

Tips and Tricks

Customer Empowerment Webinar Series

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Agenda

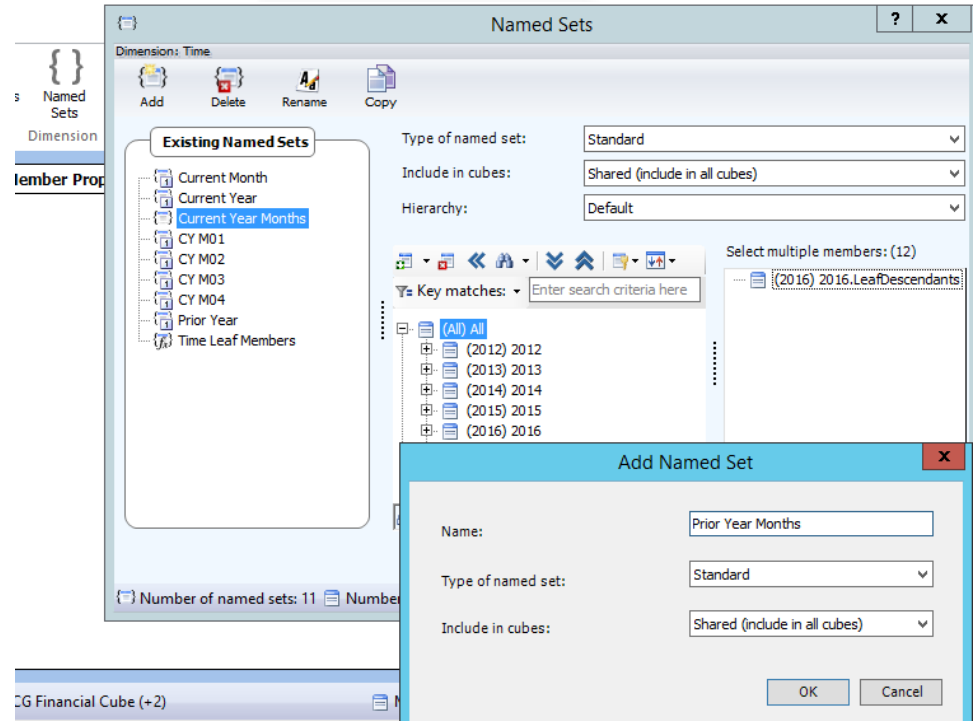
- Learning objectives
- Discuss and demonstrate tips & tricks
 - Model Manager/Dimensions
 - Processes
 - Templates
 - Workflow
 - Detailed Planning Manager (DPM)
 - Web Client
 - Miscellaneous
 - Q&A

Learning Objectives



Model Manager Tips – Named Sets

- Used to automate report, process and user security updates
- E.g. Using a Time ‘Named Set’ allows the Admin to globally update all associated templates
- Available in all dimensions (Time, Org, Versions, etc.).





Demo

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Model Manager Tips – Alternate Hierarchies

- Use to group dimension members in an alternate rollup structure than the main hierarchy (does not apply to Account dimension or data entry templates)
- Use member properties to define each level required in alternate hierarchy

Key: 350

Name:

Location:

Browsing Hierarchy: Region

- All
 - North
 - Finance
 - Human Resources
 - Information Technology
 - Sales Administration
 - Procurement
 - Consumer Division
 - Industrial Division
 - South
 - Legal
 - Marketing
 - Facilities
 - OEM Division
 - West
 - Research & Development
 - Quality Assurance
 - Internet Division



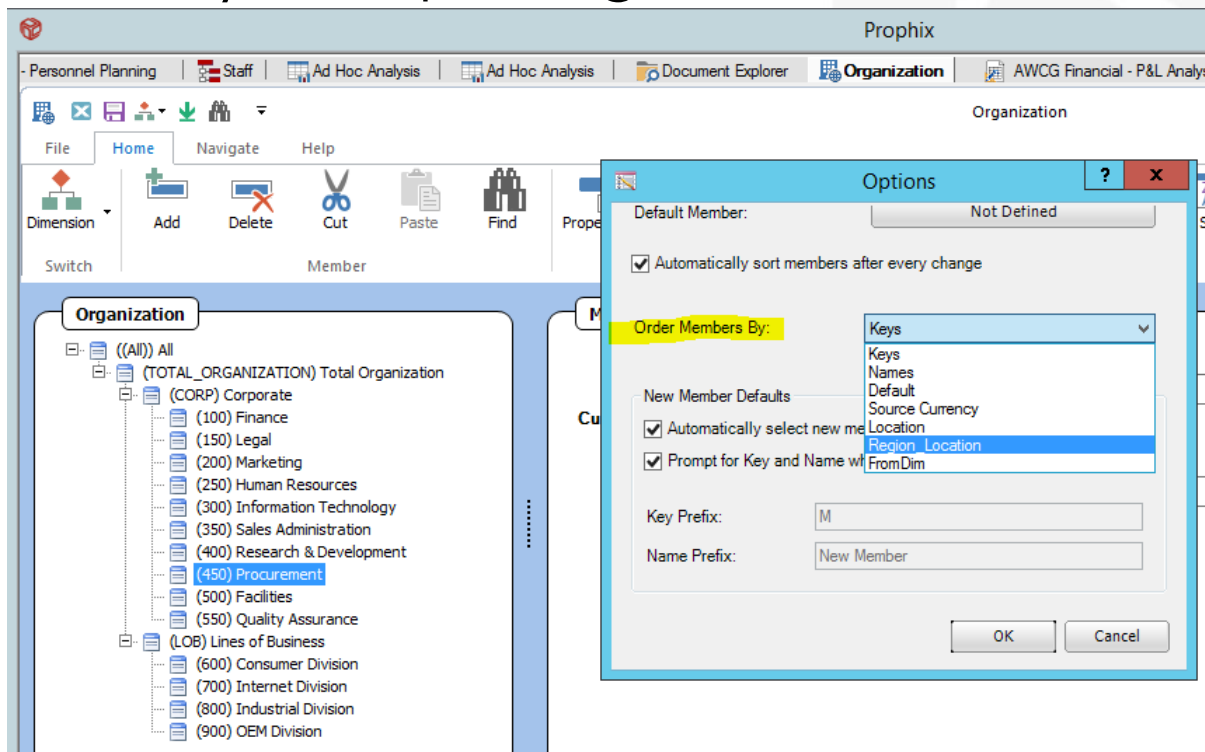
Demo

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Model Manager Tips – ‘Order by’

- Use the ‘**Order Members By**’ feature to choose a different way to sort your members (e.g. by location) for reporting.



The screenshot displays the Prophix software interface. The main window shows a tree view of the organization structure under the 'Organization' model. The tree includes nodes for '(All) All', '(TOTAL_ORGANIZATION) Total Organization', '(CORP) Corporate', and '(LOB) Lines of Business'. The 'Order Members By' dropdown in the 'Options' dialog is highlighted, and the 'Region Location' option is selected in the list. The 'Options' dialog also includes fields for 'Default Member', 'Automatically sort members after every change', 'New Member Defaults', 'Key Prefix', and 'Name Prefix'.



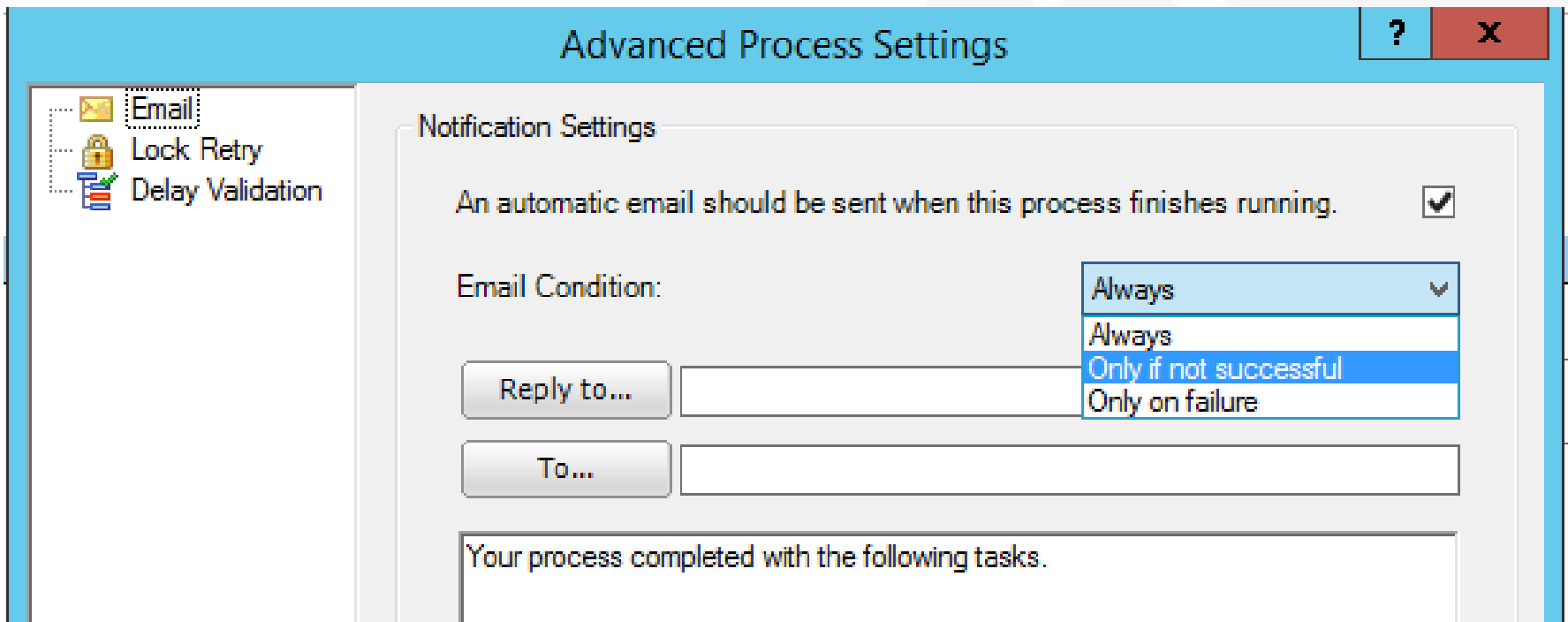
Demo



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Process Manager Tips

- Setup **email notifications** to notify users when process is complete (unsuccessful)



The screenshot shows a window titled "Advanced Process Settings" with a blue header bar containing a help icon (?) and a close icon (X). On the left is a tree view with three items: "Email" (selected), "Lock Retry", and "Delay Validation". The main area is titled "Notification Settings" and contains the following elements:

- A checked checkbox: "An automatic email should be sent when this process finishes running."
- An "Email Condition:" label followed by a dropdown menu. The dropdown is open, showing three options: "Always" (selected), "Only if not successful", and "Only on failure".
- A "Reply to..." button followed by an empty text input field.
- A "To..." button followed by an empty text input field.
- A text area containing the text: "Your process completed with the following tasks."

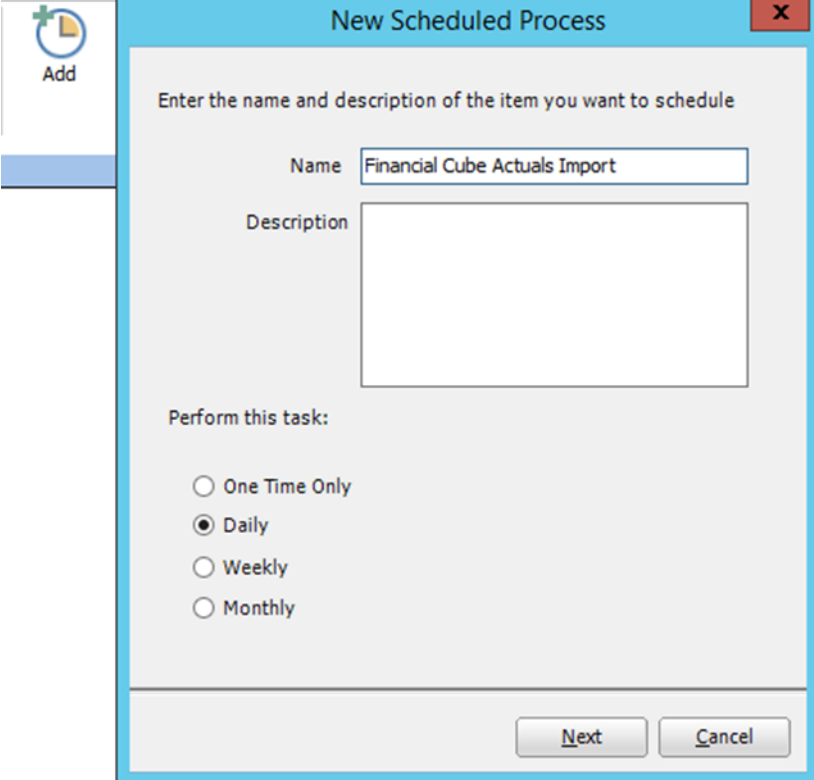
Process Manager Tips

- Create folders to **group processes** and run all processes simultaneously
- Use the **description field**, within a process, to add explanations & reminders

The screenshot displays the Process Manager interface. On the left, under the 'Process Group' tab, a tree view shows a 'Root process' containing a folder named 'Import AWCG Data'. This folder contains four processes: 'Actual 2016', 'Actual 2017', 'Budget 2017', and 'Update Cube'. On the right, under the 'Folder' tab, the 'Description:' field is empty, and the 'Number of descendants:' is shown as 4.

Process Manager Tips

- **Schedule processes** to run automatically (e.g. nightly imports)



New Scheduled Process

Enter the name and description of the item you want to schedule

Name

Description

Perform this task:

One Time Only

Daily

Weekly

Monthly



Demo

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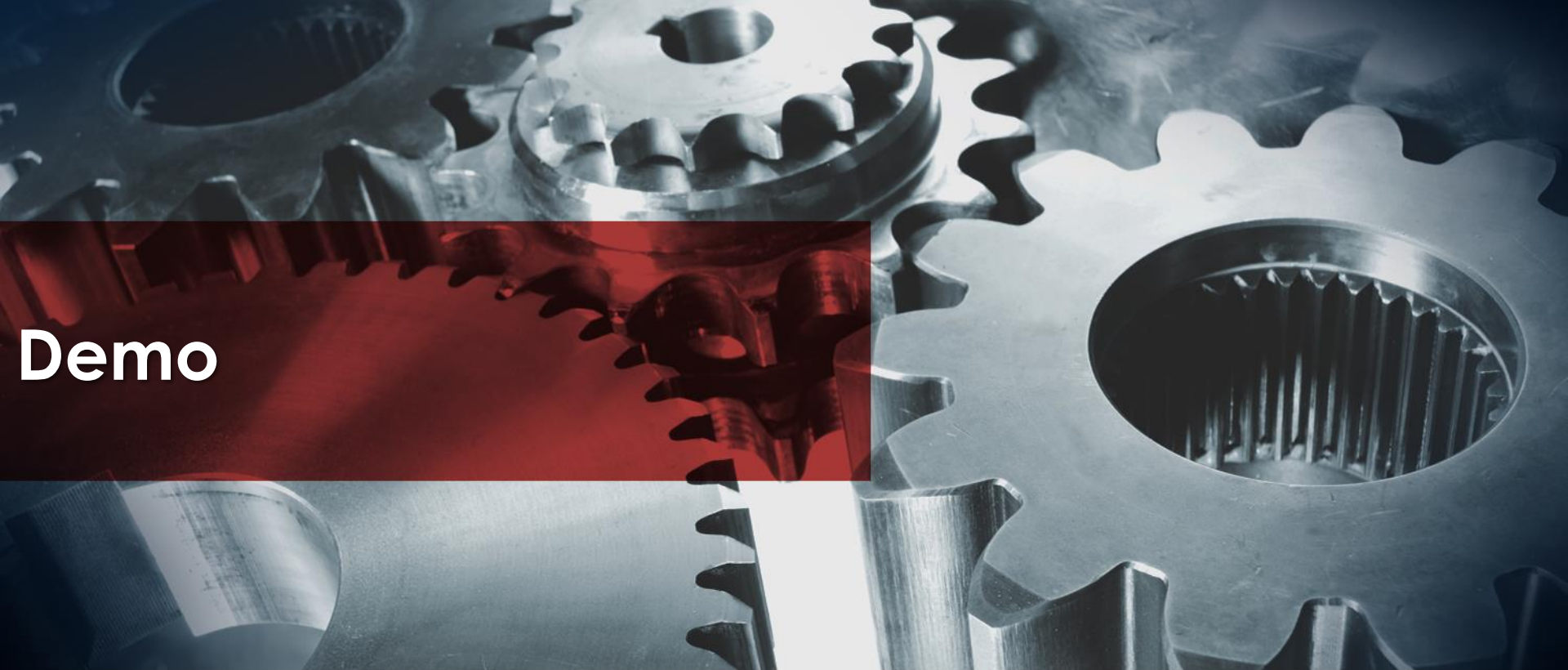
Security Manager Tips

- Limit user security maintenance by assigning security at the group level

The screenshot displays the Security Manager interface. At the top, there is a navigation bar with tabs for File, Home, Navigate, and Help. Below this is a ribbon with various icons for user and group management, including Users, Groups, Roles, Add, Edit, Remove, Import, Edit Admin, Edit Data, Copy Data, and Paste Data. The Groups ribbon is currently selected, and the Groups tab is active. Below the ribbon, there is a table listing groups. The table has columns for Group Name, Group Type, and License Type. The groups listed are Financial Managers Group (Multiple, Advanced User) and HR Manager (Single, Standard User). Below the table, there is a detailed view for the Financial Managers Group, showing options for Users, Roles, and Functions, along with buttons for Add User... and Remove User... Below these buttons is a table listing users within the group, with columns for User ID, Last Name, and First Name. The users listed are ACADEMYVM\jperen (Peron, Jesse) and ACADEMYVM\mdionne (Dionne, Martina).

Group Name	Group Type	License Type
Financial Managers Group	Multiple	Advanced User
HR Manager	Single	Standard User

User ID	Last Name	First Name
ACADEMYVM\jperen	Peron	Jesse
ACADEMYVM\mdionne	Dionne	Martina



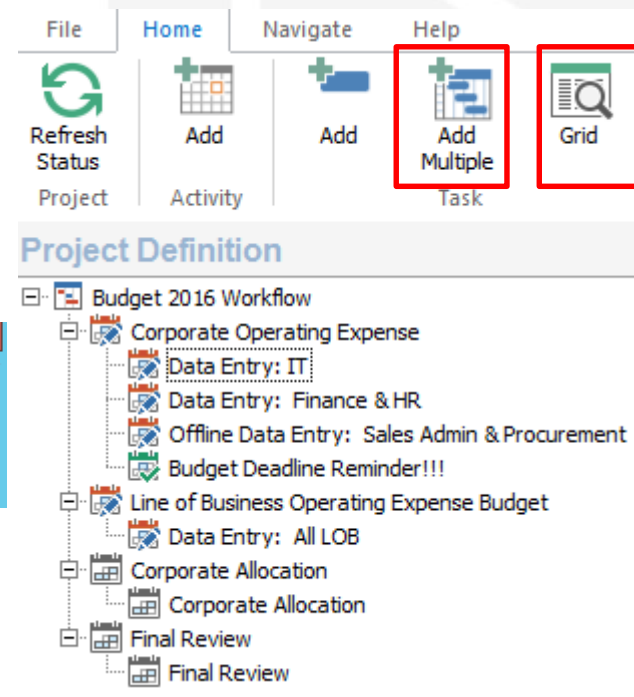
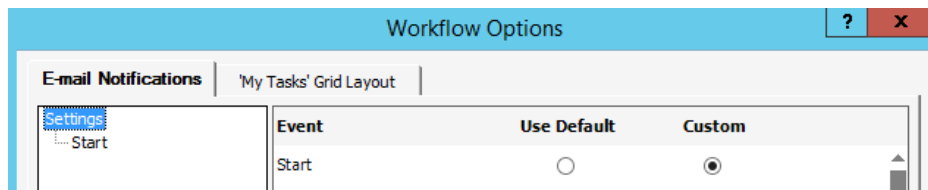
Demo

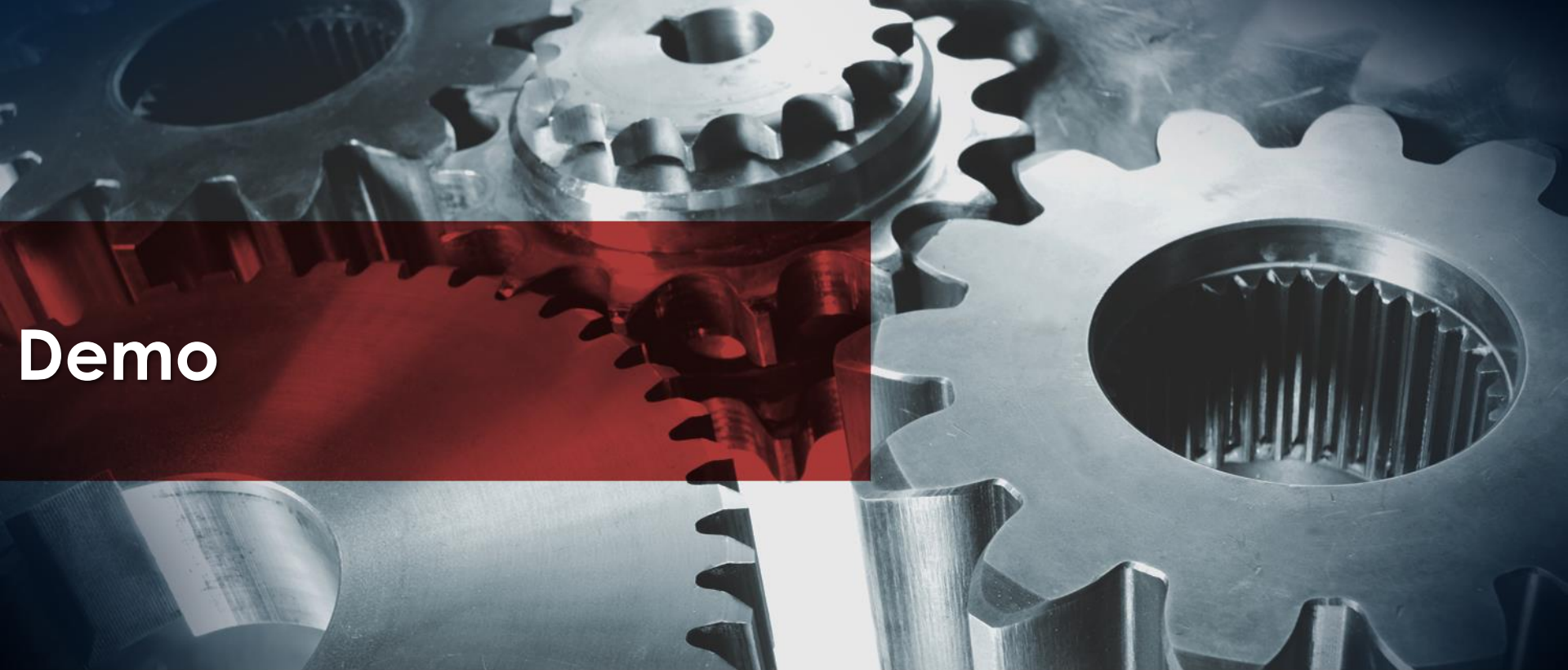


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Workflow Tips

- Save time by **adding multiple tasks** at once using 'Add Multiple'
- Use '**Grid view**' to see all your workflow tasks in a spreadsheet format
- Setup **custom workflow email notifications**



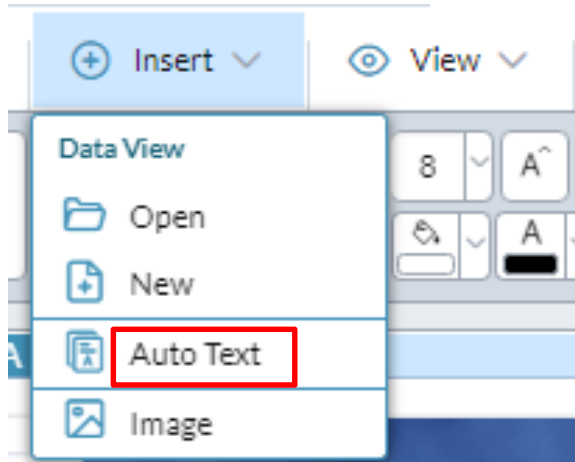


Demo

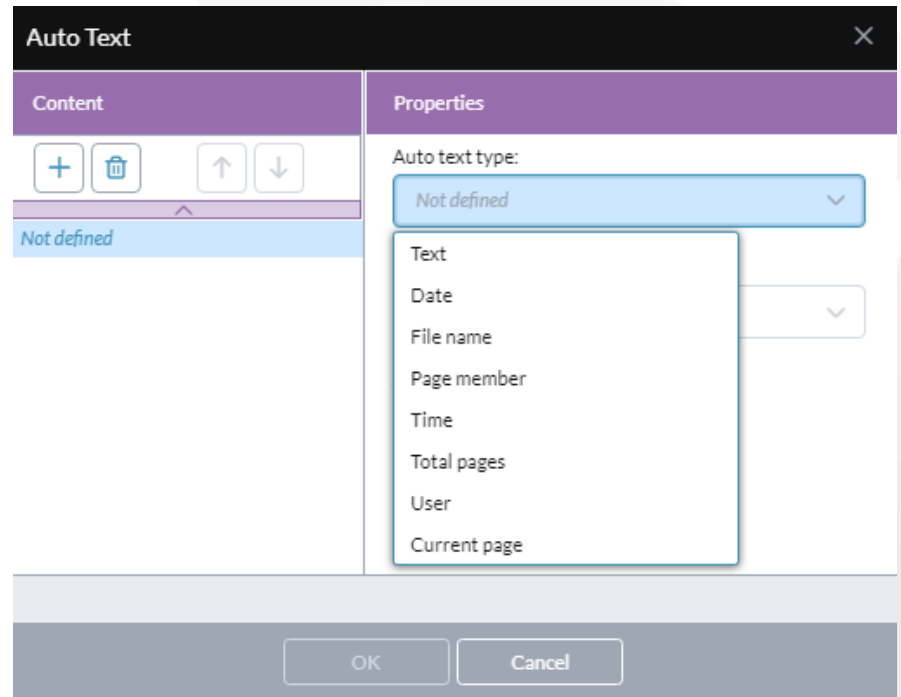
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Template Tips

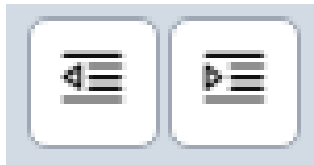


- Insert **Autotext** on templates



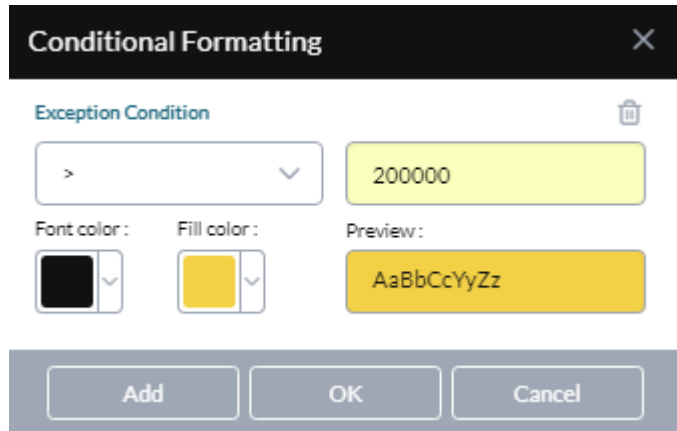
Template Tips

- Indenting
- Format data using '**Accounting**' format



	MTD	
	Actual	Plan
Revenue from product sales	266,982.63	637,778.14
Revenue from services	529,083.97	185,738.26
Other Revenue	214,652.37	292,302.91
Gross Sales	\$ 876,757.46	\$ 828,539.46

Template Tips



- Use '**Conditional Formatting**' to highlight key values

- Use '**Analyze**' from template to open associated dataview in Ad Hoc

	MTD		
	Actual	Plan	Variance
(4100) Revenue from product sales	1,514,936	1,727,969	(213,034)
(4200) Revenue from services	280,263		89,411
(4300) Other Revenue	153,099		74,234
(4000) Gross Sales	1,948,298		(6,679)
(5000) Cost of Goods Sold	984,708		138,472
(5100) Other Direct Charges	7,641		3,705
(5999) Cost of Sales	992,349		42,177
(40000) Gross Margin	955,948		(84,502)

Context menu options: Copy, Drill Across, Add Comments, Analyze, Cell Properties



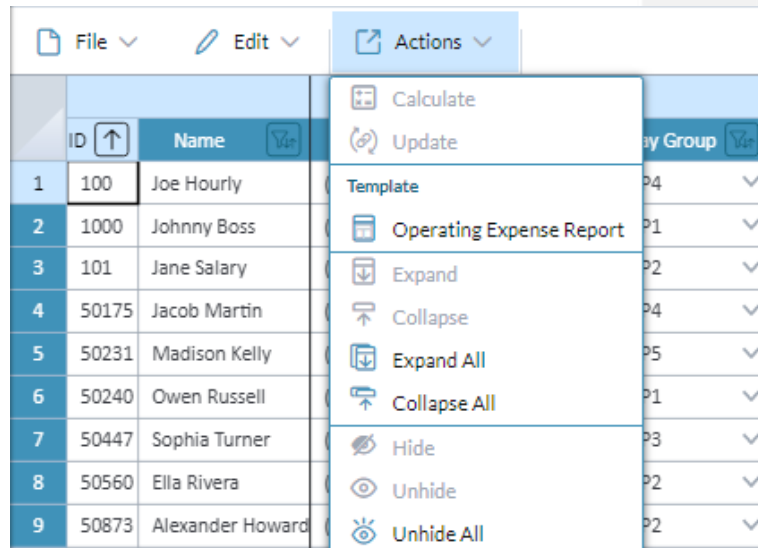
Demo

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Detailed Planning Manager Tips

- Setup **Reviewing Templates** to see impact of personnel planning updates in corresponding templates
- **Sort/filter** schedule columns



	ID	Name	Department Group
1	100	Joe Hourly	P4
2	1000	Johnny Boss	P1
3	101	Jane Salary	P2
4	50175	Jacob Martin	P4
5	50231	Madison Kelly	P5
6	50240	Owen Russell	P1
7	50447	Sophia Turner	P3
8	50560	Ella Rivera	P2
9	50873	Alexander Howard	P2



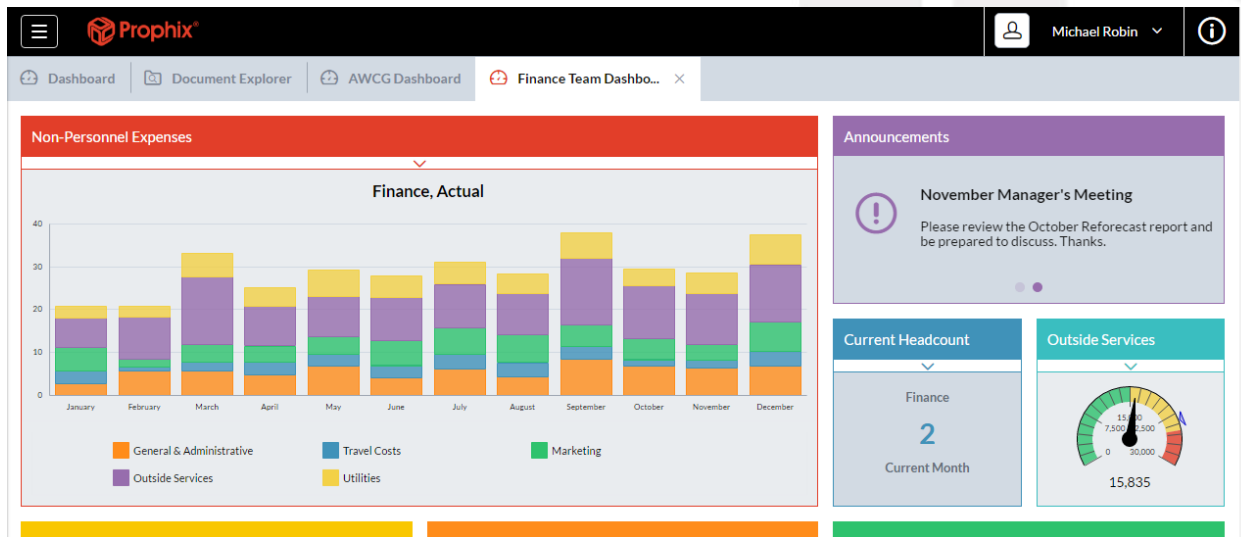
Demo

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Web Client Tips

- No software to install
- End users will find it easy to use
- Setup drillable dashboards
- Possible performance gains (reports/schedules may be faster)



Miscellaneous Tips (keeping model tidy)

- Delete unused
 - Dimension members
 - Processes
 - Templates/Data Views
- Delete anything labeled “test” as soon as testing is completed

TIP: Trying to determine what an old process/report/data view is used for will take longer than just creating a new one

Summary

Model Manager/Dimensions

- Named sets
- Alternate hierarchies
- Order by

Workflow

- Grid view to see all tasks
- Add multiple tasks all at once
- User groups

Processes

- Email notifications
- Schedule processes
- Use description fields
- Reduce member combinations

Templates

- Autotext
- Indenting
- Conditional Formatting
- Analyze
- Accounting format

Web client

- Why use it ?
- Zoom in/out
- Drillable dashboards

Detailed Planning Manager (DPM)

- Reviewing templates
- Sort/filter schedules

Resources to help you



- <http://support.prophix.com>



Prophix product feedback forum

- <https://feedback.prophix.com>



- <http://info.prophix.com/CEWS-2017-Recordings>



- <https://www.prophixacademy.com>

Prophix Version 12 help

Search the help topics. To narrow the search, select a filter.



- <http://documentation.prophix.com/p12help/en/>

Prophix User Conference

- Early bird pricing for User Conference expires November 30th
- New this year:
 - Technology & Innovation Track – gain product insight
 - Customer case study deep dive sessions





Questions?



Thank You!