

Chart Design Highlights:

To *begin a chart*, you must have a query that has been processed and has obtained results. The chart will use the data within the 'results' or 'table' sections. To insert a chart, you first click on a result or table section. This allows you to build the chart from the data in the section. Next, go to the insert menu and select 'new chart'.

A helpful tool when using charts is the '*Section*' toolbar. If this is active, you will be able to select from the various options. The first item is where you select what type of chart to build and you can change this at any time. Just be warned that changing your chart type mid creation can really alter the formatting. I would suggest picking the one you want and sticky with it. The second item is a drop down menu for legends. This helps input legends in the desired areas. And last is a 'fit to screen' button, which quickly fits your chart into the current screen.

To start *building a chart* structure, you must drag and drop fields from the Elements pane into the *Data Layout* area. This is very similar to the table, pivot and report sections.

- You want to drag and drop 'value' fields, such as the 'SFMS Trans Amount', into the 'Fact' pane, which will provide you with the data of the chart.
- You drag and drop 'label' fields, such as a 'Vendor Name', 'GL Acct', or 'PCA' to the 'x axis' area. These types of fields help create a 2-Dimensional chart.
- You can drag and drop a label type field to the 'Depth' or 'Z' area to add a third dimension to your chart.

Note: Depending on the chart type you are creating the 'Data Layout' sections area names change. For example, on a pie chart it shows a 'Slice' area, while the other charts (Line, Ribbon, Vertical and Horizontal) show an 'x axis'.

Once you have your fields set within the Data Layout area, you are ready to start *formatting* your chart. The best way to start this is to open the *properties* window. This is done by right-clicking in any open space and selecting 'properties'. Within the properties window are four tabs (General, Labels Axis, Values Axis and Bar Chart)

The '*General*' tab shows all the standard objects of the chart. Some key components of this is the hiding or displaying of various objects such as titles, the legend, borders, etc. As a note, you will only use certain functions within this area based on the chart you are designing. For example, the 'Planes' area is not needed on a Pie chart; however, the 'Rotation' area is strictly for Pie charts.

The '*Labels axis*' tab helps to display values shown on the 'x' and 'z' axis. Remember that the 'z' axis is for 3-D type charts.

The '*values axis*' tab helps display the 'values' shown on the chart. Use this to display or hide values within the chart. For example, 'show right axis labels' inputs the title of the information on the right side of the chart. You can very easily check and uncheck these options.

The '*Bar Chart*' tab helps display and hide various items within a bar chart, such as the 'Vertical' or 'Horizontal' data.

Hiding Items within a chart is a valuable feature. You are able to hide many different things, for example, negative amounts. You only need to highlight the item, right-click and select 'hide item'. Once this is complete, you will notice the chart automatically changes with the new dimensions. You can also bring the data back by simply right clicking anywhere on the chart and selecting 'show all items'.

'Add', 'alter' and format items' on your chart. For example, if you have values on the vertical axis (or left hand side) which are not expanded enough (negative amounts), then you can expand one value and it will take effect on all values. In addition, you may need to add text to data, you can simply double click on data you desire to alter and add some text in the pop up window. The data will also automatically reorder based on the changes.

Titles can add a title by simply right-clicking in an open space and select 'insert text'. And to later alter this text, you double-click on the information you want to alter. Be aware that if you click on the data within the chart and not text, you will have the properties window pop open.

Additional Formatting: (1) Altering the grid lines of the chart. You first left click on the grid line area then right click and you will see the options to display or hide the x and y axis. (2) Changing or adding color to the chart. Left clicking on almost anything in the chart will start this task and then you only need to use the short cut keys to complete. (3) Add 'Trend Lines' or 'Reference lines': Click on the actual data within the chart, then right-click and select add Trend line or add Reference line. When you add a reference line, you do receive a pop up window where you must select additional data. The important part of this step is to set where your actual line will appear, for example, you can set a fixed amount at a specific value. You can also alter the line style or even show the label value of the line. Note: Both these options do not work on a pie chart.

Grouping: Grouping is done very similarly to the other sections within Hyperion. You only need to select the items you wish to group, by holding down the shift or ctrl keys and then clicking on the various values. Once you have more than one value selected, you can click the 'group item' button on the short cut menu. You will notice it alters the name of the group and adds an asterisk at the beginning, as well as, it used the title of the first selection in your group. You can always alter the name of the group at any time by double clicking the group name. And don't forget that you only need to click the group button again to ungroup the data.

Duplicate, rename and delete: To complete these three options, you start by right clicking on the chart section, then select the operation you desire. If you duplicate a chart, you can very easily change the chart to a different type. Of course, there will be some minor formatting.

Pie charts:

Pie Slices: First, pie charts are cut into slices, thus the name difference within the Data Layout area. On other charts it shows as the 'x' axis but it shows as 'slice' on a pie chart. When using slices you have the ability to pull out each individually to help them stand out. To pull out a pie slice, select a slice of the pie, right click and choose 'Pull out Slice' on the menu. You can always put back the slice at any time by unchecking the option.

Extension lines: To go along with pulling out slices, you can create an extension line that connects your slice with the label. You only need to select the slice, right click, and select 'Line to Label'. Once complete, you may want to arrange your labels for better spacing and to do that you just need to drag and drop the values where you desire.

Percent and Negative amounts: In addition to the extension option, there are four more options when you right-click on a pie slice. You can 'show pie values', 'show pie negatives', 'show pie percentages', and 'show pie outline'. You only need to select them to have them work and at any time you can unselect them. I suggest testing how they work to see what works for you.

3-D view; Rotating: Setting a 3-D type of view should be done when using a chart type such as a 'Pie'. You can change the 'pie height' and if desired, you can alter the 'pie rotation' in degrees, as well. To do this, you must go back to the properties of the chart. To find the properties, right click in a blank area and go to properties, then the first tab is 'General' and the rotation information is on the right side. Input the data you desire and check the new display. Note: Don't forget that you must have the '3-D objects' option checked to allow the pie height to change. The option is located on the left side of the 'General' tab.

Top 5 Tips:

Tip 1 – You can open multiple instances of the IR Studio application and run multiple queries, within separate files, at the same time to help save a lot of time because they are running concurrently on the Datamart.

Tip 2 – When updating *passwords* for the Datamart, make sure they are 8 characters in length. Also, passwords are only good for 90 days, so it is a good idea to set a reminder. I suggest setting a pop up reminder through email.

Tip 3 – Make sure to use an up-to-date *Open Catalog Extension* (OCE's) because these change over time and an old version may not work properly. You can even receive odd error messages, if your oce is outdated.

Tip 4 – Make sure to complete a '*Sync with Database*' operation on a periodic (quarterly) basis. This can really help resolve query issues.

Tip 5 – The two most important items that a user should check when having issues with a query are *filters and joins*.