A Hands-On Guide for

Creating Hyperion Planning 11.1.2.2 Data Forms Part II

Working with Planning Form Formula Column

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Guide for Hyperion Planning Developers. The document focuses on how to Create Hyperion Planning Data forms. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Review#1	Amit Sharma	18th Aug 2012

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Introduction to Hyperion Planning Form Formula Column

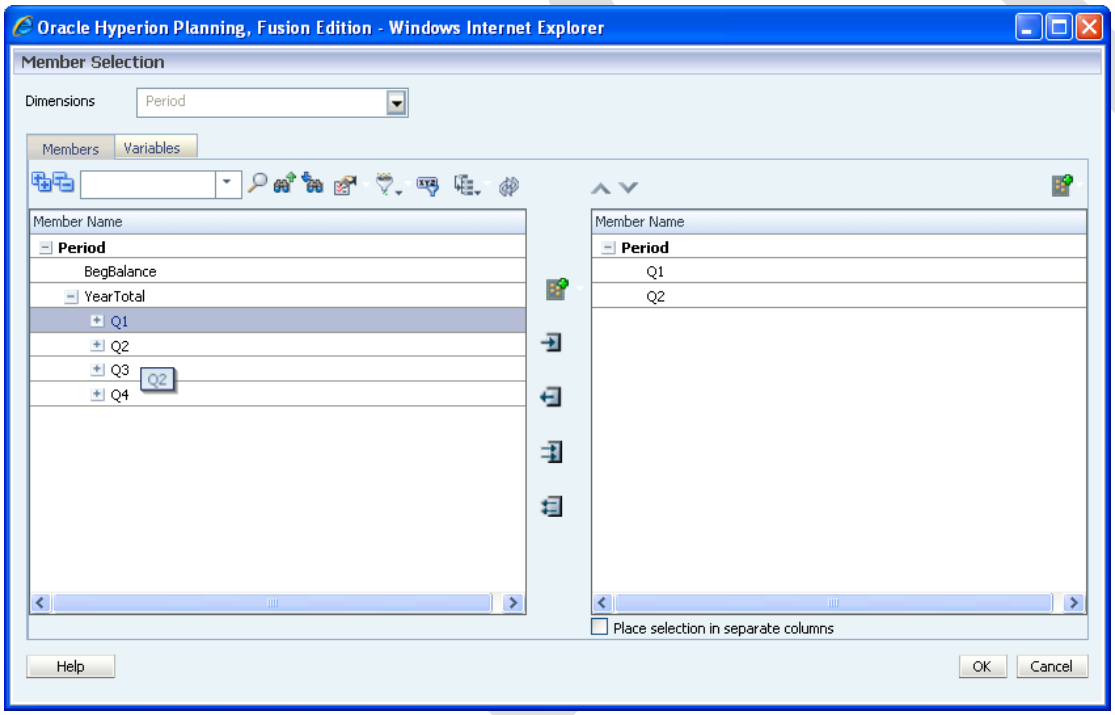
With the new release of Hyperion Planning there are many new features are available now which were awaited for long. There is one of the most awaited feature is now available with Data Form "Adding Formula in Data Form". Now, one can use Data form as adhoc grid with custom defined formulas. To make is simple I'm showing many example. Hyperion comes with many new built-in functions. The details of the functions can be downloaded from Hyperion Planning Admin guide. The objective of the below document is demonstrate how to use these functions for new bees.

After you create a formula row or column, create the formula in the formula bar that displays above Point of View in the form Layout page. Formulas include grid references, mathematical operators, and, optionally, mathematical functions

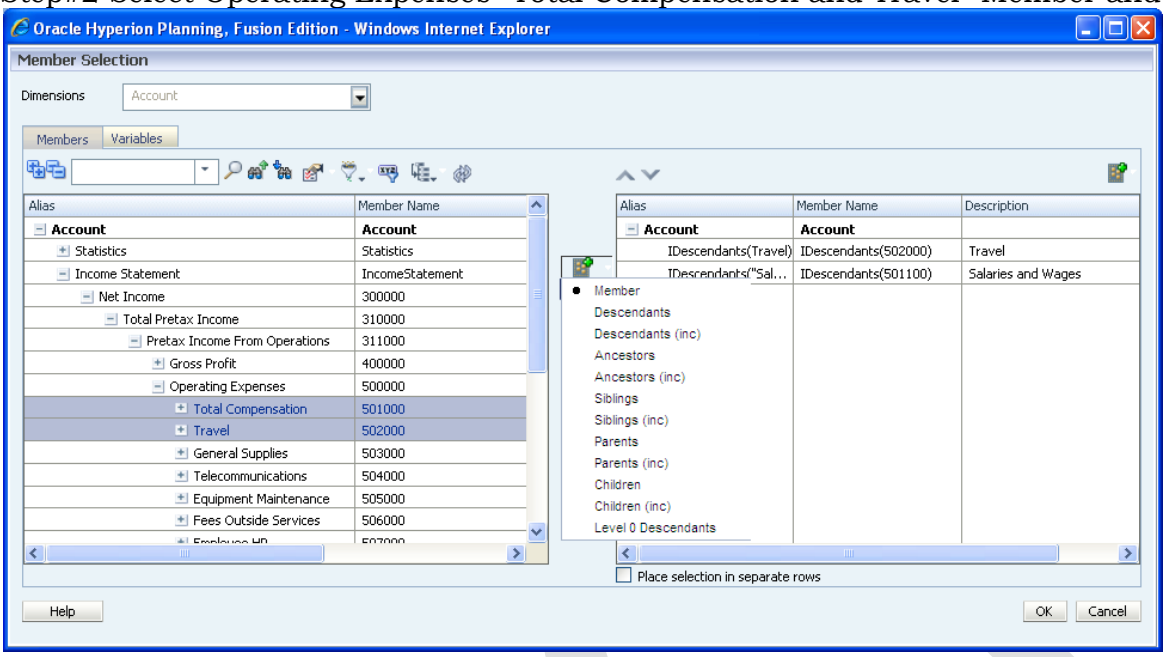
Example#1: Displaying Half year Sales using Sum Function

Displaying Half year Sales whereas Half Year is a Data Form Column Formula.
Pl refer the previous document " " to know how to create Data form.

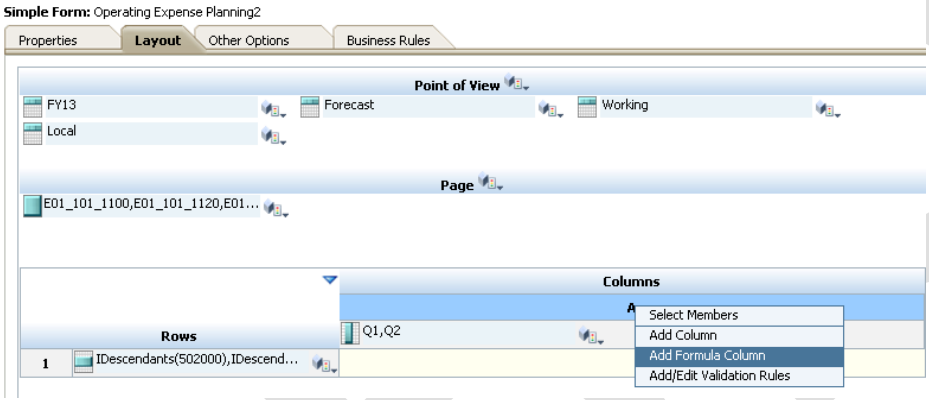
Function definition: Sum Returns the sum of a row, column, or cell.
sum(column[E], column[G], column[I])
Step#1 Select Q1 and Q2 in Column axis.



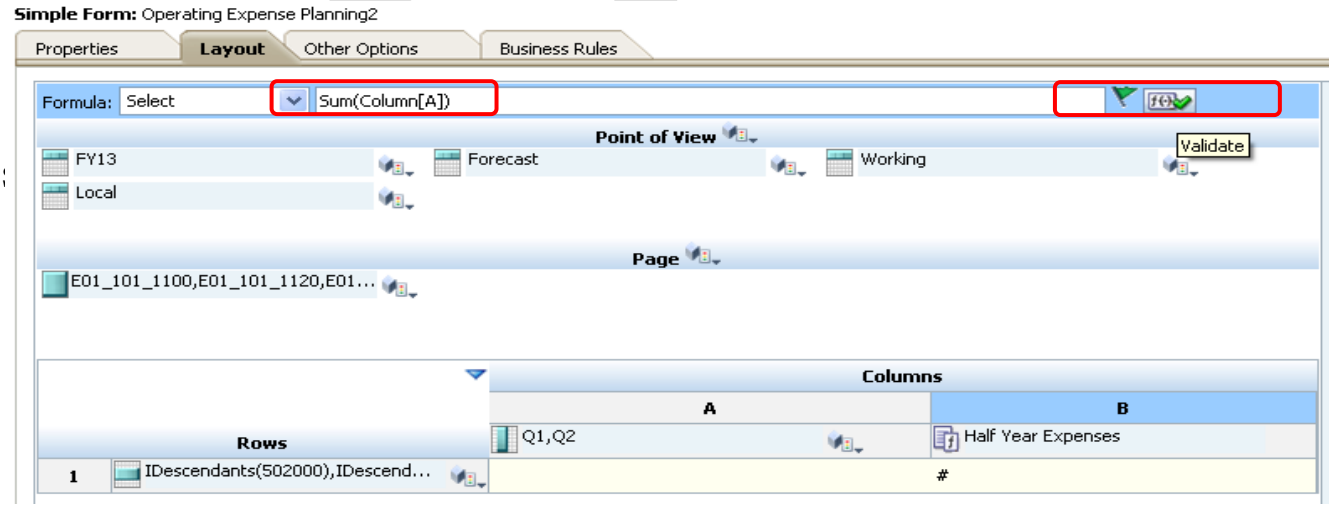
Step#2 Select Operating Expenses “Total Compensation and Travel” Member and Descendants

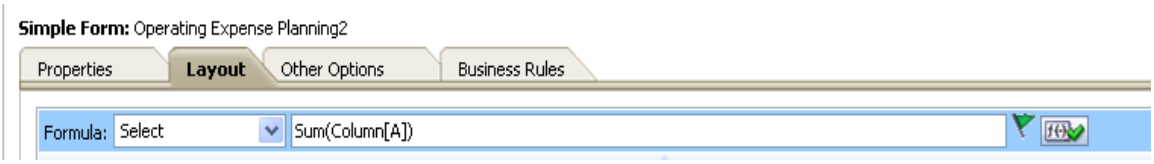


Step#3 : Add Column as “Add Formula Column”

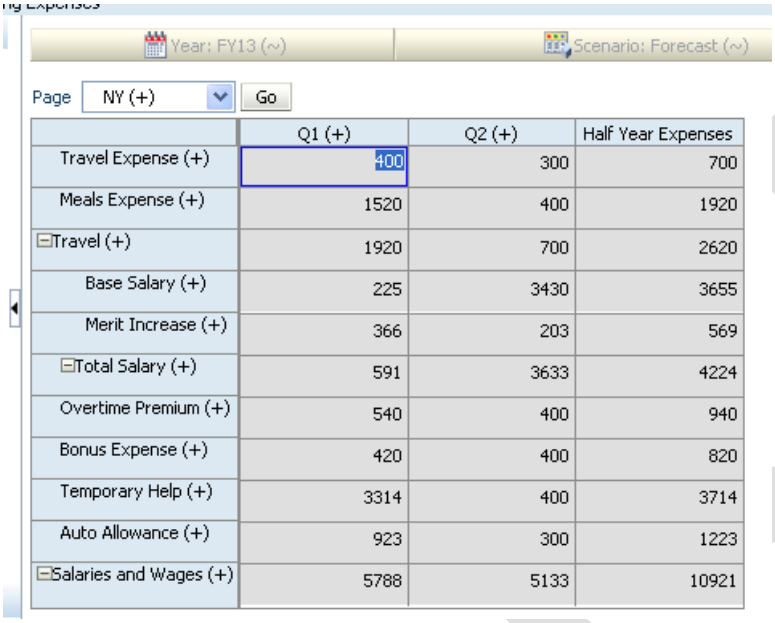


Step#4 Define Column formula and Name it. Ensure you validate the formula for syntactical errors.





Step#5 You can see in the below screen, the sum of Jan and Feb displays in "Half Year Expenses" Column

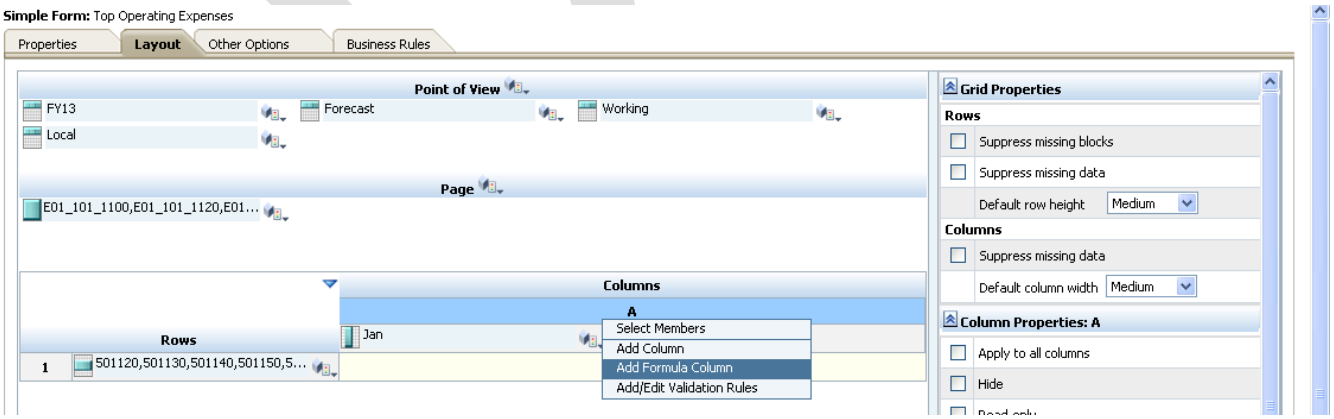


	Q1 (+)	Q2 (+)	Half Year Expenses
Travel Expense (+)	400	300	700
Meals Expense (+)	1520	400	1920
⊟Travel (+)	1920	700	2620
Base Salary (+)	225	3430	3655
Merit Increase (+)	366	203	569
⊟Total Salary (+)	591	3633	4224
Overtime Premium (+)	540	400	940
Bonus Expense (+)	420	400	820
Temporary Help (+)	3314	400	3714
Auto Allowance (+)	923	300	1223
⊟Salaries and Wages (+)	5788	5133	10921

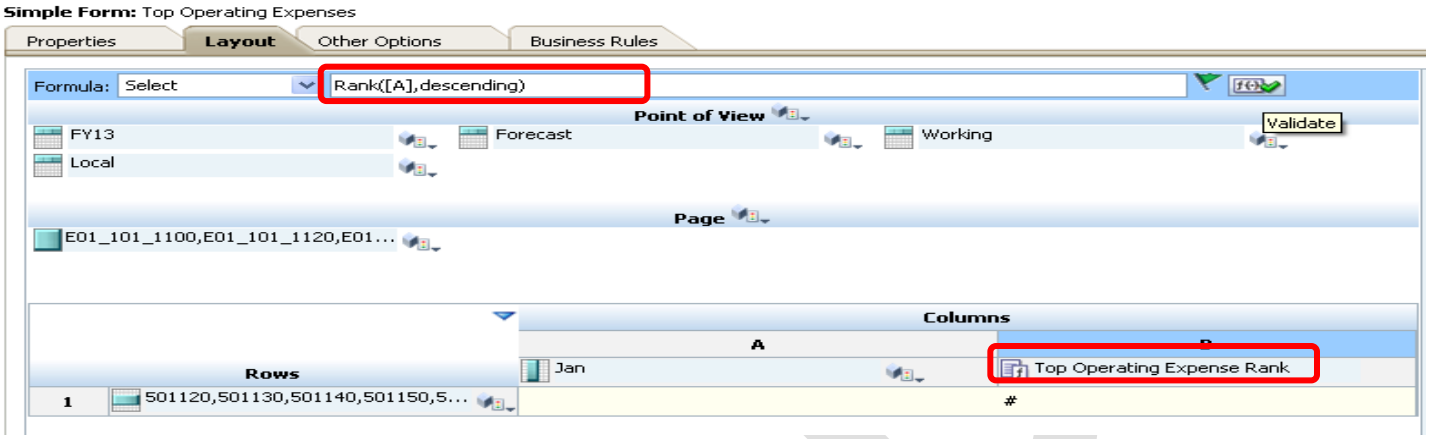
Example#2 List top 5 Operating Expenses: Rank function definition

Function Definition : Rank is a financial function that provides a rank value for a value in a specified range. The Rank function is processed by Oracle Hyperion Financial Reporting and does not depend on the database connection. The function syntax is as follows:
Rank([Reference], Order)
Rank([Reference], Order, Unique)

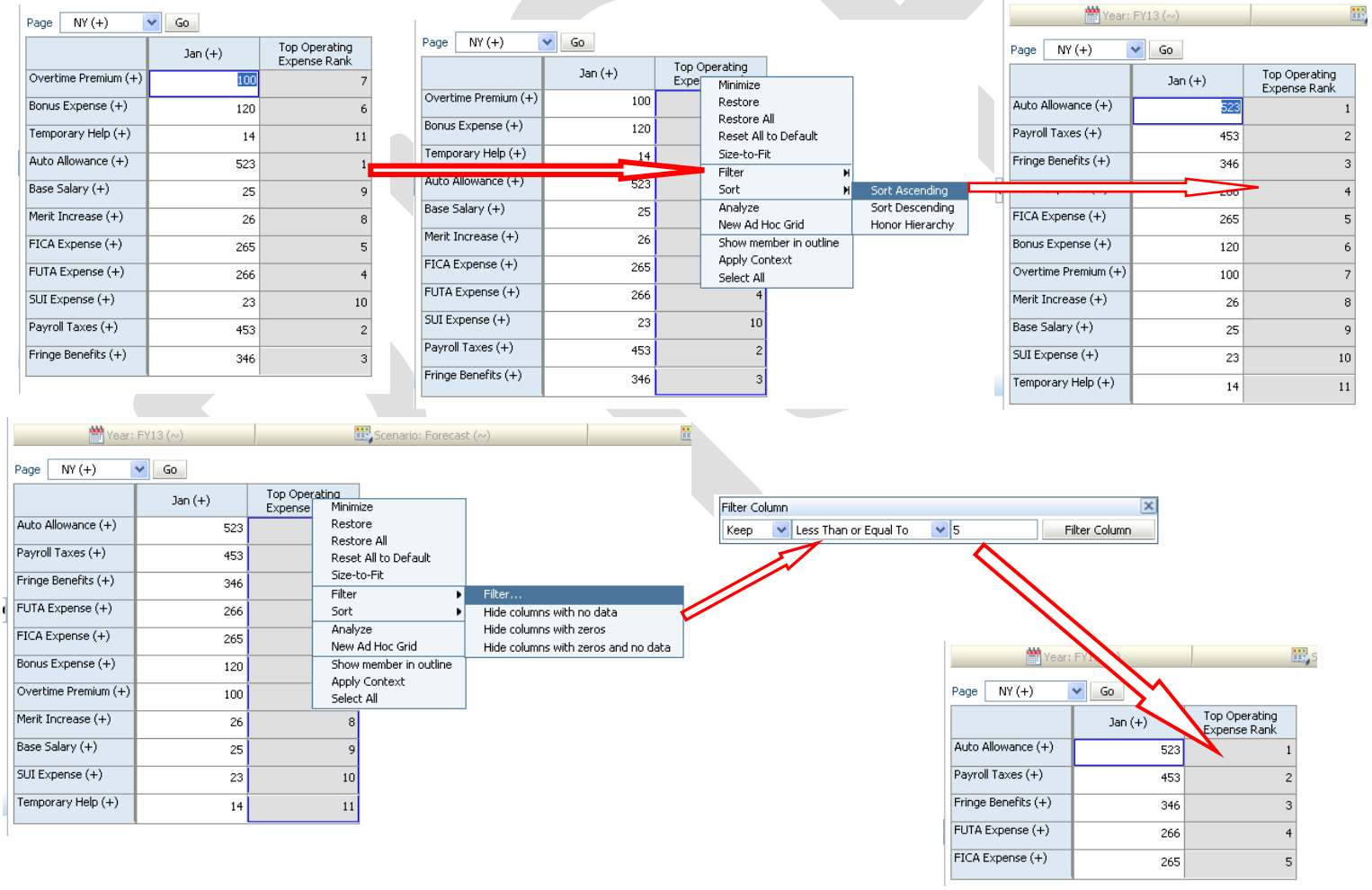
Step#1 Add Formula Column.



Step#2 : Add Rank Formula with Column A (Operating Expenses)

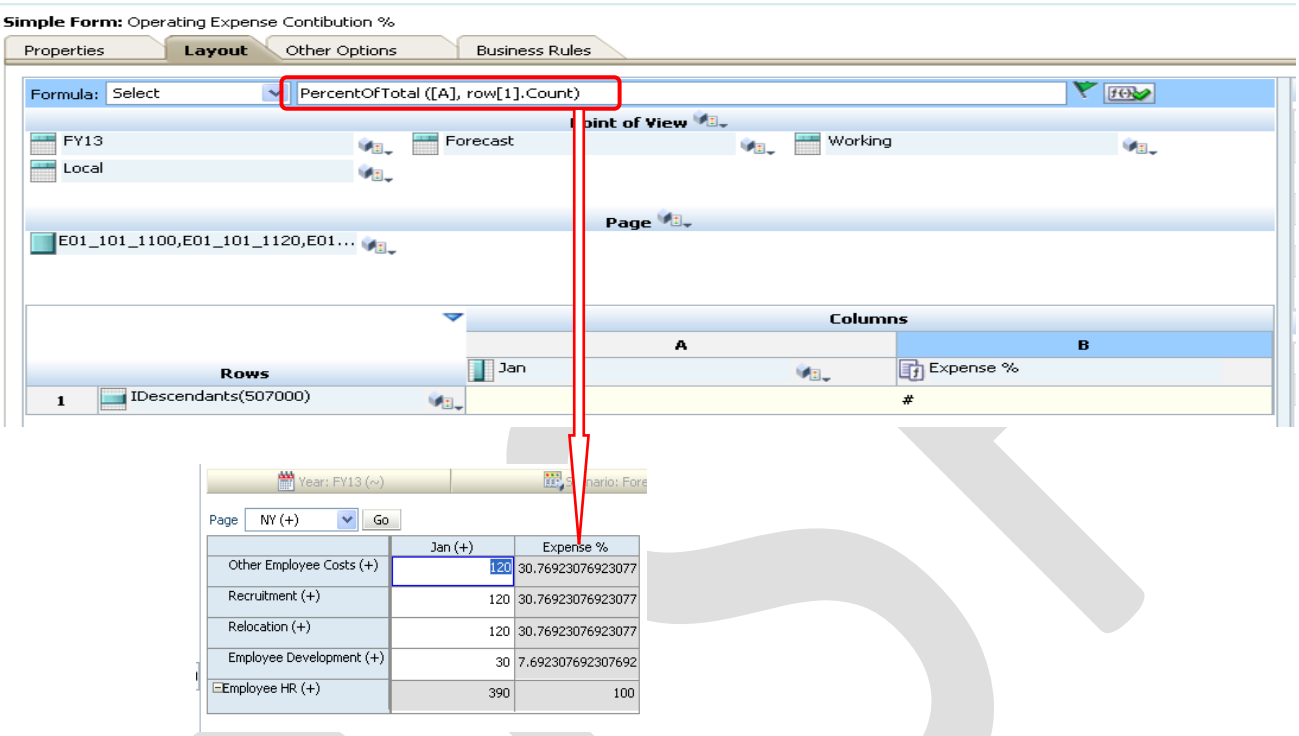


Step#3: Final Output. Now we would like to sort it and filter only first 5 records.
Save and Finish



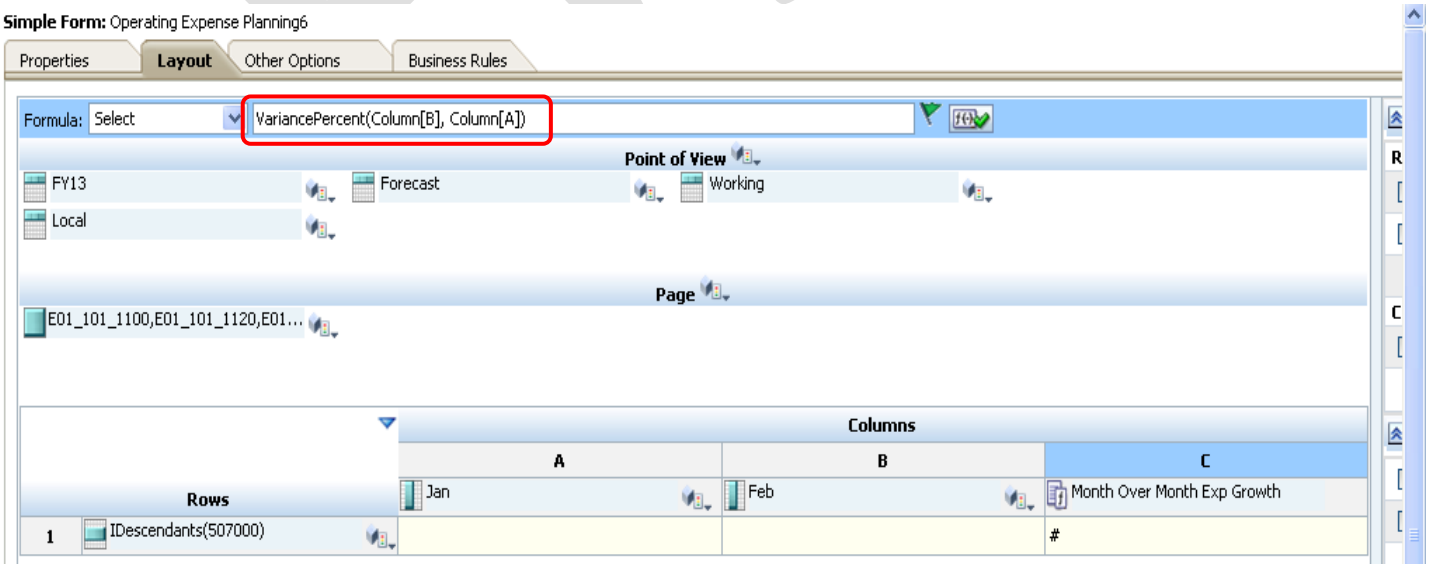
Example#3 : Calculating the "Operating Expenses Contribution % " using Formula Definition : PercentOfTotal

PercentOfTotal is a mathematical function that returns the result of a numeric value, row, column, or cell divided by another numeric value, row, column, or cell which is multiplied by100. The function syntax is:
PercentOfTotal (arg1, arg2)



Example#4 Calculating "Month Over Month Expense Growth" using VariancePercent function

Function Definition : Variance is a financial function that evaluates the difference between the specified values based on account type for the current account. For example, for Expense or Liability accounts, a positive result represents a decrease, so the result appears as a negative number.



Below is the output, the difference between Jan and Feb Expense growth in “Month Over Month Exp Growth Column”

Year: FY13 (~) Scenario: Forecast (~)

Page NY (+) Go

	Jan (+)	Feb (+)	Month Over Month Exp Growth
Other Employee Costs (+)	120	120	0
Recruitment (+)	120	140	-16.66666666666666
Relocation (+)	120	10	91.66666666666666
Employee Development (+)	30	50	-66.66666666666666
⊟Employee HR (+)	390	320	17.94871794871795

Example#5: Calculating Relocation Claim using IF Condition and IsMissing Function.

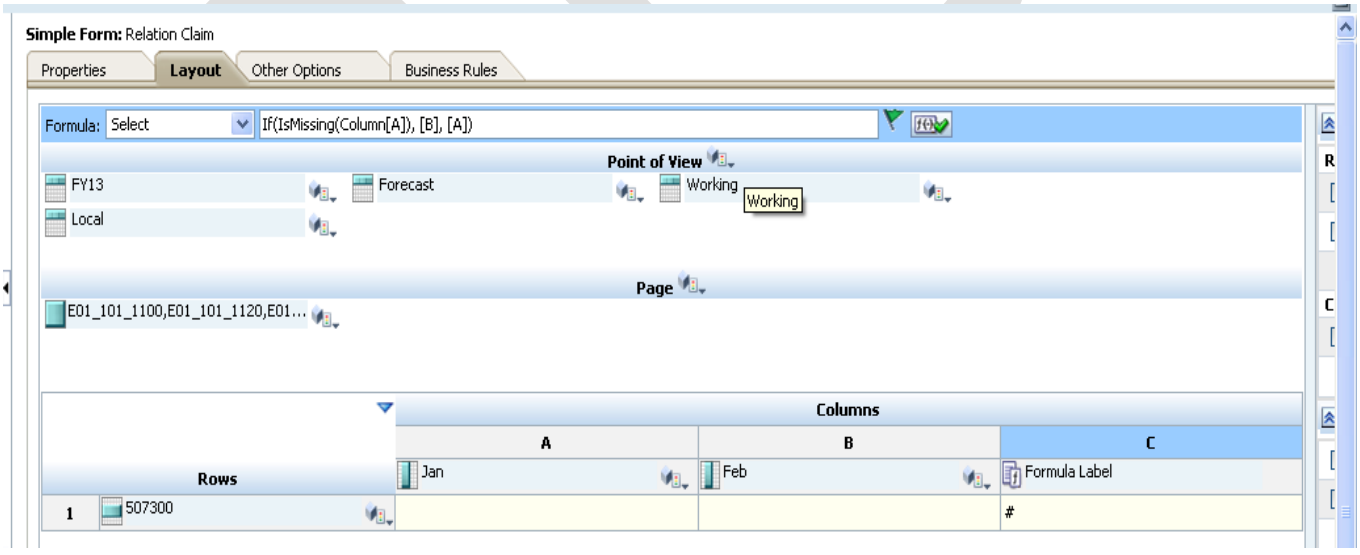
Can be done in Jan or Feb. If the relation claim is done in the Jan month, it should take Jan Month Value. However, if the claim isn’t done in Jan month It will take Feb Month Claim.

Function Definition IsMissing

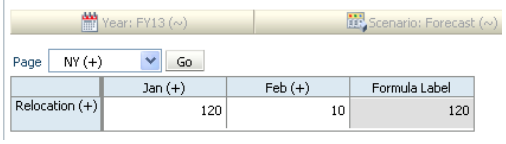
IsMissing `IsMissing` *(reference)*
`IsMiss` *(reference)*
Tests if the reference contains a #MISSING result.

IfThen, If

IfThen is a conditional function that returns a value when the condition equals True, and another value when the condition equals False.
The function syntax is as follows:
IfThen(Condition, TrueParameter, FalseParameter)

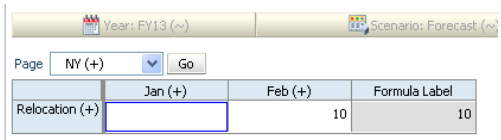


Case I In the month of Jan claim isn't done, therefore it has taken Feb Month value as claim



	Jan (+)	Feb (+)	Formula Label
Relocation (+)	120	10	120

Case II In the month of Jan claim isn't done, therefore it has taken Feb Month value as claim



	Jan (+)	Feb (+)	Formula Label
Relocation (+)		10	10