



# HYPERION® SYSTEM™ 9 BI+™

RELEASE 9.2

## NEW FEATURES



This document describes new features included in Hyperion System 9 BI+. For detailed information on features, refer to the documentation set.

For specific information on installing Hyperion System 9 BI+ Workspace™, see the *Hyperion System 9 BI+ Financial Reporting™*, *Interactive Reporting*, *Production Reporting*, *Web Analysis Installation Guides for Windows* or *UNIX*. For information on late-breaking developments with Workspace, refer to the *Hyperion System 9 BI+ Readme*.

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# WHAT'S NEW IN HYPERION SYSTEM 9 BI+

Hyperion System 9 BI+ is a business intelligence platform. It provides management reporting and analysis from data sources, including transactional systems, data warehouses, SAP BW, Hyperion System 9 BI+ Analytic Services™, and Hyperion financial applications.

For Hyperion System 9 BI + Release 9.2 new features, see the *Hyperion System 9 BI + Release 9.2 Readme*.

## HYPERION SYSTEM 9

Hyperion System 9 is a Business Performance Management system. It integrates financial applications with a business intelligence platform providing a modular system that adapts to business needs.

The major components of Hyperion System 9 are Hyperion System 9 Applications+™, Hyperion System 9 Foundation Services™ and Hyperion System 9 BI+.

Applications+ are packaged applications for planning, consolidation, and scorecarding.

Foundation Services includes common technologies used by multiple products. It eases the installation and configuration process providing metadata management and common Microsoft Office interface. Foundation Services includes Hyperion System 9 Shared Services™, Hyperion System 9 Data and Application Integration, Hyperion System 9 Master Data Management Services™, Workspace, Hyperion License Server™ and Hyperion System 9 Smart View for Office™. Workspace and Smart View are installed from BI+ or Applications+ product installation.

BI+ offerings:

- Interaction with different information in one environment; view reports, process reports and queries that include parameters, and using dynamic dashboards to view and interact with content
- The richly interactive BI+ user interface, which serves as a single thin client for reporting, analysis, and metrics management
- The broadest set of modular BI functionality in the market, including production reporting, financial reporting, ad hoc query and analysis, and advanced analytics
- Seamless integration and interaction with Microsoft Office
- Flexible and complete content access, which integrates third-party content with Hyperion content in an easy to use interface
- Subscription notifications, favorites, and scheduling options to support a wide range of application uses
- Integration with the full Foundation Services for central provisioning and management of all Hyperion System 9 users

Hyperion System 9 BI+ Modules descriptions:

**Hyperion System 9 BI+ Essbase Analytics™ and Hyperion System 9 BI+ Enterprise Analytics™**—Collectively referred to as Analytic Services; provides powerful OLAP capabilities for high performance multidimensional reporting, analysis, and modeling

**Hyperion System 9 BI+ Interactive Reporting™**—Self-service, ad hoc query and analysis for relational databases that enable users to pivot interactively, and to slice and drill from summary to detailed data

**Hyperion System 9 BI+ Production Reporting™**—Visually clear, high volume, enterprise reporting with parameters

**Hyperion System 9 BI+ Financial Reporting™**—Highly formatted financial reports with access to Applications+, Analytic Services, and SAP BW

**Hyperion System 9 BI+ Web Analysis™**—Interactive, visualization and reporting against Analytic Services, Applications+, and SAP BW

**Hyperion System 9 BI+ Enterprise Metrics™**—Enterprise metrics management and analysis delivered through personalized, interactive dashboards

## UNIFIED THIN CLIENT

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

- BI+ includes:
  - Workspace—A single zero-footprint thin client provides access to the following content:
  - Enterprise Metrics—Management metrics and analysis presented in easy-to-use, personalized, interactive dynamic dashboards
  - Financial Reporting—A scheduled or on-demand highly formatted financial and operational reporting from Hyperion System 9 Applications+, Hyperion System 9 BI+ Analytic Services, and SAP BW.
  - Interactive Reporting—Ad hoc relational query, self-service reporting and dashboards against ODBC data sources and most relational databases.
  - Production Reporting—High volume enterprise-wide production reporting
  - Web Analysis—Interactive ad hoc analysis, presentation, and reporting of multidimensional data
- Essbase Analytics and Enterprise Analytics—Collectively referred to as Analytic Services; provides powerful OLAP capabilities for high performance multidimensional reporting, analysis, and modeling

## COMMON INFRASTRUCTURE

Integration with the full Foundation Services for central provisioning and management of all Hyperion System 9 users.

Workspace's infrastructure:

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

Workspace integrated BPM applications and content from:

- Hyperion System 9 Performance Scorecard™
- Enterprise Metrics
- Analytical Services
- Hyperion System 9 Planning™
- Hyperion System 9 Financial Management™

## ADMINISTRATION

User's have single user provisioning, a single repository for all your documents, a single point to handle administration duties, and management. For administrative tasks, you use the Administer module, from the View Pane. The Administer module manages:

- General properties
- Organization; adding and modifying users, groups, and roles
- Physical resources including printers and output directories
- MIME types
- Notifications
- Smartcuts
- Interactive Reporting Row-level security
- Usage tracking
- Event tracking

## IT BENEFITS

Workspace's single system for all modes of BI requires IT to deploy Workspace once. The extended zero footprint client means less cost to support Workspace; IT only has to train users once.

Workspace's common infrastructure provides one system for all user information. One license is granted to each user creating flexible licensing. A centralized license management system allows IT to keep track of what you need to buy and use.

## REPORTING

Workspace's reporting options handle needs for business users. The Hyperion System 9 BI+ Interactive Reporting Studio™ has self-service reporting and classic management reporting functions. You can pivot, slice, and drill for an interactive analysis document.

Production Reporting allows for pixel perfect reporting and mission critical solutions.

Financial Reporting has unparalleled financial reporting capabilities. Financial Reporting thrives under Workspace's Common Infrastructure; users can access Planning, Financial Management, Analytical Service, and SAP BW.

## BUSINESS PERFORMANCE VISIBILITY

The diverse and broad functionality of Workspace eases the usability of dashboards, reports, scorecards, Key Performance Indicators (KPI) and ad-hoc analysis.

Self service reporting enables Workspace users to operate with minimal training, create highly interactive and flexible visuals for diverse work styles, and integrate operations with Microsoft Office utilities.

## MICROSOFT OFFICE INTEGRATION

Workspace enables seamless integration and interaction with Microsoft Office creating dynamic input and output data options. You can export the following items:

- Fully formatted reports such as high fidelity representation with fonts, colors, spacing, borders, and more.
- Totals and other calculations to Microsoft Excel formulas.

## SAP BW

Reporting against SAP BW has been optimized with direct BAPI access for SAP BW objects through Financial Reporting, Production Reporting, and ad-hoc analysis of SAP BW data. Users can blend SAP BW and relational data in reports and dashboards.

Studios access the SAP BW data sources. Using the custom report free form grid component in Web Analysis, you can also present OLAP, relational, and manually entered data on the same data object, and leverage all these 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.

## USER PROVISIONING

User Provisioning is the management of all users, groups and roles. User Provisioning is the process of granting users access to corporate resources; using pre-configured Roles and Access controls. A role is a mechanism that defines access to product functionality. Instead of defining access on a user – by – user basis, these roles can be re-used by linking them to users or groups of users, avoiding the repetition of re-defining system access for each group or each user.

Workspace capabilities: viewing of reports, processing of reports and queries including parameters, and using dynamic dashboards to view and interact with content, subscription notifications, favorites, and scheduling options.

## ESSBASE ANALYTICS AND ENTERPRISE ANALYTICS

Collectively referred to as *Analytic Services*; *Analytic Services* provides powerful OLAP capabilities for high performance multidimensional reporting, analysis, and modeling.

## CONTENT ACCESS

Flexible and complete content access, which integrates third-party content with Hyperion content in an easy to use interface is integrated in the Financial Reporting directory.

## MIGRATION UTILITY

Migration is the process of moving content from the source system to Shared Services and the Hyperion System 9 BI+ Repository. Migration components:

- **Source system**—Users, groups, roles, repository content, and the database used by one of the following source products:
  - Brio Portal 7.0.5 or later
  - BrioONE (Brio Portal 7.0.5 or later and OnDemand Server 6.6.4 or later)
  - Brio Intelligence Server (OnDemand Server and Broadcast Server 6.6.4 or later)
  - Hyperion Analyzer™ 6.5, 7.0.1, 7.2, or 7.2.1
  - Hyperion Performance Suite™ 8.x (user provisioning only)

- Hyperion Reports™ 2.6, 2.6.1, 7.0, 7.0.1, 7.2, or 7.2.1
- **Hyperion System 9 Shared Services**—Defines external users and groups in external directory systems, and native users maintained in an Open LDAP database.
- **Repository**—Stores information for mapping between users and groups in source systems and users and groups in Shared Services.

See the *Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis Migration Guide*.

## SHORTCUT KEYS

Shortcut Keys increase usability:

Alt+1—Toggle masthead.

Ctrl+1—Toggle viewpane.

Alt+Ctrl+1—Toggle both.

## HYPERION SYSTEM 9 INSTALLATION CHANGES

The following sections highlight the installation changes for Hyperion System 9.

See the *Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis Installation Guides for Windows or UNIX*.

### *HYPERION LICENSE SERVER*

Hyperion License Server uses a license file specific to your site assisting you in tracking and monitoring the following:

- Purchased products
- Feature options
- Number of users that can access each product
- Maintenance agreements
- Expiration dates of your license and maintenance agreements

Hyperion License Server uses a third-party component giving you centrally managed administrative tools for handling license issues. This provides:

- Ensuring license compliance
- Monitoring use of licenses
- Generating reports of license events

Hyperion License Server is a process, not a physical server, and is not installed on a dedicated computer. Hyperion License Server can be installed on a shared computer, to install it in an environment that enables the most efficient use of resources.

See the *Hyperion System 9 Shared Services Installation Guide* available on the Hyperion Download Center.

## *HYPERION SYSTEM 9 SHARED SERVICE USER MANAGEMENT™*

Shared Services User Management centralizes management of user access rights and accessibility to applications created under projects of different products. The user management process allows the administrator or delegated administrator to associate users and groups to projects giving them specific roles in that application.

User IDs and groups may exist in various authentication systems and also within products in existing installations. Create users and groups and roles at the native level. Every product has product-specific roles defined at the product level.

A project contains one or more applications. Users or groups associated with applications are assigned one or more roles per application.

See the *Hyperion System 9 Shared Services User Management Guide* available on the Hyperion Download Center.

## *HYPERION CONFIGURATION UTILITY™*

The configuration utility guides you through a series of screens to complete the following:

- Product activation
- Product registration with Shared Services
- Configuration of relational databases as product data sources
- Automatic deployment of products to application servers

Products with unique configuration requirements use the Configuration Utility additional options.

Launch the Configuration Utility from the final screen of each product installer or from the start menu - Start > Programs > Hyperion System 9 Foundation > Configuration Utility. The Configuration Utility also enables you to reconfigure Hyperion products. The reconfiguration process is similar to the initial process.

## *SERVER AND PLATFORM SUPPORT*

Upgrades from 9.0.0 to 9.0.1:

- Platform support for HP and Linux.
- Configuration support for HTTP Server installed with WebSphere will be provided.
- Automatic configuration for IIS with Tomcat will be supported.
- App Server deployment support; must complete manually.
  - Oracle 10g Application Server
  - Java Enterprise Server 8.1

**Note:** Java Enterprise replaces SunOne

**Web Analysis**—Installed as a Windows service.

**Financial Reporting**—Components of Financial Reporting are distributable. The Financial Reporting Studio, Financial Reporting Services and Financial Reporting Web Application are installed in separate homes on one machine.

**Web Server**—Configuration with the configuration tool is a separate task, which runs as part of applications deployment; run the Web Server configuration as a standalone task.

**Configuration Tool**—A checkbox in the Configuration tool dialog shows which applications are deployed during application deployment; uncheck unwanted applications to deploy less than what is installed.

## UNINSTALL

**Improvements**—The registry will be clean, icons removed from add/remove programs, files modified by the configuration tool are removed; services stop before uninstalling.

# WHAT'S NEW IN WORKSPACE

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

## FINANCIAL REPORTING

Financial Reporting offers the following new features in Workspace:

**User Functionality**—Content includes subscription notifications, favorites, directory browsing options, and SAP BW support as a data source.

**Note:** Document definitions are not changing from prior releases.

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

## HYPERION WORKFORCE PLANNING™ SUPPORT

**Smart Lists**—Attribute-like values are assigned to members, assignments store as data in the Essbase cube for the member (e.g. 0, 1, 2, 3, 4) and the Planning Repository translates them to textual strings (e.g. 0="Straight Line Depreciation", 1="Double Declining Balance"). Financial Reporting enumeration support:

- Grids referencing cells in Planning databases contain enumerations return string values instead of numbers. String values display as results not numbers.
- The Text function GetCell() returns string values instead of numbers when referencing cells containing enumerations.

Conditional Formatting and Suppression are enhanced to allow selection of any cell (Data/Formula/Text) with the "Cell Value" operand. Previously only Data or Formula cells could be selected, and the Conditional dialog provided "numeric" comparison operators (<>=, etc.) for Cell Value, Row Values, Column Values and Current Row/Column Values. "Numeric" comparison operators and "string" comparison operators (equals, startswith, etc.) are allowed. Conditional Suppression refers to data cells containing enumeration strings and apply Conditional Suppression such as "suppress row if cell value B, 6 starts with 'ABC'".

## PRODUCTION REPORTING

Production Reporting offers the following new features in Workspace:

**Secure Report Bursting**—Extended support across Production Reporting output types. Web output types include HTML, BQD, XLS, and CSV. Printed output types include PDF, SPF, PS, LP, and HP.

**Smart View**—Smart View provides framework to integrate Microsoft Office Products with Financial Management, Planning, Analytic Services, and Workspace information. Embed Production Reporting job output into Microsoft Word, PowerPoint and Excel documents using Smart View.

**JSP based SmartForms**—Standard and Custom parameter forms generated for running Production Reporting and Generic jobs utilize Java Server Pages (JSP).

**Extended Interactive Reporting Service (Analytic Bridge Service)**—Embed Production Reporting job outputs from the Repository as a section of Interactive Reporting documents.

**Cascade Delete Jobs Outputs**—Delete Production Reporting, Generic or Interactive Reporting job with all associated job outputs.

**Email Notification improvements**—Full set of HTML files (includes control.js and navigation icons) as attachment. This allows access to Production Report navigation bar and table of contents for HTML reports.

## WEB ANALYSIS

Web Analysis offers the following new features in Workspace:

**Extended Interactive Reporting Service (Analytic Bridge Service)**—Export Web Analysis content to Interactive Reporting.

**Support EIS drill-through to URL**—Web Analysis documents allow EIS drill-through to URL definitions defined in Analytic Services data sources. Access the URLs, with Linked Reporting Objects and other links to external media, using the Related Content dialog box.

## INTERACTIVE REPORTING

Interactive Reporting offers the following new features in Workspace:

**Query Building**—Interactive Reporting in Workspace provides query building functionality, allowing end user to query databases and retrieve results. The Query component of Workspace supplies three methods to query relational data sources. Developers with database connectivity software may use a full 32-bit application. Power users without connectivity are given access to query using clients connected to the database through a server. Users create content from scratch, using add-on software installed on local machines and hosted by the web browser. Information consumer users typically utilize a thin client approach.

Users need data models to build queries and reports. Data models predefine sets of database tables and columns users access; it contains the information needed to join tables.

### *INTERACTIVE REPORTING WEB CLIENT CO-EXISTENCE*

**Web Client Co-Existence**—Use different releases of Interactive Reporting Web Client (formerly, Insight) on the same machine. To enable this feature, Interactive Reporting Web Client installations includes multiple releases of the application. Work with servers older than the Hyperion System 9 BI + server through Release 8.3 or later. Interactive Reporting Web Client installation does not have backward compatibility mechanism and only supports the System 9

release of the Interactive Reporting Web Client. Your release is determined at run-time when the Interactive Reporting document opens. Opening Interactive Reporting document in a Release 8.3 or later server, the 8.3 or later release of the Interactive Reporting Web Client is launched to serve the request.

Two Interactive Reporting Web Client releases are installed in this release: an 8.3 or later release and the current System 9 release. Each Interactive Reporting Web Client plug-in entity is separated on the disk and in the registry. Each release is installed in a separate folder under <IE Install Directory>\PLUGINS\Hyperion\<Insight Series Release> or under <Firefox Install Directory>\Plugins\Hyperion\<Insight Series Release>. The Interactive Reporting Web Client Launcher that provides 6x/8x co-existence has been enhanced for 8.3 or later/9.x and further co-existence. There still is a single launcher in the system associated with BQY mime-type and file extension.

**Locally Saved Documents**—Locally saved Interactive Reporting documents which save from disks from the Interactive Reporting Web Client append with release information. After re-opening the file, the release of the Interactive Reporting Web Client launches. The Interactive Reporting Web Client checks the server release to connect to the server. If the server is newer than the current Interactive Reporting Web Client, you are prompted to upgrade to the current release. The older release accesses the URL of the server, launches the zero administration page, and performs the upgrade. The Interactive Reporting Web Client opens from the disk using file name in the upgraded release.

Interactive Reporting documents created in previous releases of the Interactive Reporting Web Client, or Designer, are prompted for the server release to use. Select from a list of eligible releases of the Interactive Reporting Web Client releases, including the 6.x release. If you select a 6.x release, no release record attaches to the document because there is no command on the Tools menu to open the document in another release of the Interactive Reporting Web Client.

After the Interactive Reporting Web Client is launched, change the Interactive Reporting Web Client designated to open the document by selecting the following options from the Tools menu:

- Change Web Client release to open this file
- Make this Web Client default for locally saved BQY files

**Interactive Reporting Web Client Mismatches**—A mismatch between the Interactive Reporting Web Client series required by the server and the launched Interactive Reporting Web Client, prompts you to select a compatible release. The Interactive Reporting Web Client releases 8.3 or later and 9.x detects required releases of the plug-in and prompt you to select a compatible release. When selecting compatible releases, a file-release record saves and the document is reloaded. If you select from the 6.x series, a file release record is not saved, but existing release records are removed.

Required Interactive Reporting Web Client series information is only provided by the 9.x release servers: if unavailable, you are connected to an 8.3 or later or 6.x server (which is detected by specific cookies and the absence of later release server cookies). Otherwise, you are connected to an 8.3 or later server. If you open a document in the Interactive Reporting Web Client in a greater release number than is required by the server (A document from a 6.x server is opened in an 8.3 or later server), the Save on Exit prompt is suppressed when the document is reloaded to prevent accidental upgrading.

### *HYPERION SYSTEM 9 BI+ IMPACT MANAGEMENT SERVICES™*

Impact Management Services eliminates problems associated with database changes and broken reports by automating the propagation of changes across your affected reports. Change the interface between your reports and the database (the data model), so reports are not affected. Database changes resemble edits in written documents. Search for an interface to an obsolete database and replace it with an up-to-date interface.

**Capture Meaningful Views of Metadata**—Impact Management Services dynamically extracts metadata from your databases and BI reports and makes it available through easy-to-understand dashboards that visually convey the analysis of your environment. Impact Management Services is innovative in its approach in a number of ways and provides metadata metrics in the following areas:

- Data Access delivers information on what Tables and Columns are used.
- Report Structure provides information on how reports use the database, how they manipulate the information, and how data is presented.
- Operational Usage shows who ran the reports, when and how often reports are run, how long they took to run, and how many records were returned. With helpful metadata about operational usage, easily build profiles to know which parts of your BI system are used most often. This information is valuable as you manage your BI environment.

**Improve IT Maintenance Decisions**—Impact Management Services helps your effectiveness by gathering intelligence you have locked inside your BI systems and making it available for solving business problems. Review metadata to understand:

- What impact database changes have on my reports?
- Which queries and reports will be affected?
- How many redundant reports exist in my BI environment?
- Has this report been created?
- How many similar reports do we have?
- Will next month's board reports still work?

**Automate Updates to Reports as your Database Changes**—Master data models provide uniform starting points for producing many BI reports. When business conditions change, however, database structures change, too—so reports that contain these data models also change. Data model changes include structural revisions like splitting tables, introducing joins, and dropping, adding, renaming or moving columns. Changes like these introduce common problems—like broken reports and dependencies—that need to be resolved, but addressing them using traditional methods is time-consuming, error prone and expensive.

**Impact Management Services**—Impact Management Services eliminates problems associated with database changes and broken reports by automating the propagation of changes across affected reports. Impact Management Services can change the interface between your reports and the database (the data model), so reports are not affected. Database changes resemble edits in written documents. Search for an interface to an obsolete database and replace it with an up-to-date interface.

## PERFORMANCE SCORECARD

Performance Scorecard offers the following new features in Workspace:

**Exporting Data**—Export data to Microsoft Excel modifying information in Excel spreadsheets, export results from a report to PDF files for printing, and export a Cause and Effect map as an image file.

**Data Mining**—Ad-hoc ability to drill data directly from the Workspace to modify data, create business objects, or view additional measure details.

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

## ENTERPRISE METRICS

Enterprise Metrics offers the following new features in Workspace:

**Workspace**—HTML client for end users to view and analyze business metrics, embedded in the BI+ Workspace.

**Personalization Workspace**—Java client for end users with viewing and analyzing capabilities identical to Workspace. The Personalization Workspace has the ability to create personalized dashboards. Personalization Workspace launches out of the BI+ Workspace into a separate window.

**Content links**—Create related content links to link content from Web Analysis and Financial Reporting.

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

## WHAT'S NEW IN BI+ STUDIOS

The term studio refers to Java or Windows components which have a rich authoring environment.

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

## PRODUCTION REPORTING STUDIO™

Production Reporting Studio offers the following new features:

**Streamlined Report Wizard**—Convenience of a reorganized Query Builder wizard with consistent selection/conditions regardless of data source and tabs to improve navigation.

**Report Layout Explorers**—Access report control properties, queries or objects from the menu bar, context menu or from the Explorers in Production Reporting Studio. The Explorers include the Query Explorer, the Object Explorer, and the Property Explorer.

**Editor Unicode support**—The Source editor tab supports editing of Unicode characters. This enables users to save Production Reporting files under Unicode or platform encoding (Latin 1) formats.

**User Interface enhancements**—Toolbars with new icons, and expanded right-click options. Enabled tab order; enabled keyboard navigation; expanded alignment options; ability to minimize, maximize, and close wizards, enabled shift and ctrl-click across wizards; and disabling of non-available features.

**SAP BW Enhancements**—Search for InfoProviders by description or technical name, filter with **and** and **or** conditions and limit the amount of metadata retrieved at one time via the range function.

## PRODUCTION REPORTING STANDALONE ENHANCEMENTS

**Functional and Platform Improvements to SAP BW Reporting**—Improvements:

- Access to SAP BW InfoProviders (ODS, InfoSets)
- SAP Variables
- Advanced filtering to restrict the result set
- Currency and unit of measure conversion
- Data cursoring to allow for high volumes of data processing

- Increased platform support of SAP BW to 3.0B, 3.1 and 3.5
- Certified for SAP NetWeaver (OLAP BAPIs)
- ANCESTOR and DESCENDANTS clauses
- Support for Key Figure Attributes - currency, formatted, unit, value type
- Large Object (CLOB, NCLOB, BLOB) data type support for Oracle data sources.
- DRAW command to specify LineArt properties (color and rounded borders) for boxes and lines.
- ODBCExecuteRetry to [Default-Settings] in SQR.INI
- Set packet size when connecting to Sybase
- Pass Unicode values with UFUNC.C.
- Add a Last Page Value to a Bar Code
- Call C++ Libraries from an SQR Program

**Charting Functionality**—Enhancements to chart creation include:

- Attributes for the number of rows and columns in a legend
- Attributes for pie chart percentage precision and pie chart label location
- Ability to specify fonts and colors
- Greater control of the name and color for the **other** pie chart slice

**Excel Output Type**—Production Reporting generates Excel outputs that maintain report data and formatting. This option is also available for Production Reporting in the Workspace.

## WEB ANALYSIS STUDIO™

Web Analysis Studio offers the following new features:

**Custom Document Component Services Button**—Member Search functionality has been added to the Services button used in custom Web Analysis documents. This option enables custom document end users to display the Search dialog box. The Search dialog box is used to locate specific dimension members in large heirarchies using strings or member attributes.

## INTERACTIVE REPORTING STUDIO

Interactive Reporting Studio offers the following new features:

**Automatic Document Refresh**—Using the plug-in, locally saved documents are synchronized with content in the repository. Sections of the same name are replaced with copies from the repository and sections that do not exist in the locally saved version are added.

**Chart Colors**—Charts created globally in Release 8.4 and later use the default colors available in the Default Color Palette. The **Use legacy colors for data points** check box is unchecked on the Default Fonts and Styles dialog box.

Single chart use the default colors available in the Default Color Palette by unclocking the **Use legacy colors for data points** check box on the General tab of the Chart Properties dialog.

If you want to use the default colors from the Legacy Color Palette, enable the **Use legacy colors for data points** check box on the General tab of the Chart Properties dialog.

**Charting enhancements**—This feature enables users to have different default colors for charts. Color schemes remain consistent across modules.

**General tab of Chart Properties**—When this feature is enabled, Smart Scaling does not remove text (it does not clip or overlap text if an object is resized or repositioned to a minimum font size). This feature checks for Chart sections, and unchecked for 8.3 or later releases and earlier that have Smart Scaling enabled. Inserted text and legends are not affected by your field selection. Smart Scaling shrink these objects, but never eliminated.

**Extended Access for Interactive Reporting**—Jointly analyze multidimensional and relational sources in one document. It retrieves the flattened OLAP results from a Web Analysis, Production Reporting and Financial Reporting FR query in the System 9 BI+ repository and imports the data into the Interactive Reporting document (.bqy) as a results section. Extended Access for Interactive Reporting provides the following:

- Ad-hoc analysis by drilling down, swapping, and pivoting on the data to see patterns or exceptions
- Results section can be used as a data source and can be joined with other data sources from the database or other tables
- Offline analysis for multidimensional data
- Interactive Reporting document can be refreshed with multidimensional data
- Query/Report (Web Analysis) can be refreshed in the Hyperion System 9 BI + Workspace
- Latest job output/snapshot (Production Reporting and Financial Reporting) can be retrieved

**Smart View**—Integrates Microsoft Office Products with Financial Management, Planning, Analytic Services and Workspace information. Smart View for Office replaces spreadsheet add-ins for Financial Management and Planning; compatible with Analytic Services.

**Microsoft Windows Colors and Styles**—Specifies colors and styles scheme used in the Interactive Reporting Studio, or the Interactive Reporting Web Client. The selection in this field updates the UseSystemColors registry key setting in the Designer or plug in folder of the registry. Enable this field to use legacy colors and styles based on Microsoft Windows.

Disable this field to use Workspace colors and styles. Before the setting in this field can take effect, the application must be closed and restarted. This option is enabled on the General tab of the Interactive Reporting Studio Options dialog.

**Document Properties Option**—Document Properties option has been added to the File Menu in the Interactive Reporting Studio and Interactive Reporting Web Client. The Document Properties option consists of the General and Server tabs. The General tab describes application creation and version information associated with a given Interactive Reporting document. The Server tab specifies the server address associated with document created or maintained in the Information Reporting Web Client application.

**Fractional Digits**—A Fractional Digits field has been added to the Filter dialog box. Allowing you to specify the number of digits you want to place to the right of the decimal point in an SQL numeric literal statement. The SQL statement uses this setting to determine which values to recognize.

**Exporting to Microsoft Office HTML File Formats**—Export and deploy a section to be deployed on an intranet or internet, and work back and forth between the HTML file and Microsoft Office 2000 Excel. This happens with Microsoft Office 2000 HTML (\*.html) or Microsoft Office Web Archive (\*.mhtml) file formats. File formats preserve and recognize formatting attributes, formulas and Visual Basic for Applications macros (VBA) created in the original section.

This feature uses Microsoft Office XML (extended markup language) tags in addition to the HTML. When exported sections open in Microsoft Office (specifically Excel), the formatting and formula from the original section are preserved and recognized. Modify the file again and save it as an HTML file without the loss of HTML code. If you modify the file and save it in Office Excel file format, the HTML tags are not retained.

Sections exported to Microsoft Office 2000 HTML (.html) file format have the main web page saved in one folder and all the graphics and other related information (such as VBA macros) in another.

Microsoft Office 2000 Web Archive (.mhtml or.mhtm) refers to MS HTML, which is a standard for including objects in the same file as the HTML code (.gif and .jpeg files). Objects are encoded using the MIME HTML Internet standard. You might use this file format if you plan to email the HTML as a single file.

**Exporting to Microsoft Office HTML File Formats**—Export and deploy sections on an intranet or internet, and work back and forth between the HTML file and Microsoft Office 2000 Excel. This is achieved by using the Microsoft Office 2000 HTML (\*.html) or Microsoft Office Web Archive (\*.mhtml file formats). These file formats preserve and recognize formatting attributes, formulas and Visual Basic for Applications macros (VBA) created in the original section.

This feature uses Microsoft Office XML (extended markup language) tags in addition to the HTML. When the exported section is opened in Microsoft Office (specifically Excel), the formatting and formula from the original sections are preserved and recognized. You can modify the file again and save it as an HTML file without the loss of HTML code. If you modify the file and save it in Office Excel file format, the HTML tags are not retained.

A section exported to a Microsoft Office 2000 HTML (.html) file format has the main web page saved in one folder and all the graphics and other related information (such as VBA macros) in another.

Microsoft Office 2000 Web Archive (.mhtml or.mhtm) refers to MS HTML, which is a standard for including objects in the same file as the HTML code (.gif/.jpeg files). Microsoft Office 2000 Web Archive (.mhtml or.mhtm) refers to MS HTML, which is a standard for including objects in the same file as the HTML code (.gif and .jpeg files). Objects are encoded using the MIME HTML Internet standard. You might use this file format if you plan to email the HTML as a single file.

**Saving an Interactive Reporting Document to the Repository**—Save modified Interactive Reporting documents (.bqy) or document jobs to the Repository. The Repository manages documents and distributes documents over a wide network for end-user query and reporting.

Saving the document to the Repository can be made by saving the document with changes to the original document (Save option), or by saving the document as a new document (Save As). If you do not have permission to overwrite a document, you must use the Save As feature.

## *DASHBOARDS*

**OnCellDoubleClick() Method**—The OnCellDoubleClick() method is accessible for the Dashboard section objects. This method is only available when a Dashboard section containing data is included in the Dashboard document.

Setting the OnCellDoubleClick() method is equivalent to repeating the action of clicking the last cell clicked in the UI.

**TopLabelValues Array**—The TopLabelValues Array is accessible for the Dashboard section object. This Array is only available when a Dashboard section containing a Pivot Embedded Section Object (ESO) is included in the BI document.

The TopLabelValues Array is a Java Script array returned instead of a standard (ESO) object. It is accessible through the Script Editor.

The TopLabelValues Array is present whenever a Pivot Embedded Object is available in the Dashboard, regardless of whether the Pivot contains data. It is refreshed each time a Pivot ESO cell is clicked in the UI, or the OnCellDoubleClick() method is used.

An array is used because of uncertainty of the TopLabel hierarchy whenever. The array forces users to iterate through and get values each time to ensure it is up to date. It avoids x.y.z.name structures of objects becoming ambiguous and/or incorrect with changes of the Pivot Top Labels.

The Array is read-only. Attempts to change values in the array will have no effect, scripts will continue and this action will not change the Pivot TopLabel Values.

**SideLabelValues Array**—The SideLabelValues Array is accessible for the Dashboard section object. This Array is only available when a Dashboard section containing a Pivot Embedded Section Object (ESO) is included in the BI document.

The SideLabelValues Array is a Java Script array returned instead of a standard (ESO) object. It is accessible through the Script Editor.

The SideLabelValues Array is present whenever a Pivot Embedded Object is available in the Dashboard, regardless of whether the Pivot contains data. It is refreshed each time a Pivot ESO cell is clicked in the UI, or the OnCellDoubleClick() method is used.

An array is used in this case due to the uncertainty of the SideLabel hierarchy at given times. The array forces the user to iterate through and get the value each time to ensure it is up to date. It purposefully avoids the standard x.y.z.name structure of an object which could become ambiguous and/or incorrect with changes of the Pivot Side Labels.

The Array is read-only. Attempts to change values in the array will have no effect, scripts will continue and this action will not change the Pivot SideLabel Values.

**OnCellDoubleClick Event**—The OnCellDoubleClick Event is accessible for the Dashboard section object. This Event is only available when a Dashboard section containing an Embedded Pivot Section Object (ESO) in Active mode is included in the BI document.

OnCellDoubleClick Event is a script container. It is accessible through the Script Editor.

Event scripts runs when the Pivot ESO is in Active Mode, is in Designer or Plug-in, and is double clicked.

Executing the OnCellDoubleClick Event itself does not dirty the document. Actions invoked by the OnCellDoubleClick Event may dirty the document. Which action is invoked determines whether it persists or not with the document or the application.

**FactName Property**—Accessible for the Dashboard Pivot Embedded Sections Objects (ESOs). This property is only available when a Dashboard section containing a Pivot ESO in active mode is included in the document.

Reading the FactName property is equivalent to noting the name of the related Pivot Fact when clicking an individual cell in a Pivot ESO. The FactName Property is read-only.

Value returned should be a string representing the un-formatted Java Script value of the cell. Default value of the property is the name of the fact associated with the cell selected. When no Fact exists and the property value is retrieved, the property will return an empty string.

The FactName Property should work the same in Designer and Web Plug-in. It is not supported in Thin Client and Schedule Module.

FactName Property was implemented in version: 8.3.2.123 (SP1).

**CellValue Property**—Accessible from the Dashboard Pivot Embedded Sections Objects (ESOs). This property is only available when a Dashboard section containing a Pivot ESO in active mode is included in the document.

Reading the CellValue property is equivalent to noting the value when clicking an individual cell in a Pivot Embedded Section Object. The CellValue Property is read-only. The property returns a Value of type VARIANT representing the un-formatted Java Script content of the cell. The user must format it using Java Script. Default value of the property is the value of the cell selected.

Cells with no intersection with generate a catchable exception and no value will be returned.

When no data exists at the intersection, it returns a catchable “no such property” exception. The script halts without try/catch and continues after catch if employed.

The CellValue Property should work the same in Designer and Web Plug-in. It is not supported in Thin Client and Jobs/Scheduler.

**Referencing a Name With a Single-byte Character**—When using the Embedded Browser control of the Dashboard section to embed content from the Repository, and it references a name (file name, directory, section, parameter) that contains a single-byte character with a value greater than 127 (accent characters), and the SmartCut encoding for URLs is set to default, the characters display as scrambled and the embedded content may not display properly. In this case, change the encoding for urls property to UTF8.

## ENTERPRISE METRICS STUDIO™

Enterprise Metrics Studio offers the following new features:

**Studio and Studio Utilities**—Used by the Designer to create content for end users to view and analyze, such as hierarchies, metrics, chart templates, reports, and dashboards. It is a completely separate user interface from the Workspace.

**Data sources**—Users can access Planning as a data source for information in the Studio design process. Performance Scorecard can also access Enterprise Metrics to gather metadata and data.

**Content links**—Users can create related content links to link content from Web Analysis and Financial Reporting.

## DASHBOARD STUDIO

Dashboard Studio offers the following new features:

### *DASHBOARD STUDIO*

**Sort**—Enables sort specifications to be configured for columns or dimensions of chart, pivots, reports, and tables. A dynamic sort feature sorts all Side Labels/X Categories. Sort buttons are on standard button bar.

**Wide View**—View matching charts and pivots in Wide View mode. Wide View extends charts and pivots to cover the entire width of the frame. This mode hides items on the side-label navigation panel. Users can switch between Wide View to Standard View modes.

**Switch Pivot Facts**—Specify pivot fact columns to be visible when the dashboard first opens. End users can add or remove fact columns.

**List Expansion**—Extend the tool tips function to display a list of items in a list or drop-down list.

**Reverse Order Quick Filters**—Specify Quick Filter drop-down list and list box values to be loaded in ascending or descending order.

**Chart Spotlights**—Spotlighted charts contain a locked state and cannot be altered by other features that may cause applied color loss. Features that interfere with Spotlights include switching between two-dimensional and three-dimensional charts, switching the legend, changing chart types, using Quick Slice, and applying the Chart Shade component.

## *NEW FRAME LAYOUTS*

Frame\_Library.bqy, located in the /templates directory, contains all available frame prototypes designed by Hyperion. It is recommended that sections from Frame\_Library.bqy are merged into the Base Template.bqy to create custom templates.

## *COMPONENTS*

**Format Header**—Generate headers for dashboard frames and reports based on currently applied filters. When filters are applied, the header recomputes based on selected values.

**Drill and Slice**—Create a hierarchy as a basis for navigating through a data set in an Interactive Reporting document.

**Quick Query Limits**—Set Query Limits with drop-down lists, list boxes, check boxes, option buttons, calendar controls, and tree controls. The component includes a Favorites feature which captures and stores the current set of selected limits.

**Conditional Sub-Queries**—Sort through detailed transactions highlighting low level exceptions, and identify the small number that fail to meet the required threshold.

**Point of View (POV)**—Display and manipulate Enterprise Metrics Studio, Web Analysis Studio, and Financial Reporting Studio views embedded within Interactive Reporting documents.

**Graphic Gauges**—Visually summarize information. A gauge is a set of images positioned on top of each other. By default, all the images are invisible and have an associated rule to indicate which image is to be made visible. Use the predefined gauge styles or create your own gauge styles using images.

**Chart Shade**—The component supports two modes; color and hatching or monochrome. Select palettes using the Chart Shade Properties configuration frame.

## *DASHBOARD STUDIO OPTIMIZE UTILITY*

**Lock/Unlock Data Models**—Specify data models to be locked or unlocked in an Interactive Reporting document.

**Duplicatable/Unduplicatable Sections**—Specify sections that are or are not available to be duplicated.

## WHERE TO GET MORE INFORMATION

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

For answers to questions about the product, contact your authorized technical support provider or:

Hyperion Solutions Customer Support

Phone: 203.703.3600 (outside the U. S. A.)

Phone: 877.901.4975 (in the U. S. A.)

Internet: <http://support.hyperion.com>

Visit the Hyperion Solutions Web Site Home Page at <http://www.hyperion.com>.

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