

Adaptive Live | 2019

Performance Tricks

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Performance Tricks

What will we be covering?

- Structure Tips
- Maintenance Tips
- Conditions of Evaluation/Formula tricks
- Reporting Tips
- Other Considerations

How can we leverage this information?

- Building new models
- Keeping models clean over time
- Speeding up models

Structure Tips

- When creating levels, use these considerations:
 - Minimize unnecessary layers. Use Attributes to allow those additional layers for reporting.
 - Point of comparability to Actuals
 - Create additional list dimension for actuals to load to lower level for additional drill through of actuals.
- Use List Dimensions over Standard when possible
 - Allows multiple hierarchies using different attributes
 - Evaluates faster when evaluating the total
 - Easier to isolate a group of dimension values using an attribute
 - Allows values to be made inactive over time

Maintenance Tips

- Inactivate unneeded levels
 - Keep Levels available in Actuals to keep loading actuals into them
- Optimize periods within versions
 - When adding a new Plan year, eliminate an actuals year in overlay
 - Ensure modeled sheet and cube sheet formulas have a condition to only evaluate in Plan periods when applicable
- Clear unused old forecast versions
 - Set remaining ones to pre-calculate values
- Run validate formulas at least once before each new cycle to remove errors in formulas
- Clear stale data from unused sheets in current versions

Conditions of Evaluation/Formula tricks

- Create step calculations when pulling aggregating data to use in further calculations
 - Instead of doing `Acct.A[Level=Top Level, Time=this-1:this-12]`
 - First create a calculation that pulls value for current period (`Acct.A[Level=top Level]`)
 - Create follow up calculation that references first value for a time range (`Acct.b[time=this-1:this-12]`)
 - Allows first calculation to cache before evaluating the time reference
- Use a plan assumption to evaluate formulas in plan periods
 - Create an Assumption where a 1 is in all plan periods
 - Create a formula that says `iff(assum.Plan=1,logic,0)`.
- If formulas need to be calculated sparsely, always create the condition of which it needs to consider before it evaluates. For example, if the formula should only evaluate when `x=1`, specifically state `iff(acct.x=1, then evaluate,0)` rather than creating a bunch of 0 result formulas.
- Level attributes evaluates quicker when using in formulas than level dimensions
- Use Optimal Syntax (IFF, DIVF, etc)

Reporting Tips

- Use the below settings to create an optimized export like excel report:
 - Suppress Rollups
 - Include Account, Level, and an Expanded list dimension in the rows (can add multiple list dimensions) (Note: Do not include Metric or System Accounts). Enter Time in columns and version in Filter or column.
 - Repeat item labels in Excel
 - Set Excel as default output

Other Tips

- Use Admin Publishing and minimize admin changes during key parts of cycle when maximum users are in system
 - Creates a full re-cache of model, which can create temporary extended load for first user after admin change is made.
 - If an admin change is needed, refresh income statement at Top Level right after change so only admin user feels impact of Admin change
- Ensure Calculate Formulas is turned on in all locked plan versions





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Q&A



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Thank You

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