

ORACLE® HYPERION FINANCIAL REPORTING

Release 16.03

Designing Charts with Financial Reporting Studio for
Oracle Planning and Budgeting Cloud



CONTENTS IN BRIEF

Introduction 2

Overall Appearance 2

Chart Data Point Sizing and Display 3

Font Angles 7

Appearance Tab 8

Legend Tab 10

Axes Tab 13

Element Style Tab 14

Bar Options Tab 19

Element Style Tab 21

Pie Options Tab 25

Introduction

In Release 16.03, Oracle Hyperion Financial Reporting has an updated charting engine for an overall improved charting presentation and user experience.

There are inherent differences between the old and new charting product features and functionality that may affect the rendered chart output and behavior. While best efforts have been made to keep the existing charting functionality, chart output may differ.

This document highlights the major differences between the charting engines.

Overall Appearance

Aside from functionality and rendering differences in specific charting user interface components, the following overall chart rendering differences exist:

- **Default Axis Scaling**—The default vertical axis scaling (without any custom ranges specified) may differ.
- **Axis Tick Marks**—The tick marks that appeared in the vertical and horizontal axes are no longer supported.
- **Default Bar Width**—The default bar width differs between the two charting engines.
- **Legend Spacing**—The spacing of the chart legend element data sets differs between the two charting engines.

Figure 1 Overall Appearance in the Original Charting Engine

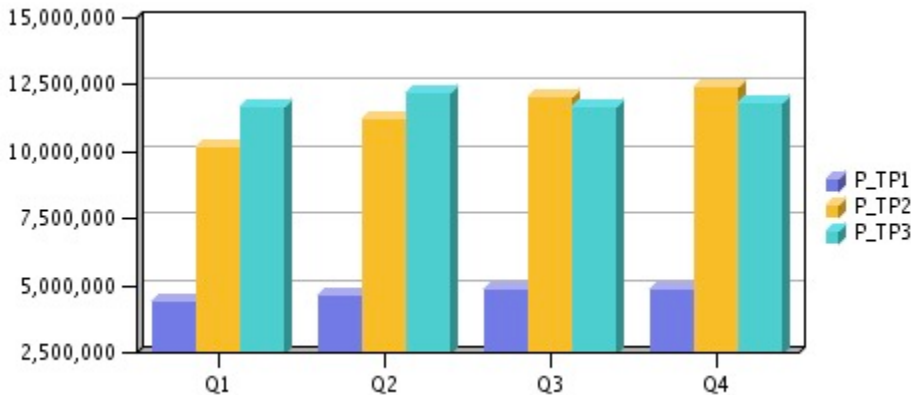


Figure 2 Overall Appearance in the Updated Charting Engine

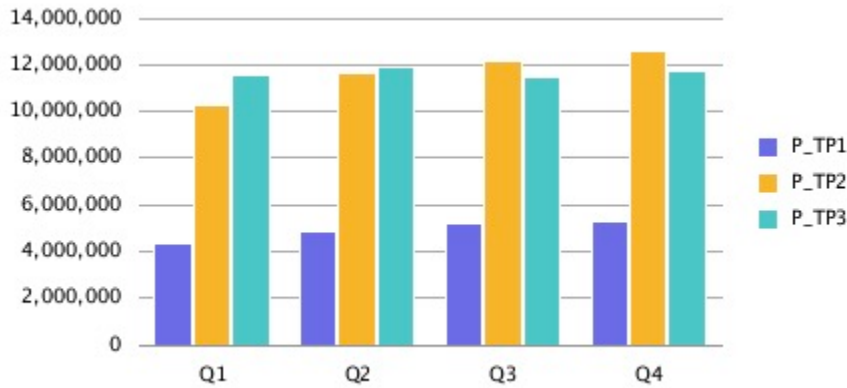


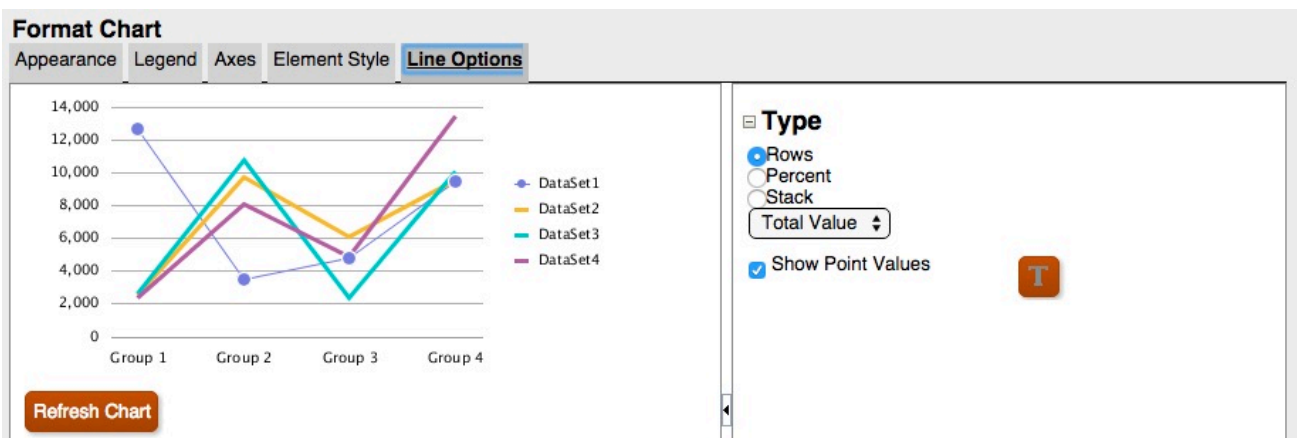
Chart Data Point Sizing and Display

With the updated charting engine, the display of chart data values and legend labels may render differently from the original charting engine due to automatic sizing. This behavior differs by chart type and is dependent on the chart and font size as well as length of the data point values. In some cases, with chart data point and long legend labels, the chart may need to be resized and/or the font size reduced to achieve proper display. Additionally, for long numeric data point values, scaling may need to be applied to shorten the number length.

Line Chart Example

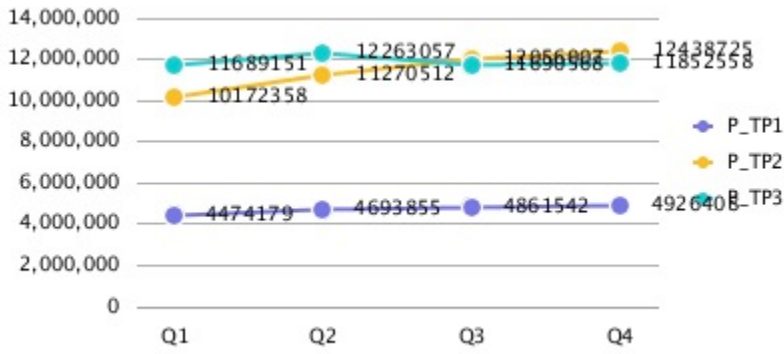
In this example, “Show Point Values” is enabled in the Line Options tab.

Figure 3 Line Options Tab in the Updated Charting Engine



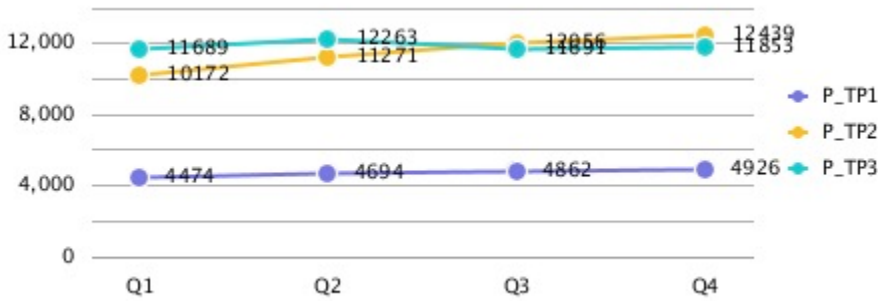
However, the point values in the chart output overlap with the legend.

Figure 4 Point Values Overlapping with the Legend



Adjusting the number scaling in the grid to thousands reduces the length of the numbers and fits the data point values more tightly in the chart.

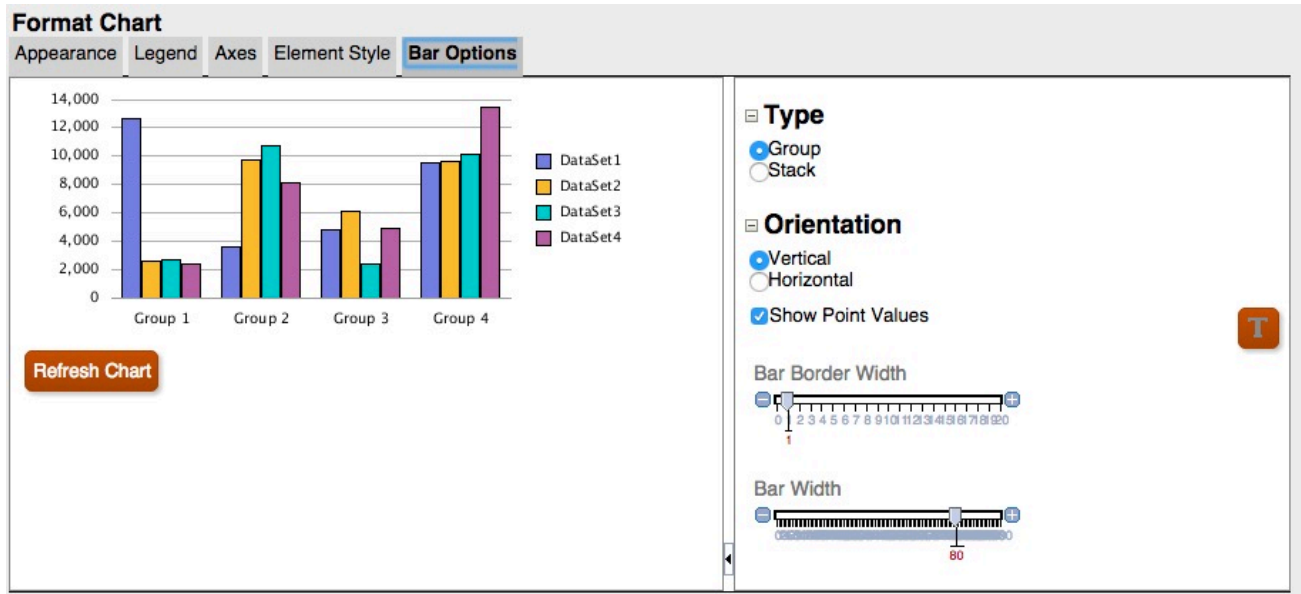
Figure 5 Point Values Not Overlapping with the Legend



Bar Chart Example

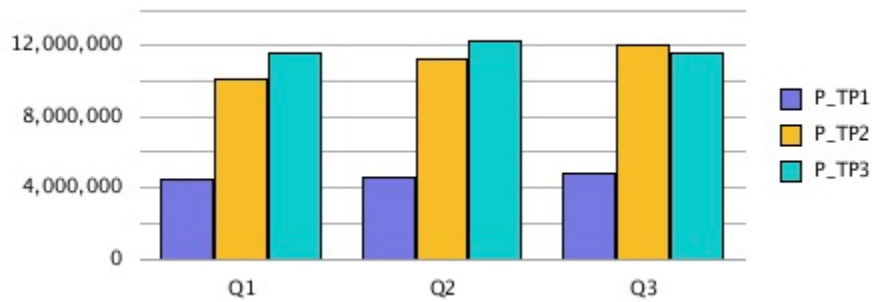
In this example, “Show Point Values” is enabled in the Bar Options tab.

Figure 6 Bar Options Tab in the Updated Charting Engine



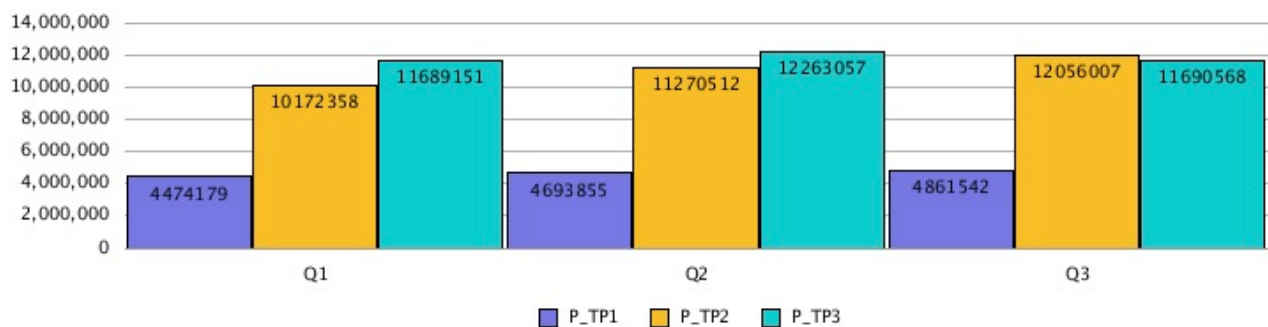
However, the point values do not appear in the bar since they are too wide to fit within the bar.

Figure 7 Point Values Do Not Display in the Bars



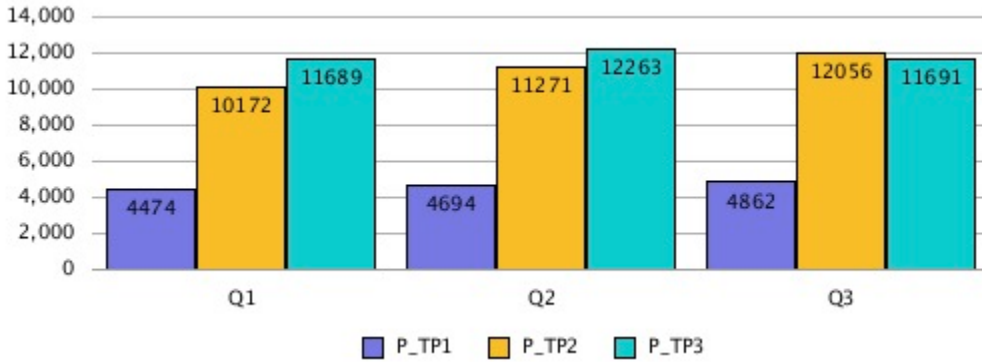
Widening the chart size on the report canvas, changing the grid width to 100, and setting the legend placement to the bottom of the chart fits the long data point values within the chart.

Figure 8 Point Values Display in the Bars



Alternately, adjusting the number scaling in the grid to thousands, placing the legend on the bottom, and changing the grid width to 90 reduces the length of the numbers and fits the data point values more tightly in the chart.

Figure 9 Point Values Display in the Bars



Pie Chart Example

In this example, “Show Point Values” is set to “Percent”, which shows a percentage data point for each slice of the pie.

Figure 10 Pie Options Tab in the Updated Charting Engine

Format Chart

Appearance Legend Element Style **Pie Options**

Legend:

- DataSet1
- DataSet2
- DataSet3
- DataSet4

Refresh Chart

Pie Angle

Separation

Show Slice Value As

Percent Data

Position

Radial Exterior

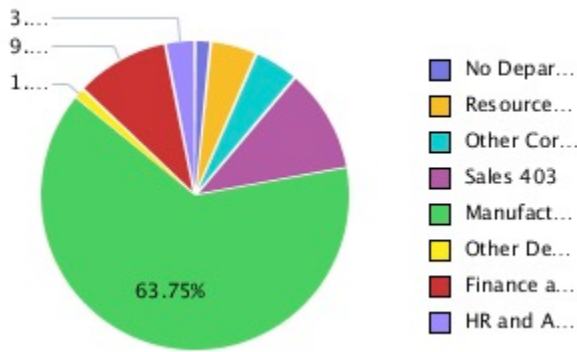
Slice Border Style

Solid

Slice Border Width

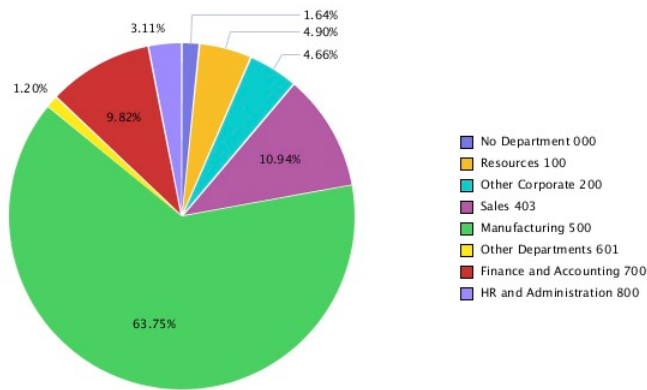
The data points are cut off or not visible for some slices. In addition, the legend text is cut off.

Figure 11 Pie Chart with Legend Data Points Cut Off



By increasing the size of the chart on the report canvas, the entire legend and all data points are displayed.

Figure 12 Pie Chart Displaying the Legend and All the Data Points



Font Angles

The updated charting engine does not support font angles. All font settings for text in the Format Chart dialog box do not include a Font Angle setting.

Figure 13 “Font Angle” Setting in the Original Charting Engine

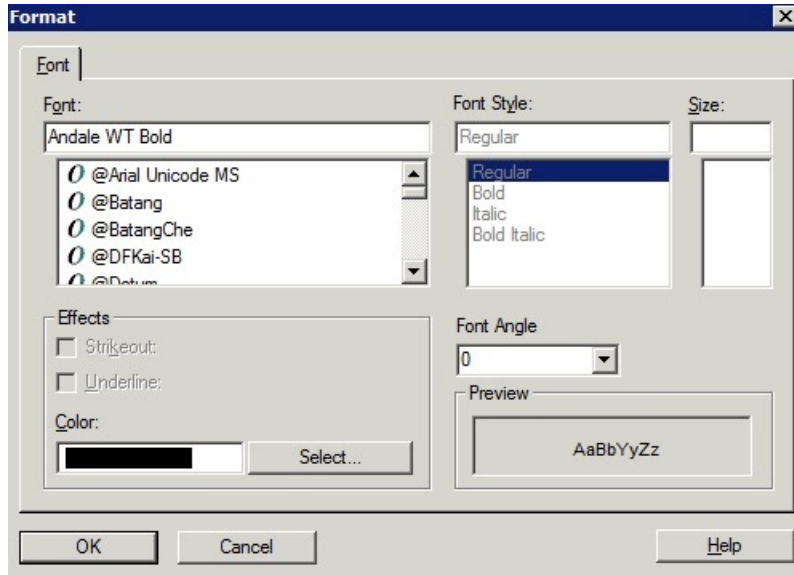
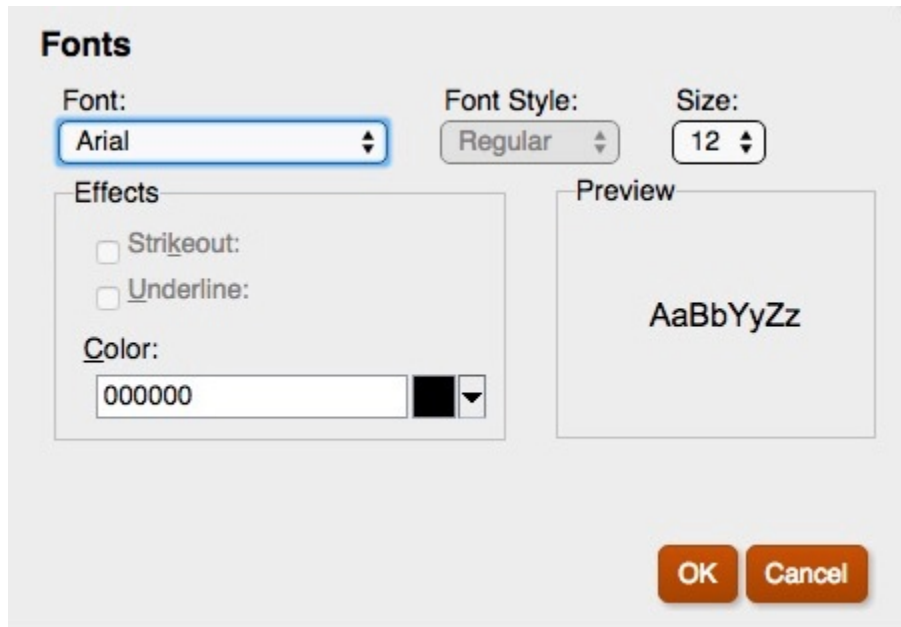


Figure 14 No “Font Angle” Setting in the Updated Charting Engine



Appearance Tab

The following are the differences in the Appearance tab in the Format Chart dialog box:

- **Grid Depth**—The updated charting engine does not support the 3D appearance for Line, Bar and Combo charts. Pie charts are either 3D or not, there is no grid depth adjustment.
- **Smooth Font Option**—The Smooth Font option is not available in the updated charting engine, since font smoothing is already applied.

- **Chart Border**—The updated charting engine only supports background color.

Note: Chart borders are currently not working in the updated charting engine in Release 16.02.

Figure 15 Appearance Tab in the Original Charting Engine

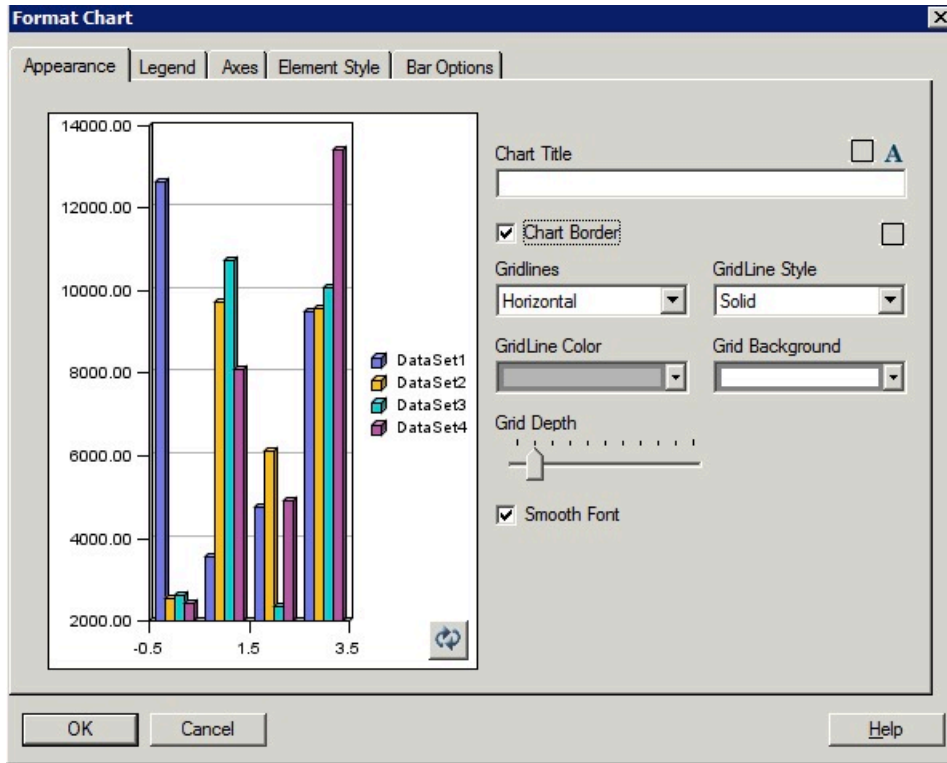
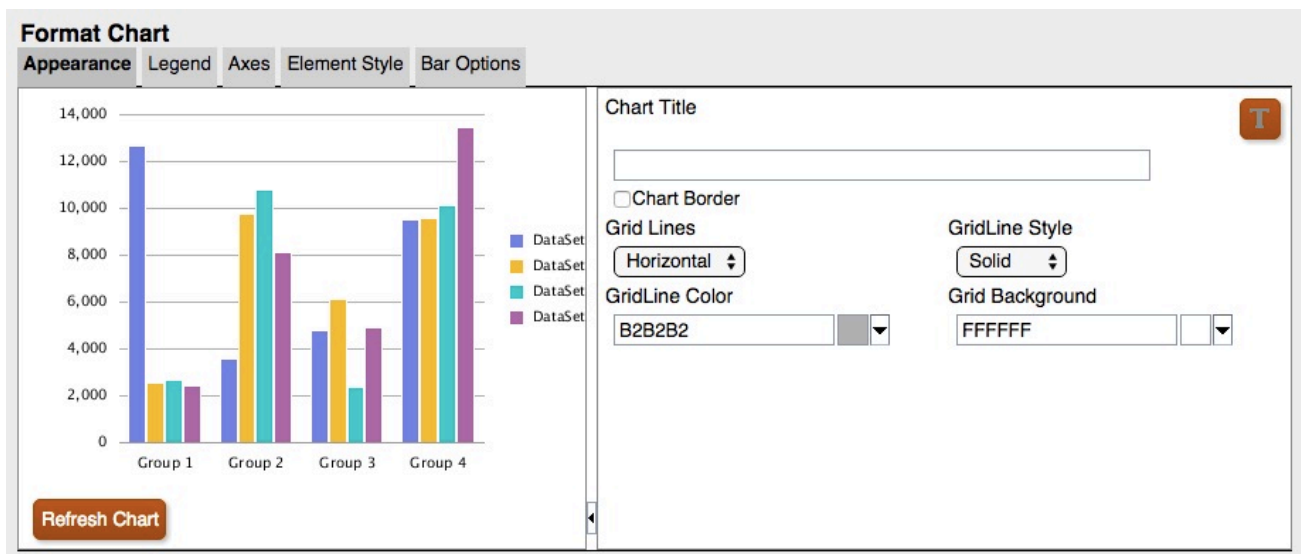


Figure 16 Appearance Tab in the Updated Charting Engine



Grid Depth Differences

Figure 17 Grid Depth in the Original Charting Engine

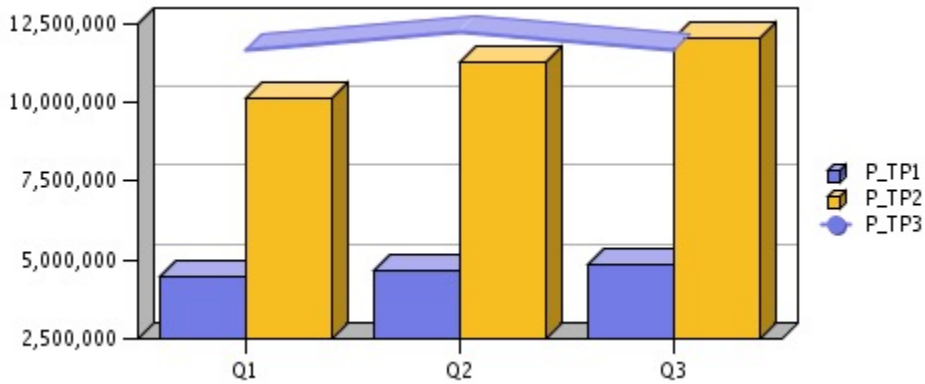
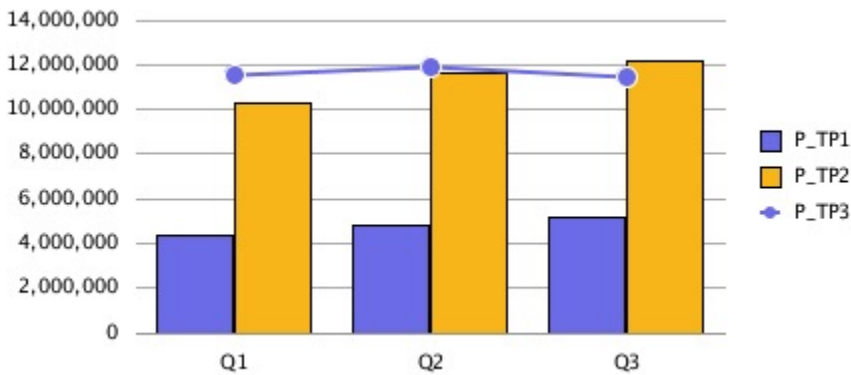


Figure 18 Grid Depth in the Updated Charting Engine



Legend Tab

The following are the differences in the Legend tab in the Format Chart dialog box:

- The updated charting engine supports four “Place Legend” options: Top, Bottom, Left and Right.
- Middle and Center is always used for placement. For existing charts:
 - “Top” is “top and center”
 - “Bottom” is “bottom and center”
 - “Left” is “left and middle”
 - “Right” is “right and middle”

Figure 19 Legend Tab in the Original Charting Engine

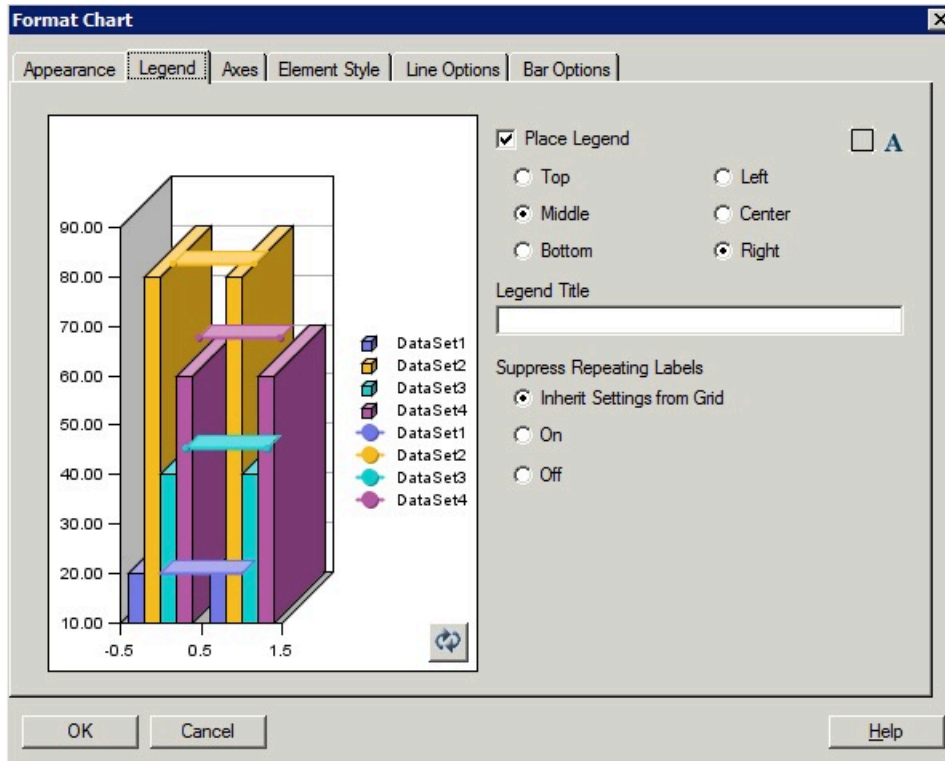


Figure 20 Legend Tab in the Updated Charting Engine

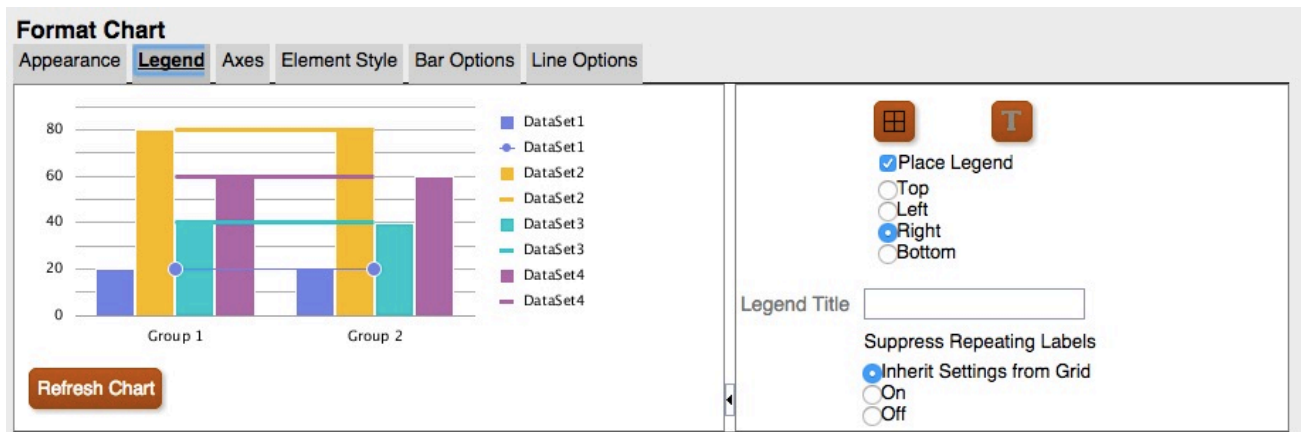


Figure 21 Place Legend = Top

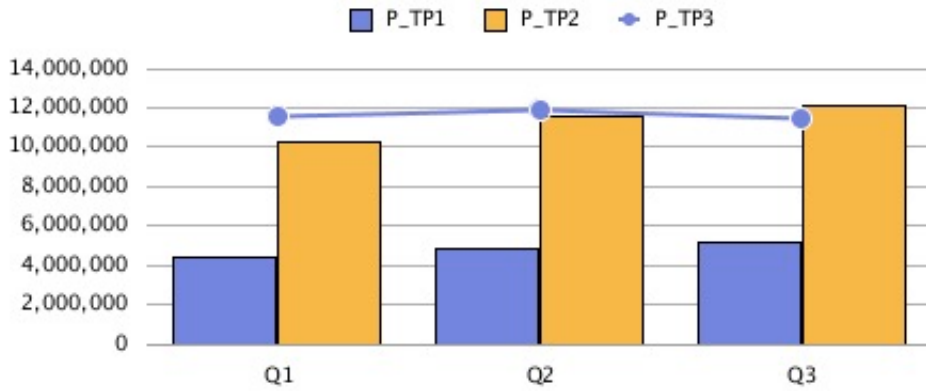


Figure 22 Place Legend = Bottom

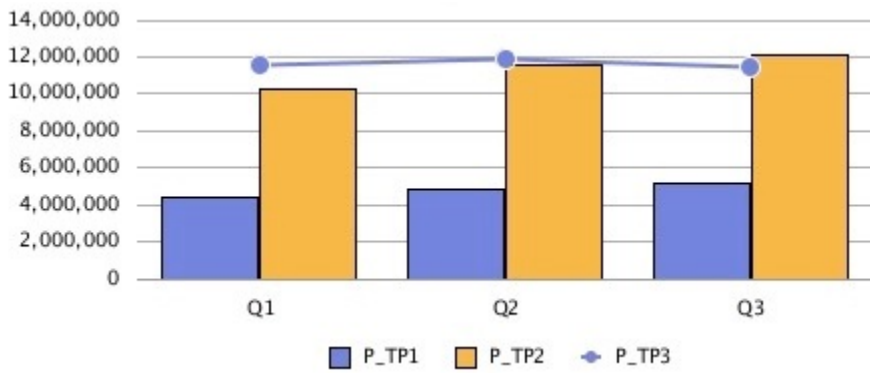


Figure 23 Place Legend = Left

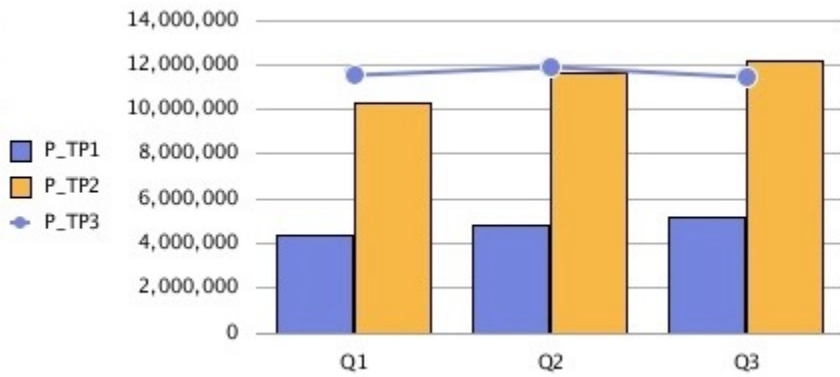
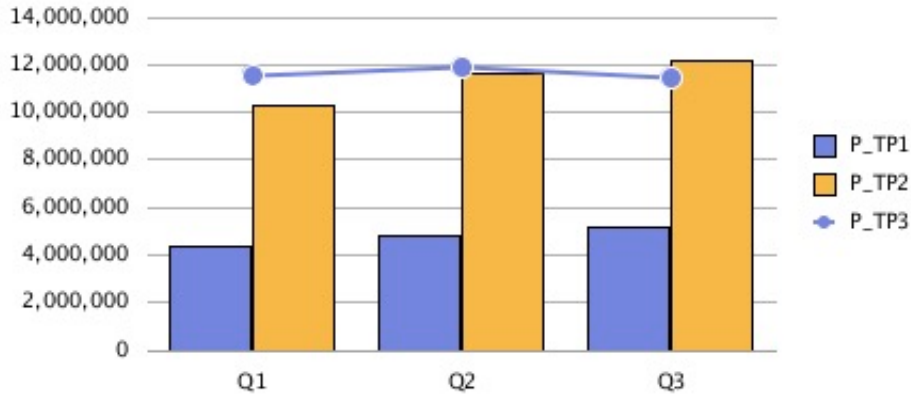


Figure 24 Place Legend = Right



Axes Tab

The updated charting engine only displays the secondary axis for Combo charts.

- Secondary axis data is required for the updated charting engine to display it.
- The original charting engine allowed secondary axis for Bar and Line charts.

Figure 25 Axes Tab in the Updated Charting Engine

Format Chart

Refresh Chart

Legend:

- DataSet2 (Yellow)
- DataSet2 (Light Yellow)
- DataSet3 (Cyan)
- DataSet3 (Light Cyan)
- DataSet4 (Purple)
- DataSet4 (Light Purple)

Primary Axis Title: [] [T]

Primary Axis Label: [] [T]

Custom Range:

Min: [0]

Max: [0]

Step: [0]

Secondary Axis Title: [] [T]

Secondary Axis Label: [] [T]

Custom Range:

Min: [0]

Max: [0]

Step: [0]

Figure 26 Secondary Axis in the Original Charting Engine

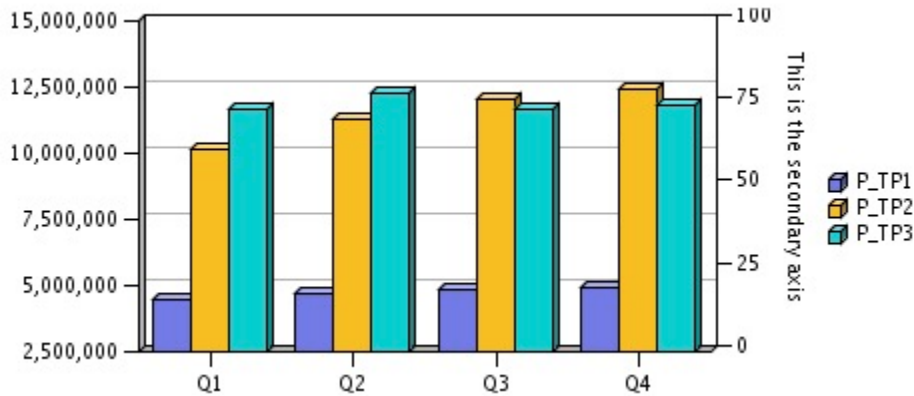
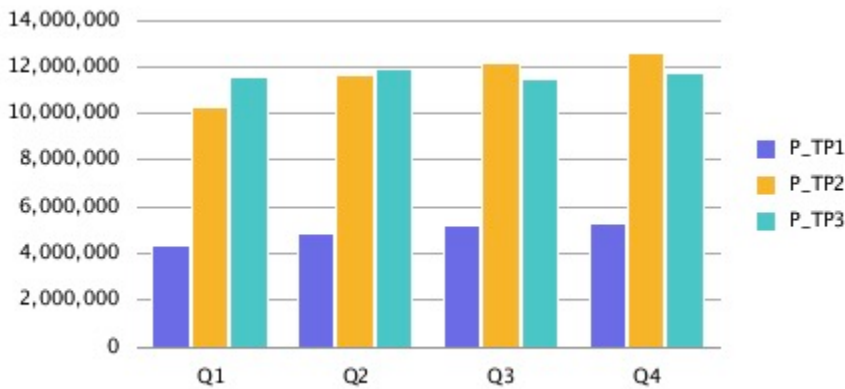


Figure 27 Secondary Axis in the Updated Charting Engine



Element Style Tab

Subtopics

- [Themes](#)
- [Bar and Pie Fill](#)
- [Bar Shape](#)

In the updated charting engine, in the Element Style tab in the Format Chart dialog box, each item is broken out into its own separate section.

Themes

Themes are a new feature that you can define in the Element Style tab in the updated charting engine.. The following new data element color themes have been added with preset color selection:

- **Classic**—Legacy Oracle Hyperion Financial Reporting colors

- BI—Colors from Oracle Business Intelligence charts, affects the first 12 elements
- Excel—Default chart colors from Excel, affects the first 25 elements

Themes are used as a starting point for element colors. You can change the colors for specific elements in the chart.

Figure 28 Themes in the Updated Charting Engine

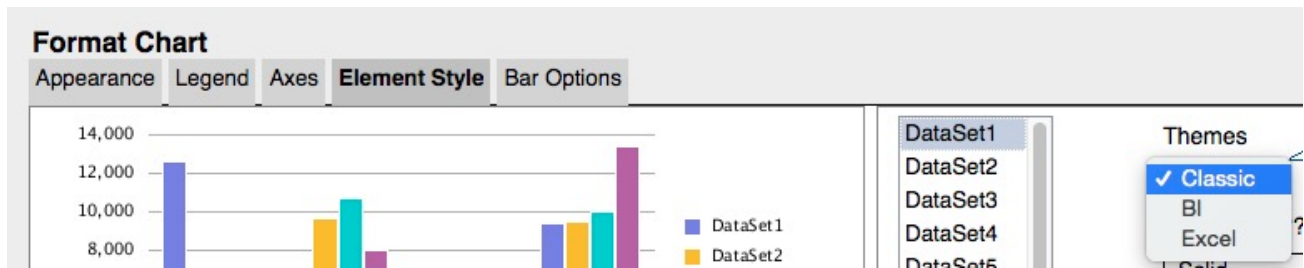


Figure 29 Classic

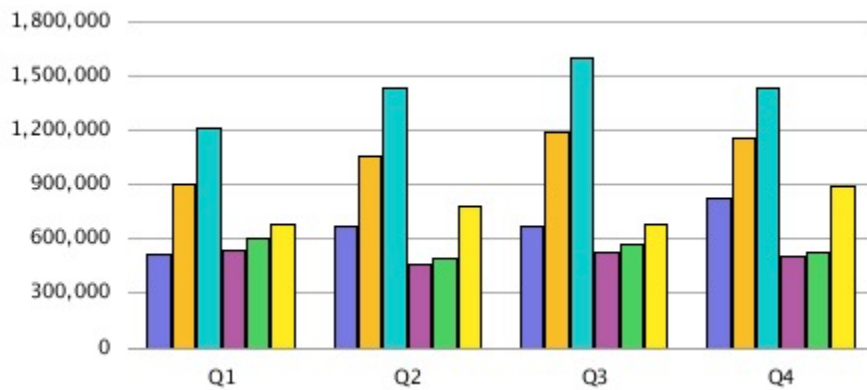


Figure 30 BI

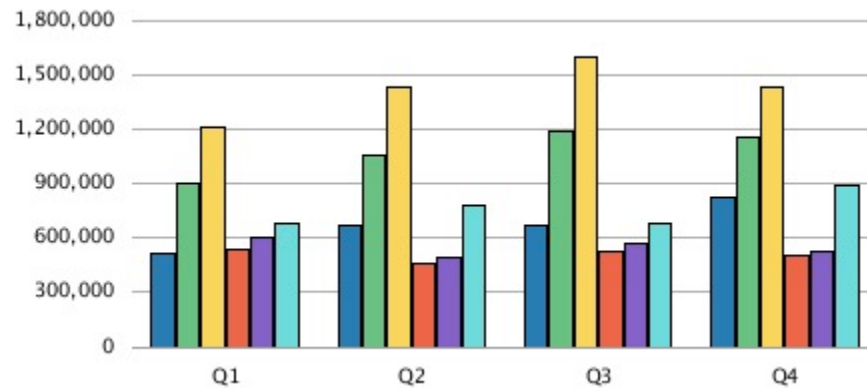
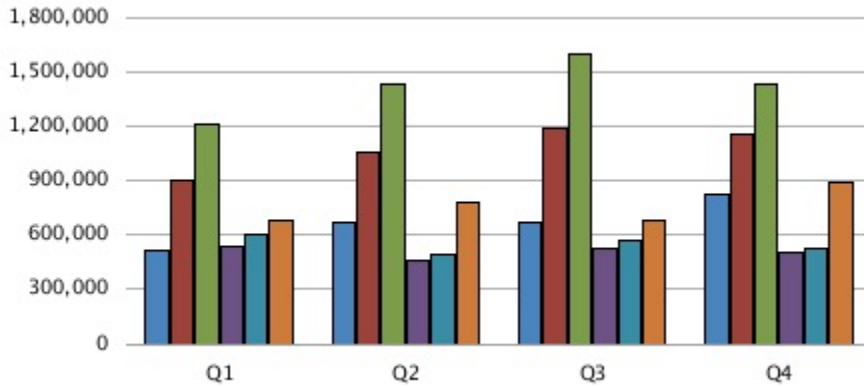


Figure 31 Excel



Bar and Pie Fill

Except for the “Solid” selection, Bar and Pie Fill selections in the updated charting engine differ in rendering in the original charting engine. All gradient types in the original charting engine map to the same gradient display in the updated charting engine. Gradient rendering is subtly visible only with wide bars in a bar chart or large pie regions. Color 2 is not used with gradients in the updated charting engine.

Figure 32 Bar and Pie Fill Options in the Updated Charting Engine

Format Chart

Appearance Legend Axes **Element Style** Bar Options

DataSet1
DataSet2
DataSet3
DataSet4

Themes
Classic

Bar and Pie fill
Solid

Color 1
7778E4

Color 2
FFFFFFF

DataSet1
DataSet2
DataSet3
DataSet4
DataSet5
DataSet6
DataSet7
DataSet8
DataSet9
DataSet10
DataSet11
DataSet12
DataSet13
DataSet14
DataSet15
DataSet16

The following screen shots illustrate the Bar and Pie Fill differences between the original charting engine and the updated charting engine from left to right:

- Horizontal
- Vertical
- Forward Slash

- Backward Slash
- Grid Diagonal Grid
- Horizontal Gradient
- Vertical Gradient
- Forward Diagonal Gradient
- Backward Diagonal Gradient

Figure 33 Bar and Pie Fill in the Original Charting Engine

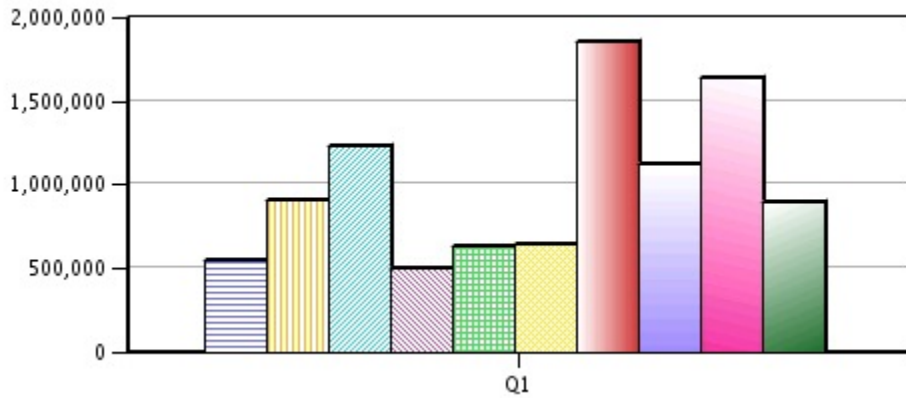
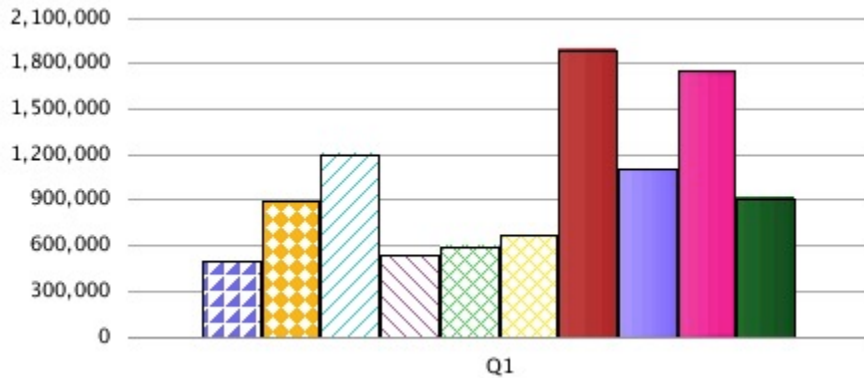


Figure 34 Bar and Pie Fill in the Updated Charting Engine



Bar Shape

Bar shapes (Triangle, Diamond, Cylinder) are not supported in the updated charting engine.

Figure 35 Bar Shape Options in the Original Charting Engine

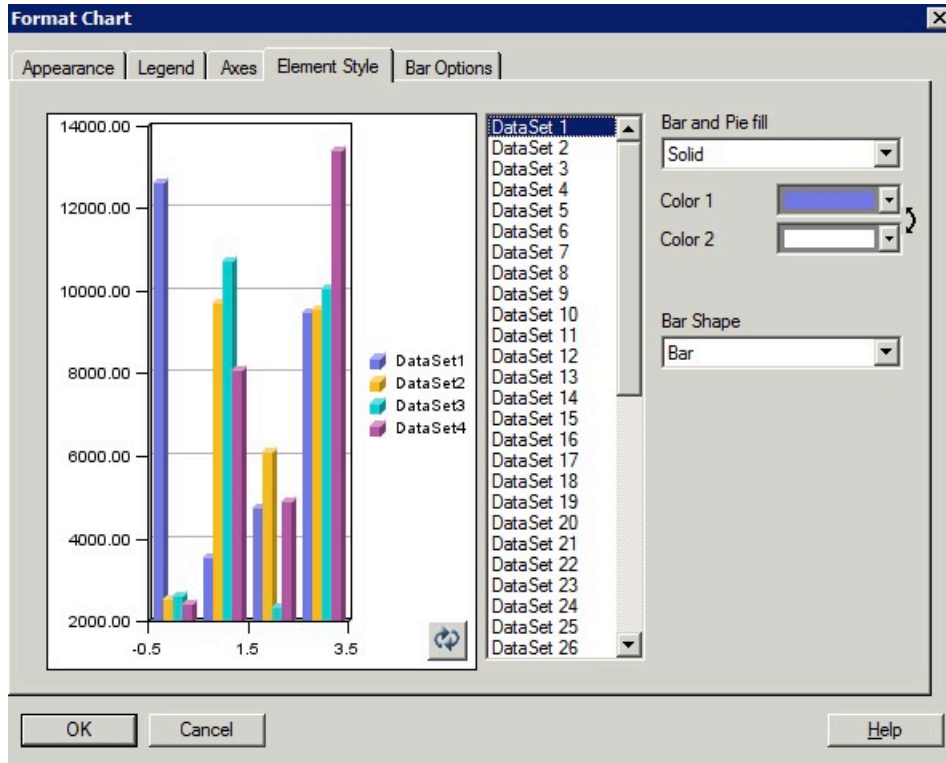


Figure 36 No Bar Shape Options in the Updated Charting Engine

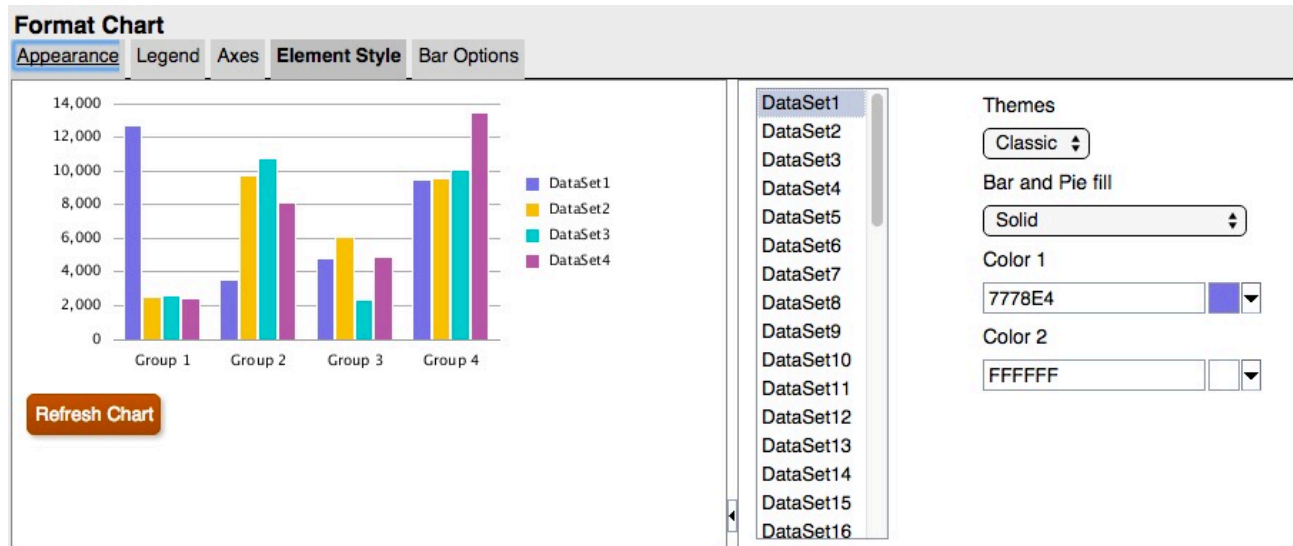


Figure 37 Bar Shapes in the Rendered Output in the Original Charting Engine

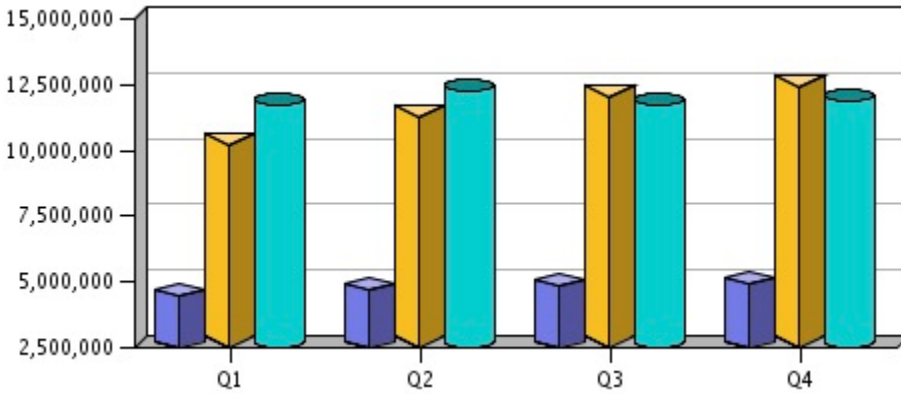
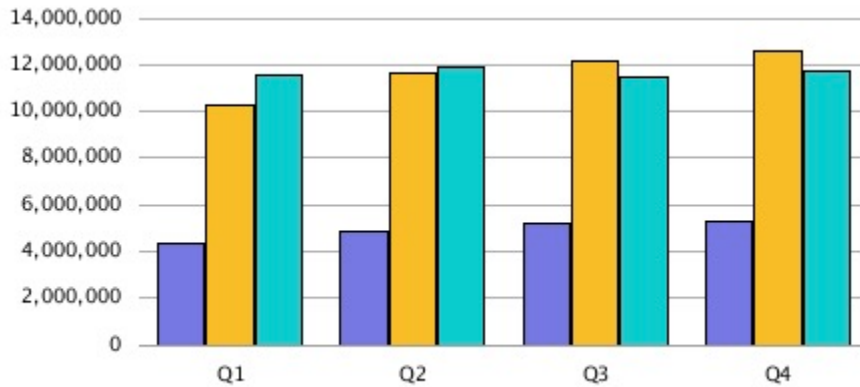


Figure 38 No Bar Shapes in the Rendered Output in the Updated Charting Engine



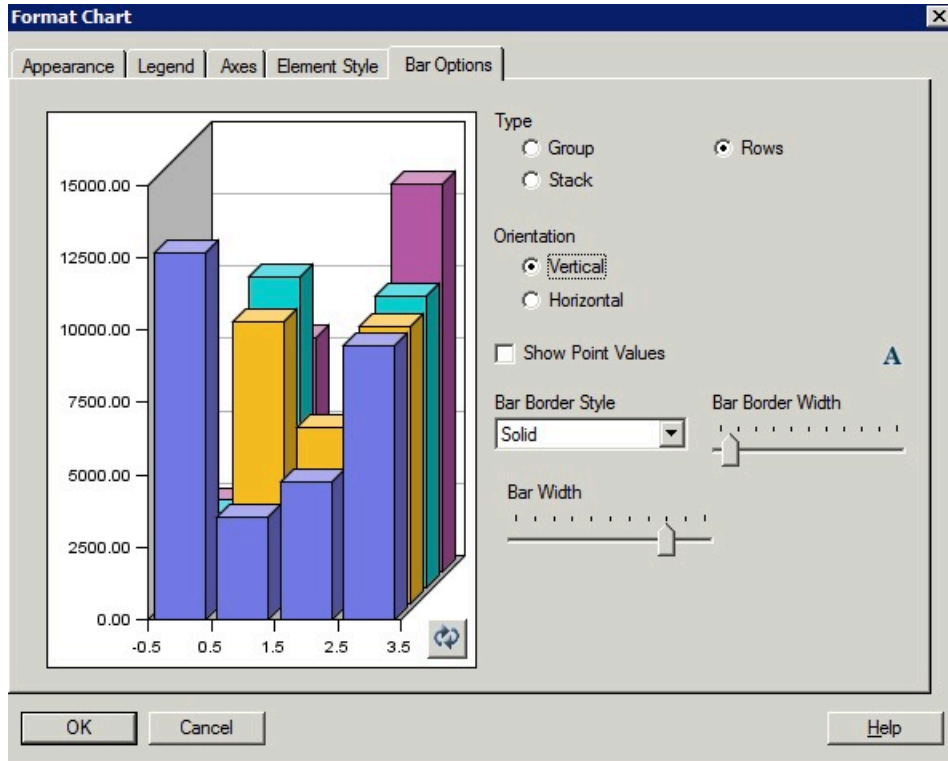
Bar Options Tab

In the updated charting engine, in the Bar Options tab in the Format Chart dialog box, each item is broken out into its own separate section.

Type = Rows

The option of “Rows” as a “Type” in the Bar Options tab is not supported in the updated charting engine, since it is 3D-specific rendering.

Figure 39 Bar Options Tab in the Original Charting Engine Showing “Rows” as an Option in “Type”



Bar Border Style

The Bar Border Style of “DotDashed” is not available in the updated charting engine.

Figure 40 Bar Options Tab in the Original Charting Engine Showing “DotDashed” as a “Bar Border Style”

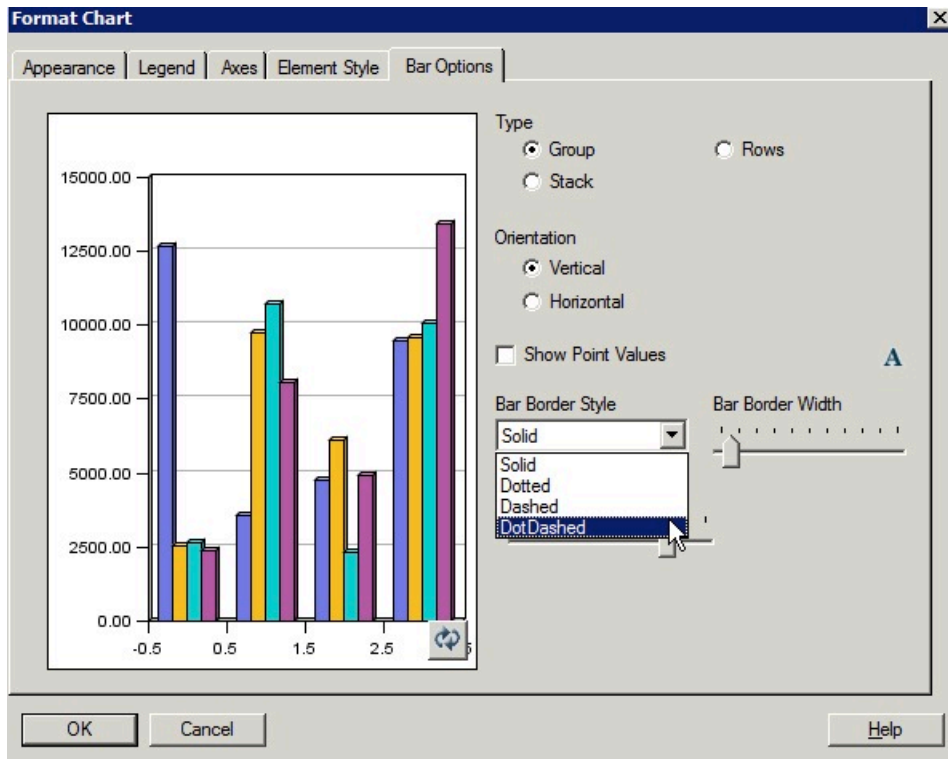
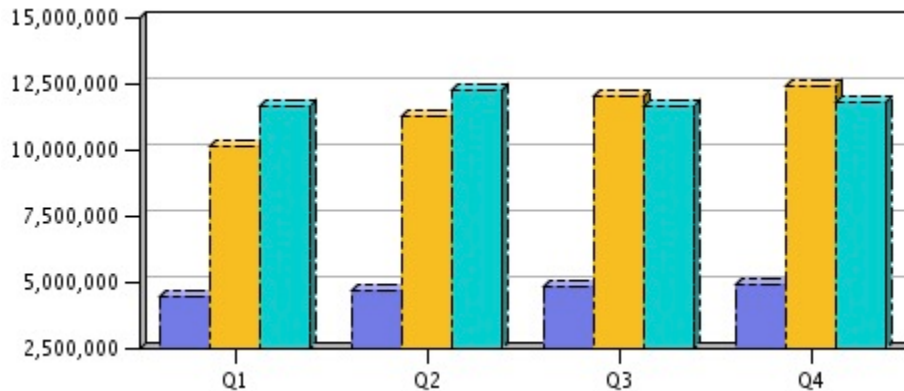


Figure 41 Dot Dashed as a Bar Border Style in the Rendered Output in the Original Charting Engine



Element Style Tab

Differences in Element Style tab for Line charts in the Format Chart dialog box include:

- Dot Dashed as a Line Style
- Line Marker Styles and Sizing

Dot Dashed as a Line Style

The Line Chart Element Style of “DotDashed” is not available in the updated charting engine.

Figure 42 Element Style Tab in the Original Charting Engine Showing “DotDashed” as a Line Style

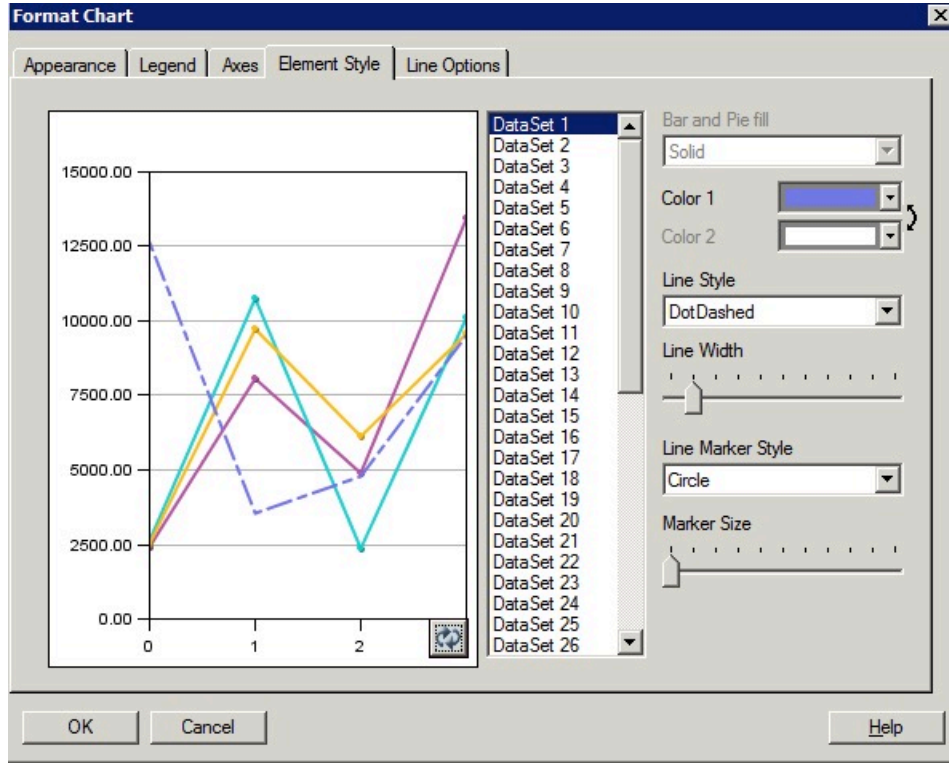
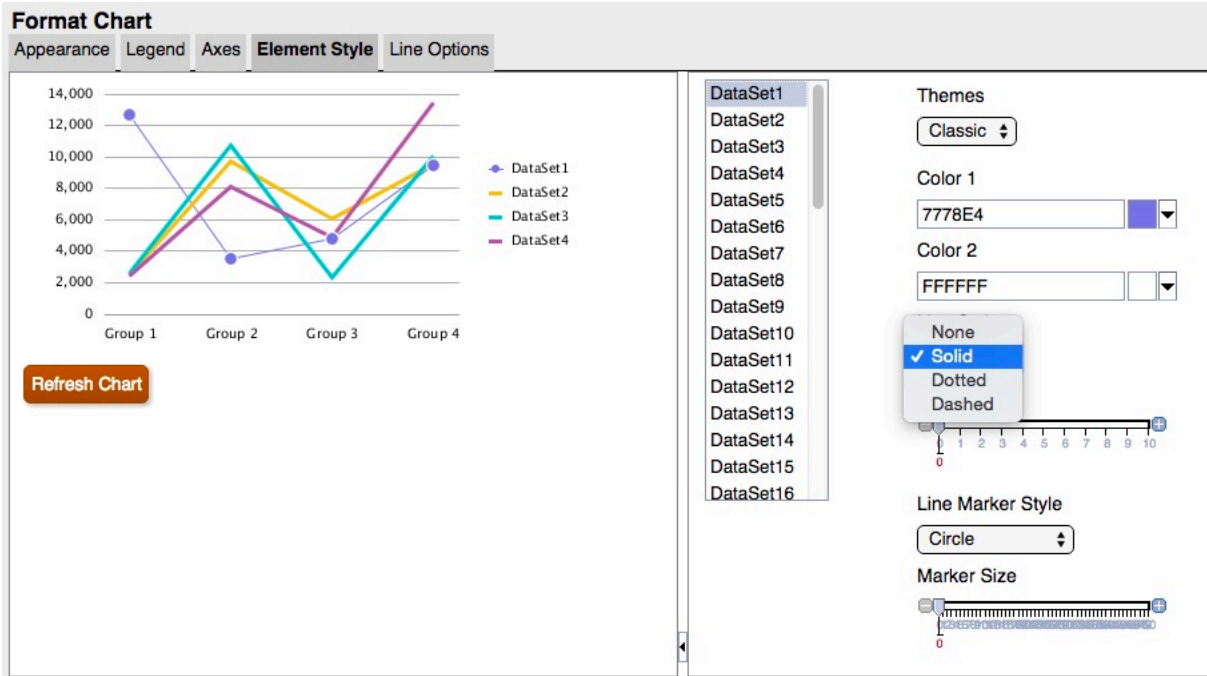


Figure 43 Element Style Tab in the Updated Charting Engine Showing That There is No “DotDashed” Line Style



Line Marker Styles and Sizing

Line Marker styles and sizing differ between the original charting engine and the updated charting engine.

Figure 44 Line Marker Styles in the Original Charting Engine

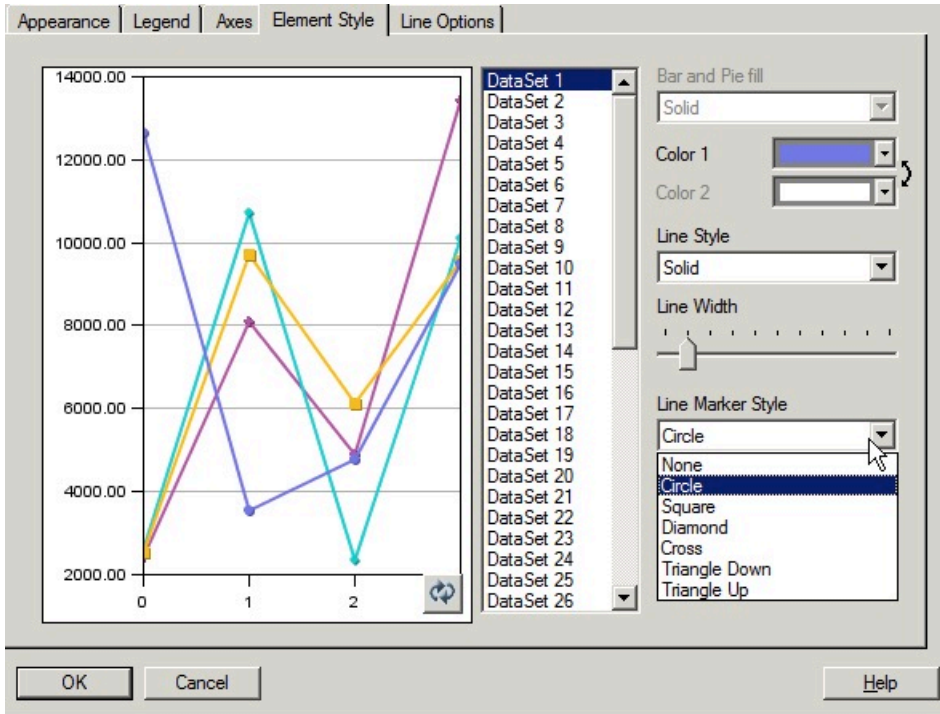


Figure 45 Line Marker Styles in the Updated Charting Engine

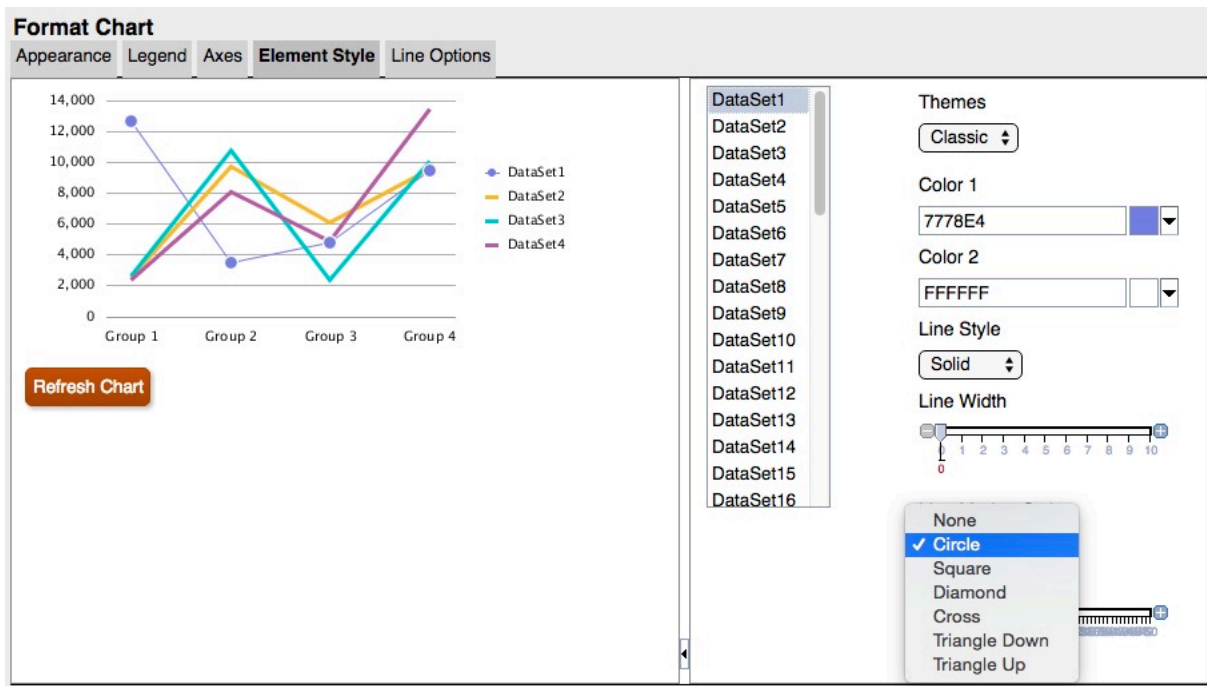


Figure 46 Line Markers in the Rendered Output in the Original Charting Engine



Figure 47 Line Markers in the Rendered Output in the Updated Charting Engine



Pie Options Tab

The following are differences in the Pie Options tab in the Format Chart dialog box:

- **Pie Angle and Separation**—Rendering differs between the original charting engine and the updated charting engine.
- **Show Slice Value As**—The original charting engine formats and fits all three labels if all are selected. The updated charting engine does not adjust Pie to fit labels; instead, it will crop

labels or not display them if the labels do not fit within the size of the Preview Window or chart output rendering.

- **Position**—In the updated charting engine, “radial” or “exterior” are supported without additional adjustments.

With “radial” positioning, if the label cannot fit within the slice, it will either be placed outside of the slice or not displayed at all.

- **Slice Border Style**—Only “solid” is supported in the updated charting engine.

Figure 48 Pie Options Tab in the Original Charting Engine

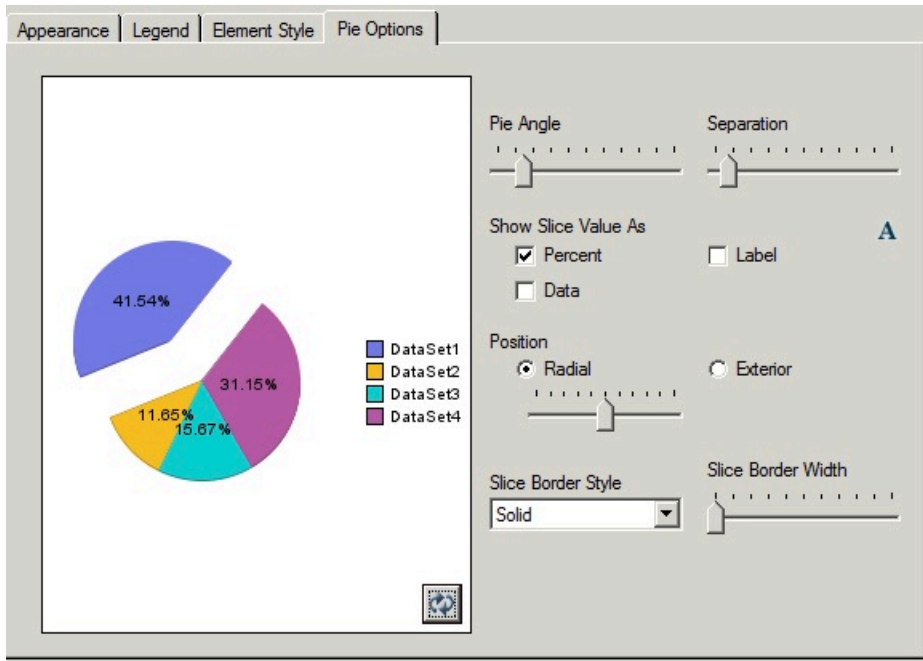
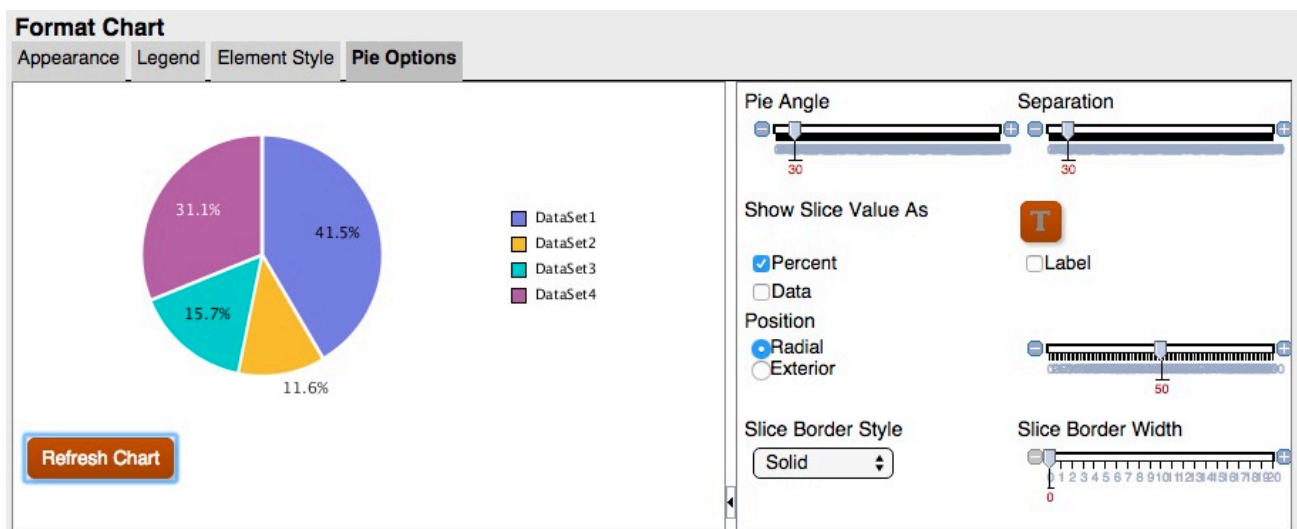


Figure 49 Pie Options Tab in the Updated Charting Engine



In the updated charting engine, the Grid Depth in the Appearance tab does not adjust the depth of a Pie chart, it only turns 3D on or off. In addition, separation does not affect one slice as it does in the original charting engine. In the updated charting engine, all slices have a smaller and uniform separation.

Figure 50 Depth and Grid Separation in the Original Charting Engine

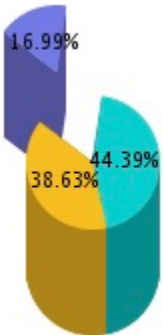
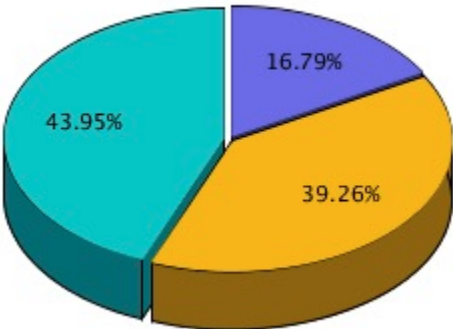


Figure 51 Depth and Grid Separation in the Updated Charting Engine



COPYRIGHT NOTICE

Financial Reporting Designing Charts with Financial Reporting Studio for Oracle Planning and Budgeting Cloud, 16.03

Copyright © 2016, Oracle and/or its affiliates. All rights reserved.

Authors: EPM Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS:

Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.