
Oracle® Hyperion Calculation Manager

Release 11.1.2.0.000 Patch Set 1 (PS1): 11.1.2.1.000

Readme

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Purpose

This document includes important, late-breaking information about this release of Oracle® Hyperion Calculation Manager (Calculation Manager). Review this Readme thoroughly before installing Calculation Manager.

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New Features

Release 11.1.2.1 New Features

Calculation Manager 11.1.2.1 includes these new and enhanced features:

- Support for Oracle General Ledger Essbase applications in Calculation Manager
- A new role that restricts users to view business rules and business rulesets in Oracle General Ledger
- The ability to use shared objects (for example, a formula, script, business rule, or template) in a script component
- Support for a new member block object for Essbase and Planning business rules

- A new Any Text check box in the Filter dialog that enables you to display business rules according to text they contain
- Support for Find and Replace functionality in the formula grid of a Formula component

Support for Oracle General Ledger Essbase Applications in Calculation Manager

For this release, Calculation Manager may be used by Oracle General Ledger users working with Essbase aggregate storage applications. Oracle General Ledger users use allocation components, point of view components, and formula components to design business rules.

New Role for Viewing and Editing Business Rules in Oracle General Ledger

The Rule Designer role is a new Calculation Manager role that enables Oracle General Ledger users to view and edit only the business rules and business rulesets that they created.

Support for Sharing an Object from a Script Component

In previous releases, Calculation Manager business rules, templates, formula components, and script components could be shared within and across applications, but could be referenced only in graphical mode. In this release, business rules, templates, formula components, and script components can be shared within and across applications and can also be referenced in script components and in script mode. The business rule script contains references to the shared objects, which are displayed in their entirety on a Script tab below the business rule script.

New Member Block Component for Essbase and Planning Business Rules

Essbase and Planning business rules can contain a new component, the member block component. The member block component functions like a loop component; it contains a string of members that are cycled through in a business rule.

New Any Text Check Box in the Filter Dialog

You can search for business rules, business rulesets, components, and templates according to any string of text they contain. In the Filter dialog, select the Any Text check box and enter the text string for which you want to search.

Support for Find and Replace in the Formula Grid of Formula Components

You can search for text and replace an instance, or all instances, of it in the formula grid of a formula component.

Release 11.1.2 New Features

Calculation Manager 11.1.2 includes these new and enhanced features:

- Support for Essbase aggregate storage business rules
- Support for launching Essbase aggregate storage business rules from Calculation Manager
- Custom function and parameter passing (Financial Management only)
- Smart list selector in the Condition Builder (Planning only)
- Parameters for user-defined attribute and attribute functions in the Function selector dialog
- Support for Public Sector Budgeting and Planning
- Changes to the Member Selector to handle large numbers of members
- Lifecycle Management support for standalone Calculation Manager

Support for Essbase Aggregate Storage Applications in Calculation Manager

For this release, Calculation Manager may be used by Essbase users working with Essbase aggregate storage applications, in addition to block storage applications. As in previous releases, Calculation

Manager may be used by Financial Management and Planning users working with Performance Management Architect or Classic applications.

Support for Allocations and Custom Calculations

You can create allocations and custom calculations in Essbase aggregate storage business rules using new Point of View, Allocation, and Formula components. Calculation Manager enables you to build simple and complex allocations, through a wizard with a full set of options (for example, options for offsetting, rounding, and picking an allocation method). Calculation Manager also has dedicated options for allocations over time.

Calculation Manager also enables you to design simple custom formulas. You can build business rules combining one or multiple allocation wizards and one or more custom calculations. The allocations and custom calculations calculate data, which is then stored in the application; it is not calculated dynamically. This feature is useful for streamlining and simplifying reporting architectures where an Essbase block storage cube is used as a staging area to calculate an allocation and make simple calculations, followed by a data movement to an Essbase aggregate storage cube for fast reporting. Running allocations directly in Essbase aggregate storage cubes removes the need for an Essbase block storage calculation step while maintaining high performances in Essbase aggregate storage calculations. This simplifies the architecture of the reporting system.

Launch of Essbase Aggregate Storage Business Rules

Like Essbase block storage business rules, you can launch Essbase aggregate storage business rules from Calculation Manager. You can also launch Essbase business rules created in Calculation Manager from Administration Services.

Custom Function and Parameter Passing (Financial Management Application Users)

In the previous release, you could specify that any execution variables used in a Financial Management business rule be passed as parameters. In this release, you can specify that a Financial Management business rule be used as a function.

Smart List Selector in Condition Builder (Planning Application Users)

In addition to using members, functions, and variables in conditions, in this release, you can use smart lists in conditions within Planning business rules. This simplifies business rule design when business logic requires using conditions in business rules.

Parameters for User-Defined Attribute and Attribute Functions Display in the Function Selector

When you select the user-defined attribute and the attribute functions in the Function Selector dialog, the parameters for these functions are displayed. This makes it simpler for you to call attribute functions in the Rule Designer. Calculation Manager indicates what attribute dimension is associated with the regular dimensions and what the attribute members are.

Support for Public Sector Budgeting

In this release, Calculation Manager includes a feature that enables you to load predefined Public Sector Budgeting and Planning business rules into Classic applications. These business rules enable you to perform predefined calculations when you are working with Web forms in Planning. All business rules that are shipped with this product are available in the Calculation Manager graphical user interface. When creating a new Public Sector Planning and Budgeting application, you can automatically initialize the Public Sector Planning and Budgeting business rules with a set of rules in Calculation Manager. Having the business rules in the graphical mode in Calculation Manager simplifies the maintenance and updating of business rules.

Member Selector Enhancements to Improve Performance with Large Dimensions

To improve performance when you are working with dimensions with large numbers of members, and limit the display of members, the Member Selector displays only the first two thousand members when

you expand a dimension or member node. If the display exceeds 2000 members, a message is displayed to prompt you to use the search function to find the member you are looking for.

Lifecycle Management Support for Standalone Calculation Manager

You can now migrate business rules and other objects designed in Calculation Manager to Classic Financial Management, Classic Planning, and Essbase applications. If a Classic Planning application is using Calculation Manager, you can now use Lifecycle Management to migrate the business rules in this application. Before this release, only Performance Management Architect applications could use Lifecycle Management to migrate business rules.

For new features relating to installation, architecture, and deployment changes in this release, see "New Features" in the *Oracle Hyperion Enterprise Performance Management System Installation Readme*.

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Installation Information

Late-breaking information about installation of EPM System products is provided in the *Oracle Hyperion Enterprise Performance Management System Installation Readme*. Review this information thoroughly before installing EPM System products.

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Supported Platforms

Information about system requirements and supported platforms for EPM System products is available in a spreadsheet format in the *Oracle Hyperion Enterprise Performance Management System Certification Matrix*. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on the Oracle Technology Network (OTN) and listed in the Oracle Business Intelligence product area:

http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html

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Supported Languages

Information about supported languages for EPM System products is available in a spreadsheet format on the Translation Support tab in the *Oracle Hyperion Enterprise Performance Management System Certification Matrix*. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on OTN (listed in the Oracle Business Intelligence product area):

http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html

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Supported Paths to this Release

You can upgrade to EPM System Release 11.1.2.1 from the following releases:

Note: For instructions to upgrade, see the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide, "Upgrading EPM System Products."*

Release Upgrade Path From	To
11.1.2.0.x	11.1.2.1 Note that when moving from Release 11.1.2.0.x to Release 11.1.2.1, you use the "Apply Maintenance Release" option in EPM System Installer, instead of following the documented upgrade procedures.
11.1.1.3.x	11.1.2.1
9.3.3.x Note: If you were using Performance Management Architect Release 9.3.1, you can download the Performance Management Architect release 9.3.3 from My Oracle Support.	11.1.2.1
9.2.1.x	11.1.2.1
An environment that includes multiple releases, which can include an environment with one instance of Shared Services or an environment with two instances of Shared Services	See "Upgrading from an Environment with Multiple Releases" in the "Upgrading EPM System Products" chapter in the <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i> .

Notes:

- If you are starting from Release 9.2.x, Oracle recommends the following upgrade path: 9.2.0 to 9.2.1 to 11.1.2.1
- If you are starting from Release 9.3.x, Oracle recommends the following upgrade path: 9.3.0 to 9.3.1 to 9.3.3 to 11.1.2.1
- If you are starting from Release 11.1.1.x, Oracle recommends the following upgrade path: 11.1.1.0 or 11.1.1.1 or 11.1.1.2 to 11.1.1.3 to 11.1.2.1
- If you are starting from an earlier release, Oracle recommends that you upgrade to the highest level release that directly supports upgrade from your starting release.
- Security Synchronization between Essbase and Shared Services was removed in Essbase Release 9.3, starting with Release 9.3.1.4.1. Essbase and Shared Services Release 11.1.1.3, however, still synchronize security information. For this reason, if you are using Essbase Release 9.3.1.4.1, 9.3.1.5, 9.3.1.6, or 9.3.1.7, you must first upgrade all products to Release 9.3.3, as recommended above. Upgrading to Release 11.1.1.3 is not an option for these Essbase releases.

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Defects Fixed in this Release

Defect Number	Defect Fixed
10266764	If you create a business rule using the @MDSHIFT function with a cross dimension operator member (for example, "Acc1_1"->"Version1"), the business rule may not validate.
9791001	You may not be able to validate a business rule that contains an XREF function against Performance Management Architect.
8899871	If you try to export business rules with special characters, the export may fail without an error message.

Defect Number	Defect Fixed
9552336	The Allocate Simple and Allocate Level to Level templates rounding option should only allow users to enter a number or a variable, not a member, variable, or function.
9472337	Business rules may be displayed in a "not deployed" status in Calculation Manager after they have been deployed from Performance Management Architect to Planning.
10626375	When Secure Sockets Layer (SSL) is enabled, you may receive a communication error when you launch the Member selector.

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Defects Fixed in Release 11.1.2.0

Defect Number	Defect Fixed
9123003	Sometimes the Save button on the Calculation Manager toolbar remains activated after you click it.
9026228	If you change the selection of members on the Member Range tab, those changes are not saved when you switch from graphical to script mode and back to graphical mode.
8600956	Large calculation scripts may cause Calculation Manager to hang.
8587436	Calculation Manager generates hidden, unnecessary 404 HTTP requests for files that do not exist, which creates unnecessary work for the Calculation Manager server.
7523078	When you are viewing a business rule in script format, the cut and paste and copy and paste functionality may not work consistently in Calculation Manager
8922361	The Change Ownership feature is not available for Financial Management.
8800397	Calculation scripts validate inconsistently in Essbase and Calculation Manager.
8871417	You cannot change a variable's limits after you set them. If you select the RTP check box and add runtime prompt text in a variable, then work on another variable, when you resume work on the first variable, the RTP check box is no longer selected, and the runtime prompt text is corrupted with slashes.
8587614	If you use wildcards in the parameters of the Function @Match, the wildcards may not validate.
8526160	Business rules of the Saved Assumption account type may not validate against Enterprise Performance Management Architect, but validate successfully against Planning. This happens because, when you create an account with the account type property of 'Saved Assumption' (with a space) in Enterprise Performance Management Architect, then deploy the application to Planning, Enterprise Performance Management Architect saves the account type property as 'SavedAssumption' without a space, while Planning saves it as 'Saved Assumption' with a space. To work around this, create the user-defined attribute, 'Saved Assumption', in the Enterprise Performance Management Architect application library so when you use a saved assumption in a business rule, the rule validates against

Defect Number	Defect Fixed
	Planning and Enterprise Performance Management Architect.
8259116	If you have a business rule that contains an @LIST function with more than one argument, the @LIST function may not validate.

Known Issues

The following issues are the noteworthy known issues of this release.

Defect Number	Known Issues
11814411	When you search for multiple Essbase members in the Member Selector, you may receive an error message, and the Member Selector may be unable to retrieve the members for which you searched
10308234	(Oracle General Ledger users only) You may receive an "access is denied" error after working in Calculation Manager for more than an hour. To work around this: 1) Log on to OAM Access System Console. 2) Navigate to Access System Configuration > AccessGate Configuration. 3) Search for the Resource WebGate in question and click on it. 4) Click Modify. 5) Increase the value of "Maximum user session time (seconds)." 6) Save the changes.
11785272	You may be unable to deploy a Financial Management application using the Actions menu and the Deploy sub-menu from the Deployment View in Calculation Manager.
11689342	If you edit a template within a business rule, and you click Next button more than one time before the next screen is displayed, you may receive the following error: "Default Process Error handler. An error occurred processing the result from the server."
11685229	In the System View, formula objects in Financial Management applications may be expandable.
10308020	In the Rule Designer, when you validate a business rule that has multiple members that are not valid, the system only gives you the first member as not found and highlights the component that is using that member. You need to fix that member, save, validate and then get the next error message with the next member that is invalid, and so on, until all members validate. If you validate the business rule from the System View, the system gives you all of the invalid member errors at one time, but because you are in the System View, no components are highlighted. If you want to see all of the validation errors, validate from the System View. If you want to see the invalid members highlighted in their components, validate from the Rule Designer.
9964305	If you create two business rules in Calculation Manager, and the names of the rules use the same words with different spacing, such as Rule 1 and Rule 1, the spacing is not retained within Planning, and the rules are displayed with the same name. In the database, the rule names are displayed correctly.
9862094	If you are working for more than eight hours, your session may expire. To work around this, change the token timeout setting. In Shared Services, select Administration, then Configure User Directories, and then Security Options to change

Defect Number	Known Issues
	the Token Timeout setting.
9852647	If you are using the Allocate Level to Level template in a business rule, define the offset member on the allocation dimension, save the business rule, then edit the dimension to which to allocate the data, the offset member may still display the dimension you selected prior to editing the business rule.
6981904	You cannot migrate Business Rules macros that contain other macros to Calculation Manager.
9815870	If you are working with a business rule in script mode and you edit the script of the business rule, when you return to graphical mode, the edits you made may not be retained.
9804886	If you are using Internet Explorer version 8 to create a business rule in script mode, and you copy text from the script to the clipboard using the "Copy to Clipboard" option, you may receive an error message.
9801375	If you are using a template that has POV as the first tab in the template wizard, when you click the Action icon on the POV, the member, variable, and function menu displays, but it may display in the top left of your screen. To work around this, press Enter before you click the Action icon.
9799861	If you create a business rule with a script or formula component that has more than five thousand lines, and save the rule, the browser may hang for a few minutes. To work around this, Oracle recommends that you create business rules with between one hundred to four hundred lines.
9798363	If you are working with a business rule in script mode, and you display the Find and Replace dialog, the "Wrap Search" option is not in the dialog.
9795243	If you have a business rule with two formula components, each with an IF condition and a common member block, the generated script of the business rule may contain two member blocks. In graphical mode, the same business rule contains only one (correct) member block.
9781874	In Internet Explorer, when you are working with a business rule in script mode, and you receive an error, the line in the script with the error may not be highlighted. In Firefox, when you are working with a business rule in script mode, and you receive an error, the line in the script with the error is not highlighted.
9727143	In Firefox, after a business rule is validated in script mode, you may not be able to switch back to graphical mode.
9593061	Assume you create a business rule with an allocation component, validate and save the business rule, then edit the allocation component. When you click on the Source tab, delete the existing account, click on the Action icon, and try to select a member from the Account dimension, the Member Selector may not open. To work around this, after deleting the existing account, press Enter. Now click on the Action icon, select member, and the Member Selector will display.
9593036	If you create a business rule using an allocation component, save and validate the rule, then double-click on the allocation component in the Rule Designer, the Allocation wizard may not open. To work around this, from the Summary tab, click Edit.
11700639	If you are creating a Workforce Planning, Capital Expense Planning, or Public Sector Budgeting Performance Management Architect or Classic application, the application creation may fail and you may receive the error message, "Content is not allowed in Prolog." To prevent this, before you create the application, navigate to Calculation Manager and expand or refresh the Planning application node.

Defect Number	Known Issues
7154795	In Firefox, you may be unable to move a business rule component after you drop the component into the Rule Designer pane.
11714446	In the System View, the Launch and Deploy right-click options are not displayed for Essbase applications.
8866203	If you are using screen reader software, when you open the Rule Designer or the Template Designer, the screen reader software reads out 10%, 20%, and so on, which indicates that the page load is in progress, even after the module is completely loaded and a confirmation message is announced.
8894789	You may receive the error message, "Error: Index: 1, Size: 1" if you paste a component after expanding or collapsing a loop or condition component. To work around this, use Ctrl+Shift+E to move the component within a loop or condition to the end of the loop or condition. To paste a component in the Else part of the condition, use Ctrl+Shift+I.
8866203	If you are using screen reader software, when you open the Rule Designer or the Template Designer, the screen reader software reads out 10%, 20%, and so on, which indicates that the page load is in progress, even after the module is completely loaded and a confirmation message is announced.
8860666	To read a script using screen reader software, you need to copy the script to an alternate text editor.
7133648	If you create a graphical business rule with components, you can convert from graphical to script mode and from script to graphical mode, but if you remove any comments in script mode, you may not be able to convert from script to graphical.

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Documentation Updates

Accessing EPM System Product Documentation

The most recent version of each EPM System product guide is available for download from the Enterprise Performance Management System Documentation area of the OTN Web site (<http://www.oracle.com/technology/documentation/epm.html>). For faster access to the documentation, you can also use the Enterprise Performance Management Documentation Portal (<http://www.oracle.com/us/solutions/ent-performance-bi/technical-information-147174.html>) which also links to EPM Supported Platform Matrices, My Oracle Support, and other information resources.

Deployment-related documentation is also available from the Oracle E-Delivery Web site (http://edelivery.oracle.com/EPD/WelcomePage/get_form).

Individual product guides are available for download on the Oracle Technology Network Web site only.

Copying and Pasting Code Snippets from PDFs

When you cut and paste code snippets from a PDF file, some characters can be lost during the paste operation, making the code snippet invalid.

Workaround: Cut and paste from the HTML version of the document.

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Accessibility Considerations

It is our goal to make Oracle products, services, and supporting documentation accessible to the disabled community. Oracle's Calculation Manager supports accessibility features, which are described in Appendix A in the *Calculation Manager Designer's Guide*. The most up-to-date version of this guide can be found in the EPM System Documentation Library on the Oracle Technology Network (<http://www.oracle.com/technology/documentation/epm.html>).

In addition, this Readme file is accessible in HTML format.

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