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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.

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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.*

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

🖉 Oracle Hyperion Planning, Fusion Edition - Windows Interne	t Explo	rer	
Member Selection			
Dimensions Period			
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Tuta ∕ An ta 27 , ™ ta, 40		~ ~	11
Member Name		Member Name	
neriod neriod		🖃 Period	
BegBalance	10	Q1	
- YearTotal		Q2	
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1 Q3 [con]	-		
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		Place selection in separate columns	
Help			OK Cancel
	_		

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

Oracle Hyperion Planning, Fusion Edition -	Windows Internet Explore	r					
Member Selection							
Dimensions Account	•						
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19 - 1 - - 1 - - 1	?. 🔫 H. 🛷			~	~		R.
Alias	Member Name			Ali	as	Member Name	Description
Account	Account			E	Account	Account	
🖭 Statistics	Statistics			_	IDescendants(Travel)	IDescendants(502000)	Travel
Income Statement	IncomeStatement				IDescendants("Sal	IDescendants(501100)	Salaries and Wages
Net Income	300000		• •	/lembe	er		
📃 Total Pretax Income	310000)esce	ndants		
Pretax Income From Operations	311000)esce	ndants (inc)		
🖭 Gross Profit	400000			Ances	tors		
Operating Expenses	500000			Ances	tors (inc)		
Total Compensation	501000			sibling	8		
* Travel	502000			sibling	s (inc)		
🖭 General Supplies	503000			arent	S (/)		
Telecommunications	504000			-arent Shilder	s (Inc)		
📧 Equipment Maintenance	505000			Childre	n (inc)		
🖭 Fees Outside Services	506000			evel) Descendants		
#I Employee HD	E07000				T		
	2	_		<			
					Place selection in separate	rows	
Help							OK Cancel

Step#3 : Add Column as "Add Formula Column"

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		×	Lo	umns		
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	Rows	Q1,Q2	VI.	Add Column		
1 IDescendar	nts(502000),IDescend	·		Add Formula Column		
-		* · · · ·		a little in the bit of the second second		

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

Simple Form: Operation	ng Expense Planning2					
Properties	ayout Other Options	Business Rules	<u> </u>			
Formula: Select	Sum(Column[A	D				fo
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			А		В	
	Rows	Q1,Q2		¥:_	Half Year Expenses	
1 IDescer	ndants(502000),IDescend	VI.			#	

Simple Form: Oper-	ating Expense Planning2	
Properties	Layout Other Options Business Rules	
Formula: Select	Sum(Column[A])	Y FOW

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

ngr	скропаса				
Ч	🛗 Year: FY:	13 (~)		Scenario: Forecast (~)
	Page NY (+) 💌	Go			
		Q1 (+)	Q2 (+)	Half Year Expenses	
	Travel Expense (+)	400	300	700	
	Meals Expense (+)	1520	400	1920	
	⊡Travel (+)	1920	700	2620	
	Base Salary (+)	225	3430	3655	
Ľ	Merit Increase (+)	366	203	569	
	⊡Total Salary (+)	591	3633	4224	1
	Overtime Premium (+)	540	400	940	
	Bonus Expense (+)	420	400	820	
	Temporary Help (+)	3314	400	3714	1
	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.

imple Form: Top Opera	ating Expenses				
Properties La	yout Other Options	Business Rules			
		Point of View 🎙			Serid Properties
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			A Select Members		Column Properties: A
	Rows	Jan	Add Column		Apply to all columns
1 501120,50	01130,501140,501150,5	VI.,	Add Formula Column	loc	Hide
			Hadybait Validation Re	103	Dead arks

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

n ple Form: Top Operatir	ng Expenses					
Properties Layo	out Other Options	Business Rul	es			
Formula: Select	Rank([A],desce	nding)				TOP TOP
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🚟 Local	ý.					
	- L. Y					
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			A			unities - Frances Basely
	Rows	Jan		1	Top Oper	ating Expense Rank
1 501120,501	130,501140,501150,5	WE_			#	

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

Page NY (+)	Go			1							Year:	FY13 (~)	
	Jan (+)	Top Operating]	Page [VY (+)	Go					Page NY (+)	Go	
Overtime Premium (+)	100	Zxpense Kank				Jan (+)	Top C Expe	Minimize	J			Jan (+)	Top Operating Expense Rank
Bonus Expense (+)	120	6	1	Overtime	Premium (+)	100		Restore Restore All			Auto Allowance (+)	523	1
Temporary Help (+)	14	11		Bonus Ex	pense (+)	120		Reset All to Default			Payroll Taxes (+)	453	2
Auto Allowance (+)	523	1		Temporar	ry Help (+)	14		Size-to-Fit			Fringe Benefits (+)	346	3
Base Salary (+)	25	9		Auto Allo	wance (+)	523		Sort M	Sort Ascending			200	- 4
Merit Increase (+)	26	8		Base Sala	ry (+)	25		Analyze New Ad Hoc Grid	Sort Descending Honor Hierarchy]	FICA Expense (+)	265	5
FICA Expense (+)	265	5		Merit Incr	ease (+)	26		Show member in outline	nonor niorarchy		Bonus Expense (+)	120	6
FUTA Expense (+)	266	4		FICA Exp	ense (+)	265		Apply Context Select All			Overtime Premium (+)	100	7
SUI Expense (+)	23	10		FUTA Exp	ense (+)	266	l	4	J		Merit Increase (+)	26	8
Payroll Taxes (+)	453	2	1	SUI Expe	nse (+)	23		10			Base Salary (+)	25	9
Fringe Benefits (+)	346	3		Payroll Ta	axes (+)	453		2			SUI Expense (+)	23	10
				Fringe Be	nefits (+)	346		3			Temporary Help (+)	14	11
Page NY (+)	Y13 (~) Go Jan (+)	Top Operating Expense Minimiz	Scenario	o: Forecast	(~)		ii	Filter Column				x	
Payroll Taxes (+)	523	Restor	e All					Keep 💉 Less Than o	or Equal To 🛛 📉 5	$\mathbf{\wedge}$	Filter Column		
	453	Reset / Size-to	All to Deh -Fit	ault						\sim			
Fringe Benerics (+)	346	Filter		•	Filter								
FUTA Expense (+)	266	Sort		•	Hide column	ns with no data	-						
FICA Expense (+)	265	New Ac	a Hoc Grie	d	Hide colum	ns with zeros and no da	ata				Wenn EV		
Bonus Expense (+)	120	Show n Apply (nember in Topteyt	n outline						_			and a
Overtime Premium (+)	100	Select	4II						Pa	ige 🔤	4Y (+) 🔽 🔽 🖸	<u>۲</u> ۲	
Merit Increase (+)	26	8									Jan ((+) Top Ope Expense	rating Rank
Base Salary (+)	25	9							A	uto Allov	wance (+)	523	1
SUI Expense (+)	23	10							Pa	ayroll Ta	ixes (+)	453	2
Temporary Help (+)	14	11							F	inge Be	nefits (+)	346	3
									F	JTA Exp	iense (+)	266	4

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)

Simple Form: Operating Expense Contibution % Properties Layout Other Option	s Busine	ness Rules
Formula: Select	otal ([A], row[1].	I].Count)
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FY13	Forecast	t 🛛 🖓 📩 🔤 Working 🖓 🖓
	-	
		Barra (41
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	▼	Columns
		A B
Rows	Jan	an 🙀 🛐 Expense %
1 IDescendants(507000)	¥1.	#
🎽 Year: FV13 (~)		III S pario: Fore
Page NY (+) 🔽 Go		
Other Employee Center(1)	Jan (+)	Expense %
Other Employee Costs (+)	120 3	30.76923076923077
Recruitment (+)	120 3	30.76923076923077
Relocation (+)	120 3	30.76923076923077
Employee Development (+)	30 7	7.692307692307692
Employee HR (+)	390	0 100

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.

imple Form: Operating E:	xpense Planning6						
Properties Layo	out Other Options	Business Rules					
Formula: Select		umn[B]. Column[A])			Y FOM		
			D-1-1-5 -5 U1-1	. Ma			E
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							Г
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		A		В		С	E
F	Rows	Jan	Ŵ1.,	Feb	VI.	Month Over Month Exp Growth	-
1 IDescendan	ts(507000)	,				#	

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

🛗 Year: FY13 (~)		🔛 Scenario: Fo	recast (~)
Page NY (+) 💙 Go			
	Jan (+)	Feb (+)	Month Over Month Exp Growth
Other Employee Costs (+)	120	120	0
Recruitment (+)	120	140	-16.666666666666666
Relocation (+)	120	10	91.666666666666666
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

If Then 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)

ple Form: Relation Claim				
operties Layout	Other Options Business Rules	<u>\</u>		
ormula: Select	▼ If(IsMissing(Column[A]), [B], [A])		* 1000	
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		A	В	C
Bo	ws Jan	📢 🚺 Feb	VI.,	📊 Formula Label
KU				

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

🛗 Year: FY13 (~)			🔛 Scenario: Forecast (~)		
	Page NY (+)	❤ Go			
		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

	Year: FY13 (~)		Scenario: Forecast
Page NY (+) 🔽 Go		
	Jan (+)	Feb (+)	Formula Label
Relocation (+)		10	10