide the view pane, while resizing the content area |
|  | Tools > Viewer | Display Viewer, used to review query, reporting, analysis, KPI, and scorecard content |
|  | Help > Help on This Topic | Displays help for the page displayed in the content area |
|  | Tools > Schedule | Display Schedule, used to define and schedule events, jobs, and batches |
|  | Tools > Explore | Display Explore, to display the repository as a file management system |
|  | Tools > Administer | Display Administer, used to define users, groups, roles, and preferences |
|  | Tools > Impact Manager | Display Impact Manager, used to modify and update groups of documents |

Viewer, Web Analysis Toolbar

The Viewer, Web Analysis toolbar displays standard buttons and buttons specific to it.



Table 9 Viewer, Web Analysis Toolbar Buttons

| Button | Menu Command | Description |
|--|--------------------|---|
|  | View > Data Layout | Display the Data Layout dialog box, used to redefine queries and dimension member selections |
|  | View > Filters | Show and hide the Filter area, which indicates filter member selections |
|  | View > Pages | Show and hide the Page Control area, which indicates the number of pages for the current data object and the current page |
|  | File > Save | Save documents to the repository |
|  | File > Save As | Save documents to the repository under new names or to new locations |
|  | File > Print HTML | Display the browser Print dialog box, used to define print parameters and options |
|  | View > Refresh | Update the document display |

Viewer, Financial Reporting Toolbar

The Viewer, Financial Reporting toolbar displays standard buttons and buttons specific to it.






Table 10 Viewer, Financial Reporting Toolbar Buttons

| Button | Menu Command | Description |
|---|-------------------------------|---------------------------------------|
|  | File > Open in > PDF Preview | Open documents in the browser in PDF |
|  | File > Open in > HTML Preview | Open documents in the browser as HTML |

Viewer, Book Editor Toolbar

The Viewer, Book Editor toolbar displays standard buttons and buttons specific to it.





Table 11 Viewer, Book Editor Toolbar Buttons

| Button | Menu Command | Description |
|---|-------------------------------|--|
|  | Edit > Add Report or Snapshot | Add reports and snapshots to books |
|  | Edit > Delete | Remove reports and snapshots from books |
|  | Edit > Member Selection | Open the member selection dialog box |
|  | Edit > Move Up | Move reports or snapshots up in the list |
|  | Edit > Move Down | Move reports or snapshots down in the list |

Viewer, Batch Editor Toolbar

The Viewer, Batch Editor toolbar displays standard buttons and buttons specific to it.











Table 12 Viewer, Batch Editor Toolbar Buttons

| Button | Menu Command | Description |
|---|-------------------------|--|
|  | Edit > Add Item(s) | Adds reports, snapshots, books, or snapshot books to batches |
|  | Edit > Delete | Removes reports and snapshots from batches |
|  | Edit > Member Selection | Opens the member selection dialog box |
|  | Edit > Schedule Batch | Opens the Schedule Batch dialog box |

Viewer, Interactive Reporting Toolbar

The Viewer, Interactive Reporting toolbar displays standard buttons and buttons specific to it.




Table 13 Viewer, Interactive Reporting Toolbar Buttons

| Button | Description |
|---|--|
|  | Displays the Dashboard Home section. Dashboard sections are streamlined, push button approaches to viewing business intelligence reports. |
|  | Moves to the first page of the section. |
|  | Moves one view left in Chart and Pivot sections. To move to the first view on the left, select [Shift] + Click + left arrow. |
|  | Moves one view up in Chart and Pivot sections and one page up in Results, Table, and Report sections. To move to the top view or page, select [Shift] + Click + Up. |
|  | Moves one view down in Chart and Pivot sections and one page down in Results, Table, and Report sections. To move to the bottom view or page, select [Shift] + Click + Down arrow. |
|  | Moves one view right in Chart and Pivot sections. To move to the first view on the right, select [Shift] + Click + right arrow. |
|  | Refreshes the current section against the database server to dynamically retrieve the most current data set (except for Dashboard and Report sections). When Refresh is selected in Dashboard and Report sections, all queries are refreshed. Queries are refreshed in the order in which they are displayed in the section catalog of the full client. For example, in a document with three queries, Query1, Query2, and Query3, queries are executed in numeric order when Refresh All is selected. You must have at least View access privilege on the Interactive Reporting database connections with which you are working to use Refresh. |
|  | Exports a section to Portable Document Format (PDF) and launches it inside your browser if the PDF MIME type is set in the browser. If the PDF MIME type is not set in the browser, the browser Save As dialog box is invoked. |
|  | Exports a section to Excel and launches it inside your browser if the mime type is set to recognize the XLS file extension. Thereafter, you save the file locally or manipulate the file in the Excel application. If the mime type is not set to recognize the XLS file extension, you are prompted with a Save As dialog box and must specify a local destination to which to save the XLS file. |
|  | <p>Tip: Saves files locally and launches documents in the Interactive Reporting Web client so you can view and save the documents to your desktop for offline viewing. Documents can be viewed only in the full desktop or the Web client. If the Web client is not installed, the browser is launched automatically.</p> <p>Tip: If you want to save to the repository, use the File >Save or File >Save As command.</p> |

Viewer, Performance Scorecard Toolbar

The Viewer, Performance Scorecard toolbar displays standard buttons and buttons specific to it.







Table 14 Viewer - Performance Scorecard Toolbar Buttons

| Button | Menu Command | Description |
|---|--------------------------------------|---|
|  | File > Print | Print scorecards or maps to a designated printer |
|  | File > Export to Microsoft Excel | Export scorecards for employees or measures to an Excel worksheet |
|  | Tools > Link > Performance Scorecard | Launch the Performance Scorecard application to access additional functionality, such as data entry, measure scorecard details, and object creation |

Batch Scheduler Toolbar

The Batch Scheduler toolbar displays standard buttons and buttons specific to it.







Table 15 Batch Scheduler Toolbar Buttons

| Button | Menu Command | Description |
|---|----------------------------|--|
|  | File > New Scheduled Batch | Opens the Schedule Batch dialog box |
|  | Edit > Properties | Displays the details for scheduled batches; for example, the time for which a batch is scheduled |
|  | Edit > Delete | Deletes scheduled batches |
|  | View > Refresh | Updates the desktop with changes to scheduled batches |
|  | Action > Retrieve Output | Retrieves results for the latest batch job |
|  | Action > Show Details | Displays batch details; for example name, start time, and destination |

Explore Toolbar

The Explore toolbar displays standard buttons and buttons specific to it.

Table 16 Explore Toolbar Buttons

| Button | Menu Command | Description |
|---|-------------------|--|
|  | File > New Folder | Creates folders |
|  | NA | Navigates up to the repository location that contains the current folder |
|  | File > Search | Displays the Search dialog box, used to search for files and folders by character string and file type |
|  | Edit > Cut | Marks repository files to be moved |
|  | File > Properties | Open the Properties dialog box, used to set file properties; for example, file permissions |
|  | Edit > Paste | Pastes files to the current repository location |

Administer Toolbar

The Administer toolbar displays standard buttons and buttons specific to it.

Table 17 Administer Module Toolbar Buttons










| Button | Manage Menu Command | Description |
|---|---------------------|---|
|  | General | Define general system and user interface properties |
|  | User Management | Provision users, groups, and roles |
|  | Physical Resources | Specify printers and output directories for job output |
|  | MIME Types | Create, modify, and delete Workspace MIME types |
|  | Notifications | Define mail server properties and how end users receive e-mail notifications about jobs |
|  | SmartCuts | Specify how to construct SmartCuts (shortcuts to imported documents in Workspace) for inclusion in e-mail notifications |

Table 17 Administer Module Toolbar Buttons (Continued)

| Button | Manage Menu Command | Description |
|---|---------------------|--|
|  | Row-Level Security | Manage row-level security settings in data sources used by Interactive Reporting documents |
|  | Usage Tracking | Track system usage and define related properties |
|  | Event Tracking | Track events, such as document opens, documents closes for selected MIME types, and jobs run |

Production Reporting Toolbar Buttons

When you view Production Reporting documents in Workspace, you see no buttons in the toolbar area. However, you see the navigation bar, which provides options for navigating among HTML-report pages and for viewing reports in multiple output formats. The navigation buttons are dynamic, based on job output. For button descriptions, see the *Hyperion System 9 BI + Workspace User's Guide*.

Menus

- From Workspace, the standard menus are File, View, Favorites, Tools, and Help. Action and Format menus are displayed for some modules. A Manage menu is displayed for Administer.
- Menus and buttons in the masthead are updated as you use the system, based on the following criteria:
 - The roles granted to you. Role determines which modules are displayed in the view pane.
 - The module being used and the task being performed. For example, if you use Viewer, the menu contains active-document tasks. If you use Explore, the menu contain file or folder tasks.

File Menu

The File menu is available for all Workspace modules. Option availability depends on the content of the current window and the module from which the menu is accessed.

Table 18 File Menu

| Command | Description |
|---|---|
| New Document | Create documents, such as books, batches, or analysis documents. |
| Open > Document > Desktop > Scorecards > Enterprise Metrics | Select, open, and use repository documents |
| Open in >PDF Preview | For Financial Reporting, open your PDF reader and display the report |
| Open in > HTML Preview | For Financial Reporting, open your Web browser and display the report as HTML |
| Open in > New Window | Open documents in separate windows |
| Close All | Close all open documents |
| Save | Save changes, overwriting the current document |
| Save As | Saves documents to the repository under new names or to new locations |
| Print > PDF or HTML | From Financial Reporting, open reports in PDF or HTML for printing |
| Print PDF | For Financial Reporting, Web Analysis, and Interactive Reporting, open reports in PDF for printing |
| Print HTML | For Financial Reporting, Web Analysis, and Interactive Reporting, open reports in HTML for printing |
| Print | For Performance Scorecard, print scorecards or maps displayed in the Contents pane |
| Export to Excel | For Performance Scorecard, export maps or employee scorecards to Excel worksheets |
| Export Map | For Performance Scorecard, if a Cause and Effect map is being viewed, export an image of the maps |
| Import > File > URL > File as Job > Financial Reports | Open the Import dialog box, used to import documents, URLs, files, files as jobs, and financial reports to Hyperion System 9 |
| Export | Open the Export dialog box, used to export native file formats in XML, Excel as fully formatted or query-ready grid and text, Word, or PowerPoint |
| Properties | Open the Properties dialog box, used to set file properties; for example, file permissions |
| E-mail Link | Send URL links of objects or folders by e-mail |
| Subscribe | Inform subscribing users when documents are changed or updated |

Table 18 File Menu (Continued)

| Command | Description |
|---------------|--|
| Run Job | For Interactive Reporting jobs, set job parameters and run jobs |
| Print | Opens the browser Print dialog box, used to specify printers and print reports |
| Page Setup | For Financial Reporting, opens the Page Setup dialog box, used to specify page size, page margins, and workspace size |
| Print Preview | For Financial Reporting, view reports as they look printed |
| Preferences | Opens the Preferences dialog box, used to change your password (using native authentication) and e-mail address and set the default for opening snapshots (PDF Preview or HTML Preview) For Financial Reporting, you can also change your language selection and enable XBRL editing. |
| Logoff | End the session |
| Exit | Exit Workspace |

Edit Menu

The Edit menu is available for all Workspace modules. Option availability depends on the content of the current window and the module from which the menu is accessed.

Table 19 Edit Menu

| Command | Description |
|--------------------------------------|--|
| Cut | Removes objects from the repository |
| Paste | Pastes objects from the repository |
| Delete | From Explore, deletes repository files or folders; from Book Editor or Batch Editor in Financial Reporting, removes reports and snapshots from books |
| Rename | Changes name of file or folders |
| Move Up | From Book Editor for Financial Reporting, moves reports or snapshots up in the list |
| Move Down | From Book Editor for Financial Reporting, moves reports or snapshots down in the list |
| Add Items | From Batch Editor and Book Editor for Financial Reporting, adds documents to batches or books |
| Member Selection | From Book Editor or Batch Editor for Financial Reporting, opens the member selection dialog box |
| Display Members in Table of Contents | From Book Editor in Workspace, displays members in the tables of contents of books |
| Copy Member Selection to | From Book Editor for Financial Reporting, copies members from one document to another |
| Schedule Batch | From Batch Editor for Financial Reporting, opens the Schedule Batch dialog box |

Table 19 Edit Menu (Continued)

| Command | Description |
|---------------------|---|
| Section > Delete | For Financial Reporting and Web Analysis documents, deletes sections |
| Section > Rename | For Financial Reporting and Web Analysis documents, changes the document name |
| Section > Duplicate | For Financial Reporting and Web Analysis documents, duplicates documents by saving them with a different name |
| Data | For Web Analysis documents only |

View Menu

The availability of View menu options depends on the content of the current window and the module from which the menu is accessed.

Table 20 View Menu

| Command | Description |
|-----------------------|--|
| Masthead | Show or hide the masthead |
| View pane | Show or hide the view pane |
| Filters and POV | Display or disable filters and POV options for Web Analysis documents |
| Pages | For Web Analysis documents, maintain the dimensions on the row and column axes while changing their intersections on the Page axis |
| Display Items of Type | In the repository, limit document lists by type |
| Show Columns | Display the Show Columns dialog box, used to select and deselect columns for displaying |
| Show Hidden | Display hidden files |
| Refresh | Refresh the repository |

Favorites Menu

Use the Favorites menu to set up personal pages and favorites and to select from a list of favorite documents.

Table 21 Favorites Menu

| Command | Description |
|------------------|---|
| Add to Favorites | Adds the selected document from the repository to Favorites list. Displays only when the current tab can be added to the favorites--when the current view is either repository content or Explorer. |
| Manage Favorites | Opens the Favorites Manager dialog box |

Table 21 Favorites Menu (Continued)

| Command | Description |
|----------------------------------|--|
| Scorecards Enterprise Metrics | Displays in alphabetical order a list of favorite documents or folders defined by you or pushed to you |
| My Personal Page | Opens your personal page |

Actions Menu

The Actions menu is displayed in View mode for the following sections of BQY documents:

- Query—[Table 22](#)
- Results—[Table 23](#)
- Pivot—[Table 24](#)
- Chart—[Table 25](#)
- Table—[Table 26](#)

Table 22 Actions Menu - Query Section

| Command | Description |
|-------------------|---|
| Insert | Insert Query, Results, Table, Pivot, or Chart sections. If Query, you can select a query to modify, or you can link to a distributed, predefined data master. |
| Add to Request | Add Catalog List items to the Request pane |
| Add to Filter | Add Catalog List items to the Filter pane |
| Modify Filter | Modify Filter pane items (using the Filter dialog box) |
| Add to Sort | Add Request pane items to the Sort pane, in ascending or descending order |
| Add Computed Item | Use Request pane or Catalog list items to calculate data items (based on functions, data items, and operators in the Computed Items dialog box). Data items can be included in reports or used to calculate other data. |
| Add Data Function | Aggregate and compute values for Request pane or Catalog list items. Data function computations include averages, maximums, counts, and other statistics that summarize data groups. |

Table 23 Actions Menu - Results Section

| Command | Description |
|---------|--|
| Insert | Insert Query, Table, Pivot or Chart sections. If Query, you can select a query to modify or link to a distributed, predefined data master. If Table, Pivot, or Chart, the data set is based on the current Results section |
| Sort | Sort columns in ascending or descending order |

Table 23 Actions Menu - Results Section (Continued)

| Command | Description |
|--------------------------|--|
| Filter | Add or modify filters on columns |
| Auto-size column width | Resize columns to content width |
| Grand Total | Calculate column grand totals |
| Break Total | Calculate break totals |
| Add/Modify Computed Item | Use columns to calculate data (based on functions, data items, and operators provided in the Computed Item dialog box). Computed items can be included in reports or used to calculate other data. |
| Delete | Delete columns |

Table 24 Actions Menu - Pivot Section

| Command | Description |
|--------------------------|--|
| Insert | Insert Query, Table, or Chart sections. If Query, you can select a query to modify or link to a distributed, predefined data master. |
| Drill Up | Collapse the data view (see less detail) |
| Focus | Update the pivot table to include only selected data |
| Hide | Hide columns |
| Show Hidden | Display hidden columns |
| Show All | Update the pivot table to include all items |
| Group/Ungroup | Group labels so that, when labels are combined, their associated data is aggregated, creating a summary label category. With grouping, only the data view changes. Use ungroup to return views to original label values. |
| Data Functions | Aggregate and compute values for selected columns. Data function computations include averages, maximums, counts, and statistics that summarize data groups. |
| Add/Modify Computed Item | Use items to calculate data items (based on functions, data items, and operators in the Computed Items dialog box). Data items can be included in reports or used to calculate other data. |
| Add Totals | Adds totals for columns, according to next higher dimension items. |

Table 24 Actions Menu - Pivot Section (Continued)

| Command | Description |
|------------------------|--|
| Delete Totals | Delete column totals. |
| Use Surface Values | Apply calculations to values displayed in the pivot table or to underlying values, rather than to values from the original Results section |
| Auto-size Column Width | Resize columns to content width |

Table 25 Actions Menu - Chart Section

| Command | Description |
|---------------------------------|--|
| Insert | Insert Query, Table, or Chart sections. If Query, you can select a query to modify or link to a distributed, predefined data master. |
| Drill Up | Collapse the data view (see less detail) |
| Focus | Update tables to include only selected data |
| Hide | Hide items |
| Show Hidden | Display hidden items |
| Show All | Update to include all items |
| Group/Ungroup | Group labels so that, when labels are combined, their associated data is aggregated, creating a summary label category. With grouping, only the data view changes. Use ungroup to return views to original label values. |
| Data Functions | Aggregate and compute item values. Data function computations include averages, maximums, counts, and statistics that summarize data groups. |
| Add/Modify Computed Item | Use items to calculate data items (based on functions, data items, and operators in the Computed Items dialog box). Data items can be included in reports or used to calculate other data. |
| Chart Type | Select chart types |
| Set Legend on | Set the chart legend on the x, y, or z axis |
| Show Bar Values | Display bar values |
| Show Pie Values | Display pie-slice values |
| Show Negative Values | Display positive and negative values (rather than only positive values) |

Table 25 Actions Menu - Chart Section (*Continued*)

| Command | Description |
|----------------------|---|
| Show Pie Percentages | Display pie slices as percentages (rather than as values) |
| Show Line Values | Display values for all lines |

Table 26 Actions Menu - Table Section

| Command | Description |
|--------------------------|--|
| Insert | Insert Query, Table, Pivot, or Chart sections. If Query, you can select a query to modify or link to a distributed, predefined data master. If Table, Pivot, or Chart, the data set is based on the current Results section. |
| Sort | Sort columns in ascending or descending order |
| Filter | Add or modify column filters |
| Auto-size column width | Resize columns to content width |
| Grand Total | Calculate column grand totals |
| Break Total | Calculate break totals |
| Add/Modify Computed Item | Use items to calculate data items (based on functions, data items, and operators in the Computed Items dialog box). Data items can be included in reports or used to calculate other data. |
| Delete | Delete selected columns |

Format Menu

The Format menu is available for Web Analysis and Interactive Reporting. Option availability depends on the content of the current window and the module from which the menu is accessed.

Table 27 Format Menu

| Command | Description | Submenu |
|---------|-------------------------------------|---|
| Font | Change the appearance of characters | Ariel |
| Style | Change the appearance of characters | <ul style="list-style-type: none"> ● Plain ● Bold ● Italics ● Underline |

Table 27 Format Menu (Continued)

| Command | Description | Submenu |
|-----------------|---|---|
| Numbers | Set the appearance of numerical values | <ul style="list-style-type: none"> ● Currency ● Percentage ● Date ● Time |
| Justify | Adjust text position | <ul style="list-style-type: none"> ● Left ● Center ● Right ● Top ● Bottom ● Horizontal ● Vertical ● Vertical_Rotated_Up ● Vertical_Rotated_Down |
| Auto-size Width | Size columns to fit the text of their widest column value. By default, Interactive Reporting truncates columns evenly, without regard to data-value length. | NA |
| Swing | Re-orient pivot-table axes to view data in new ways. When you swing dimensions, you move them up, down, or to the opposite axis. | NA |
| Chart Types | Determine chart type. Chart types are defined by how they represent data graphically and how they plot values and labels along the X, Y, and Z axes. | <ul style="list-style-type: none"> ● Vertical Bar ● Horizontal Bar ● Vertical Stacked Bar ● Horizontal_Stack_Bar ● Vertical Cluster Bar ● Line ● Stacked Area ● Area ● Ribbon ● Bar-Line ● Pie |
| 3-D | Display charts in three-dimensions | NA |
| Set Legend On | Do or do not display chart legends | <ul style="list-style-type: none"> ● X ● Y ● Z |
| Show Bar Values | Do or do not display bar values | NA |

Table 27 Format Menu (Continued)

| Command | Description | Submenu |
|--|---|--|
| Display Type (Web Analysis documents) | Determine display type. Documents display data values returned from the data source in data objects. Web Analysis documents can have multiple data objects, each one with a different display type. | <ul style="list-style-type: none"> ● Spreadsheet ● Chart Types <ul style="list-style-type: none"> ○ Default ○ Vertical Bar ○ Horizontal ○ Bar ○ Line ○ Spline ○ Area ○ Curved Area ○ Pie ○ Marks ○ Pareto ○ Box ● Pinboard |
| Auto-Resize (Web Analysis documents) | Resize Web Analysis documents in the content area (usually accompanied by re-sizing of Workspace) | NA |

Tools Menu

The Tools menu is always available. Command availability is determined by product and roles.

Table 28 Tools Menu

| Command | Description | Submenu |
|----------|--|--|
| Viewer | Display many types of documents and maintain a list of open documents | <ul style="list-style-type: none"> ● Desktop ● Enterprise Metrics ● Scorecards ● <<List of Open documents>> |
| Schedule | Manage jobs, batches, and events for automated processing | <ul style="list-style-type: none"> ● Batch Scheduler ● Manage Jobs ● View Job Status ● Manage Events ● Consolidated Job Status List |
| Explore | List and navigate through repository contents and manage and control files and folders | Opens Explore |

Table 28 Tools Menu (Continued)

| Command | Description | Submenu |
|------------------------------|--|---|
| Administer | Manage users, user groups, user preferences, roles, and authentication methods | <ul style="list-style-type: none"> ● General ● User Management ● Physical Resources ● Mime Types ● Notifications ● Smartcuts ● Usage Tracking ● Event Tracking ● Manage HSS Modules ● Manage HSS Projects |
| Impact Manager | Update Interactive Reporting documents when database structures or connections or external, data-source links change | <ul style="list-style-type: none"> ● Synchronize Metadata ● Data Model Updates ● Show Task Status ● Show Impact of Change |
| Personalize | Display documents to which you are subscribed and manage personal pages | <ul style="list-style-type: none"> ● Show Subscribed Items ● Manage Personal Pages |
| Links | Connect to Web Analysis documents or the Enterprise Metrics workspace or launch applications or custom links from the Tools menu | <ul style="list-style-type: none"> ● Web Analysis Studio ● Metrics Personalization Workspace ● For Performance Scorecard, launch the Performance Scorecard application. |
| Change Related Content Links | Select Financial Reporting documents and change related content links | NA |
| Change Database Connections | For Financial Reporting documents, open Database Connection Manager, used to change database connections for reports | NA |
| Database Connection Manager | For Financial Reporting documents, open Database Connection Manager | NA |
| Search | Search within Explore | NA |
| Install | Install the Interactive Reporting Web client or Smart View | <ul style="list-style-type: none"> ● Interactive Reporting Web Client ● SmartView |

Help Menu

You use the Help menu to access Workspace Help, PDF files and information about Workspace.

Table 29 Help Menu

| Command | Description |
|---------------------------------------|--|
| Help on this Topic | Displays help for the current topic |
| Contents | Opens the online help Contents tab, from which you can search for specific topics |
| Information Map | Opens the Hyperion System 9 information map, which contains links to documents |
| Technical Support | Opens the Hyperion Technical Support home page |
| Hyperion Developer's Network | Opens the Hyperion Developer Network home page |
| Hyperion.com | From Workspace, opens the Hyperion home page |
| About Hyperion System 9 BI+ Workspace | Opens the About Hyperion System 9 BI+ Workspace window, which contains information about Workspace, including UI and Server versions and version details |

Shortcut Menu Commands

To perform tasks, you can use shortcut menu commands, which are displayed when you right-click in the repository for a module document. Option availability depends on the content of the current window and the module from which the menu is accessed.

Table 30 Shortcut Menu: Repository

| Repository - Right Click Menu | |
|---|---|
| Menu Command | Description |
| New Folder | Add folders to the repository |
| New Document | From the New Document wizard, create documents, such as books, batches, analysis documents, or scheduled batch jobs |
| Open | Select, open, and use repository documents |
| Open In > HTML Preview PDF Preview | View documents in browsers as HTML or PDF |
| Import > File > URL > File as Job > Financial Reports | Open the Import to Repository dialog box, used to import reports, books, snapshot reports and books, report objects (grid, text, image, and chart) and row and column templates into the repository |
| Expand | From the view pane, display sub-folders under selected folder |
| Collapse | From the view pane, collapse selected folder |
| Export | Open the Export dialog box, used to export saved reports, snapshot reports and books, and report objects (grids, text, image, and chart) from the repository |

Table 30 Shortcut Menu: Repository (Continued)

| Repository - Right Click Menu | |
|--------------------------------------|--|
| Menu Command | Description |
| E-mail Link | Display the E-mail Editor dialog box, used to indicate recipient names and e-mail message subjects. E-mail Links Editor creates hyperlinks to files so recipients can view the files in Web browsers. Only Financial Reporting users can view hyperlinked files. |
| Cut | Remove repository items and place copies on the clipboard |
| Paste | Place cut and copied items in reports |
| Delete | Remove files from the repository upon confirmation |
| Delete with Outputs | For Interactive Reporting documents, delete items with job outputs, if there are outputs |
| Rename | Changes name of file or folders |
| Properties | Display scheduled batch detail; for example, the time for which a batch is scheduled |
| Run Job | For Interactive Reporting jobs, set job parameters and run jobs |
| Subscribe | Inform subscribing users of document changes |
| Explore | Opens Explore. |
| Search | Search for repository files |
| Create Shortcut | Create document shortcuts, for example, create shortcuts to Interactive Reporting, PDF, and HTML documents |
| Retrieve | Download and save an Interactive Reporting document |
| Schedule Job | Schedule Interactive Reporting Job |
| Add to Favorites | Add files to the favorites list |
| Refresh | Refresh the repository to include new folders and files |

Shortcut Keys

To toggle the masthead and view pane, you can use shortcut keys.

Table 31 Shortcut keys

| Shortcut Keys | Description |
|----------------------|----------------------|
| Alt+1 | Toggles the masthead |

Table 31 Shortcut keys *(Continued)*

| Shortcut Keys | Description |
|----------------------|-------------------------------|
| Ctrl+1 | Toggles the view pane |
| Alt+Ctrl+1 | Toggle masthead and view pane |

2

Viewing Documents in Workspace

With Workspace, you can use the Explore and Viewer modules to view available documents. With Explore, you can list and navigate the contents of the repository and manage and control files and folders. With Viewer, you can view, interact with, and modify document content. The Navigate panel within the Viewer module displays a list of items:

- Desktop—View contents, displayed as icons in the content area
- Performance Scorecard—View and print all scorecards and maps that you are authorized to access, export employee and measure scorecards to Excel worksheets, export cause and effect maps as image files
- Enterprise Metrics—Access metric data, dynamic charts and reports, daily updates, hyperlinks from charts and reports, personalized data displays, and filtering and sort options
- Document list —Select from a document list, to view a document in the contents pane

You use the following features and functionality to customize how you view documents in Workspace:

- Desktop folder—Set up desktop folders, each with selected documents
- Favorites—Create a list of favorite documents (System administrators can push items to users' favorites.)
- Subscriptions—Set up e-mail notifications:
 - For document, URL, shortcut, or file modifications
 - For job runs
 - For exception generations
 - For changes to folder contents

You can attach a modified item to an e-mail notification. You can add subscriptions to your default personal pages as a bookmark.

- Personal Pages—Organize Workspace items and Web content on a Web page

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Viewing Web Analysis Documents

Web Analysis enables you to query a wide variety of multidimensional and relational data sources. Through an easy-to-use interface, you create queries that are based on hierarchical relationships, discrete attributes, or advanced filtering (based on data limits and comparison criteria). You can then choose, based on actual or what-if scenarios, visual cues and display mediums that reveal exceptions, trends, and variances.

Web Analysis Clients

To conduct Web Analysis, use one of three clients:

- Workspace, a modular business intelligence platform, provides management reporting and analysis for almost any data source in a single coordinated environment. It is a 100 percent DHTML thin client that is served by a Web application through a Web server.
- Web Analysis Studio is a robust Web Analysis authoring Java applet that enables advanced users to design sophisticated, custom Web analysis documents using a coding-free interface. See the *Hyperion System 9 BI+ Web Analysis Studio User's Guide*.
- The Web Analysis API Toolkit enables developers to incorporate Web Analysis Studio look and feel and functionality into their custom Web applications. See the *Hyperion System 9 BI+ Web Analysis API Toolkit*.

The following descriptions focus on Web Analysis using Workspace.

Web Analysis Client Interfaces

Web Analysis tasks must be executed in specific interfaces:

View

The View module is the default interface for reviewing Web Analysis documents. Whatever your role, you can access the View module and review documents in the content area.

User Preferences

You customize the Web Analysis display and set behavior for new documents by setting one of two types of preferences.

- User Preferences— Personal Web Analysis settings, contained in a preferences file that is typically located in a user's Profiles folder
- Shared Preferences—Files located anywhere in the repository and referenced by multiple users, thus enabling common settings and defaults for everyone using a file

- To display the User Preferences dialog box, select **File > Preferences**.

Favorites Manager

You use Favorites Manager to access contents of your Favorites folder. You can access Favorites Manager from the Favorites menu, even if you do not have permission to browse the rest of the repository.

- To display the Favorites Manager dialog box, select **Favorites > Manage Favorites**.

Desktop Mode

The Desktop interface collects icons and presents them as your operating system desktop presents icons. You can quickly locate and access presentations from your Desktop, using the Files or Tools menu. For Workspace, the Desktop lists commonly accessed documents, which are identified in a folder defined in **Workspace > Preferences > Explorer**.

- To display your Desktop, select **Tools > Viewer > Desktop** or **File > Open > Desktop**.

About Presentations

Presentations, playlists of Web Analysis documents, enable documents to be grouped, organized, ordered, distributed, and reviewed. Presentations are lists of pointers referencing documents in the repository, not documents copied into sets.

Edit Data

With appropriate permission, you can edit cell values and write edits back to Analytic Services. You can initiate Edit Data only from the spreadsheet display type.

- To initiate Edit Data in a Web Analysis document, right-click the data object and select **Edit Data**.

Web Analysis Documents

Web Analysis documents can be displayed in an unlimited number of ways. However, each document includes four basic components:

Data Objects

Web Analysis documents display in a data object the values returned from the data source. A document can have multiple data objects; each data object has one display type:

- Spreadsheet
- Chart

- Pinboard
- SQL Spreadsheet
- Free-form grid

Each display type has numerous prerequisites.

- To change display type of the current document, select **Format > Display Type >**, and select a display or chart type.

Note: Web Analysis Studio users can lock display type to prevent subsequent users from altering a document.

Page Control Panel

You use the Page Control panel to jump or scroll through pages of intersections.

Paging maintains row and column dimensions on their axes, while changing their Page-axis intersections.

- To display the Page Control panel, select **View > Pages**.

A Page Control panel, which displays above its data object in the content area, organizes Page axis intersections so that each page focuses on one Page dimension member.

- To navigate a Page dimension, perform an action:
 - Click the **Page Control** scroll buttons (< >).
 - From the list, select a page dimension member by name.

Filter Panel

The Filter panel lists the Filters-axis dimension selections. Despite their absence from rows, columns, and pages, data-object intersections are related to Filter dimension selections. Filter selections help to focus data-object intersections on smaller subsets.

- To display the Filter panel, select **View > Filters (POVs)**.

View Pane Information Panel

The View pane extends down the left side of the content area. When you click the Information button, the View pane displays the Information panel, which contains segments summarizing the current data object of the current Web Analysis document. Different panel segments feature different context-sensitive controls and hyperlinks:

- Top segments list the analysis tools activated on the current data object.
- Middle segments (spreadsheet-axis segments) list axis dimensions.
- Last segments list the data sources serving current data values and the user profile.

Display the Information panel to review the features influencing the current data object.

With appropriate permission, you can rearrange dimensions by dragging dimension names between axes. See [“Moving Dimensions” on page 76](#).

Opening Web Analysis Documents

You can open Web Analysis documents in various ways:

- Select **File > Open > Document**, and, from the **Open** dialog box, click the **Open** toolbar button.
- Use the **View Pane**, **Tools** menu or **Explore** toolbar button to access the Explore module, and navigate to and select a document from a repository location.
- Select **Favorites > Manage Favorites** to access a document from Favorites Manager.
- Select a Web Analysis document link embedded in a custom document.

➤ To open Web Analysis documents, using the **Open** dialog box:

1 Perform an action:

- Select **File > Open > Document**.
- Select the **Open** icon.

The **Open** dialog box, which lists the contents of the current folder (specified by the **Look In** list) is displayed.

2 Optional: Select **All Files** or select **Web Analysis Document** from the **Type** list.

3 Navigate to a presentation:

- From **Look In**, select a location.
- Click the **Go Up A Level** button to display the contents of the parent folder in the selection frame.

As you navigate, the selection frame lists the files and folders that the **Files of Type** list indicates.

4 Select a document.

5 Click **OK**.

If the document database connection requires you to log on, the **Database Login** dialog box is displayed.

6 For the database connection, enter a valid user ID and password, select **Save User ID and Password**, and click **OK**.

The content area displays the selected document.

Showing and Hiding Web Analysis Document Components

You use the **View** menu to control the display of Web Analysis document components.

- To show or hide Web Analysis document components:
 - To display the Page Control panel, select **View > Pages**.
 - To display the Filter panel, select **View > Filters (POVs)**.
 - To display the View Pane, select **View > View Pane**.
 - To display the Data Layout panel, select **View > Data Layout**.
 - To display the Information panel, display the View Pane by selecting **View > View Pane**, and click the **Information** button.
 - To display the Edit Data interface, right-click the data object, and select **Edit Data**.

Resizing Web Analysis Documents

As Workspace is resized, you may need to resize Web Analysis documents in the content area.

- To auto-resize the current data object, select **Format > Auto-Resize**.

Navigating Web Analysis Documents

In Workspace, you use various navigation methods:

Table 32 Navigation Methods

| Navigation | Description | Method |
|-----------------|--|--|
| Move | Relocates a dimension on data layout axes. | Position on an axis or between axes, using the Data Layout dialog box, Information panel, or document wizard. |
| Paging | Maintains dimensions on the row and column axes, while changing intersections on the Page axis | Click or scroll the Page Control panel. See “Paging” on page 76 . |
| Keep Only | For the selected dimension, retains the selected member and removes all other members. | Right-click a dimension member header, and select Keep Only. See “Keep Only” on page 77 . |
| Remove Only | Removes the selected member from the query result set | Right-click a dimension member header, and select Remove Only. See “Remove Only” on page 77 |
| Drilling | Increases or decreases dimension detail by including or excluding members | Double-click dimension member headers. You can customize the drilling behavior; see “Drilling” on page 77 . |
| Custom Controls | Provides ability to use custom controls in custom documents to define Web Analysis navigation. | Use a custom document component to change the query. Web Analysis users can use custom document components, but components can be created only in Web Analysis Studio. |

Moving Dimensions

You can rearrange intersections by repositioning dimensions on or between axes.

- To move a dimension, using the Data Layout dialog box:
 - 1 Click the **Toolbar Data Layout** button.
 - 2 **Drag the dimension from the current position to another position, on the same or another axis.**

Note: Document creators can lock the ability to swap and move dimensions by using Properties.

- To move a dimension, using the View Pane Information Panel:
 - 1 **Select View > View Pane.**
 - 2 **Click the Information Panel** button.
 - 3 **Scroll to the Filter tree, Page tree, Row tree, and Column tree and review the dimension placement for the current data object.**
- **Drag a dimension from one to another axis tree.**

Note: The requirement to have at least one row and one column dimension may prevent you from dragging dimensions that leave an axis empty. In this case, use Data Layout to rearrange the dimension layout.

Paging

Paging maintains row and column dimensions on their axes, while changing their intersections on the Page axis. You can jump or scroll through pages of intersections by using the Page Control panel.

- To navigate the Page dimension, perform an action:
 - Click the **Page Control** scroll buttons (< >).
 - From the drop-down list, select a page dimension member by name.

Pages

Think of the Page axis as the Z axis of a three-dimensional graph.

Visualize a stack of spreadsheets. Traveling within the stack enables comparison of values on different pages.

The stack represents Page axis dimensions; each page represents a Page axis member or member combination.

Keep Only

Keep Only retains the selected member and removes all other members of the selected dimension.

- To keep only one dimension member, right-click the dimension member header, and select **Keep Only**.

Remove Only

Remove Only removes the selected member from the query result set.

- To remove one member from the query result set, right-click a dimension member header, and select **Remove Only**.

Drilling

Drilling increases or decreases data-object detail by changing the member display.

Distributing Web Analysis Documents

You have various options, as determined by your roles and permissions, for distributing Web Analysis documents to other users:

- You can embed Web Analysis content into **Personal Pages**. When you import personal pages to the repository, other repository users can review the content.
- You can save documents into the **Favorites Folders** of other users. The users can review document content, even if they do not have access to Explore mode.
- You can use Smart View to export Web Analysis data to **Microsoft Office applications**.
- You can right-click a file name in Explore mode and **e-mail a file link** to other repository users.
- You can right-click a data object and **print** a document hard copy.
- You can set file properties for documents in the repository. File properties indicate the access assigned to specific users.
- You can include documents in **presentations** that are distributed by a shared Desktop folder. To view the content, users must have access to the Desktop folder, presentation, and document.

For distribution-method information, see the *Hyperion System 9 BI+ Workspace User's Guide*.

Passing Web Analysis Document to Web Analysis Studio

Because advanced Web Analysis functionality is not extended to Workspace, you may want to pass documents to Web Analysis Studio. You can save a report to the repository, log out, and then log on to the studio; or, you can proceed to the studio in a single click.

- To jump to Web Analysis Studio from Workspace, select **Tools > Links > Web Analysis Studio**.

Viewing Financial Reporting Documents

You can view documents, such as reports and books, from the Workspace Explore module in two ways:

- HTML Preview—view in a Web browser.
- PDF Preview—view as if printed

When you view reports or books, data is automatically refreshed; data, calculations, and format are updated.

Snapshot reports and books contain data retrieved when the reports or books were saved as snapshots. Data in a snapshot report or book is not refreshed.

After a report is saved and file permissions are set, advanced users, such as designers, or end users, such as viewers, can access the document in the Workspace repository.

Making Reports and Books Available to Workspace Users

Reports and snapshots are created in Financial Reporting Studio. Books and snapshot books are created in Workspace and saved to the repository in the Explore module. Folders are used to organize reports, snapshots, books, and snapshot books in the repository. From the Workspace Administration module, a designer specifies that reports, snapshots, books, snapshot books, or folders listed in the repository are available to Workspace users by creating users, groups, and roles and defining file permissions (by using the Properties settings of the documents). Users with appropriate permissions can then view the documents in Workspace. For report-design information, see the *Hyperion System 9 BI+ Financial Reporting Studio User's Guide*. For information on the functionality and features of the Explore module and the repository, see the *Hyperion System 9 BI + Workspace User's Guide*. For information on assigning file permissions to users and groups for reports and books, see the *Hyperion System 9 BI + Workspace Administrator's Guide*.

Navigating in Workspace

Designers and viewers can perform various tasks from Workspace. See [Chapter 1, “Using Workspace”](#) for task information. The options that are available or enabled vary depending on user rights or roles. For example, Schedulers can access the Explore and Schedule modules to set the parameters necessary to schedule and save jobs and batches. Viewers can access the Viewer module to open and display documents.

Financial Reports Functionality

In the Explore module, documents (for example, reports) can be opened (reports view only), deleted, moved, imported, exported, and renamed. Folders can be created, opened (reports view only), deleted, imported, exported, and renamed. Reports and books can be previewed (HTML or PDF), and users can respond to prompts and change the POV.

You can sort repository items by clicking column field headers and, from the menus, can access various functions:

- Import and Export
- Preferences
- Properties
- Change and Manage Database Connections
- Database Connection Manager
- Change Related Content Links
- Email Links
- Display items of type
- Favorites
- Subscribe

For feature details, see the *Hyperion System 9 BI + Workspace User’s Guide*.

Note: User and group administration is available from the Workspace Administer module. See the *Hyperion System 9 BI + Workspace Administrator’s Guide*.

Batch and Book Editor, Batch Scheduler

Workspace enables Content Publishers and Schedulers to work with books and batches. Batches can be created, edited, saved, and scheduled, with full Batch Scheduler capabilities. Books can be created, edited, and saved. Advanced Member Selection provides member functions (for example, Children, Descendants) and lists, similar to Financial Reporting Studio advanced member functionality.

Opening Reports

From Workspace, you can open reports to display the reports with current data. Data is refreshed when a report is opened or viewed. You can view reports in HTML and PDF, respond to prompts, and change the POV.

Viewing Snapshot Reports and Books

From Workspace, you can view snapshot reports and books, which you opened from the Workspace repository.

Creating Database Connections

You use Database Connection Manager, accessed from Workspace, to create, maintain, and assign database connection names—data source names, for example, MySampleBasic, assigned to specific data sources, for example, DevServer:Sample:Basic for a report. Thus, you can easily assign data sources to reports and other objects, such as books and grids.

Viewing a Production Reporting Document

You can view Production Reporting documents in Workspace. To view the output formats available for a job, double-click the job output. Output format availability depends on the output formats selected when the job was run:

- HTML file (HTML)
- Portable Document Format file (PDF)
- Comma Separated Value file (CSV)
- Interactive Reporting Data file (BQD)
- Excel file (XLS)
- Extensible Markup Language file (XML)
- Production Reporting Document (SPF)
- PostScript file (PS)
- HP Printer file (PCL)
- Line Printer file (LS)

See the *Hyperion System 9 BI + Workspace User's Guide*.

Using Interactive Reporting Documents in Workspace

Workspace enables users to query relational databases and heterogeneous sources (for example, SQL Server, Oracle, flat files, and Production Reporting and Web Analysis module content) and perform ad hoc analysis by drilling down and pivoting on the data to see patterns or exceptions. Various features help users analyze data to conduct sales, performance, financial, and forecasting analyses.

Three methods of querying a relational data source:

- Developers with database connectivity software can use a full 32-bit application.
- Power users without connectivity or with security concerns can use a client connected to the database through a server. Power users can be given permission to create content from scratch, using add-on software installed on their local machines and hosted by Web browsers.
- Information consumer users typically use a thin-client approach; no software is loaded for these users, who interact with a DHTML-based series of pages.

How Interactive Reporting Works

Interactive Reporting enables you to access and analyze information stored in company data sources. It connects you to data and supplies a set of tools that enable you to build queries quickly and intuitively—by clicking icons and manipulating objects. Interactive Reporting builds a query to your specifications, sends it to the database, and displays the retrieved data as a results table.

Interactive Reporting information is stored in documents, files that you create and use to retrieve and analyze database information and build reports. Because Interactive Reporting is an integrated query, analysis, and reporting tool, Interactive Reporting documents (.bqys) have multiple sections, each of which governs one part of the query and reporting process. You create sections progressively as you query a database, retrieve results, and generate reports.

Interactive Reporting documents (can contain data from multiple relational and multidimensional database queries and from imports. Documents usually include one or more of the following items:

- A *query* or multiple queries for retrieving a data subset from the database
- A *results* set displayed in a table-style format
- *Reports* presenting customized, hierarchical data views
- Multidimensional *pivot* tables that permit drill-down analysis of data results
- *Charts* that graphically display query results and present varied data perspectives

Viewing Interactive Reporting Documents in Workspace

All Interactive Reporting documents have at least one Query and one Results section. From the Results section, you can create multiple Pivot, Chart, Table, and Report sections. Developers can create Dashboard sections, which provide users an automated, push-button interface.

Queries

Queries, which request information from a database, use a command language that enables you to select, insert, update, determine data location, and so forth.

The standard command language for retrieving information from and updating relational databases is Structured Query Language (SQL). SQL statements are used for interactive, relational-database queries and report, data-collection queries.

With Interactive Reporting, you do not need to know SQL to create powerful database queries. You build queries by choosing data from topics that represent database tables and by refreshing the data.

Analysis and Reporting

After a query is processed and data results are returned to Workspace, you can use powerful reporting and analysis tools to create custom views and cross-sections and to drill-down to slice and dice data and view multidimensional relationships.

You can create as many views as you want and display information in any form and from any angle possible. At any time, you can reconnect to the server and update reports and charts with fresh data.

You can work autonomously with data after disconnecting from Workspace, continuing to analyze data and produce reports. You can save results for additional refinement in Interactive Reporting Studio or Interactive Reporting Web Client and export data to other applications for further analysis.

Interactive Reporting enables you to create a wide variety of reports:

- **Tables**—Columnar arrangements of data, used as building blocks in other reporting sections. You can apply filters to tables, add computed items, and include subtotals, grand totals, and summary totals such as sum, count, or average.
- **Pivot tables**—Interactive tables that summarize or cross-tabulate large amounts of data. You can rotate rows and columns to see different data summaries or to display details. A pivot table summarizes data by using a summary function that you specify, such as Sum, Count, or Average. You can include subtotals and grand totals automatically or use your own formulas by adding computed items.
- **Charts**—A visual display of information (fully interactive, three-dimensional views of data). In charts, Interactive Reporting Studio displays data from results sets as bars, lines, columns, pie slices, or other shapes. When you create charts, worksheet values are automatically represented. Charts are linked to the data from which they are created and are updated when data changes.
- **Custom reports**—Free-form, presentation-quality reports with graphic objects, predefined fields, band-style report data from multiple data sources, and computed fields, charts, and pivots. In Smart reports, you can embed charts and pivot tables and show only data that is relevant to the section in which it is placed.

- **Dashboards**—A customized, front-end report used for a variety of purposes. Each button and item selection and navigation sequence can invoke a script. Behind the scenes, Workspace refreshes Dashboard script commands, which perform actions such as retrieve data, populate controls, hide objects, navigate between sections, and specify report parameters.

Using Enterprise Metrics to Manage Business Performance

Enterprise Metrics retrieves essential performance and trend metrics and thus enables you to monitor business performance.

Metrics, numeric measurements computed from business data, help you assess business performance and analyze company trends. To enable immediate and intuitive understanding, Enterprise Metrics metrics are displayed in charts and provide the following features:

- Access to metric data, based on customized views for business models and input from business analysts
- Dynamic charts and reports that provide up-to-date visual data so you can identify performance, events, and trends that indicate a need for action and areas in which profitability can be increased
- Daily updates that enable you to act on a timely basis
- Chart and report hyperlinks that enable you to navigate to more detailed and focused data
- Personalized data display, which filters and sorts options

For details on personalizing Enterprise Metrics using the Enterprise Metrics Personalization Workspace, see the *Hyperion System 9 BI+ Enterprise Metrics User's Guide*.

How Enterprise Metrics Manages Data

Your company's database experts and business analysts ensure that data from various sources (databases, order-entry systems, and desktop data sources such as spreadsheets) is consolidated into one Application Data area. An Application Data area, running on a relational or multi-dimensional database, provides a rich set of metrics that are based on your business models and data framework.

Behind the scenes:

- Data is cleansed when it is loaded into the Application Data area to ensure rollup accuracy, despite such factors as subsidiaries, order-entry inconsistencies, and typographical errors.
- Automated load processes provide nightly updates and check for exceptional conditions to ensure high-quality data and minimize administration costs.
- A sophisticated data model ensures high query performance and analytical flexibility, reduces user errors, integrates related data from different sources, and provides extensibility for future data sources.

- Libraries, which include business rules, analytical methods, metric hierarchies, and layouts, are applied.
- A history of multiple years is normally held for business metrics, enabling trend analysis and year-over-year comparisons.

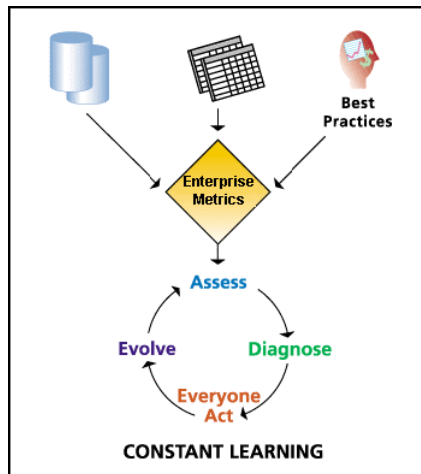
Thus, metrics are ready for you to use daily to manage your business.

Analysis Framework

The Enterprise Metrics framework is based upon unique business metrics that optimize your ability to find business-model issues:

- Identify significant and relevant anomalies
- Diagnose anomalies
- Access key information so you can evolve your business based on trend analysis
- Evolve applications by personalizing data to reflect information pertinent to business decisions
- Use timely and accurate information to manage business-operation performance.

Figure 5 KPI Management Workspace Process



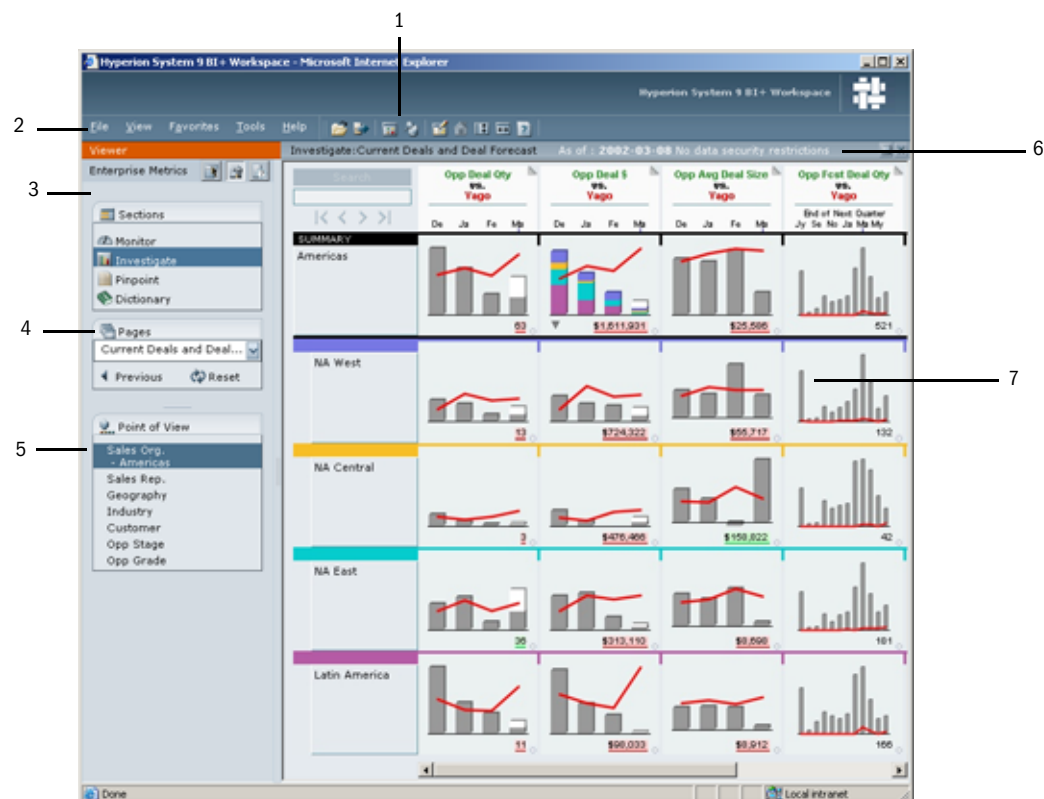
Enterprise Metrics Workspace provides four sections with pages that help with analysis:

- Monitor—Survey overall performance, look for anomalies, and start a *decision process*
- Investigate—Narrow a problem or opportunity spotted in the Monitor section
- Pinpoint—Identify details that enable action, such as customer names, order details, events, shopping cart contents, and problem histories
- Dictionary—Find detailed information about the data that metrics and charts use in the Monitor and Investigate sections.

Understanding the Enterprise Metrics Workspace

Enterprise Metrics provides all components necessary for analyzing your company's latest business information.

Figure 6 Enterprise Metrics Window



Enterprise Metrics Workspace elements:

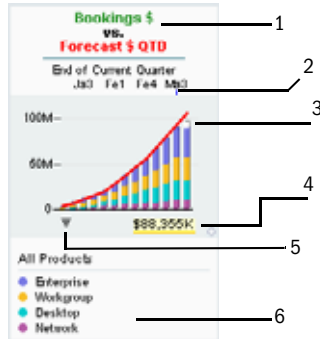
| | | |
|---|---------------|---|
| 1 | Toolbar | Right of the menu |
| 2 | Menu | Access other documents and online help (top of window—below the masthead) |
| 3 | View Pane | Navigate between sections |
| 4 | Page Selector | Select pages in the Monitor, Investigate, and Pinpoint sections |
| 5 | Console | View options and page point of view—context-sensitive (Change the width of the Console by dragging the vertical divider.) |
| 6 | Process bar | View (below the title bar) security restrictions, the As of data date on the right and the page on the left (It is very important that you periodically view security restrictions, so you can interpret results displayed in Enterprise Metrics. See “Security Restrictions” on page 87.) |
| 7 | Content Area | View (right side of window) information specific to the current page (For example, the Investigate section displays charts, and the Pinpoint section displays a tabular report.) |

Enterprise Metrics Charts

Enterprise Metrics presents information in charts and tabular reports. Enterprise Metrics charts (see [Figure 7](#)), display performance metrics, trended over time. The numeric value displayed with the chart is the chart cell value, the value of the primary metric for the current period.

If the point of view is sorted based on a chart metric, a symbol indicating the sort order (ascending or descending) is displayed in the left corner of the Summary chart.

Figure 7 Enterprise Metrics Chart



Elements of Enterprise Metrics charts:

| | | |
|---|-------------------------------------|--|
| 1 | Chart Header | Displays metric names |
| 2 | As of Date Tick Mark | Indicates the data date relative to the chart period above the chart; directly below the label in time series charts) |
| 3 | Extrapolation of the Current Period | Projects the current-date value to the end of the current period—based on the fraction of the period that is complete (Current period extrapolation is shown with a white bar or white dotted line and may be applied for incomplete time periods.) |
| 4 | Chart Cell Value | Identifies the primary-metric value for the current period, defined as <i>Metric 1</i> unless changed by Enterprise Metrics Editor.(Yellow shading indicates highlighting. Thresholds are defined— yellow indicates a warning, green indicates a good number, and red indicates a bad number.) |
| 5 | Sort Indicator | Indicates the sort order (ascending or descending) of the chart metric information. (Figure 14 displays a descending sort, the top component having the largest value.) |
| 6 | Chart Legend | Is displayed only on Monitor section charts, below Summary charts. (Investigate section charts have a color key above the Drill buttons. Colors in stacked bar charts represent component values of the total, as in a pie chart. |

Enterprise Metrics charts can display one or more metrics as a time series over fiscal periods (days, weeks, fiscal months, fiscal quarters, and fiscal years). Charts in the Monitor section can display one or more metrics for one time period (such as current fiscal month), with the x-axis displaying slice (business hierarchy) values. For example, the x-axis might display the Sales Organization hierarchy divided into CAPJ, EMEA, and Americas.

Granularity (whether metrics are displayed by quarter, month, week, and so on), varies by metric type. Granularity can differ from update frequency. For example, a quarterly forecast can be updated monthly.

Detail charts are displayed below Summary charts in Investigate section columns.

Security Restrictions

The information displayed in your Summary and Detail charts is based upon your security restrictions, which are shown on the Process Bar. Therefore, your charts may show only portions of data.

It is extremely important that you closely monitor your security restrictions to help ensure that you are interpreting Enterprise Metrics information correctly.

Getting Started with Scorecard Studio

Successful organizations are strategy-focused. Identifying and articulating strategic goals is central to performance management. Without a central, comprehensive, and communicated strategy, your organization is not properly positioned to achieve or reevaluate its goals.

Hyperion® System™ 9 Performance Scorecard™ (Performance Scorecard) is a Web-based solution that provides recognized scorecarding methodologies, assists your organization to set goals, and measure and monitor business performance.

Performance Scorecard enables users to formulate and communicate organizational strategy and accountability structures by using measures, scorecards, and maps to measure and track progress in key business areas:

- Performance measures or Key Performance Indicators (KPIs), are used to identify and create tasks or achievements that monitor progress toward key goals.
- Scorecards use measures to indicate performance for strategy elements, accountability teams and employees. Scorecard performance is reflected using performance indicators to represent good, acceptable, or poor results.
- Strategy Maps depict how organizations translate high-level mission and vision statements into lower-level, actionable strategy elements.
- Accountability maps identify business areas, departments, and teams that are responsible for the actions that must be performed to achieve strategic goals and objectives.
- Cause and Effect maps depict how strategy elements in applications interrelate and support corporate or departmental strategy and enable you to identify strategy elements that are impacted by strategy-element changes.

To view Performance Scorecard through Workspace, you must have both applications running. Performance Scorecard and Workspace require the same data-access permissions. If you can view information in Performance Scorecard, you can view it in Workspace.

For instructions on viewing Scorecard Studio through Workspace, see *Hyperion System 9 BI+ Workspace User's Guide*.

3

Designing Documents in Workspace

Products that have design capabilities within Workspace:

- Financial Reporting
- Web Analysis
- Production Reporting
- Interactive Reporting

| | | |
|------------------------|--|-----|
| In This Chapter | Designer Tasks | 90 |
| | Designer Capabilities in Workspace | 91 |
| | Designing Web Analysis Documents | 92 |
| | Designing for Financial Reporting | 101 |
| | Production Reporting | 102 |
| | Overview of Design Features in Interactive Reporting | 105 |

Designer Tasks

A user with designer rights has a number of tasks to consider prior to using Workspace. Tasks that a designer should consider are the following:

- [“Planning” on page 90](#)
- [“User Preferences” on page 90](#)
- [“Designer Resources” on page 90](#)

For task and role information, see [“Module Tasks” on page 24](#).

Planning

When planning Workspace deployment and determining what modules to use, designers consider these factors:

- Technical and business goals
- Deployment planning tasks
- System requirements
- System architecture
- Data and metadata integration requirements
- Requirements for third-party components
- A deployment timeline
- An infrastructure plan
- An integration plan
- A capacity and performance testing plan

For task information, see [Chapter 1, “Using Workspace.”](#)

User Preferences

Designers can set defaults for the appearance of the user interface, Explore module, and studios. Some settings can be overridden through menu options; for example, from the Preferences dialog box, designers can select not to show the masthead. See the *Hyperion System 9 BI+ Workspace User’s Guide*.

Designer Resources

Workspace provides standard tools for creating documents. For example, the design resource library includes graphics, data sources, database connections, samples resources, roles a designer can set up, and so on.

Designer Capabilities in Workspace

For Financial Reporting, designers can create books and batches. From Workspace, batches can be created, edited, saved, and scheduled, with full Batch Scheduler capabilities available; and books can be created, edited, and saved. Advanced Member Selection provides capabilities such as member functions (for example, Children, Descendants) and lists, similar to Financial Reporting Studio advanced member functionality. Creation and design of Financial Reporting documents are performed from Financial Reporting Studio. Financial Reporting documents that are ready for end-user viewing can be opened for viewing purposes from the Workspace Explore module.

You can create Web Analysis documents, in one of the following ways, only if you have permission to create content:

- Use the new document wizard to create a document.
- Modify a document and save it under a new name or to a new location.

Web Analysis documents display data values returned from the data source in a data object. Documents can contain multiple data objects, each having a display type:

- Spreadsheet
- Chart
- Pinboard
- SQL spreadsheet
- Free-form grid

You can review display types in Workspace, but you can create spreadsheets and charts only in the new document wizard.

To create a document, you specify three items:

- The data source—provides data values
- The data object—displays data values
- The query—retrieves data values from the data source and returns them to the data object

Administrators and Web Analysis Studio users can set properties that customize these elements. In Workspace, you can set only default numeric formatting and database connection parameters.

For Production Reporting, in addition to the stand-alone components, you can use Workspace to run, schedule, and view Production Reporting jobs. When you double-click the job output, you can view the available output formats. Depending on the output formats selected when you ran the job, you can select from a list of output formats. For more information, see the *Hyperion System 9 BI + Workspace User's Guide*.

For Interactive Reporting documents, a document is a file created by the desktop application and is commonly known as a BQY file. In Workspace, the query and Data Model aspects of a document are not visible to the end-user, but the ability to process (refresh) data that come from these sources is. After a document has been created by a designer, it is saved and published to the repository of the Explore module.

When a Workspace user selects and retrieves a document from a document list, the emphasis changes from document viewing, processing, and analyzing to document query, data model, layout, and report building. Each Intelligence Client document consists of one or more sections, such as charts and pivot tables.

Designing Web Analysis Documents

Topics that describe how to create and enhance Web Analysis documents with Workspace:

- [“Creating Web Analysis Documents” on page 92](#)
- [“Modifying Queries” on page 94](#)
- [“Selecting Dimension Members” on page 95](#)
- [“About Advanced Member Selection” on page 96](#)
- [“Managing Analysis Tools” on page 98](#)
- [“Creating Traffic Lighting Definitions” on page 99](#)
- [“Saving Web Analysis Documents” on page 100](#)
- [“Setting File Permissions for Web Analysis Documents” on page 100](#)

Creating Web Analysis Documents

The new document wizard guides you through the process of creating Web Analysis spreadsheets and charts. The wizard requires a database connection. You must know the repository location of the database connection and have permissions to use the connection.

► To create a document by using the new document wizard:

1 Perform an action:

- Select **File > New Document**.
- Select the **New Document** toolbar button.

The Process bar displays the new document wizard in the content area. Depending on which modules are installed, you may be prompted to indicate a type of document.

2 Select Create a Web Analysis document, and click Next.

The content area displays **Step 2: Select a Data Source**. You must select a previously defined database connection from the repository. Because the repository stores document definitions, not document data, you must identify a data source and the parameters for connecting to it.

3 Perform a task:

- In the text area, enter the path from the root directory (*/*) to a database connection, including the filename.
- Click **Browse**, select a database connection file from the **Open** dialog box, and click **OK**.

- 4 Optional: Select Use my active POV on the data source as the starting point for all subsequent steps to populate the query from a predefined point of view definition, and click Next.**

Completing this step enables you to load member selections from predefined point of view definitions and thus use one click to insert dimensions and members into documents. You can define many point of view definitions, but only the definition set in user preferences as the currently active point of view is applied.

- 5 Optional: Select Automatically select one dimension in both rows and columns to populate and display a simple spreadsheet, and click Finish.**

If you complete this step, you skip the remaining steps. This option uses the highest aggregate members of the time and measures dimensions to populate the row and column axes of spreadsheets and provides the quickest document-wizard method for displaying a simple spreadsheet.

- 6 Click Next to proceed to Step 3: Select Row Dimensions.**

You are required to have at least one Row axis dimension and one Column axis dimension.

- 7 Move a dimension name from the Filters frame to the Rows frame by clicking first the name and then the right arrow.**

The dimension name is displayed in the Rows frame. If no point of view definition was applied in Step 1, the highest aggregate member is used. If a point of view definition was applied, member selections are used.

- 8 Optional: To select dimension members, in the Rows frame, double-click the dimension name.**

The **Dimension Browser** dialog box presents the dimension as a node tree in the **Browse** frame. You must select members from the Browse frame and move them to the **Selections** frame:

- To expand or contract the hierarchy, click the plus (+) or minus (-) sign nodes, or double-click a dimension name.
- To select a member, right-click the member, and select **Select Member**.

The Selections list displays the member name.

- To select a member dynamically, right-click the member, and select an advanced member selection method from the list.
- You can set the label mode for each dimension to the default label, an ID label, or the alias table description set in database connection properties.

For descriptions of Dimension Browser options, see [“Selecting Dimension Members” on page 95](#).

- Click **OK** to dismiss Dimension Browser and return to the wizard.

- 9 After you indicate and define member selections for all Rows axis dimensions, click Next.**
- 10 Using the methods that you used to define the Rows axis, move a dimension from the Filters frame to the Columns frame.**
- 11 Optional: To select dimension members, double-click the dimension name in the Columns frame.**
- 12 Using dimension browser methods, select members, set options, and click OK.**

13 Click Next.

In Step 5, you can select dimensions to be used on the Page axis. Because all document intersections are relative to all member selections, you can organize row and column intersections by page dimension members.

14 Optional: Using the methods that you used to define the Rows and Columns axes, move a dimension from the Filters frame to the Pages frame.

15 Optional: Using Dimension Browser methods, select page members.

16 Click Next.

In Step 6, you can select dimension members for the Filters axis.

All dimensions participate in every spreadsheet intersection, regardless of the axes to which dimensions are assigned. The Rows, Columns, and Pages axes define intersection arrangement, and member selections determine which data values are displayed at each intersection.

All data-object intersections are relative to Filter member selections. Filter member selections focus intersections, data values, and, consequently, data-object analysis.

Dimensions in the Filter axis are by default represented by the highest aggregate dimension member defined in the data source outline. If a point of view definition was applied, its member selections are used. If you select Filter members, all intersections are relative to the selections.

17 Optional: To display Dimension Browser for Filter axis dimensions, double-click a dimension name.

18 Optional: Using Dimension Browser methods, select Filter axis members, and click OK.

19 Click Next.

20 Optional: Select a result-set, layout option:

Spreadsheet—spreadsheet data object

Chart—chart data object

Vertical Combination —chart and spreadsheet data objects stacked vertically

Horizontal Combination—chart and spreadsheet data objects arranged side-by-side

You can change the display types of objects in the Vertical Combination and Horizontal Combination layouts; for example, you can convert a spreadsheet to a chart. The objects, however, are linked and maintain a coordinated context.

21 Click Finish to submit the query to the data source.

The data source is queried. The result set is displayed as a data object (or objects) on a Web Analysis document.

Modifying Queries




After you create Web Analysis documents, you modify queries by using the Data Layout panel, which displays the dimensions returned by the database connection, as arranged on four axes:

- Rows

- Columns
- Pages
- Filters

Database connections can return three types of dimensions:

Table 33 Dimension Type Icons

| Icon | Dimensions |
|---|------------------------|
|  | Dimensions |
|  | Attribute Dimensions |
|  | Attribute Calculations |

Every query must have at least one dimension assigned to the Rows axis and at least one dimension assigned to the Columns axis, but you can nest multiple dimensions on one axis. You can organize Row and Column dimensions by assigning dimensions to the Page axis. Dimensions not assigned to Rows, Columns, and Pages remain in the Filter axis.

All dimensions, regardless of their assigned axes, participate in every data-object intersection.

- To redefine the query and dimension layout of the current data object of the current document, click the toolbar **Data Layout** button.
- To move a dimension between axes, drag the dimension from its current axis to another axis.
- To select members, double-click the dimension name.
Dimension Browser is displayed. See [“Selecting Dimension Members” on page 95](#).

Selecting Dimension Members

Dimension Browser, a graphical interface for selecting members and refining database queries, can be used with the new document wizard, Data Layout dialog box, or Information Panel or by itself.

Dimension Browser presents a dimension as a node tree in the Browse frame. You select members in the Browse frame and move them to the Selections frame.

You can select members individually, by familial relationships, by data-source-specific option, or from predefined selection lists.












- To access Dimension Browser, perform an action:
 - Right-click a member label on a data object, and select **Browse**.

- Click the toolbar **Data Layout** button, and double-click a dimension name.
 - In the **New Document** wizard, double-click a dimension name.
- To expand or collapse the Dimension Browser hierarchy, click the plus (+) or minus (-) sign nodes, or double-click the dimension name.
- To select a member, right-click the member, and select **Select Member**.
The member is displayed in the Selections list. You cannot select the database connection name at the top of the node tree.
- To select members dynamically in Dimension Browser, right-click a member, and select an advanced member selection method from the list.
See [“About Advanced Member Selection” on page 96](#).
- To remove members from the selection list, perform an action:
- Right-click a member in the **Browse** or **Selection** list and deselect the selection method.
 - Select a member in the **Selection** list and click **Remove**.
- To remove all members from the selection list, click **Remove All**.
- To preview members returned by advanced member selections, before you quit Dimension Browser, click **Preview**.
- To set the label mode for a dimension, select **Dimension Labels**, and specify a label option:
- Use Default
 - Descriptions (uses the alias table specified by database connection properties)
 - IDs
 - Both (uses ID and Description simultaneously—only for Financial Management)
- The label displayed by the Description label mode is drawn from the alias table specified by the active user’s database preferences. You can set the alias table for each Active Preferences user or user group ID.
- Users can specify label mode, using Dimension Browser.

About Advanced Member Selection

In dimensions with large member sets, users can select members by using the Dimension Browser right-click menu and then selecting by familial relationship or data-source-specific options:

Table 34 Dimension Browser Right-Click Menu

| Icon | Right-Click Menu Command | Description |
|---|---------------------------------|---|
| | Select Member | Selects the current member. |
|  | Also Select Children | Selects the current member and its children. |
|  | Also Select Descendants | Selects the current member and its descendants. |
|  | Select Parent | Selects the parent of the current member. |
|  | Also Select Ancestors | Selects the current member and its ancestors. |
|  | Also Select Siblings | Selects the current member and all members with the level and parent of the current member. |
|  | Select Dim Bottom | Selects all level 0 members of the current dimension. |
|  | Select Dim Top | Selects the highest ancestor. |
|  | Also Select Level | Selects the currently selected dimension member and all dimension members on the same level. |
|  | Also Select Generation | Selects the currently selected dimension member and all dimension members in the same generation. |
|  | Also Select Previous | Displays the Previous Selection dialog box, used to select previous members at the same dimension level. |
|  | Also Select Subset | Displays the Subset dialog box, used to select an Analytic Services member subset. |
| | Substitution Variables | Displays the Substitution Variables dialog box, used to set a substitution variable as the dimension selection. |
| | User Defined Fields | When Financial Management is used as a data source, displays the User Defined Fields dialog box, used to specify one of three pre-defined attribute values. (You can select members that feature the attribute values and compose compound selection statements with AND and OR operators.) |
| | Dynamic Time Series | Displays the Analytic Services Dynamic Time Series menu (for example: History To Date, Quarter To Date). |
| | Search | Displays the Search dialog box, used to locate members in large dimensions. (Uses search criteria and adds found members to the Selection list.) |
| | Find In Tree | Locates members in large dimensions. (Find In Tree expands the dimension hierarchy, but does not add found members to the Selection list.) |

Managing Analysis Tools

You can use analytical formatting tools and data-source-specific tools to enhance Web Analysis documents. Analysis tools expedite comparisons, visually organize data, and promote structures and conclusions.

Analysis tools are data-source-specific; not all analysis tools are available in all data objects.

Analysis Tools Manager, accessed through the data-object, right-click menu, organizes and applies analysis tools. The Ordered By panel of Analysis Tool Manager shows the number and order of analysis tools definitions activated on the current data object. The following analysis tools are available in Workspace:

Table 35 Analysis Tools

| Analysis Tool | Description |
|----------------------------|---|
| Traffic Lighting | Displays the Traffic Lighting dialog box, used to color-code dimension member values based on fixed limits or a comparison of values. Traffic Lighting visually associates member values whether or not they are sorted or ranked. |
| Sorting | Displays the Sorting dialog box, used to order the query result set. |
| Retrieve Only Top/Bottom | Displays the Analytic Services Retrieve Only Top/Bottom dialog box, used to limit and rank the query result set. |
| Restrict Data | Displays the Analytic Services Restrict Data dialog box, used to restrict the query result set based on criteria. |
| Calculations | Displays the Calculations dialog box, used to create calculated rows and columns. |
| Show/Hide Only | Displays the Show/Hide dialog box, used to filter data by color, value and member. |
| Data Formatting | Displays the Data Formatting dialog box, used to format data values based on member or value criteria. |
| Currency Conversion | Displays the SAP BW Currency Conversion dialog box, used to convert currency denominations using specified exchange rates. |
| Unit of Measure Conversion | Displays the SAP BW Unit of Measure Conversion dialog box, used to convert units of measure using known and custom conversion rates. |

Activating and Deactivating Analysis Tools Definitions

By activating and deactivating analysis tool definitions without removing them from Analysis Tools Manager, you enable use of various analysis tool combinations.

- To deactivate an analysis tool definition, select the appropriate Active in the Ordered By panel.

Creating Traffic Lighting Definitions

Traffic Lighting color-codes data cells based on member values. You can color-code by comparing two dimension members or by placing fixed limits on one dimension member. Colors graphically associate member values, whether they are sorted or ranked. Traffic Lighting definitions are maintained as the document is pivoted and changed.

Note: Setting traffic lighting colors to the colors used by Spreadsheet Options may obscure member color-coding.

► To create a traffic lighting definition:

1 Right-click a dimension member header and select **Analysis Tools > Traffic Light**.

The Traffic Lighting dialog box is displayed.

2 Select the dimension member to which traffic lighting is to be applied, from the **Apply To** panel.

3 From the **Comparing To**, select the dimension member to which the preceding dimension member is to be compared.

- Compare to a fixed limit by either disabling the % Differences check box in the Assign Limits group box, or by selecting Fixed Value from the Comparing It To panel.
- Select the Advanced check box to separate dimension members into combinations. Click it again to select from aggregated dimension members.

The Assign Limits group box contains three default set points and colors. Set points divide all possible values, into ranges of values that are identified by color.

4 For each set point, indicate a set point operand.

The first drop down list, prompts you to specify whether the setpoint value is in the range. You can choose from greater than (>) or greater than and equal to (>=).

5 Enter a set point value in the text entry box, to specify the threshold separating traffic lighting ranges.

The second drop down list, prompts you to specify the setpoint value. You can enter positive or negative decimal values.

6 **Optional:** To change the color of the traffic lighting range, click the color button and select another color square.

The Color button displays a palette of color squares. Clicking a color square assigns it to the corresponding traffic lighting range, and displays the hexadecimal value of that color in the neighboring text entry field.

7 **Optional:** To change the opacity of the color, enter another value in the last text entry box for each range.

The last text entry field specifies the opacity of the color. You can specify a percentage of opacity for the color from zero to a hundred. Zero indicates that the color is completely transparent. This is sometimes used to reveal background graphics by means of traffic lighting.

8 **Optional:** To add another set point to the ranges, click the **Add to End** button, then repeat steps 4 through 7 for the new range.

9 Click **OK**.

Saving Web Analysis Documents

➤ To save a Web Analysis document, perform an action:

- Select **File > Save**.
- Select the **Save** icon.

If your Web Analysis document is not saved, you must indicate the filename and location under which the file is saved.

The Web Analysis message box, indicating that the document is saved, is displayed.

Setting File Permissions for Web Analysis Documents

When you set file permissions for Web Analysis documents, you specify users, user groups, or users of a particular role who have access to the documents. You can also specify in detail the kind of access assigned to each user, group, or role.

Before you set file permissions, you must save your Web Analysis document to the repository.

➤ To set file permissions for a Web Analysis document:

1 Access Explore mode by clicking the View Pane **Navigate button and selecting the **Explore** tab.**

The Content area displays the Explore mode interface.

2 Navigate to the Web Analysis document file name in the repository hierarchy:

- To expand or collapse a folder, click the plus or minus button.
- To display the contents of a folder in the Content area, select the folder.
- To select a repository document, click the file name.

3 Right-click the file or folder name and select **Properties.**

The Properties dialog box, with content-sensitive panels, displays current file properties.

4 Click the **General icon.**

The General panel specifies the file name, description, and owner and grants access to the Edit Permissions interface.

5 Optional: To rename the file, for Name, enter a name.

6 Optional: To modify the file description, in the text area, enter a description.

7 Click the **Edit Permissions button.**

Another Properties dialog box, which lists users, groups, and roles that are assigned permissions and the kinds of permissions that are granted, is displayed.

8 To populate the **Available Users, Groups and Roles list with a search result set:**

- a. Select **begin with**, **contain**, or **are in group**.
- b. Select **Users**, **Groups**, or **Roles**.
- c. Enter letters or a string to be used to search the list of available users, groups, or roles.

d. Click the **Get List** button.

A search is conducted for results that satisfy the specified criteria. Results are displayed in the **Available Users, Groups and Roles** panel.

9 Select the users, groups, or roles to which to grant access.

10 Click the **Add (>>)** button.

The appropriate panel displays the selected users, groups, or roles, and the **Privileges** column indicates access.

11 Select one record from the **Selected User, Groups and Roles** panel, and click **Edit**.

The **Edit Permissions** panel is displayed. You can grant the current record four kinds of access:

- **No access**—Cannot review the file, but the global administrator can access the content
- **View**—Can read the file
- **Modify**—Can modify the file and save it under another name
- **Full Control**—Has unlimited access to the file

12 Select one option from the **Edit Permissions** list, and click **OK**.

The **Properties** dialog box is redisplayed.

13 To remove a record from the **Selected User, Groups and Roles** panel, select the record and click the **Remove (<<)** button.

14 Repeat steps 7 through 10, until you define all users, groups, and roles with access and the kind of access granted.

15 **Optional:** If you typically specify the current list of users and access, select **Make these the default access privileges for all file I publish**.

16 Click **OK**.

17 **Optional:** Click the **Advanced** icon, and specify auto-delete or show/hide file parameters.

18 Click **OK** to exit the dialog box.

File permissions are set as specified.

Designing for Financial Reporting

Reports are created in Financial Reporting Studio. You design reports in Report Designer by using a blank report layout to specify report contents, including grids, charts, images, text boxes, headers, and footers. You view completed designs from the Explore module in Workspace. A designer can perform additional design functions (creating books and batches, scheduling batches, and setting preferences) through Workspace. Setting preferences includes setting the default language, specifying numeric format, providing a default e-mail address, and specifying default file permissions. For information on creating books and batches and

scheduling batches from Workspace, see the *Hyperion System 9 BI + Workspace User's Guide*. For an overview of designer tasks in Financial Reporting Studio, see the *Hyperion System 9 BI+ Financial Reporting Studio User's Guide*

Production Reporting

Production Reporting, a powerful enterprise reporting system:

- Provides data access, data manipulation, and report generation capabilities for scheduled and on-demand reports from various data sources
- Is optimized for high-volume reporting
- Provides browser-based management for secure delivery of reporting content in Web-based and printed formats to large numbers of users
- Consists of two stand-alone components—[Production Reporting Client](#) and [Production Reporting Server](#)

You use the stand-alone components and Workspace to run, schedule, and view Production Reporting jobs. (See the *Hyperion System 9 BI+ Workspace User's Guide*.)

Production Reporting Client

Production Reporting Client components include:

- [Production Reporting Studio](#)
- [Production Reporting Activator](#)
- [Production Reporting Viewer](#)
- [Production Reporting Remote](#)

Production Reporting Studio

You use Production Reporting Studio, the graphical report design and layout tool, to design reports on Windows systems. This interactive report builder combines a visual, easy-to-use report development environment with the underlying power of Production Reporting.

Note: See Volume 1 of the *Production Reporting Client User's Guide*.

Production Reporting Activator

You use Production Reporting Activator, a set of ActiveX controls, to run Production Reporting programs launched from within your application and to view and print output from within your application.

Table 36 Production Reporting ActiveX Controls

| | |
|------------------------|---|
| ActiveX Control | Run Production Reporting programs on the local PC or on remote servers. |
| Viewer ActiveX Control | View and print reports and send reports to other people. |
| Print ActiveX Control | Print report output. |

Note: See Volume 2 of the *Production Reporting Client User's Guide*.

Production Reporting Viewer

Production Reporting Viewer, by providing a printer-independent output file created with Production Reporting Compiler or Production Reporting Studio, shows you how reports look on the printed page. A file viewed in Production Reporting Viewer must be in SPF format, which normally has an SPF or *Smm* extension.

- ▶ To run Production Reporting Viewer, perform an action:
 - Select Start > Programs > Hyperion System 9 BI+ > Production Reporting Viewer.
 - Enter this command:


```
SQRV [SPF Filename]
```

Note: See the online help accessed from within Production Reporting Viewer, a Windows-only product.

Production Reporting Remote

Production Reporting Remote enables an application to connect to a server, submit and run Production Reporting programs remotely, receive report output, and transfer files. Production Reporting Remote, useful for running Production Reporting programs that contain large amounts of data, provides these benefits:

- Reduced network traffic
- Server execution that frees the PC for other applications
- Server-system processing power that typically exceeds the power of a local PC

Note: See “Using the Production Reporting ActiveX Control Remote” in Volume 2 of the *Production Reporting Client User's Guide*.

Production Reporting Server

Production Reporting Server, a high-performance, server-based reporting environment, can handle high-volume reporting jobs and highly interactive reports. Using Production Reporting Server, you can publish information to the corporate intranet or extranet, process production reports, or populate a data warehouse or other large-scale database environment.

Production Reporting Server includes three components:

- [Production Reporting Language](#)
- [Production Reporting Engine](#)
- [Production Reporting DDO](#)

Production Reporting Language

You use Production Reporting language to access, manipulate, and report enterprise data. You build complex procedures that execute multiple calls to multiple data sources and implement nested, hierarchical, or object-oriented program logic.

Note: See Volume 2 of the *Production Reporting Server Developer's Guide*.

Production Reporting Engine

The Production Reporting engine includes three components:

- [Production Reporting Compiler](#)
- [Production Reporting Execute](#)
- [Production Reporting Print](#)

Production Reporting Compiler

Production Reporting Compiler translates source code written in Production Reporting language into a byte-code, machine-independent representation of the report code (SQT file) that can be transferred to any machine with Production Reporting Execute. Thus, with one compile, a report can run on any platform.

➤ To run Production Reporting Compiler, perform an action:

- Select **Start > Programs > Hyperion System 9 BI+ > Production Reporting for [database] > Server**.
- Enter this command.

```
SQR [program] [connectivity] [flags...] [args...] [efile...]
```

Note: See the online help accessed from Production Reporting Compiler.

Production Reporting Execute

You use Production Reporting Execute, a runtime program, to run previously compiled Production Reporting programs. The results generated by Production Reporting Execute (SPF files) are output-independent. Thus, one report execution can produce multiple outputs.

- ▶ To run Production Reporting Execute, perform an action:
 - Select **Start > Programs > Hyperion System 9 BI+ > Production Reporting for [database] > Execute.**

- Enter this command.

```
SQRT [program] [connectivity] [flags...] [args...] [@file...]
```

Note: See the online help accessed from Production Reporting Execute and see Volume 1 of the *Production Reporting Server Developer's Guide*.

Production Reporting Print

You use Production Reporting Print to convert portable, printer-independent files (SPF) into printer-specific files for all file types supported by Production Reporting.

- ▶ To run Production Reporting Print, perform an action:
 - Select **Start > Programs > Hyperion System 9 BI+ > Production Reporting for [database] > Print.**

- Enter this command:

```
SQRP [spf-file] [flags...]
```

Note: See the online help accessed from Production Reporting Print.

Production Reporting DDO

Production Reporting DDO (Direct Data Objects) provides an open interface for data access, allowing applications to extract data from vastly different data sources. The KPI Management Workspace Software Development Kit (SDK) provides the technical resources for building drivers with the special interface knowledge to access data sources.

Note: For detailed information on Production Reporting DDO, see Volume 3 of the *Production Reporting Server Developer's Guide*.

Overview of Design Features in Interactive Reporting

Interactive Reporting provides an easy-to-navigate environment for data exploration and decision making in a Web-server-based reporting system. A consistent design paradigm for query, pivot, charting, and reporting enables users at any level to move fluidly through

cascading dashboards—finding answers fast. Trends and anomalies are highlighted, and users use robust formatting tools to build free-form, presentation-quality reports for broad-scale publishing across their organization.

Features of Interactive Reporting:

- Cross-platform and cross-browser support
- Secure and centralized source for distribution and updates of Interactive Reporting documents (.bqys)
- Ad-hoc or “on the fly” querying of business data

For information about Interactive Reporting features, see the *Hyperion System 9 BI + Workspace User’s Guide*. For information about in-depth, Interactive Reporting Studio tasks, see the *Hyperion System 9 BI + Interactive Reporting Studio User’s Guide*.

Understanding Interactive Reporting Documents

Documents created in Workspace, Interactive Reporting Studio, or Interactive Reporting Web Client are known as Interactive Reporting documents (.bqys). The documents focus on data from queries (either relational or OLAP) or imports. Any number of queries and data models can supply document data. Documents can contain multiple queries, with queries retrieving their data from different databases (relational databases, local files, imported files and OLAP servers).

In Workspace, end users cannot see data-models, but they can refresh data that comes from data model sources. End users can duplicate queries and create queries based on master data models.

After documents are created, they are saved and imported to the repository on the server.

When the Interactive Reporting user selects and retrieves a document from a document list, the emphasis changes from document viewing, refreshing, and analyzing to document query, data model, layout, and report building. Each Interactive Reporting document can consist of one or more sections, such as charts or pivot tables.

Creating an Interactive Reporting Document

➤ To create a document:

- 1 From Workspace, select **File > New Document**.

The Step 1: Select a Task wizard is displayed.

- 2 Select **Create a document**.

The Step 2: Select Data Source wizard is displayed.

- 3 Enter the **data-source name** or browse to locate the data source, and click **Next**.

Verify that the object type is Interactive Reporting by changing Type to Interactive Reporting document.

To go to the Preference setting, which determines the default directory for data-source files, select **Explore > New Document Folder**.

If you cannot locate the folder, ask your administrator where in the repository it is located.

- 4 Click **Finish**.

Accessing a Document

- To open a Workspace document:

- 1 Specify the Workspace URL in your Web browser.

The Hyperion System 9 BI+ Workspace login dialog box is displayed.

- 2 Enter your user name and password, and select **Login**.

- 3 Open a document:

- From the Explore module, by navigating to the document and double clicking it
- By selecting the document and clicking **Open** on the shortcut menu
- By selecting **File > Open**
- By selecting Favorites and selecting the document (if the document is in Favorites)

The document opens in Workspace. If the document includes a Dashboard section, the document is displayed in creation-date order. Typically, a Dashboard section is shown first. If no Dashboard section is included, the document opens to the section in creation-date order. If the last saved section is a query or data model or fails for some reason, the document attempts to open the next section from Section pane, working from the top to the bottom of Section pane until a section can be displayed.

- To close a document, select **File > Close**.

If you modify a document, you are prompted to save changes.

Saving Documents

To ensure that document changes, subsequent to analysis, are preserved, use the Save features to save documents to the repository (importing). To save documents locally, see [Exporting Documents in Native File Format](#).

Saving an Interactive Reporting Document to the Hyperion System 9 BI + Repository

You can save modified Interactive Reporting documents and jobs to the repository. The repository is an efficient way to manage documents and distribute documents over a wide network for end-user query and reporting.

You save modified documents to the repository by simply saving the documents (Save) or by saving the documents as new documents (Save As). If you do not have permission to overwrite a document, you must use Save As.

- To save to the repository, select **File > Save**.

You can also click the Save icon on the Interactive Reporting toolbar.

- To save as to the repository:

- 1 Select **File > Save As**.

The Save As dialog box is displayed.

- 2 For Name, enter a **document name**.

- 3 **Optional:** For Description, enter a **document description**.

- 4 Click the **Save** icon.

Working with Document Sections

Because Interactive Reporting documents are integrated query, analysis, and reporting tools, they have multiple sections, each of which governs one part of the query and reporting refresh. You create sections progressively as you query a database, retrieve results, and generate reports.

Each section occupies an independent window and performs distinct operations. You can move between sections at any time to rebuild your query or alter result data.

Interactive Reporting end-users do not need a strong technical understanding of databases. Data Model sections are not available and not visible in the Section pane. Each visible section occupies an independent window in the browser and shows discrete data views. For example, the Pivot section resembles a spreadsheet or crosstab report and enables drill-down, data-relationship analysis. The Chart section graphically depicts data summaries, trends, and relationships.

The default home page of a document is the Dashboard section. For information on using document sections

- [Section Pane](#)
- [Selecting Document Sections](#)
- [Adding Sections](#)
- [Moving Between Sections](#)
- [Duplicating Sections](#)
- [Renaming Sections](#)
- [Deleting Sections](#)
- [Refreshing Document Sections](#)
- [Printing Sections](#)
- [Dashboard Home](#)

Section Pane

The Section pane shows the sections available in the current document:

- **Dashboard**—Provides commands that perform actions such as retrieve data, populate controls, hide objects, navigate between sections, and specify report parameters
- **Report**—Enables viewing of high-quality, professionally designed reports that range from complex, critical operational reports to Results sets, charts, and pivot tables and that help you evaluate your business, expand communications, and make decisions
- **Query**— Enables a relational-database connection and download of a prebuilt query or data model (foundation of the Interactive Reporting document)
- **Results**—Displays in table columns data that Workspace retrieves in response to a query refresh.
- **Pivot**—Summarizes, or cross-tabulates large amount of data (You can rotate rows and columns to see data-source summaries and to display data details.
- **Chart**—Provides a fully interactive, two- or three-dimensional data view that provides powerful ways to visually analyze data
- **Table**—Displays data in columns (as a single-dimension report), often used in other sections as a building block
- **OLAPQuery**—Used to connect to multidimensional databases

By default, an Interactive Reporting document has at least one Query and one Results section.

Selecting Document Sections

The Section pane displays sections associated with the document.

- To select a section, select it from the Sections pane.
- To scroll through a section, use the scroll bar on the right side of the browser.

Adding Sections

Section additions are based on query and results sets.

- To insert a section into a document, select **Actions > Insert > (New Section)**.

For example, to insert a chart, select Actions > Insert > Chart; to insert a table, select Actions > Insert > Table.

Workspace inserts the section and adds a section label (based on the type of section) to the Section pane. Workspace appends a sequence number, if needed to prevent duplicate names.

Moving Between Sections

You can easily navigate between sections to work on queries, results, and reports.

- To move between sections, select the target section from the Section pane.
If necessary, use the scrollbar to move vertically through the Section pane.

Duplicating Sections

A duplicated section retains all content and formatting of the original section. The new section label, which is added to the Section pane, is the original section label with an appended sequence number. For example, if you duplicate a section named SalesChart three times, the Section pane shows SalesChart, SalesChart2, SalesChart3, and SalesChart4.

- To duplicate a section:
 - 1 In the Section pane, select the section.
 - 2 From the shortcut menu, select **Duplicate**; or, select **Edit > Section > Duplicate**.

Renaming Sections

The first section of a type is given the default section name, for example, Query or Results. Additional sections of a type are numbered sequentially, for example, Query2, Results2, and so on. To assign unique names, use the Rename command.

- To rename a section:
 - 1 In the Section pane, select the section to be renamed.
 - 2 On the shortcut menu, select **Rename**; or select **Edit > Section > Rename**.
The Input Section Name dialog box is displayed.
 - 3 Enter the new name, and click **OK**.

Deleting Sections

You can delete sections. However, some sections are dependent on other sections, so you may delete sections that you do not want to delete. You cannot restore deleted sections.

- To delete a section:
 - 1 In the Section pane, select the section.
 - 2 On the shortcut menu, select **Delete**; or select **Edit > Section > Delete**.
The Confirm Deletion dialog box is displayed.
 - 3 Click **OK**.

Dashboard Home

A customized Dashboard section can be displayed as a document home page. Each dashboard button and item selection and navigation sequence can invoke a script. Behind the scenes, Workspace refreshes Dashboard script commands that perform actions such as retrieve data, populate controls, hide objects, navigate between sections, and specify report parameters.

- To go to Dashboard home, click **Dashboard Home** on the Interactive Reporting toolbar.

Refreshing Document Sections

You refresh document sections to retrieve the most current data from the database. The Refresh command can be used in any query reporting section. When data is refreshed in one section, it is refreshed in all sections.

By default, Workspace uses the Refresh Current command (refreshes the current object) in all sections except Dashboard and Report. In some cases, multiple queries may be refreshed, if, for example, a report references results sets from multiple queries.

In Dashboard and Report sections, Workspace uses the Refresh All command to refresh all queries. Although queries are not visible to end-users, they are executed in the order in which they are displayed in the section catalog in the full client version. For example, in a document with three queries, Query1, Query2, and Query3, the queries are executed in numeric order.

If a variable filter is set for a query, filter selections must be resolved before the query is refreshed. The user is prompted to select or enter filter values and complete the constraint.

- To refresh a section, click the **Refresh** icon on the Interactive Reporting toolbar.

Printing Sections

Sections are printed to PDF files and launched inside your browser if the PDF MIME type is set in the browser. If the PDF MIME type is not set in the browser, the browser Save As dialog box is invoked. PDF files can be viewed online or hard-copy printed.

Note: A Query section cannot be printed.

- To export a document to PDF, select **File > Print via PDF**, or click the **Export to PDF** icon.

Tip: Printing and exporting to PDF are equivalent features.

Exporting Data

You can save Interactive Reporting documents as PDF or Excel files or in native file format.

Exporting a Section as a PDF

Exporting sections to Portable Document Format (.PDF) provides several benefits:

- Preserve layout and format
- Transfer layout and format across multiple platforms (such as Windows, Unix, and the Macintosh)
- Save, print, and distribute files easily and effectively

To display and print PDF files, you must have Adobe® Acrobat® Reader™ installed. Acrobat Reader is a self-contained application that can behave as an Internet Browser plug-in or a stand-alone application.

Acrobat Reader enables you to view, print, and share PDF files but not to create or modify files. Acrobat Reader is free and can be downloaded from Adobe's Web site.

You may need to configure your browser to use Acrobat Reader. For example, you may need to associate Acrobat Reader as the application to read PDF files or display PDF files in a separate window. You open PDF files by double-clicking them in Explore.

To save a PDF to your desktop for offline viewing, click the Acrobat Reader Save as Copy icon on the Acrobat Reader toolbar, and, when prompted, specify the directory in which to save the file.

To print a PDF, click the Acrobat Reader Print icon, and, when prompted, specify print parameters and print.

If Acrobat Reader is not installed, the File Download dialog box is displayed. You can save the file to disk and open it from a specified location.

- To export a document to PDF, select **File > Print via PDF** or click the **Export to PDF** icon.

Exporting Sections to Excel (.XLS)

You can export a section to Excel and launch it inside your browser if the mime type is set to recognize the XLS file extension. Then, you can save the file locally and work with the data directly in Excel. If the mime type is not set to recognize the XLS file extension, you are prompted to specify a local destination to which to save and from which to use the XLS file.

- To export a document to Excel (XLS):

- 1 Click the **Export to XLS** icon.

If the mime type is set to recognize .XLS, the section is launched in Excel. Otherwise, the Save As dialog box is displayed.

- 2 If the Save As dialog box is displayed, for File Name, enter a name.
- 3 Select **Microsoft Excel Workbook (.XLS)** in the Save as Type field.
- 4 Select **Save**.

Exporting Documents in Native File Format

When a document is exported in native file format, Workspace determines whether Interactive Reporting Web Client is installed and, if so, launches the document in a browser. Interactive Reporting Web Client is an application file located in a Web browser plug-in direction. Plug-ins add seamless functionality to Web browsers, enabling browsers to open plug-in file types as if they were HTML files.

Document changes are not replicated to the original Interactive Reporting document, which was selected from the document list in the repository, resides on the server, and can be changed only by re-importing.

- To export a file in native file format, select **File > Export > Native File Format**.

If Interactive Reporting Web Client is installed, it is launched. You can make changes and save the document to the repository. If you do not have permission to overwrite the document, you can use the Save To Repository As command to rename and save it.

If Interactive Reporting Web Client is not installed, the File Download dialog box is displayed. You can open the document from its current location or export the file to disk and open the document from a specified location.

Glossary

access control A security mechanism that manages a user's privileges or permissions for viewing, modifying, and importing files or system resources.

access privileges The level of access—for example, view, modify, run, full control—that the importer of an item grants to others.

accountability map A visual, hierarchical representation of the responsibility, reporting, and dependency structure of your organization. An Accountability map depicts how each accountability team in your organization interacts to achieve strategic goals. An accountability team is also known as a critical business area (team, department, office, and so on).

action A task or group of tasks executed to achieve one or more strategic objectives. In a Hyperion Performance Scorecard application, each action box represents an activity or task that helps to accomplish a strategic objective. Each action is usually assigned measures.

actions Job output definitions for an Interactive Reporting job is defined in terms of a series of actions.

active group A group that is entitled to access the system.

active service A service whose Run Type is set to Start rather than Hold.

active user A user who is entitled to access the system.

active user/user group The user or user group identified as the current user by user preferences. Determines default user preferences, dynamic options, access, and file permissions. You can set the active user to your user ID or any user group to which you belong.

adaptive states Interactive Reporting level of permission. There are six levels of permission: view only, view and process, analyze, analyze and process, query and process, and datamodel and analyze.

aggregate cell A cell comprising several cells. For example, a data cell that uses Children(Year) expands to four cells containing Quarter 1, Quarter 2, Quarter 3, and Quarter 4 data.

aggregate limit A limit placed on an aggregated request line item or aggregated metatopic item.

alias An alternative name.

Analysis Server Web Analysis Server. An application server program that distributes report information and enables Web client communication with data sources.

Analyze The main Web Analysis interface for analysis, presentation and reporting.

appender A Log4j term for destination.

application A program running within a system.

application server A middle-tier server that is used to deploy and run Web-based application processes.

asymmetric analysis A report characterized by groups of members that differ by at least one member across groups. The number and names of members can differ.

attribute Characteristics of dimension members that are not stored in the data source but calculated on demand. You can select, group, or calculate members that have a specified attribute. For example, an Employee Number dimension member may have attributes of Name, Age, or Address.

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

authentication service A core service that manages one authentication system.

authentication service repository (ASR) A database that contains a complete model of users/groups in an external system.

authentication system A security measure designed to validate and manage users and groups.

axis A two-dimensional report aspect used to arrange and relate multidimensional data, such as filters, pages, rows, and columns.

bar chart A chart that can consist of one to 50 data sets, with any number of values assigned to each data set. Data sets are displayed as groups of corresponding bars, stacked bars, or individual bars in separate rows.

batch POV A collection of all the dimensions on the user POV of every report and book in the batch. While scheduling the batch, you can set the members selected on the batch POV.

book A container that holds a group of similar Financial Reporting documents. Books may specify dimension sections or dimension changes.

book POV The dimension members for which a book is run. A book is a collection of Financial Reporting documents that may have dimensions on the User POV. Any dimension on a report's user POV is added to the book POV and defined there. The member for a dimension on the book POV can be one of the following items: (a) User POV. This means the member is set by the end user just before the book is run. (b) A specific member. If a specific member is chosen, then the selection is stored in the book definition and can only be altered in the Book Editor. (c) A set of member selections. A dimension left on the user POV of a report may be iterated over within the book. For example, a report may be run for four entities within one book.

bookmark A link to a reporting document or a Web site, displayed on a personal page of a user. The two types of bookmarks are My Bookmarks and image bookmarks.

bounding rectangle The perimeter that encapsulates the Interactive Reporting document content when embedding Interactive Reporting document sections in a personal page. It is required by the Interactive Reporting to generate HTML and is specified in pixels for height and width or row per page.

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 aggregate and extrapolate the values of a database.

Catalog pane A pane displaying a list of elements available to the active section. For example, if Query is the active section, the Catalog pane displays a list of database tables. If Pivot is the active section, the Catalog pane displays a list of results columns. If Dashboard is the active section, the Catalog pane displays a list of embeddable sections, graphic tools, and control tools.

categories Groupings by which data is organized (for example, month).

cause and effect map A map that depicts how the elements that form your corporate strategy are interrelated and how they work together to meet your organization's strategic goals. A Cause and Effect map tab is automatically created for each of your Strategy maps.

cell A unit of data representing the intersection of dimensions in a multidimensional database; the intersection of a row and a column in a worksheet.

chart A graphical representation of spreadsheet data. The visual nature of charts expedites analysis, color-coding, and visual cues that aid comparisons. There are many different chart types.

chart cell value Appears in the lower right corner of a chart on pages in the Monitor and Investigate Sections. The Editor defines the chart cell value that you see in Enterprise Metrics. The chart cell value might display a metric on the chart, such as Booking \$, or a calculation based on the metrics displayed on the chart, such as ratio of Booking \$ to Forecast \$.

chart column Enterprise Metrics Detail charts are displayed in columns below each Summary chart.

Chart section With a varied selection of chart types, and a complete arsenal of OLAP tools like group and drill-down, the Chart section is built to support simultaneous graphic reporting and ad hoc analysis.

Chart Spotlights A feature that enables you to color-code charts based on some condition in Interactive Reporting Studio.

chart template A template that defines the metrics to display in Workspace charts.

child A member that has a parent above it in the database outline.

choice list A list of members that a report designer can specify for each dimension when defining the report's point of view. A user who wants to change the point of view for a dimension that uses a choice list can select only the members specified in that defined member list or those members that meet the criteria defined in the function for the dynamic list.

client A client interface, such as Web Analysis Studio or a workstation on a local area network.

clustered bar charts Charts in which categories are viewed side-by-side within a given category; useful for side-by-side category analysis. Clustering is only done with vertical bar charts.

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.

column heading A part of a report that lists members across a page. When columns are defined that report on data from more than one dimension, nested column headings are produced. A member that is listed in a column heading is an attribute of all data values in its column.

computed item A virtual column (as opposed to a column that is physically stored in the database or cube) that can be calculated by the database during a query, or by Interactive Reporting Studio in the Results section. Computer items are calculations of new data based on functions, data items, and operators provided in the dialog box and can be included in reports or reused to calculate other data.

connection file A file used to connect to a data source.

console The console is displayed on the left side of the Enterprise Metrics workspace. The console is context sensitive, depending on the page displayed.

content Information stored in the repository for any type of file.

content area The Contents pane appears on the right side of the Workspace and provides specific information for the page that you are using.

cookie A small piece of information placed on your computer by a Web site.

correlated subqueries Subqueries that are evaluated once for every row in the parent query. A correlated subquery is created by joining a topic item in the subquery with one of the topic items in the parent query.

critical business area (CBA) An individual or a group organized into a division, region, plant, cost center, profit center, project team, or process; also called accountability team or business area.

critical success factor (CSF) A capability that must be established and sustained to achieve a strategic objective. A CSF is owned by a strategic objective or a critical process and is a parent to one or more actions.

cube The query result set from a multidimensional (OLAP) data source; a logically organized subset of OLAP database dimensions and members.

custom calendar Any calendar created by an administrator.

custom report A complex report from the Design Report module, composed of any combination of components.

cycle A Interactive Reporting job parameter that is used when scheduled Interactive Reporting jobs need to process and produce different job output with one job run.

Dashboard A collection of metrics and indicators that provide an interactive summary of your business. Dashboards enable you to build and deploy analytic applications.

Dashboard Home A button that returns you to the Dashboard section designated as the Dashboard Home section. If you have only one Dashboard section, Dashboard Home returns to that section. If you have several Dashboard sections, the default Dashboard Home is the top Dashboard section in the Catalog pane. In Design mode, you can specify another Dashboard section to be the Dashboard Home section.

data The values (monetary or non-monetary) associated with the query intersection.

data function A function that computes aggregate values including averages, maximums, counts, and other statistics, that summarize groupings of data. You can use data functions to aggregate and to compute data from the server before it reaches the Results section, or compute different statistics for aggregated totals and items in the other analysis sections.

data layout The data layout interface is used to edit a query, arrange dimensions, make alternative dimension member selections, or specify query options for the current section or data object.

data model Any method of visualizing the informational needs of a system.

data object A report component that displays the query result set. The display type of a single conventional data object can be set to spreadsheet, chart, or pinboard, and it displays OLAP query result sets. A SQL spreadsheet data object displays the result set of a SQL query, and the free-form grid data object displays the result set of any data source included in it.

data source 1. A data storage application. Varieties include multidimensional databases, relational databases, and files. 2. A named client-side object connecting report components to databases. Data source properties include database connections and queries.

database A repository within Essbase Analytics 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 file that stores definitions and properties used to connect to data sources. Database connections enable database references to be portable and widely used.

database function A predefined formula in a database.

default folder A user's home folder.

descendant Any member below a parent in the database outline. For example, in a dimension that includes years, quarters, and months, the members Qtr2 and April are descendants of the member Year.

Design Report An interface in Web Analysis Studio for designing custom reports, from a library of components.

Desktop An interface that presents the icons to open items.

detail chart A chart that provides the detailed information that you see in a Summary chart. Detail charts appear in the Investigate Section in columns below the Summary charts. For example, if the Summary chart shows a Pie chart, then the Detail charts below represent each piece of the pie.

dimension A data category used to organize business data for retrieval and preservation of values. Each dimension usually contains a hierarchy of related members grouped within it. For example, a Year dimension often includes members for each time period, such as quarters and months.

dimension tab In the Pivot section, the tab that enables you to pivot data between rows and columns.

dimension table 1. A table that includes numerous attributes about a specific business process. 2. In Enterprise Metrics, a table in a star schema with a single part primary key.

display type One of three Web Analysis formats saved to the repository: spreadsheet, chart, and pinboard.

dog-ear The flipped page corner in the upper right corner of the chart header area. You can click the dog-ear to display a shortcut menu. The dog-ear is displayed only on charts in the Investigate Section.

drill Allows you to investigate results reflected by a chart in the Investigate Section. You can click a chart that hyperlinks to a lower (more detailed) level in the Investigate Section. This concept is called "drilling."

drill anywhere A feature that enables you to drill into and add items to pivot reports residing in the Results section without returning to the Query section or trying to locate the item in the Catalog pane. Drill Anywhere items are broken out as new pivot label items.

drill target The data to which you are drilling. Specifying a drill target automatically creates a hyperlink enabling you to click the chart to obtain additional detail.

drill to detail A feature that enables you to retrieve items from a data model that are not in the Results section without rerunning the original query. This feature provides the ability to query the database interactively and filter the data that is returned. Drill-to-detail sets a limit on the query based on your selection and adds the returned value as a new pivot label item automatically.

drill-down Navigation through the query result set using the organization of the dimensional hierarchy. Drilling down moves the user perspective from general aggregated data to more detailed data. While default drill down typically refers to parent-child navigation, drilling can be customized to use other dimension member relationships. For example, drilling down can reveal the hierarchical relationships between year and quarters or between quarter and months.

drill-through The navigation from a data value in one cube to corresponding data in another cube. For example, you can access context-sensitive transactional data. Drill through occurs usually from the lowest point of atomicity in a database (detail) to a next level of detail in an external data source.

dynamic report A report containing current data. A report becomes a dynamic report when you run it.

Edit Data An interface for changing data values and sending edits back to Essbase Analytics.

employee Users responsible for, or associated with, specific business objects. Employees do not necessarily work for an organization, such as an analyst or consultant. An employee must be associated with a user account for authorization purposes.

ending period The ending chart period allows you to adjust the date range shown in the chart. For example, an ending period of “month” produces a chart that shows information through the end of the current month.

exceptions Values that satisfy predefined conditions. You can define formatting indicators or notify subscribing users when an exception has been generated.

external authentication Logging on to Hyperion applications by means of user information stored outside the application, typically in a corporate authentication provider such as LDAP or Microsoft Windows NTLM.

externally triggered events Non-time-based events that are used to schedule job runs.

Extract, Transform, and Load Data source-specific programs that are used to extract and migrate data to an application.

extrapolation A means of showing projected figures. Extrapolation from the current date to the end of the current period is displayed on Enterprise Metrics charts with a white area of the bar. If a line chart shows extrapolation, the line that is extrapolated is dotted.

fact table The central table in a star join schema, characterized by a foreign key and elements drawn from a dimension table. This table typically contains numeric data that can be related to all other tables in the schema.

filter A filter is used to limit data. While every dimension in the cube must participate in every intersection, you can make filter selections that focus the intersections on a smaller portion of the cube. For example, in Interactive Reporting Studio use a filter to exclude certain tables or data values. In Enterprise Metrics Studio implement a filter by adding a where clause on a join statement.

folder A file that contains other files for the purpose of ordering and structuring a hierarchy.

footer The text or images that are displayed at the bottom of each page in a report. A footer can contain a page number, date, company logo, document title or file name, author name, and so on. Footers can contain dynamic functions as well as static text.

format The visual characteristics of a document or a report object.

free-form grid A data object that present OLAP, relational, and manually entered data together and enables you to leverage all these data sources in integrated dynamic calculations.

generic jobs Jobs that are neither Production Reporting nor Interactive Reporting jobs.

grid POV A means for specifying members for a dimension on a grid without placing the dimension on the row, column, or page intersection. A report designer can set the POV values at the grid level, preventing the user POV from affecting that particular grid. If a dimension has only one value for the entire grid, the dimension should be put into the grid POV instead of the row, column, or page.

group A construct that enables the assignment of users with similar system access requirements.

grouping columns A feature in the Results and Table sections that creates a new column in a dataset by grouping data from an already existing column. Grouping columns consolidate nonnumeric data values into more general group values and map the group values to a new column in the dataset.

header The text or images that are displayed at the top of each page in a report. A header can contain a page number, date, company logo, document title or file name, author name, and so on. Headers can contain dynamic functions as well as static text.

highlighting Depending on your configuration, you may see highlighting applied to a chart cell value or ZoomChart detail values. A value can be highlighted in red (indicating the value is bad), yellow (indicating that the value is a warning), or green (indicating the value is good).

host A server on which applications and services are installed.

host properties Properties pertaining to a host, or if the host has multiple Install_Homes, to an Install_Home. The host properties are configured from the LSC.

hyperlink A link to a file, Web page, or an HTML page on an intranet.

Hypertext Markup Language A programming language of tags that specify how Web browsers display data.

image bookmarks Graphic links to Web personal pages or repository items.

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.

inactive group A group that cannot access the system because an administrator has inactivated it.

inactive service A service that has been placed on hold or excluded from the list of services to be started.

inactive user A user who cannot access the system because an administrator has inactivated the user account.

Install_Home A variable name for the path and directory where Hyperion applications are installed. Refers to a single instance of a Hyperion application when multiple applications have been installed on the same machine.

Interactive Reporting document sections Divisions of a Interactive Reporting document that are used to display and analyze information in different formats (such as Chart section and Pivot section).

Interactive Reporting files or jobs Files created by Interactive Reporting and published into the repository as files or as jobs. Files and jobs have different capabilities.

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

Java Database Connectivity A client-server communication protocol used by Java based clients and relational databases. The JDBC interface provides a call-level API for SQL-based database access.

job output Files or reports produced from running a job.

job parameters The compile time and runtime values necessary to run a job.

job parameters Reusable, named job parameters that are accessible only to the user who created them.

jobs A collection of documents that have special properties and can be executed to generate output. A job can contain Interactive Reporting documents, Production Reporting documents or generic documents.

join A link between two relational database tables based on common content in a column or record or a relational database concept indicating a link between two topics. A join typically occurs between identical or similar items within different topics. Joins enable row records in different tables to be linked on the basis of shared information in a column field. For example, a row record in the Customer table is joined to a related record in the Orders table when the Customer ID value for the record is the same in each table. This enables the order record to be linked with the record of the customer who placed the order. If you request items from unjoined topics, the database server has no way to correlate the information between the two tables and leads to awkward datasets and run-on queries.

join path A predetermined join configuration for a data model. Administrators create join paths for users to select the type of data model needed in a user-friendly prompt upon processing a query. Join paths ensure that the correct tables in a complex data model are used in a query.

JSP Java Server Pages

layer Stack a single object in relative position (sends back and front, or brings forward or backward) to other objects.

legend box An informative box containing color-keyed labels to identify the data categories of a given dimension.

level A hierarchical layer within the database outline or tree structure.

line chart A chart that displays one to 50 data sets, with automatic, uniform spacing along the X-axis. Each data set is rendered by a line. A line chart can optionally show each line set stacked on the preceding ones, using either the absolute value or a normalized value from 0 to 100 percent.

link Link files are fixed references to a specific object in the repository. Links can reference folders, files, shortcuts, and other links using unique identifiers. Links present their targets in the current folder, regardless of where the targets are located or how the targets are renamed.

linked data model Documents that are linked to a master copy in a repository. When changes are made to the master, users are automatically updated with the changes when they connect their duplicate copy to the database.

linked reporting object A cell-based link to an external file in the Analytic Services database. Linked reporting objects can be cell notes, URLs, or files that contain text, audio, video, or pictures. Note that support of Analytic Services LROs in Financial Reporting applies only to cell notes at this time (by way of Cell Text functions).

local report object A report object that is not linked to a Financial Reporting report object in Explorer.

local results Results of other queries within the same data model. These results can be dragged into the data model to be used in local joins. Local results are displayed in the catalog when requested.

locked data model Data models that cannot be modified by a user.

logger Log4j term for where the logging message originates; The class or component of the system in which a log message originated.

LSC services The services that are configured with the Local Service Configurator. They include Global Services Manager (GSM), Local Services Manager (LSM), Session Manager, Authentication Service, Authorization Service, Publisher Service, and in some contexts, Data Access Service (DAS) and Interactive Reporting Service.

Map Navigator A feature that displays your current position on a Strategy, Accountability or Cause and Effect map. Your current position is indicated by a red outline on the Map Navigator.

master data model A data model that exists independently and has multiple queries that reference it as a source. When you use a master data model, the text “Locked Data Model” is displayed in the Content pane of the Query section. This means that the data model is linked to the master data model displayed in the Data Model section, which may be hidden by an administrator.

MDX (multidimensional expression) The language used to give instructions to OLE DB for OLAP- compliant databases (MS Plato), as SQL is the language used for relational databases. When you build the OLAPQuery section’s Outliner, Intelligence Clients translate your requests into MDX instructions. When you process the query, MDX is sent to the database server. The server returns a collection of records to your desktop that answer your query.

measures Numeric values in an OLAP database cube that are available for analysis. Measures may be margin, cost of goods sold, unit sales, budget amount, and so on.

member A discrete component within a dimension. A member identifies and differentiates the organization of similar units. For example, a time dimension might include such members as Jan, Feb, and Qtr1.

member list A named group that references members, functions, or other member lists within a dimension. A member list can be system- or user-defined.

metadata A set of data that defines and describes the properties and attributes of the data stored in a database or used by an application. Examples of metadata are dimension names, member names, properties, time periods, and security.

metric A numeric measurement computed from your business data. Metrics help you assess the performance of your business and analyze trends in your company. For immediate and intuitive understanding, Enterprise Metrics metrics display visually in charts.

MIME Type (Multipurpose Internet Mail Extension) An attribute that describes the format of data in an item, so that the system knows which application to launch to open the object. A file's mime type is determined either by the file extension or the HTTP header. Plug-ins tell browsers what mime types they support and what file extensions correspond to each mime type.

minireport A minireport is a component of a report, and includes layout, content, hyperlinks, and the actual query or queries to load the report. Each report can include one or more minireports.

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

model In Shared Services, a file or string of content containing an application-specific representation of data. Models are the basic data managed by Shared Services. Models are of two types: dimensional hierarchies, and nondimensional application objects. Dimensional hierarchies include information such as entities and accounts. Nondimensional application objects include security files, member lists, calculation scripts, and web forms.

multidimensional database A method of organizing, storing, and referencing data through three or more dimensions. An individual value 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.

native authentication The process of authenticating a user ID and password from within the server or application.

note Additional information associated with a box, measure, scorecard or map element.

null value A value that is absent of data. Null values are not equal to zero.

OLAPQuery section A document section that analyzes and interacts with data stored in an OLAP cube. When you use Intelligence Clients to connect to an OLAP cube, the document immediately opens an OLAPQuery section. The OLAPQuery section displays the structure of the cube as a hierarchical tree in the Catalog pane.

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

Open Catalog Extension Files (OCE) files Files that encapsulate database connection information. OCE files specify the database API (ODBC, SQL*Net, etc.), database software, the network address of the database server, and your database username. Administrators create and publish OCE files.

origin The intersection of two axes.

page A display of information in a grid or table often represented by the Z-axis. A page can contain data from a single field, derived data from a calculation, or text.

page member A member that is displayed on the page axis.

palette A JASC compliant file with an extension of PAL. Each palette contains 16 colors that complement each other and can be used to set the color elements of a dashboard.

performance indicator An image file used to represent measure and scorecard performance based on a range you specify; also called a status symbol. You can use the default performance indicators or create an unlimited number of your own.

period A time interval that is displayed along the x-axis of a chart. Periods might be days, weeks, months, quarters or years.

personal pages Your personal window to information in the repository. You select what information to display, as well as its layout and colors.

personal recurring time events Reusable time events that are accessible only to the user who created them.

personal variable A named selection statement of complex member selections.

perspective A category used to group measures on a scorecard or strategic objectives within an application. A perspective can represent a key stakeholder (such as a customer, employee, or shareholder/financial) or a key competency area (such as time, cost, or quality).

pie chart A chart that shows one data set segmented in a pie formation.

pinboard One of the three data object display types. Pinboards are graphics, composed of backgrounds and interactive icons called pins. Pinboards require traffic lighting definitions.

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.

plot area The area bounded by the X, Y, and Z axes; For pie charts, the rectangular area immediately surrounding the pie.

predefined drill paths Paths that enable you to drill directly to the next level of detail, as defined in the data model.

presentation A playlist of Web Analysis documents. Playlists enable reports to be grouped, organized, ordered, distributed, and reviewed. Presentations are not reports copied into a set. A presentation is a list of pointers referencing reports in the repository.

primary measure A high-priority measure that is more important to your company and business needs than many other measures. Primary measures are displayed in the Contents frame and have Performance reports.

private application An application for the exclusive use of an product to store and manage Shared Services models. A private application is created for a product during the registration process.

Production Reporting A specialized programming language for data access, data manipulation, and creating Production Reporting documents.

property Characteristics of an object, such as size, color, type.

proxy server A server that acts as an intermediary between a workstation user and the Internet to ensure security.

public job parameters Reusable, named job parameters created by an administrator and accessible to users who have the requisite access privileges.

public recurring time events Reusable time events created by an administrator and accessible through the access control system.

range A set of values that includes an upper and lower limit, and the values that fall between the limits. A range can consist of numbers, amounts, or dates.

reconfigure URL URL used to reload servlet configuration settings dynamically when a user is already logged in to the Workspace.

recurring time event An event that specifies a starting point and the frequency for running a job.

relational database A database that stores its information in tables related or joined to each other by common pieces of information called keys. Tables are subdivided into column fields that contain related information. Column fields have parents and children. For example, the Customer table may have columns including Name, Address, and ID number. Each table contains row records that describe information about a singular entity, object, or event, such as a person, product, or transaction. Row records are segmented by column fields. Rows contain the data that you retrieve from the database. Database tables are linked by Joins. (See also join.)

report footer See *footer*.

report header See *header*.

report object A basic element in report designs. Report objects have specific properties that define their behavior or appearance. Report objects include text boxes, grids, images, and charts.

Reports section A dynamic, analytical report writer, that provides users with complex report layouts and easy-to-use report-building tools. Pivot tables and charts can be embedded in a report. The report structure is divided into group headers and body areas, with each body area containing a table of data. Tables are created with dimension columns and fact columns. These tables are elastic structures. Multiple tables can be ported into each band, each originating from the same or different result sets.

request line A line that holds the list of items requested from the database server and that will appear in the user's results.

request line items Columns listed in the request line.

resources Objects or services that the system manages. Examples of a resource include a role, user, group, file, job, publisher service, and so on.

result A value that an application collects for measures. If you have the required permissions, you can use the Result Collection report to enter or modify measure results.

result frequency The algorithm used to create a set of dates for either the collection of data (collection frequency) or the display of data (result frequency). The result frequency's algorithm is defined by: Major type (for example, weekly, monthly, and so on.) Minor type (for example, first, last, last Friday, 5th day of period, and so on.) Interval (for example, every one, every two, every 5, and so on.)

Results section A section in an Interactive Reporting document that contains the dataset derived from a query. Data is massaged in the Results section for use in the report sections.

role A construct that defines the access privileges granted in order to perform a business function; for example, the job publisher role grants the privilege to run or import a job.

row heading A report heading that lists members down a report page. The members are listed under their respective row names.

RSC services The services that are configured with the Remote Service Configurator. They include Repository Service, Service Broker, Name Service, Event Service, and Job Service.

scale The range of values on the Y axis of a chart.

scale code Specification of how an individual metric or minireport field is scaled. It may be displayed in thousands, or multiplied by 100 in conjunction with a percent format.

schedule Specify the job that you want to run as well as the time and job parameter list for running the job.

score The level at which specified targets are being achieved. It is usually expressed as a percentage of the target for a given time period.

scorecard Business Object used to represent the progress of an employee, strategy element, or accountability element toward specific goals. Scorecards ascertain this progress based on the data collected for each measure and child scorecard you add to the scorecard.

scorecard report A report that presents the results and detailed information about scorecards attached to employees, strategy elements, and accountability elements.

secondary measure A low-priority measure that is less important to you than primary measures. Secondary measures do not have Performance reports but can be used on scorecards and to create dimension measure templates.

Section pane Lists all the sections that are available in the current Intelligence Client document.

security agent A Web access management solutions provider employed by companies to protect Web resources; also known as Web security agent. The Netegrity SiteMinder product is an example of a security agent.

security platform A framework enabling Hyperion applications to use external authentication and single sign-on using the security platform driver.

security rights Rights defined by a user's data access permissions and activity-level privileges as explicitly defined for a user and as inherited from other user groups.

services Resources that provide the ability to retrieve, modify, add, or delete business items. Some services are Authorization, Authentication, Global Service Manager (GSM).

servlet A piece of compiled code executable by a Web server.

Servlet Configurator A software utility for configuring all of the locally installed servlets.

shortcut A pointer to an actual program or file that is located elsewhere. You can open the program or file through the shortcut, if you have permission.

shortcut menu A menu that is displayed when you right-clicks a selection, an object, or a toolbar. A shortcut menu lists commands pertaining only to that screen region or selection.

sibling A child member at the same generation as another child member and having the same immediate parent. For example, the members Florida and New York are both children of East and siblings of each other.

Single Sign-On A feature that enables you to access multiple Hyperion products after logging on just once using external credentials.

SmartCut A link to an item in the repository in the form of a special URL.

snapshot Read-only data from a specific point in time. See [snapshot report](#).

snapshot report A report that has been generated and that stores static data. Any subsequent change of the data in the data source does not affect the report content. A snapshot report is portable and can be stored on the network, locally, or e-mailed. See [snapshot](#).

sort Reorder or rank result sets in ascending or descending order.

sort order An indicator specifying the method by which you want your data to be presented. Data is typically shown in one of two sort orders. Ascending sort order presents data from lowest to highest, earliest to latest, first to last, A to Z, and so on. Descending sort order presents data from highest to lowest, latest to earliest, last to first, Z to A, and so on.

SPF files Printer-independent files created by an Production Reporting server that contains a representation of the actual formatted report output, including fonts, spacing, headers, footers, and so on.

spreadsheet One of the three data object display types. Spreadsheets are tabular reports of rows, columns, and pages.

SQL spreadsheet A data object that displays the result set of a SQL query.

stacked charts A chart where the categories are viewed on top of one another for visual comparison. This type of chart is useful for subcategorizing within the current category. Stacking can be used from the Y and Z axis in all chart types except pie and line. When stacking charts the Z axis is used as the Fact/Values axis.

Start in Play The quickest method for creating a Web Analysis document. The Start in Play process requires you to specify a database connection, then assumes the use of a spreadsheet data object. Start in Play uses the highest aggregate members of the time and measures dimensions to automatically populate the rows and columns axes of the spreadsheet.

strategic objective (SO) A long-term goal defined for an organization that is stated in concrete terms whose progress is determined by measuring results. Each strategic objective is associated with one perspective in your application, has one parent, the entity, and is a parent to critical success factors or other strategic objectives. It also has measures associated with it.

Strategy map A detailed representations of how your organization translates its high-level mission and vision statements into lower-level, constituent strategic goals and objectives.

structure view A view that displays a topic as a list of component items allowing users to see and quickly select individual data items. Structure view is the default view setting.

Structured Query Language The language used to give instructions to relational databases. When you build the Query section's Request, Limit, and Sort lines, Interactive Reporting translate your requests into SQL instructions.

subscribe Register an interest in an item or folder, in order to receive automatic notification whenever the item or folder is updated.

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.

Summary chart A chart that is displayed at the top of each chart column in the Investigate Section and plots metrics at the summary level, meaning that it rolls up all of the Detail charts shown below in the same column. All colors shown in a stacked bar, pie, or lines Summary chart also appear above each Drill button of the Detail charts and extend across the row, acting as the key.

super service A special service used by the startCommonServices script to start the RSC services.

table The basic unit of data storage in a database.

Database tables hold all of the user-accessible data. Table data is stored in rows and columns.

Table catalog A display of the tables, views, and synonyms to which users have access. Users drag tables from the Table catalog to the Content pane to create data models in the Query section.

Table section The section used to create tabular-style reports. It is identical in functionality to the Results section, including grain level (table reports are not aggregated). Other reports can stem from a Table section.

target The expected result for a measure for a specified period of time, such as a day, quarter, month and so on. You can define multiple targets for a single measure.

time events Triggers for execution of jobs.

time scale A scale that enables you to see the metrics by a specific period in time, such as monthly or quarterly.

token An encrypted identification of one valid user or group existing on an external authentication system.

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

top and side labels In the Pivot section, the column and row headings on the top and sides of the pivot. These define categories by which the numeric values are organized.

top-level member A dimension member at the top of the tree in a dimension outline hierarchy, or the first member of the dimension in sort order if there is no hierarchical relationship among dimension members. The top-level member name is generally the same name as the dimension name if a hierarchical relationship exists.

trace level A means of defining the level of detail captured in the log file.

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 Web Analysis Traffic Light Analysis Tool.

transparent login A mechanism that enables users who have been previously authenticated by external security criteria to log in to a Hyperion application, bypassing the login screen.

trend How the performance of a measure or scorecard has changed since the last reporting period or a date that you specify.

trusted password A password that enables users who have been previously authenticated in another system to have access to other applications without reentering their passwords.

trusted user A user authenticated by some mechanism in the environment.

Uniform Resource Locator The address of a resource on the Internet or an intranet.

variable A value that can be modified when you run a report. String variables are useful for concatenating two or more database columns. Numeric variables can calculate values based on other values in the database. Encode variables are string variables that contain nondisplay and other special characters.

variable limits Limits that prompt users to enter or select limit values before the queries are processed on the database.

Web server Software or hardware hosting intranet or Internet Web pages or Web applications. This term often refers to the Interactive Reporting servlets' host, because in many installations, the servlets and the web server software reside on a common host. This configuration is not required, however; the servlets and the web server software may reside on different hosts.

weight A value assigned to an item on a scorecard that indicates the relative importance of that item in the calculation of the overall scorecard score. The weighting of all items on a scorecard accumulates to 100%. For example, to recognize the importance of developing new features for a product, the measure for New Features Coded on a developer's scorecard would be assigned a higher weighting than a measure for Number of Minor Defect Fixes.

ws.conf A configuration file for Windows platforms.

wsconf_platform A configuration file for UNIX platforms.

Y axis scale The range of values on the Y axis of the charts displayed in the Investigate Section. You can use a unique Y axis scale for each chart, the same Y axis scale for all Detail charts, or the same Y axis scale for all charts in the column. Often, using a common Y axis improves your ability to compare charts at a glance.

Zero Administration A software tool that identifies the version number of the most up-to-date plug-in on the server.

zoom A feature that sets the magnification of a report. The report can be magnified to fit the whole page, page width or a percentage of magnification based on 100%.

ZoomChart A feature that makes it easy to view detailed information by enlarging a chart displayed on a page in the Monitor or Investigate Section. Zooming in on a chart enables you to see detailed numeric information on the metric that is displayed in the chart. You can click the + (plus sign) in the lower right corner of the chart or right-click anywhere on the chart to enlarge it.

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