



HYPERION® FINANCIAL MANAGEMENT –  
SYSTEM 9  
RELEASE 9.3.1

USING ADMINISTRATOR FEATURES

ORACLE | Hyperion

Oracle's Hyperion® Financial Management – System 9 Release 9.3 contains significant enhancements to administrator features and provides a user experience consistent with other Hyperion products.

Oracle's Enterprise Performance Management Architect is a new feature in Financial Management. Performance Management Architect enables administrators to manage, create, and deploy Hyperion Applications within one interface.

This document describes the key changes to administration features introduced with Performance Management Architect. It also includes information on Classic Application Administration features for any application not being managed using Performance Management Architect. See [Table 1, “Changes to Key Tasks in Financial Management ,” on page 3](#) and [Table 2, “Classic Application Administration Tasks,” on page 7](#).

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# Performance Management Architect Modules

Performance Management Architect has the following modules:

- **Dimension Library**—A centralized location to manage dimensions and dimension properties. You can use the Dimension Library to:
  - Create dimension import profiles—enabling dimension updates from both flat files and relational database interface tables
  - Add, delete, and modify dimension members
  - Modify dimension and member properties
- **Application Library**—A summary of Application Views that have been created and/or deployed to Financial Management, Oracle's Hyperion® Planning – System 9, Enterprise Analytics, or Essbase Analytics. Application Views contain dimensions and dimension attributes that are designed to meet specific requirements for Financial Management and Planning needs. You can use the Application Library to:
  - Create Financial Management, Planning, Enterprise Analytics, or Essbase Analytics Application Views based on Financial Management and Planning dimension sets
  - Manage Application Views in one centralized location
  - View the data flow between Application Views
  - Migrate Application Views to different servers
  - Deploy Application Views to Financial Management, Planning, Enterprise Analytics, or Essbase Analytics
- **Data Synchronization**—Enables data synchronization within Hyperion applications. You can use the Data Synchronizer to:
  - Create data movement synchronizations between Hyperion applications. For example, an administrator can synchronize data between two Financial Management applications; two Planning applications, and between one Financial Management and a Planning application
  - Create data mappings for reuse
  - Create flat file and interface table mappings to import data into Hyperion applications
- **Application Upgrade**—Enables administrators to upgrade from previous Financial Management and Oracle's Hyperion® Planning – System 9 releases.
- **Library Job Console**—Provides a summary of Dimension Library and Application View activities, including imports, deployments, and data synchronizations.

# Summary of Changes to Key Financial Management Administration Tasks

**Table 1** Changes to Key Tasks in Financial Management

Category / Action	Pre-9.3x Action	Release 9.3x Action
<b>Oracle's Hyperion® Workspace Integration</b>		
Logging into Financial Management	Log on Financial Management using the following URL: <code>http://servername/HFM/</code>	<p>Open your Web browser and access Performance Management Architect through Workspace (<code>http://&lt;Web Server&gt;:&lt;port&gt;/workspace/</code>) where <code>&lt;Web Server&gt;</code> is the Web server machine host name and <code>&lt;port&gt;</code> is the Web server listen port; for example, 19000 if using the Apache instance configured with Oracle's Hyperion® Reporting and Analysis – System 9.</p> <p>Select <b>Navigate &gt; Applications &gt; Consolidation</b>. Then, select an application to open.</p> <p>The selected application opens on a new tab within the Workspace.</p> <p><b>Note:</b> If you try to access Financial Management from the old URL, a dialog box is displayed indicating that an error has occurred. Then, you are directed to the Workspace URL.</p>
<b>Application Creation and Application Management</b>		
Profile creation	Use the Win 32 Client to create Application profiles. These templates define the languages, calendar, frequencies and periods for applications.	<p>Import dimensions into the Dimension Library using an import profile.</p> <p>You can utilize these profiles to populate the Dimension Library from flat files or relational interface tables.</p> <p>Profiles define the mapping of the dimensional information within the flat file or interface table. The languages, calendar, frequencies, and periods are now treated as dimensions similar to other dimensions (accounts, entities, and so on). Similar to earlier versions, these dimensions cannot be altered once an application has been created.</p>
Application	In the Web or Win 32 Client, select <b>Create Application</b> , then enter the application label, description, and select the application profile.	<p>Select <b>File &gt; New &gt; Application View</b>. Enter a name, select a type, and enter a description, then click <b>OK</b>.</p> <p>The new Application View opens in the Dimension Library. This creates a View of the application in Performance Management Architect but does not create the application within Financial Management until the View is deployed. Deploying an application is a right-click operation within the Application Library.</p>

Category / Action	Pre-9.3x Action	Release 9.3x Action
Application settings	In the Web or Win 32 Client, select <b>Manage Metadata</b> . Open the application file and select <b>AppSettings</b> .	Open the Application View and click on the application name. The application settings are displayed in the Property Grid.
Creating dimensions	In the Win 32 Client, select <b>Manage Metadata</b> . Then, open the application file and select the dimension to edit.	<p>Open the Dimension Library. (<b>Navigate &gt; Administer &gt; Dimension Library</b>) Perform one of these actions:</p> <ul style="list-style-type: none"> <li>● Import dimensions into the Dimension Library by creating and importing a flat file or importing information from interface tables. (<b>File &gt; Import &gt; Create Profile</b>)</li> <li>● Select <b>File &gt; New &gt; Dimension</b>. Enter a name, description and select the dimension type.</li> </ul>
Metadata editing	<p>In the Win 32 Client, open the application.</p> <p>Perform one of these actions:</p> <ul style="list-style-type: none"> <li>● Save the Application files and load into the Financial Management application from the Web or Win 32 Client.</li> <li>● Make the modifications directly within the XML or APP files and load into the Financial Management application.</li> </ul>	<p>Perform one of these actions:</p> <ul style="list-style-type: none"> <li>● Edit dimensions in the Dimension Library.</li> <li>● Edit dimensions in the *.ads flat files. Then, reload into the Dimension Library in replace or merge mode; or load the modified dimensions through the interface tables within the profile.</li> </ul>
Metadata flat file formats	Hyperion Application files (*.app) and XML files (*.xml)	<p>Financial Management 9.3 utilizes a new flat file format, (*.ads).</p> <p>Existing Financial Management *.xml files can be converted into the new *.ads file format using the EPM Architect File Generator utility, available on the Hyperion Developer Network (<a href="http://dev.hyperion.com/">http://dev.hyperion.com/</a>).</p>
Application upgrade	Run HFM Schema Upgrade.exe to modify the existing application's database and register the applications with Shared Services.	<p>Run HFM Schema Upgrade.exe to modify the existing application's database and register the applications with Shared Services.</p> <p>Bring the upgraded applications into the Application Library:</p> <ul style="list-style-type: none"> <li>● Select <b>Navigate &gt; Administer &gt; Application Upgrade</b>. Navigate through the Application Upgrade wizard, selecting the applications to be brought into the Application Library.</li> </ul>
Duplicating applications within the same environment	<p>Application artifacts can be exported into flat files from either the Web or Win 32 Client:</p> <ul style="list-style-type: none"> <li>● Application Profile</li> <li>● Security</li> <li>● Metadata</li> <li>● Member Lists</li> <li>● Rules</li> </ul>	<p>Select <b>Navigate &gt; Administer &gt; Application Library</b>. Right-click the source application and select <b>Duplicate</b>. Enter a new name, select the application type, and input a description.</p> <p>The new Application View contains the same application settings and dimensionality as the original Application View. Deploy the new Application View and load the existing application artifacts into the new application.</p>

Category / Action	Pre-9.3x Action	Release 9.3x Action
	<ul style="list-style-type: none"> <li>● Data</li> <li>● Journals</li> <li>● Documents</li> </ul> <p>A replica of the application can then be created by utilizing these artifacts within a new application.</p>	
Migrating applications to a new instance	Run HfmCopyApplication.exe. Then, populate the dialog box with the appropriate source and target application information.	<p>Open the Application Library and right-click the source application and select <b>Migrate</b>.</p> <p>Next, enter the name and description, select the Financial Management instance, application server, and Shared Services project for the new application. Then, select the appropriate data options The new application will contain all of the source application's application settings, artifacts, rules and data.</p>
Replicating applications from its artifacts	<p>You can export these application artifacts into flat files from the Web or Win 32 Client:</p> <ul style="list-style-type: none"> <li>● Security</li> <li>● Metadata</li> <li>● Member Lists</li> <li>● Rules</li> <li>● Data</li> <li>● Journals</li> <li>● Documents</li> </ul> <p>A replica of the application can then be created by utilizing these artifacts within a new application.</p>	<p>Application Views can be extracted utilizing the EPM Architect File Generator utility, available on the Hyperion Developer Network (<a href="http://dev.hyperion.com/">http://dev.hyperion.com/</a>). This utility creates an *.ads flat file containing the application settings and the dimensional structures for the selected Application View.</p> <p>A replica of the application can then be created by combining the *.ads file with the following artifacts (which can be extracted from the Financial Management Web or Win 32 Client):</p> <ul style="list-style-type: none"> <li>● Security</li> <li>● Member lists</li> <li>● Rules</li> <li>● Data</li> <li>● Journals</li> <li>● Documents</li> </ul>
Deleting applications	In the Win 32 Client, select <b>Delete Application</b> . Then, select the application from the server cluster and click <b>Delete Application</b> .	<p>Open the Application Library, right-click on the source application and select <b>Delete</b>. Then, confirm the deletion of the application.</p> <p>The application is deleted from the Application Server and the Application View is removed from the Application Library.</p>
<b>Data Synchronization</b>		
Copying data between applications	Data can be copied through extract and load using either the Win 32 or Web Client.	<p>Open the Data Synchronization module (<b>Navigate &gt; Administer &gt; Data Synchronization</b>) then select <b>File &gt; New &gt; Synchronization</b>. Follow the wizard to define source and target information. After you select the source and target, define the appropriate dimension mappings, apply filters, and save the synchronization. You can execute the</p>

Category / Action	Pre-9.3x Action	Release 9.3x Action
		synchronization manually or schedule an automated task using Task Automation.
Loading data into applications	<p>Data can be loaded using the Load Data option using either the Win 32 or Web Client.</p> <p>You can also use Hyperion Application Link and Hyperion Financial Data Quality Management.</p>	<p>In Financial Management 9.3 you have the ability to load data using the interface tables included with the Data Synchronization module.</p> <p>Open the Data Synchronization module (<b>Navigate &gt; Administer &gt; Data Synchronization</b>) then select <b>File &gt; New &gt; Synchronization</b>. Follow the wizard to define source and target information. For the source information, select Hyperion Data Interface Area (for data loaded via relational database) or External Source (for data loaded via flat files). For the target information, select the appropriate Financial Management application.</p> <p>You can predefine external files and data interface information using <b>File &gt; New &gt; Data Interface Table Definition</b> or <b>File &gt; New &gt; External File Definition</b> prior to building the synchronization. You can manually execute the synchronization or schedule the synchronization using Task Automation.</p>

### Security

Classic Editor	Using the Financial Management Configuration Utility, assign the Application Creator role.	<p>Assign the Application Creator role using the Oracle's Hyperion® Shared Services Global role listing.</p> <p><b>Note:</b> If you are using Performance Management Architect, you need the global role to create/deploy applications. The Application Creator role from the Financial Management Configuration Utility is not needed.</p>
Create Applications Role	Applications could be created by any user that has been provisioned as an Administrator through Shared Services for the given application.	The Performance Management Architect Shared Services role of Application Creator by product allows the user to create and deploy applications.
Dimension Editing Role	Dimension editing can be performed by any user that has been provisioned as an Administrator through Shared Services for the given application.	The Dimension Editor for Oracle's Enterprise Performance Management Architect allows the user to create, manage, delete, and assign dimension security to other users.
Dimension Security	Dimension modifications can only be made by users that have been provisioned as Administrators through Shared Services for the given application.	Dimension security is assigned by the Dimension Editor or the Dimension Owner.

# Summary of Classic Application Administration Tasks

**Table 2** Classic Application Administration Tasks

Category / Action	Pre-9.3x Action	Release 9.3x Action
<b>Application Creation and Application Management</b>		
Create applications on the Web	Log on Financial Management at <a href="http://servername/HFM/">http://servername/HFM/</a> . Select <b>File &gt; Create Application</b> . Populate the required application information and select Create.	Log on Workspace. Select <b>Navigate &gt; Administer &gt; Classic Application Administration &gt; Consolidations Administration</b> . Select <b>Create Application</b> . Populate the application information and select Create.
Open applications on the Web	Select <b>File &gt; Open Application</b> . Select the application from the server cluster.	Select <b>Navigate &gt; Applications &gt; Consolidation &gt; Refresh</b> . The new application is added to the existing list.
Delete applications on the Web	Log on Financial Management at <a href="http://servername/HFM/">http://servername/HFM/</a> . Select <b>File &gt; Delete Application</b> . Select the application from the server cluster, then click <b>OK</b> .	Log on Oracle's Hyperion® Workspace. Select <b>Navigate &gt; Administer &gt; Classic Application Administration &gt; Consolidations Administration</b> . Select <b>Delete Application</b> . Select the application from the server cluster and click <b>OK</b> .
Register applications on the Web	Log on Financial Management at <a href="http://servername/HFM/">http://servername/HFM/</a> . Select <b>File &gt; Register Application</b> . Select the application from the server cluster. Review the application information and click <b>Register</b> .	Select <b>Administration &gt; Consolidations Administration</b> . Select <b>Register Application</b> . Select the application from the server cluster. Review the application information and click <b>Register</b> .
<b>Security</b>		
Application Creation	To create applications, you must be a member of the Application Creators group designated within the Financial Management Server and Web configuration.	To create applications, you must be a member of the Application Creators group designated within the Oracle's Hyperion® Financial Management – System 9 Server and Web configuration. In addition, in Oracle's Hyperion® Shared Services, you must be assigned the Dimension Editor and Financial Management Application Creator roles.

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Financial Management Using Administrator Features, 9.3.1

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