



ORACLE® HYPERION PLANNING, FUSION
EDITION

RELEASE 11.1.2.1

NEW FEATURES

ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

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Features Introduced in Release 11.1.2.1

Upgrade Wizard

The new Oracle Hyperion Planning, Fusion Edition Upgrade Wizard enables you to:

- Upgrade both Classic and Oracle Hyperion EPM Architect, Fusion Edition Planning applications.
- Simultaneously update multiple data source references for rehosted relational databases and Oracle Essbase servers.
- Update references to rehosted Essbase servers that have reporting applications.

Enhancements to Administrative Features

Approvals

Former process management functionality is renamed Approvals and includes key new features:

- Dynamic owner assignment
Leverage UDAs to dynamically assign owners, reviewers, and users to be notified in data validation rules. This enables administrators to set the user name in the UDA associated to the dimension member that participates in the approval process, instead of specifying the user name in the validation rule. For example, create a UDA that includes a prefix—a generic user description (for example, ProdMgr:). Then in a validation rule, instead of entering specific user names, you select the UDA method, which dynamically returns the user name stored in the UDA of the current member.
- Troubleshooting support
When an error occurs during planning unit validation or promotion, a report is generated that lists the data form and validation rule name that caused the error. More information is written to the server log.
- View how planning units are used
A new Usage tab enables you to view planning unit hierarchy dependencies and links you to the data forms or scenario and version associations so you can remove the dependencies, if needed. Dependent objects such as data validation rules or scenario and version associations must be disassociated before you can delete a planning unit hierarchy.

Support for Fiscal Year Calendars

Using the Classic Application Wizard in Planning or the application wizard in Performance Management Architect, you can set the first fiscal year and month and specify whether the fiscal year starts from the same calendar year or the previous calendar year. You can later set up calculations based on the calendar year, for example, using formula expressions.

Data Form Creation

Data form design enhancements:

- Validation rules based on Attribute dimensions support operators such as **Greater Than** and **Less Than**, which are required for attributes of type **Numeric** and **Date**. Additionally, attribute values are supported in validation rules for **If** conditions.
- The **Not In** operator is now supported in data validation rules.
- In the data form list, icons now distinguish whether data forms are simple, composite, or ad hoc grids.
- When designing data forms, you can set row height (with the options **Medium**, **Size-to-Fit**, and **Custom**). Users can also drag row headings to adjust row height while viewing a data form, regardless of the row height setting in the data form properties.
- A new **Use Context** checkbox enables user variables to be used in the POV. With this option selected, the value of the user variable changes dynamically, based on the context of the data form.

Reporting Application Enhancements

- The new `PushData` utility enables administrators to schedule pushing data to a reporting application during non-peak hours.
- Smart List labels in Planning dimensions can be mapped to reporting application member names or aliases.

Other Administrative Enhancements

- Use the Essbase `@RETURN` function to customize displayed messages when a business rule calculation is terminated.
- The `OutlineLoad` utility now supports an `/8` parameter for specifying that input, output, log, and exception files use UTF-8 encoding, and that UTF-8 BOM markers be written to output, log, and exception files.
- Set the maximum length for cell text and notes with the `MAX_CELL_NOTE_SIZE` and `MAX_CELL_TEXT_SIZE` properties.
- To configure a data source to support Essbase failover in active-passive clustering mode, you can replace the **Essbase Server** name value with the APS URL followed by the Essbase cluster name (for example, `http://:13090/aps/Essbase?clusterName=EssbaseCluster-1`). For more information, see the “Documentation Updates” section of the *Oracle Hyperion Planning Readme*.
- The online help systems for PlanningOracle Hyperion Public Sector Planning and Budgeting, Fusion Edition modules, Oracle Hyperion Workforce Planning, Fusion Edition, and Oracle Hyperion Capital Asset Planning, Fusion Edition are now available in Oracle Hyperion Enterprise Performance Management System dynamic help, enabling access to them from an integrated help environment.

New Roles

The following new roles are available in Oracle's Hyperion® Shared Services:

- **Approvals**
 - **Approvals Administrator:** Typically responsible for controlling the approval process for their region, but does not need the overall Planning administrator role. The Approvals Administrator comprises these roles:
 - **Approvals Ownership Assigner:** Performs Planner role tasks, and for members of the planning unit hierarchy to which they have write access, can assign owners, reviewers, and users to be notified.
 - **Approvals Process Designer:** Performs Planner role tasks and Approvals Ownership Assigner tasks, plus, for any member of the planning unit hierarchy to which they have write access, they can change the secondary dimensions and members for the Entities to which they have write access, change the scenario and version assignment for a planning unit hierarchy, and edit data validation rules for data forms to which they have access.
 - **Approvals Supervisor:** For members of the planning unit hierarchy to which they have write access, they can start, stop, and take action on a planning unit. Approvals Supervisors can perform the preceding actions even if they do not own the planning unit. However, they cannot change data in a planning unit unless they own it.
- **Ad Hoc Grid Creator:** Performs Ad Hoc User tasks, plus creates and saves ad hoc grids.
- **Ad Hoc User:** Analyzes data forms using ad hoc features.

For role descriptions, see the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

Enhancements to End User Features

Ad Hoc Grids

With ad hoc grids, users having the appropriate access permissions and assigned role (see “[New Roles](#)” on page 4) can create, personalize, and dynamically change focused data slices that they frequently access. Users are not confined by the data form definition and can change the data intersection and layout of ad hoc grids (assuming that they have access to the members). For example, they can save a set of products that they work with during spring promotions so they can easily access their data. Ad hoc grids can be created and accessed in a similar ways from Planning and Oracle Hyperion Smart View for Office, Fusion Edition.

New ad hoc grid functionality:

- Select which alias table the ad hoc grid uses.
- Control, at a global level, how ad hoc actions are performed or how the ad hoc grids are displayed. Examples:

- Set which members are selected when **Zoom In**, **Zoom Out**, **Keep Only**, and **Remove Only** operations are performed.
- Display member names, aliases, or both.
- Set the member level (next, all, or bottom-level) when zooming in.
- Set indentation (no indentation, indent totals only, or indent all subitems with totals one level down).
- During **Zoom In** operations that are inclusive, set whether to display the parent members at the top or the bottom of the hierarchy.
- Set whether to refresh data when performing ad hoc actions such as **Pivot To**, **Move**, **Zoom In**, and so on.
- To streamline the grid, suppress rows or columns that contain unneeded data (for example, #MISSING data, zeros, repeated members, and missing blocks on rows).
- Set the number of decimal positions to display for numerical data.
- Specify the text to display in cells having missing or no data or to which the user does not have access permissions.

End User Data Forms

End users can now drag row headings to adjust row height while viewing a data form, regardless of the row height setting in the data form design. After adjusting the row, they can add a new line of text to the row.

Planning in Smart View

For information about new features in Smart View, see *Oracle Hyperion Smart View for Office New Features* and the *Oracle Hyperion Smart View for Office User's Guide*.

Performance Management Architect Enhancements

For information about new features in Oracle Hyperion EPM Architect, Fusion Edition, see *Oracle Hyperion Enterprise Performance Management Architect New Features* and the *Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide*.

Lifecycle Management Enhancements

If you are using Oracle Hyperion Enterprise Performance Management System Lifecycle Management to migrate from a test to a production environment, and Planning does not exist in the target environment, you can use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to create an application shell. See “Creating a Planning Application Shell” in the *Lifecycle Management Guide*.

Public Sector Planning and Budgeting Enhancements

New Fiscal Year Definitions

You can build budget applications using fiscal years that do not start on January 1, or that start in the previous calendar year. For example, you can define budgets in which the fiscal year for 2012 starts July 1, 2011.

Improved Compensation Budget and Line Item Budget Integration

Compensation budget expenses such as benefit schedules, salary, employer-paid taxes, and additional earnings are generated in the HCP plan type. Budgets for operating expenses (leases and utility expenses, for example) or revenues are maintained in the plan type 1, 2, or 3. Product implementors or administrators transfer compensation expenses, enabling General Ledger allocations and creating the line item budget, by:

1. Preparing applications by defining and configuring the required and custom dimensions, Smart Lists, and possibly configuring business rules to support their General Ledger allocation implementation.
2. Defining mappings to link compensation expenses in the HCP plan type with the appropriate dimensions in Plan 1, 2, or 3.
3. Pushing data whenever compensation budgets are updated or new budget cycles begin, from the HCP plan type to Plan 1, 2, or 3 and the reporting application.

New Task to Perform General Ledger Allocations

After modifying or updating employee, position, and compensation expenses, you can allocate expenses to General Ledger account segments or chart fields as follows:

- For all or individual entities, enabling you to simultaneously allocate the expenses for all positions, employees, or jobs in an HRMS organization
- For all or individual jobs or positions in an entity
- For all or individual employees in an entity

These options ensure that you can select and quickly allocate expenses for a range of personnel—for entire departments and bureaus—to specific employees or positions.

New Task to Adapt Effective-Dated HRMS Data for Budget Periods

Use the **Process loaded human resources data** task to adapt these effective dates loaded from HRMS to calculate the period-level status and FTEs of positions and employees:

- Position start and end dates
- Employee hire dates
- FTE start and end dates

This new task enables you to ensure that positions and employees are between these dates, and the respective period's status is updated accordingly.

Activating Jobs

Planners can activate jobs for their entities by selecting the **Maintain job details** task, and reviewing the jobs displayed on the **All Jobs** and **Active Job** tabs. Jobs to be activated display on the **All Jobs** tab. Right-click these jobs to activate them.

Loading HRMS Data Using the Outline Line Utility

You can now more easily load a wide range of HRMS source system data to Public Sector Planning and Budgeting applications using the sample code and further instructions provided in Appendix A of the *Oracle Hyperion Public Sector Planning and Budgeting User's Guide*.

Accessibility

It is our goal to make Oracle products, services, and supporting documentation accessible to the disabled community. Planning supports accessibility features, described in the *Oracle Hyperion Planning Administrator's Guide*, available on Oracle Technical Network (OTN).

Features Introduced in Release 11.1.2

Accessibility

It is our goal to make Oracle products, services, and supporting documentation accessible to the disabled community. Planning supports accessibility features, described in the *Oracle Hyperion Planning Accessibility Addendum* available on Oracle Technical Network (OTN).

Core Planning End User Enhancements

End users can use Planning with a Web browser, or through a Microsoft Office interface using Smart View.

Process Management

Manage Planning Units

- Promote planning units based on entity and secondary dimensions. For example, the owner of a department that includes HR and revenue accounts can promote the HR accounts first, and continue working with revenue accounts until they are ready to promote. Planning unit ownership now drives the read or write access in data forms at a more granular level.

- Select and promote multiple planning units at one time.
- Manage planning unit status by filtering, sorting, and setting display options for planning units to which you have access:
 - Filter by planning unit, process status, sub-status, current owner, location name, and location generation. For example, filter by location to view planning units that have reached a certain level of approval in the promotional path.
 - Sort in ascending or descending order, or use a default sort order.
- See a graphical view of the promotional path.
- When you are not available, use an **Out of Office** wizard to set an automatic action such as **Delegate**, **Promote**, or **Reject**. This ensures that the process continues even when reviewers are away.
- Use the new actions available for the new budgeting modes.

Guided Budgeting Modes

With the new budgeting modes, end users do not have to select the next owner. Owners are determined by the system, based on the planning unit hierarchy and validation rules. New budgeting modes:

- **Bottom-up Budgeting:** Data is input at the leaf member level (for example, children of Budget Group) and consolidated by rolling data up the organizational hierarchy. When the budget is started, data is populated for each scenario and user independently. The ownership follows the hierarchy of approval in bottom-up mode. Users can view or edit data based on access permissions defined for the planning unit. The topmost Budget Group owner consolidates individually approved budgets into a final consolidated budget.

New actions and status for this mode:

- **Delegate:** Pass ownership to a user not on the promotional path
- **Take Ownership:** Become the owner of the planning unit and any level 0 planning units under the selected parent planning unit
- **Originate:** Pass ownership to the first owner in the planning unit hierarchy
- **Reopen:** Reopen an approved planning unit
- **Freeze, Unfreeze:** Lock or unlock related data in descendant planning units
- **Frozen:** All related data is locked in descendant planning units
- **Distributed Budgeting:** Budget data is entered at the leaf level of the organization, and ownership starts at the top level of the organization. Ownership is then distributed down the organization hierarchy. After ownership reaches the lower levels, budgets are submitted back to the top through the approval process. The top budget group owner reviews, approves, and loads the budgets for budgetary control, transaction control, and reporting.

New actions and status for this mode:

- **Distribute, Distribute Children, Distribute Owner:** Assign ownership to members at the current level of the planning unit hierarchy, to children of the current owner, or to the level 0 owner defined during planning unit hierarchy creation
- **Submit, Submit to Top:** Give ownership to the next level or to the top user defined in the hierarchy
- **Reopen:** Reopen an approved planning unit
- **Distributed:** Multiple users are reviewing the budget

You can still use the free-form budgeting mode, in which planners select the next owner from a drop-down list.

Data Validation Rules

Validation rules can prevent the planning unit from being promoted, or they can change the promotional path. For example, an HR reviewer can be included if expense boundaries are exceeded for budget items such as salaries or new hires.

Validation rules can be used for matrix-based organizations, and can be implemented by department and by product. For example, after department managers promote a plan, users in charge of the budgets of their products across all departments automatically become the owner of all data related to their products for all departments.

Planning Unit Validation

Validate planning units by running data validation rules associated with the planning unit. Conditions in data validation rules must be met before the planning unit is promoted.

Validation Reports

The validation process returns the status of the planning unit. When planning unit validation indicates a problem, such as invalid data or additional approval required, review a validation report to correct data errors and take any necessary actions.

URLs in Planning Unit Annotations

Document budget assumptions by including clickable URLs in planning unit annotations that link to an external source.

Validation Rules for Data Entry

- Use data validation rules to maintain data integrity, for example, to ensure that entered values are between minimum and maximum values. Errors or warning messages are generated if entered data violates validation rules.

- Data forms can display data validation messages, tooltips, and cell colors when data validation errors occur. For example, a tooltip can instruct you to enter data that meets certain criteria or that fits within a specific range.
- If data forms contain data validation messages, a **Data Validation Messages** pane displays on the right side of the data form. View messages specified by the administrator, and click links to set the focus on the cell associated with the message.

Sorting and Filtering

- Sort rows and columns within the hierarchy or across data to view data in ascending or descending order.
- Filter rows and columns to customize the display in the data form; keep or exclude members using simple functions that compare against a specified value.

New Context Menus

- Use right-click context menus in data cells for regular planning actions: **Cut, Copy, Paste, Clear, Delete, Edit, Adjust Data, Grid Spread, Mass Allocate, Insert Comment, Supporting Detail, Add/Edit Document**, and **Lock/Unlock Cells**.
- Use context menus that are displayed in the POV, page, row, column, members, and cells; for example, a menu may be available when you right-click Account members or when you right-click a data cell.
- New menu item to return to the previous data form.

Ad Hoc

Use ad-hoc analysis features in data forms to analyze data and save personalized views of data. For example:

- Pivot to move a dimension to another area, such as moving a row to the POV, page, or column.
- Move to the left or right from a row, page, or POV. Move up or down in a column.
- Zoom in to a hierarchy and show descendants that are not displayed by default in the data form definition. For example, if the data form displays Year Total, click the Year Total member, and open the Year Total hierarchy to view a dimension. View a member's children and add them to the data form.
- Zoom out a level, based on your access permissions. For example, click a member and zoom out to the member's parents to add them to the data form.
- Remove only the selected member from the data form definition.
- Keep only the selected member, and remove all other members from the dimension.
- Select members using a member selector, based on your access permissions; selections can go beyond the current form definition.

- After making ad-hoc changes, save and rename a personal version of the data form to access it again later.

Other Features

- Ability to show the consolidation operator associated with a member with the member name, such as Sales (+); set preferences to control the display of consolidation operators in data forms
- Separate notifications for task lists and process management
- New user settings for process management display
- Improved navigation with restructured menus
- Improved look and feel with new colors and icon-based indicators for data forms and task lists

Planning in Smart View

With this release, end users can perform their planning activities completely in a Microsoft Office environment without having to go to the Web. All of the new end user features mentioned previously are available through Smart View. Key features added to Smart View in this release to support a fully functional end-user experience:

- Planning task lists are now integrated into Outlook, so planners can integrate their tasks into Outlook tasks, and can perform these tasks from within Outlook. Planning data form tasks are seamlessly launched from Outlook into the familiar Excel interface
- Planning task lists are available in Office, including task status and task reports; users can perform tasks in Excel, and have them automatically synchronized with the Web
- All process management end-user functionality can be accessed from Outlook and Excel
- Data validation, including validation indicators and messages
- The ability to monitor the status of Planning jobs in the Job Console
- Composite data forms in Microsoft Office with shared dimensions that are automatically synchronized across multiple data forms
- Mass Allocate and Grid Spread for spreading values
- Copy data across versions for scenario-entity combinations
- Dynamic user variables that allow end users to select and change user variable values directly in data forms
- Custom right-click menus for data and metadata
- Member formula display
- Setting Planning user preferences within Smart View
- Data forms enabled for ad hoc allow users to slice data and save a slice to create reports or share with other users
- Improved look and feel, including a Smart View home page

For information about Smart View, see the *Oracle Hyperion Smart View for Office New Features* and *Oracle Hyperion Smart View for Office User's Guide*.

Planning Using Smart View for Outlook

Following are the key features for Planning users when using Smart View for Outlook.

- Smart View task panel:
 - Task status, task reports, import, and removal of tasks
 - The ability to refresh task lists
- Planning tasks displayed as Outlook categories:
 - Task due dates and other task fields
 - Customizable task fields
 - Auto synchronization of task completion status changes
- Outlook reminders driven by tasks alter dates and due dates in Planning
- Planning task-based launch actions are enabled from within Outlook:
 - Descriptive tasks
 - Business rule tasks
 - Launch a URL from a task
 - Execute process management actions
- Launch data form-based task actions into Excel:
 - Users are taken to specific tasks that need to be acted on
 - Single sign-on support
- Can be used with native Outlook task capabilities:
 - Mobile support
 - Task printing
 - Display of tasks in Outlook Calendar with synchronization to mobile device
 - Display of tasks in Outlook task/status bar

Planning Using Smart View for Excel

Following are the key features for Planning users when using Smart View for Excel.

- Planning task lists in Excel:
 - Task status, reports, instructions, alerts, due dates, and other information
 - Refresh task lists and update task completion status
 - Visual color-coded display of completed and overdue tasks
- Process management:
 - Support for granular, matrix-based, and data-driven planning unit definition

- Status changes and all planning unit actions
- Promotional path display
- Flexible actions, including take ownership and the ability to select multiple actions
- Out Of Office setting
- Planning unit status display
- Annotations with URL links to attachments
- Validation reports displayed as tasks for corrective actions
- Composite data forms:
 - Color-coded display and navigation of shared global and section dimensions
 - Display instructions for multiple data forms
- Data validation and messaging:
 - Color-coded display of shared global and section dimensions
 - Validation message display
 - Color-coded validation indicators
- Mass Allocate and Grid Spread
- Support for dynamic user variables
- Member formula display on row, column, page, and POV
- Copy versions
- Planning Job Console
- Option to suppress Excel right-click menus and use Planning right-click menu actions, for data cells and metadata
- Smart View options:
 - Planning user preference settings
 - Planning-specific Smart View Options
 - New default cell styles for Planning with an Office look and feel
- Planning Ad Hoc:
 - Launch a data form into Ad Hoc mode on the fly
 - Save an Ad Hoc slice as a Smart Slice definition
 - Cascade an Ad Hoc slice across a selected dimension
- Smart View connection manager:
 - **Home** page
 - Easy entry point for connections, icon-based recently used items
 - Unified display of connections
 - Products filtered for display, servers and applications in tree view
 - Separate sub-trees for data forms and tasks

- Icons to easily identify tasks and all types of data forms (single, composite, and Ad Hoc)
- Shared connections:
 - Oracle's Hyperion® Shared Services connections (based on common registry)
 - APS Connections (Ad Hoc for Planning)
- Private connection:
 - Named connection to Planning provider
 - On-the-fly URL connections
- Easy navigation across connections
- One-click disconnect from all connections
- **Action** pane for context-based actions
- Newly designed Office ribbons, including ribbons for Planning and Planning Ad Hoc
- Data cell level context menus for drill through, document attachment, and cell comments
- Application level right-click access to application level actions:
 - Offline wizard, copy version
 - Process management, business rules, user preferences

Core Planning Administrative Enhancements

Process Management

To implement business policies and practices, administrators can build data validation rules that are checked when conditions are met in data forms. Rules can generate validation messages, enforce limits on submitted planning unit data, and designate a specific reviewer or owner to review data that meets some condition. For example, data validation rules can ensure that a department's capital expenses fall within designated guidelines.

Planning Unit Promotional Path

Set up the planning unit promotional path based on the review process for owners and reviewers in the planning unit hierarchy. The review process follows the promotional path unless an event triggers a change in the path, for example, exceeding expense boundaries for budget items. The path can also change if the current owner returns the budget to the previous owner for additional information, or requests help from an authorized user who is not necessarily on the promotional path. In addition, administrators can set up the hierarchy so that some users receive notifications for changes in planning unit status.

Planning Unit Hierarchies

Use planning unit hierarchies to adapt the budgeting process to all types of organizational requirements.

- Planning units are now a combination of the entity and other dimensions. For example, if an application includes all of a company's products, the planning unit hierarchy for North America can include dimensions and members appropriate to products sold in North America. Similarly, the planning unit hierarchy for the European division can include dimensions and members for products sold in Europe. Within the same process management hierarchy, Latin America entities can be enhanced using the Account dimension, creating planning units such as Entities by HR, Entities by Capital Expenditures, and Entities by Revenue.
- Use preset budgeting mode templates to create hierarchies that are bottom up, distributed, or free form.
- Include dynamic links to dimensions based on generation numbers for the entity dimension and the secondary dimension that is used. For example, automatically add generations 0 to 3 in the entity or segment dimension to the planning unit hierarchy. If a change occurs in the dimension, the planning unit hierarchy can be easily updated.
- Import and export planning unit hierarchies.
- Create planning unit hierarchies that differ by scenario and version. For example, the Budget scenario can have a large planning unit hierarchy consisting of departments, accounts, and products, while the Forecast has a simpler process organization with fewer levels of approval.

Data Form Creation

- Drag and drop dimensions with many ease-of-use enhancements for selecting data form properties
- Use live preview to view dimensions assigned to the POV, columns, rows, and page axes
- Add data validation rules to provide color coding or special messages to be displayed to end users in data forms; multiple validation rules can be added at the cell level, at the row or column level, and at the grid level of a data form
- Add formula rows and columns, including blank rows and columns; many Oracle Hyperion Financial Reporting, Fusion Edition formula functions are supported

Composite Layout Manager

- Easily create data forms by dragging and dropping within the Layout manager
- Share dimensions across all data forms within the composite, or only for data forms in a section
- Divide the layout into multiple tabs so that data forms in each section of the composite are displayed as tabs
- Customize section labels
- Customize data form display names

Member Selector Enhancements

Most of the functionality described here is available for both administrators and end users:

- Search by member, alias, description, or UDA
- Find an exact match for a single word or multiple words
- Use wildcard characters, including characters within lists or ranges
- Collapse and expand members
- Narrow down the display using ad hoc functions, attributes, levels, or generations
- Set multiple display options for member name and alias, description, and count
- Select user variables, substitution variables, and attributes in a separate tab
- Select members across multiple dimensions, where applicable, through a single member selector
- Place selections in separate rows or columns, which is useful for easy data form creation

Task List Enhancements

- After a task list is completed, clear the completion status, due dates, and alerts for all tasks in a task list; this allows tasks to be reused for a future planning period
- Select default page members for data form type tasks

Reporting Application Integration

With reporting application integration, you can map dimensions between Planning applications and reporting applications to enable:

- Easily reporting on Planning data in a reporting application
- Aggregations and queries on Smart Lists, which are converted to regular dimensions in the reporting application
- Linking Planning data to multiple reporting applications for various consolidations

After setting up application mappings, you can push data to reporting applications. Planning validates the selected application mappings, and then pushes the mapped Oracle Hyperion Planning, Fusion Edition dimension data to the reporting application dimensions.

Reporting applications can be either Oracle Essbase block storage or aggregate storage databases.

Data Load Setup

- Load incremental dimension members based on unique driver identifiers. For example, when loading employee data, load new budget line item detail for Salary Grades, or update existing line item detail. Use Advanced Settings to load and update data for dimension hierarchies based on unique identifiers for the driver dimension.
- New Outline Load utility features:
 - Load Smart Lists and Smart List dimension members using `DX:HSP_SMARTLISTS`.
 - Export planning unit hierarchies, including owners, reviewers, and users to be notified, to a file using `/E:outputFileName`. The hierarchy can include sub-hierarchies.

Public Sector Planning and Budgeting

Public Sector Planning and Budgeting is a Web-based integrated budgeting and planning solution in the EPM System suite. It helps public sector and higher education organizations manage existing and projected budgets that are based on reliable information from Human Resource Management Systems and General Ledgers.

Human capital planning features provide out-of-the-box configurable and expandable position and employee expense budgets. Combined with sophisticated process management functionality, these features help you project and evaluate the impact of employee compensation and benefits on overall budgets. The application enables you to forecast the impact of new positions, workforce reductions, contract proposals, as well as compensation and benefit changes as they occur throughout the year. Using a Microsoft Excel-like interface, you can plan for human capital expenses using the budget detail that is most appropriate for your organization's needs:

- Position only
- Employee only
- Both positions and employees

Budgeting activities can be distributed across an organization with planners having different views to make the process easy, resulting in greater accuracy, efficiency, and transparency. Notifications can be issued when budget issues need attention or the budget is completed. Users can distribute, consolidate, monitor, and manage budgets, including revisions, through an approval process. Public Sector Planning and Budgeting optimizes the allocation of scarce public resources and provides consistency and control throughout the budget process.

Public Sector Planning and Budgeting Features

Oracle Hyperion Public Sector Planning and Budgeting, Fusion Edition features include:

- Manage position data such as department or organization, job code, position type (for example, shared or pooled), status, and other compensation details.
- Manage employee-related data such as department, salary (annual or hourly), salary grade, benefits, FTE, location, status, employer-paid taxes, and union information.
- Enable allocating budget amounts to different programs, projects, or other chart of account dimensions.
- Integrate with Human Resource Management Systems and General Ledgers for tightly integrated budget preparation and execution processes through the use of Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications.
- Enable detailed and highly formatted budget books and reports through the use of Oracle Hyperion Financial Reporting, Fusion Edition.
- Help build budgets from prior years or prior versions.
- Support multiple scenarios.
- Distribute work and merge data into an overall process.
- Enable organizations to define approval processes that fit their unique requirements.

- Set constraints and validate the data against them.
- Handle overrides with comprehensive audit trails to ensure accuracy.
- Enable integrating and aggregating position budgets into operating expense budgets.
- Enable budget managers to prepare, distribute, review, and approve budgets that use organizationally defined time frames, account codes, and data field combinations.
- Include date-driven calculation logic for the entire organization.
- Enable spreading and allocating values by organization or by using attributes as drivers.
- Support mass updates and defaults based on changes to HRMS salary and other structures.
- Support working with data forms using Oracle Hyperion Smart View for Office, Fusion Edition.

The latest product documentation is available from Oracle Technical Network.

Installation and Configuration

- Oracle Configuration Manager (OCM) integrates with My Oracle Support and provides configuration information for Oracle software. It assists in the troubleshooting, maintenance, and diagnostics of your EPM System deployment. For more information about Oracle Configuration Manager see the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.
- With this release, many EPM System products support hostnames that resolve to IPv6 addresses. See the *Oracle Hyperion Enterprise Performance Management System Certification Matrix*. IPv4 support (both hostname and IP address) remains unchanged from earlier releases.
- Oracle Hyperion Enterprise Performance Management System supports the following types of SSL configurations:
 - Full SSL Deployment (including data access)
 - SSL Terminating at the Web Server
 - SSL Accelerators (Off-loading)
 - Two-way SSL

For more information on the SSL configurations, see the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

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