What's New in Business Analytics

Spring 2019-Summer 2019

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New Features and Enhancements Summer 2019

The following new features have been introduced in the Summer 2019 release of Business Analytics.

For more information, see the FinancialForce Business Analytics Help.

All Dashboards

The following new features have been introduced in the Summer 2019 release of Financial Statements.

- You can now include custom fields from your transactions and transaction lines to the Financial Transactions and Financial Balances datasets. The App Template Design Wizard contains two new questions, 10a and 10b.
  For more information, see "The App Template Design Wizard" in the Business Analytics Help.

  > **Note:** To comply with your license agreement, to add more than three custom fields you need a Business Analytics license. Furthermore, if you have a custom field that is a look-up to an object outside of FinancialForce Accounting, the integration user requires a license to that object.

- The prefix S2S has been removed from all dashboard titles. For example, the S2S Balance Sheet dashboard has been renamed Balance Sheet.

  > **Warning:** If you are upgrading from Business Analytics Spring 2019 or earlier and you have added new dashboards which refer to the previous dashboards, you must update them. As the names of the dashboards have changed, your dashboard will not find the previous dashboards. To fix this you must edit the links in your dashboard so that they point to the new dashboards, without the prefix S2S. Dashboards which you have added which do not refer to the previous dashboards are not affected..

Balance Sheet Dashboard

Balance Sheet Dashboard

- The label Pick Initial Selections has changed to Pick Initial Values.

Income Statement Dashboard

Income Statement Dashboard

- The label Pick Initial Selections has changed to Pick Initial Values.

New Fields

The following new fields have been added to Financial Balances.

Financial Balances Fields

Field	Description
PeriodYearPeriodDisplay	The year followed by the period. For example 2019/01.

The following new fields have been added to Financial Transactions.

Financial Transactions Fields

Field	Description
PeriodYearPeriodDisplay	The year followed by the period. For example 2019/01.

Financial Analytics

The following new features have been introduced in the Summer 2019 release of Financial Analytics.

Label Change

The label Pick Initial Selections has changed to Pick Initial Values.

Custom Filters

You can now add custom filters to the global filters displayed on the CFO Overview, CFO Profitability Detail Dashboard and CFO Balance Sheet Detail dashboards. See the "Using the CFO Overview Dashboard" starting on page 1, "Using the CFO Profitability Detail Dashboard" starting on page 1 and "Using the CFO Balance Sheet Detail Dashboard" starting on page 1 topics to learn how to add custom filters to these dashboards.

New Dashboard

Dashboard	Description
CFO Profitability Trend Prediction	Calculates a forecast of Revenue and Operating Expenses based upon your current data. This dashboard uses the Financial Balances datasets.

New Fields

The following new fields have been added to Transformed Fields.

Transformed Fields

Field	Description
Financial Year-Period (s)	Hidden field. Combines the year from Financial Year (PeriodYearName) field, and the period from the Financial Period (PeriodNumber) field and transforms the values to create a date field for use in Time Series charts. This is calculated as follows: Financial Year = Year (not transformed). Financial Period: Period 000 is added to 01. Period 100 and Period 101 are added to 12. Following this calculation, 2018/012 becomes 2018-12.
Financial Year/Month (s)	Hidden field. Combines the year from Financial Year (PeriodYearName) field, and the period from the Financial Period (PeriodNumber) field and transforms the values to create a Year/Period string. Used for date labels.

Mobile Support for CFO Dashboards

From Summer 2019, you can access the following CFO dashboards from the Einstein Analytics native application for Android and iOS, using iOS mobile and tablet devices and Android mobile devices:

- CFO Overview Dashboard
- CFO Profitability Detail Dashboard
- CFO Balance Sheet Detail Dashboard

For more information on accessing these dashboards from your mobile device or tablet, see "Supported Environment" starting on page 1.

PSA Analytics

Preparing the Data Environment

We have added support for backlog calculations with custom top-level region names. Previously, the data mappings for PSA Analytics only supported backlog calculations with the top-level region named Global Region. We now support any custom names for your top-level region.

We have added support for multiple top-level regions. If your PSA configuration supports multiple top-level regions, you can create multiple backlog calculations, selecting a different top-level region for each calculation. The PSA Analytics dataflow uses the latest calculation for each top-level region to build the datasets and displays the data in the corresponding dashboards.

Multiple Selection Faceting

We have updated the faceting functionality of several dashboards charts to support multiple selection. You can now select several data points in the chart to facet. This enhances your ability to dissect the data. For example, in the Roles, Resources and Skills chart of the Capacity dashboard, you can now select multiple resources and compare the available total capacity hours between them.

The following dashboards and charts have been updated to support multiple selection faceting.

Dashboard	Charts
Backlog	All charts
Billings	Regions, Practices, and Groups
	Accounts, Project, Resources, and Project Managers
Capacity	Regions, Practices, and Groups
	Roles, Resources and Skills
Utilization	Regions, Practices, and Groups
	Resources and Roles
	Resources by Target Attainment
Forecasts	Breakdown

All Dashboards

We have replaced the toggle buttons across all dashboards with drop-down menus. You can now use the drop-down menus to select different criteria for data visualization and to group the information in the chart accordingly.

We have also added dynamic title functionality to all charts that use drop-down menus. This changes the card's title according to the criteria selected in the drop-down.

To improve the dashboard visibility, you can now hide or display the filters panel in all applicable dashboards by clicking . The dashboard charts automatically adjust their size accordingly.

Forecasts Dashboard

We have augmented the Forecasts dashboard with the inclusion of a new **Comparison** tab. The **Comparison** tab enables you to compare your selected forecast calculation adjusted revenue value with its previous committed iteration. This tab also enables you to extract valuable insights by breaking down the difference between the current and previous iterations.

The original Forecasts dashboard's charts are now located in the **Totals** tab. This tab enables you to view and compare the expected, best case, and worst case scenarios for your service forecasts. You can also view the original and adjusted revenue values, and their distribution.

To navigate between the different tabs, click on the relevant tab in the dashboard's top header.

We have added a hierarchy level drop-down menu to the Breakdown chart in the **Totals** tab. This enables you to further dissect the data displayed by selecting which hierarchy level you want to use to visualize the forecast calculation.

We have optimized the readability of the Details table in the **Totals** tab by creating a new column for record type. Now you can see the record names in the Project/Opportunity Name column of the details chart and whether a record is a project or an opportunity in the Type column.

We have enhanced the Forecasts dashboard by implementing the functionality to drill down into PSA records from the Details chart. To do so:

1. Hover over the name of the record in the Project/Opportunity Name column.
2. Click to open the action menu.
3. Click **Open Record** to open the record in a new browser tab.

Known Issues in FinancialForce Business Analytics

This section describes known issues that can affect your use of FinancialForce FinancialForce Business Analytics.

Financial Management Analytics

Financial Analytics

The following known issues may affect your use of Financial Analytics.

Known Issues in Financial Analytics

Issue	Solution
If your calendar is configured to contain more or less than 12 periods in a year, your dashboard data will be incorrect. With the exception of special periods, Einstein Analytics dashboards only support years with 12 periods.	This is for informational purposes only.
When using the Financial Analytics dashboards, you cannot combine data from companies with differing financial years.	This is for informational purposes only.
To avoid incorrect evaluations, do not use duplicate names in your chart of accounts. For more information about configuring your dashboards, see Setting up Dashboards in Financial Analytics.	This is for informational purposes only.
When you are in the CFO Overview dashboard, not all of your filter selections here are kept when you move to the CFO Profitability Detail dashboard.	This is because only Year, Period, and Company are true global filters. When you move to the next dashboard ensure that your filter selections are correct.

Known Issues in Financial Analytics (continued)

Issue	Solution
The map component will not work correctly if the country codes do not follow the Salesforce format.	Either: 1. Change the country codes to match the Salesforce Format (https://help.salesforce.com/articleView?id=bi_chart_intro_map.htm&type=0). Or 2. Change the chart type from map to a non-geographical representation (for example bar) and delete the map toggle component tg_revenue_map_type.
When you are in the CFO Profitability Detail Dashboard, if you select a filter on the for example, Revenue page, then when you navigate to for example, Gross Margin, that same filter will be applied.	This is standard behavior. To ensure you do not lose your changes when moving between pages within the CFO Profitability Detail Dashboard, you must clear facets before moving to a new page.
You cannot load Financial Analytics dashboards with duplicate names when viewing these dashboards using a mobile device. For example, if your org contains two identically-named dashboards in two separate apps, the mobile versions of these dashboards cannot differentiate between these dashboards and the dashboard does not load.	Avoid duplicate names for dashboards across all apps in your org. To rename dashboards, run your app template, then open each dashboard in edit mode and rename.

Financial Statements

The following known issues may affect your use of Financial Statements.

Known Issues in Financial Statements

Issue	Solution
When including custom fields from your transactions and transaction lines in the Financial Transactions and Financial Balances datasets (questions 10a and 10b in the App Template Design Wizard) the "Text Area (Long)" custom field truncates if you exceed 32,000 characters.	Ensure that the "Text Area (Long)" custom field contains no more than 32,000 characters.
When including custom fields from your transactions and transaction lines in the Financial Transactions and Financial Balances datasets, encrypted custom fields are not supported.	This is for informational purposes only.
If you create an app which includes custom fields from your transactions and transaction lines, and later delete these fields on the transaction and transactions lines, the app still retains the fields. Therefore, when you re-run the app, it will fail.	You must remove the fields (questions 10a and 10b) from the app template by re-running the app template.
Custom fields with a field type of "multi-select dropdown" are not supported in Einstein Analytics and cannot be imported into the datasets.	This is for informational purposes only.
In this version of Financial Statements, the Balance Sheet and Income Statement dashboard do not return data if your org does not contain the same Section and Trial Balance 3 values as those within the dashboard. Additionally, these values must be in the same order.	This only affects Fall 2018. It has been fixed for Winter 2019. Ensure that your org contains the same Section and Trial Balance 3 values as those within the Balance Sheet and Income Statement dashboard, and that they are in the same order.
This version of Financial Statements is not supported on mobile or tablet devices.	This is for informational purposes only.

Known Issues in Financial Statements (continued)

Issue	Solution
As with all dashboards in Einstein Analytics, when you change a field selection on the Dashboard Configuration page, any previously selected values remain selected. For example, if you select Gross Profit in the Section field, but later change the field to Trial Balance 3, Gross Profit remains selected.	Previously selected values do not affect the results of the report, however, if you want to clear a selection, click ⌄ then click the checkbox next to the selected value. For more information about configuring your dashboards, see Setting up Dashboards in Financial Statements.
In multi-company mode, when you open the Balance Sheet, Income Statement or Trial Balance dashboards for the first time, details will be shown for the company which appears first alphabetically, for that currency code, instead of using the company name from the app template.	Use the Company filter to select the company you want to see details for.

PSA Analytics

The following known issues may affect your use of PSA Analytics:

Known Issues in PSA Analytics

Issue	Solution
This version of PSA Analytics dataflow requires your org to have set time periods of the type Week. If no time periods of type week exist in your org the dataflow execution fails and an error is displayed in the Einstein Analytics Data Manager.	Ensure you set up all the time periods that you require in advance including time periods well into the future. For more information on time periods, see Creating or Importing Time Periods in the PSA Help.

Known Issues in PSA Analytics (continued)

Issue	Solution
When you have multiple Utilization Calculations with overlapping dates but with different Time Period Types, the results shown can have duplicated values. For example, if you have two Utilization Calculations for the same resource over the year, one with the utilization calculated monthly and the other calculated quarterly.	To avoid incorrect utilization data being displayed, ensure that the Utilization Details generated by the Utilization Calculation are unique per resource and time period, we also recommend using the smallest Time Period Type available.
When using the PSA Analytics dashboards, depending on the filter and drop-down menu selection combination, some charts may display the message "No results found". This can happen, for example, if you try to filter projects in a particular region by project manager when there is none assigned.	Try changing the filtering criteria, and verify that all fields used for filtering have data in PSA.
In the Forecasts dashboard. When faceting by RPG in the Breakdown chart of the Totals tab, the Details table faceting is based on the weighted category instead of the RPG selected.	This is for informational purposes only.
In the Distribution and Risk chart of the Forecasts dashboard. When you select different RPGs for different weighted categories in the Breakdown chart, the expected, best, and worst cases of the Distribution and Risk chart facet according to the RPGs selected independently of the weighted category selected. This happens, for example, if you select the best case scenario for EMEA and the Americas in the Breakdown chart along with the expected for EMEA; the Distribution and Risk chart displays the expected and best case for both regions.	This is for informational purposes only.

Contacting Customer Support

Helping You Keep Your FinancialForce Solutions Running Smoothly

FinancialForce aims to provide you with first-class, global support via a network of support centers around the world.

To get the answers you need:

- Consult the FinancialForce and Salesforce Help
- View documentation, tutorials, training, and knowledge articles in the FinancialForce Community: **https://erp.force.com/community/s/Training-Home**
- Ask a question in the FinancialForce Community: **https://erp.force.com/community/s/**
- Log a case with FinancialForce Customer Support: **https://erp.force.com/community/s/cases**

For more information and contact details, see the Support page of the FinancialForce website: **https://www.financialforce.com/support/**