ORACLE® HYPERION FINANCIAL MANAGEMENT, FUSION EDITION

RELEASE 11.1.1.3

NEW FEATURES

ORACLE
ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

CONTENTS IN BRIEF

Installation and Configuration

The new Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition and Oracle's Hyperion Enterprise Performance Management System Configurator provide a streamlined and simplified approach to product installation, upgrade, and configuration. Oracle's Hyperion Enterprise Performance Management System Configurator uses the new Oracle's Hyperion Shared Services Registry, which simplifies product configuration by storing and re-using configuration information.

Oracle's Hyperion Enterprise Performance Management System Diagnostics confirms that product components were successfully installed, configured, and are up and running.

The reorganized installation and configuration documentation set reduces the number of installation guides and makes it easier to find the information you need. Individual product installation guides are replaced by the following guides:

- *Oracle Hyperion Enterprise Performance Management System Installation Start Here*
- *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*
- *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*

You might also need to use one or more of the following guides:

- *Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide*
- *Oracle Hyperion Enterprise Performance Management System High Availability Guide*
- *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*
- *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*
- *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*
- *Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide*

ERP Integrator

Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications is a module of Oracle Hyperion Financial Data Quality Management, Fusion Edition that enables you to:

- Integrate metadata and data from an Enterprise Resource Planning (ERP) source system into an Oracle Hyperion EPM target application.
- Drill through from the EPM application (Oracle Hyperion Financial Management, Fusion Edition or Oracle Hyperion Planning, Fusion Edition through web forms, Oracle Hyperion Smart View for Office, Fusion Edition or Oracle Hyperion Financial Reporting, Fusion Edition) and view details in the ERP source system.

ERP Integrator supports general ledger data for:

- PeopleSoft 9.0

- Oracle E-Business Suite 11.5.10 CU2
- Oracle E-Business Suite 12.0.6
- Oracle E-Business Suite 12.1.1

See the *Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications Administrator's Guide.*

Automated Consolidation Journals

From the Process Journals module, you can now view a list of journals that were generated during the consolidation process and drill down to view the transactions. This feature is useful for audit purposes. From this list, you can view or print automated consolidation journals, run a journal report, or extract the journals and then import them into an external system.

See the *Oracle Hyperion Financial Management User's Guide*.

Calculation Manager Enhancements

Support for Calculation Manager in Classic Applications and Essbase Block Storage Applications

Hyperion Calculation Manager may be used by:

- Financial Management and Planning users working with Oracle Hyperion EPM Architect, Fusion Edition applications
- Financial Management and Planning users working with Classic applications
- Oracle Essbase users working with Essbase block storage applications

Performance Management Architect applications work with business rules created in Calculation Manager. Classic Planning, Classic Financial Management, and Essbase block storage applications work with business rules created with Oracle's Hyperion® Business Rules or Calculation Manager. (Runtime prompts are not supported in Essbase rules.)

As in the earlier release, you can launch Financial Management business rulesets and Planning business rules from Financial Management and Planning, respectively. Oracle Essbase business rules, however, may be launched from either Calculation Manager or Oracle Essbase Administration Services.

Templates Enhancements

Template enhancements include those made to system templates and those made to the Template Designer.

System Templates Enhancements

Calculation Manager system templates are now available in wizards instead of in a tab based user interface. This makes the templates easier to use in a business rule and reduces the potential calculation script errors.

The options available in system templates are filtered based on the choices users make when using the wizard. For example, the Aggregation system template does not display the step for selecting the dense dimensions to aggregate if there are no dense dimensions available for aggregation. (This happens if all dense dimensions are used in an upper level member range component.)

System templates can detect upper level member ranges in which they are placed. If a user drops a system template into a member range component (that is, a Fix statement), then the dimensions used in the member range are not displayed in the wizard. This reduces the potential for calculation script syntax errors when using system templates. For example, if the Allocate template is used in a member range made of entities, the entity dimension is not displayed as a dimension on which an allocation can be performed.

Template Designer Enhancements

- Wizard designer

  When you design custom-defined templates, you can define steps in a wizard that guide template users through creating and editing a template and its design time prompts. The templates wizard enables you to organize the display of design time prompts in a template: you can decide what design time prompts you display in each step and choose to display or hide a step based on conditions that you define. Conditions can be based on member or dimension selections made in previous steps or made in an upper Fix statement of the business rule in which the template is used.

- New Upper POV system design time prompt

  A new system design time prompt, Upper POV, is displayed in the design time prompt list of each template. This is a member range design time prompt that retrieves the member ranges used in the rule.

- New design time prompt properties

  New properties are available for design time prompts. Design time prompts can be displayed as read only in the wizard. This is useful when you want to display a member selection made in a previous step, but not enable users to edit it.

- New DTP Assignment component for assigning values to design time prompts

  You can assign a value to a design time prompt using the new component, DTP Assignment, that is available for custom-defined templates. In the template flow chart, you can place this component inside a condition component to assign a value to design time prompts based on conditions. Using the DTP Assignment component in a business rule reduces the complexity of the template's flow chart and makes the logic of the template easier to develop and maintain.

Note: The DTP Assignment component is also used in the design of system templates.

- New condition and condition grid in formula and script components

  For custom-defined templates, formula and script components have a new condition grid that enables you to define a condition for enabling the component. This simplifies the flow chart and prevents you from having to add a separate condition component that can overload the template's flow chart.

  There is also a new condition that lets you test whether a design time prompt type member is dense or sparse.

Printing Enhancements

Printing enhancements:

- You can define the number of pages you want the flow chart to print across and down. Then you can specify whether the components in the flow chart should print down (vertically, like a column), then across (horizontally, like a row) or print across, then down. These options are helpful when you have business rules with many components.
- You can print components in the order in which they display in the Rule Designer or Template Designer flow chart.
- You can insert a page break before a new section (that is, the summary section that includes information about when the rule was created, who owns it, and so on; the variable section that includes information about the variables used in the rule; and the detail section that includes detailed information about the components in the rule).
- You can print nested business rules and rulesets.

Saving Variables Within the Same Application

Using Save As, you can save a variable with a different name to the same application. Before, you could copy a variable from one application to another, but you could not save a variable to the same application.

Zoom Mode Enhancements

When you are in any zoom mode within a flow chart, you can select a component and view and edit its properties. You can also drag a component and drop it into another location in the flow chart in zoom mode. Before, when components in the flow chart were displayed in small sizes, the components were represented by bitmaps that were not selectable.

Formula Grid Enhancements

In the formula grid of a component, you can double-click in a formula's cell to display a larger text box in which to view and edit long formulas.

Menu for Loading Business Rules into Capital Asset Planning and Workforce Planning

A new right-click menu option lets you load predefined Calculation Manager business rules into Oracle Hyperion Capital Asset Planning, Fusion Edition and Oracle Hyperion Workforce Planning, Fusion Edition Classic applications.

System Variables for Financial Management System Templates (Financial Management Users Only)

To improve the performance of Financial Management system templates, system variables are being provided with this release of Calculation Manager. These system variables can be loaded from the System View into the Financial Management system templates. The variables can be viewed and worked with separately in the Calculation Manager Variable Navigator.

List Tab in the Member Selector (Financial Management Users Only)

In this release, when you use the Member Selector for Financial Management objects, it contains a LIST tab that displays system lists and user-defined lists for selection. After you select a list, you can select one or more of its members to insert into the component.

Variable Tab for Financial Management Business Rules (Financial Management Users Only)

Like Oracle Hyperion Planning, Fusion Edition business rules in Calculation Manager, Financial Management business rules now include a Variables tab when you open the rules in the Rule Designer. You use this tab to create, and later view, the variables you want to include in the business rule.

Global Calculation Type (Financial Management Users Only)

A new calculation type, Global, is available in this release of Financial Management and Calculation Manager. As with the other Financial Management calculation types, objects of the Global calculation type can contain only other objects with a calculation type of Global or Generic. For example, a Global business rule can contain other business rules of the Global or Generic calculation type only.

Rules Migration Tool

This release introduces a new utility to convert VB script (`.rle`) files to graphical objects for Calculation Manager. This enables you to use existing VB script rule files without manually converting them for use in Hyperion Calculation Manager. The utility is named `FMRulesMigrator.exe` and is installed by default in the `Financial Management\Consultant Utilities` folder during installation.

Web Data Form Enhancements

Web data forms now include the same right-click menu options as Web data grids. The right-click context menu is dependent on the form cell status and user security rights. The icons in Web data forms have also been updated. See the *Oracle Hyperion Financial Management User's Guide*.

Performance Management Architect

- Interface Tables

  Database administrators can now populate the i_Load_ID column in the IM_Load_Info interface table to enable filtering on dimensions and members imported into Performance Management Architect. After the i_Load_ID column is populated, you can enter a load ID to filter artifacts from the interface tables when you create an import profile or import dimensions in Performance Management Architect.

- Performance Management Architect Transaction History Purge Utility

  Performance Management Architect creates transactions in the Performance Management Architect database. Since the database size can increase over time, you can use the Transaction History Purge Utility to remove transactions from the database and reduce database size.

- Performance Management Architect Batch Client

  The Batch Client provides a command-line interface that allows Oracle Hyperion EPM Architect, Fusion Edition tasks to be scripted and run in a lights-out fashion. These Batch Client commands are new for this release:

  - Copy Application
  - Validate Application
  - Copy Dimension
  - Include Dimension
  - Remove Dimension
  - Detach Dimension
  - Share Dimension
  - Copy Member
  - Insert Member
  - Exclude Member
  - Rename Member

- ❍ Move Member
- ❍ Create Association
- ❍ Delete Association

The *Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide* describes all Batch Client commands.

Drill-Through in Smart View

If you are connected to Financial Management through Smart View, you can use the drill-through capabilities of Oracle Hyperion Smart View for Office, Fusion Edition to drill through your Oracle Hyperion Financial Management, Fusion Edition application to detailed data in Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications or Oracle Hyperion Financial Data Quality Management, Fusion Edition data sources. See the *Oracle Hyperion Smart View for Office User's Guide*.