



HYPERION® PLANNING – SYSTEM 9
RELEASE 9.3.1

NEW FEATURES

ORACLE | Hyperion

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Administrative Enhancements

More Flexible Dimensions

You now have more flexibility when working with dimensions in Oracle's Hyperion® Planning – System 9:

- You can now create hierarchies for Scenario, Version, Period, and attribute dimensions.
- All hierarchical dimensions except attributes now support shared members.
- Period members, including BegBalance, can be set to any valid consolidation operator.
- You can set two-pass calculation for root dimensions.
- You can assign aliases to attributes and attribute values.

Dynamic Time Series Members

You can now set Dynamic Time Series (DTS) Period members in Planning that show period-to-date data, such as quarter-to-date expenses. You can also set aliases for DTS members.

Predefined DTS members include:

- H-T-D: History-to-date
- Y-T-D: Year-to-date
- S-T-D: Season-to-date
- P-T-D: Period-to-date
- Q-T-D: Quarter-to-date
- M-T-D: Month-to-date
- W-T-D: Week-to-date
- D-T-D: Day-to-date

Ability to Write Essbase Data

By assigning a new Planning role in Oracle's Hyperion® Shared Services called *Essbase Write Access*, you can grant planners and interactive users the same access permissions they have in Planning, to data in Oracle's Hyperion® Essbase® – System 9 . Using another product such as Oracle's Hyperion® Provider Services with Oracle's Hyperion® Smart View for Office, Essbase Excel Add-in, or third-party tools, users can then change Planning data—to which they have write access in Planning—directly in Essbase.

Export Access Permissions

Using the new ExportSecurity utility, you can now export access permissions from one application and, using the ImportSecurity utility, import them into another application.

Business Rules

Oracle's Hyperion® Business Rules new features:

- Configurable threshold for background processing during the execution of business rules
- If configured, users can view executing business rules having runtime prompts
- Administrators can set whether substitution variables are displayed in runtime prompts or are filtered for the context

Performance Management Architect Enhancements

You can create Planning applications using Oracle's Enterprise Performance Management Architect functionality or Classic Planning application administration. Performance Management Architect enables administrators to manage, create, and deploy Hyperion applications within one interface. The following sections describe enhancements in Performance Management Architect.

Dimension Folders

Dimensions can now be grouped and organized in folders to improve search and navigation in the Dimension Library. Dimensions can be shared across multiple folders to facilitate reusability of the same dimension across multiple applications and subject areas. Folders can include subfolders and are managed using drag-and-drop. When you delete folders, dimensions in the folder can also be deleted.

Dimension Member Rename

When you change member names, the rename operation is reflected appropriately during deployment to a target application. A member's name remains consistent between the Master View and all Application Views to which the member belongs.

Dimension Filtering and Sorting

The Dimension Library Master View enables you to filter and focus tasks to a particular subset of dimensions by Name, Type, or Owner. Dimensions and folders can be sorted within the Master View. Both filters and sorts can be cleared or reapplied.

Child Member Reordering

Members can now be reordered under a parent member after the original order was defined. This enables newly created members to be reordered in between existing members. Reordering of child members is available both manually within the Dimension Library as well as through an import process.

Search Enhancements

To improve analysis capabilities in the Dimension Library, the Find feature enables searching for dimension members by any property value. Previously, you could search by only a member's name or description. The search can be in the Master View or limited to an Application View.

Oracle Application Server Support

Performance Management Architect Application and Data Synchronizer servers can now be deployed on Oracle Application Server 10G during installation. See the *Hyperion Planning – System 9 Installation Guide*.

Customize PDF Reports

You can define the content and layout of PDF reports on data forms, data form definitions, task lists, and planning units. By customizing templates, you can add company logos, charts, special formatting, and so on.

Sample Application

This release includes a predefined Planning application—included with installation—that provides sample application designs and objects: dimensions, composite data forms, business rules, menus, task lists, user variables, substitution variables, and data.

The Sample Application:

- Demonstrates various components and their relationships, which can give you ideas for building an application that suits your enterprise.
- Is supported in both Classic and Performance Management Architect application administration.
- Confirms a successful Planning installation when you initialize the Sample Application.
- Provides data form definitions that you can import for use in your own application.

New Documentation

This release includes new guides to help administrators set up and administer Oracle's Hyperion products:

- *Hyperion Installation and Configuration Troubleshooting Guide*—Describes how to troubleshoot Hyperion product installations and provides suggestions for resolving common deployment issues.
- *Hyperion Product SSL Configuration Guide*—Describes how to deploy Hyperion products in Secure Sockets Layer (SSL)-enabled environments.
- *Hyperion Backup and Recovery Guide*—Provides guidance on backing up Oracle's Hyperion® Shared Services, Oracle's Hyperion® Financial Management – System 9,

Planning, Oracle's Hyperion® Business Rules, Oracle's Hyperion® Reporting and Analysis – System 9, Oracle's Hyperion® Essbase® – System 9 , and Oracle's Enterprise Performance Management Architect.

Functional Enhancements

Multiple Open Planning Applications

In Oracle's Hyperion® Workspace, you can have multiple Planning applications open simultaneously and can easily navigate among them.

Smart View

This release of Oracle's Hyperion® Smart View for Office supports:

- Single-click method for selecting all data forms and members taken offline when syncing data to the server
- Single-click method for selecting all data forms and members taken offline when refreshing data and data forms from the server
- Support for Planning's shortcut menus in data forms, allowing users to right-click a member and select a menu item to open a URL, data form, workflow, or business rule.
- Substitution and user variables in runtime prompts
- Displaying member aliases during member selection
- Calculation when loading data forms

International Date Formats

Users can determine how dates display in data forms:

- MM-DD-YYYY
- DD-MM-YYYY
- YYYY-MM-DD
- Automatically Detect (to use their system's locale settings)

Indentation of Members on the Page

Users can set how members are indented on the Page drop-down list:

- Indent only the bottom-most members
- Indent members based on their hierarchy level
- Do not indent; display members as a flat, sequential list

User Interface Enhancements

Mass Allocate or Grid Spread with Percentages

If Grid Spread and Mass Allocate are enabled as a data form property, you can specify an amount—or percentage—by which Planning increases or decreases values across dimensions.

Apply Cell Locking with an Icon

To facilitate “what if” analysis, Oracle's Hyperion® Planning – System 9 now provides an icon for temporarily locking cell values.

Copy Cell Text Option when Copying Versions

When copying versions, users can now select to copy cell text.

Application Link and DIM Adapter for Planning

Oracle's Hyperion® Application Link Adapter and Oracle's Hyperion® Data Integration Management Adapter for Planning support hierarchical attribute dimensions and assigning attribute aliases. Thus, there are new parent and alias ports on the attribute method. Oracle's Hyperion® Data Integration Management Adapter for Planning also supports a Cube Refresh option.

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