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# Hyperion® Data Integration Management Adapter for Planning

Release 11.1.1.1

## Sample Readme

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## Purpose

This document describes sample files that are provided to help you learn about this release of *Oracle Hyperion® Data Integration Management Adapter for Planning*. Review this information thoroughly before attempting to use the sample files.

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## About Data Integration Management Release 11.1.1.1

Data Integration Management is integrated with Informatica PowerCenter. It provides a way of uniting disparate sources of data across an enterprise. For example, it can integrate data stored in multiple

warehouses and data marts, relational database management systems (RDBMS), and on-line analytical processing (OLAP) stores.

Data Integration Management includes these components:

- PowerCenter applications:
  - PowerCenter Client
  - PowerCenter Server

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## Data Integration Management Adapters

When you have installed and configured Data Integration Management Release 11.1.1.1, you can install and configure adapters that enable you to retrieve and write data for these other Hyperion products:

- Oracle Hyperion® Data Integration Management Adapter for Hyperion Enterprise®
- Oracle Hyperion® Data Integration Management Adapter for Essbase®
- Oracle Hyperion® Data Integration Management Adapter for Financial Management
- Oracle Hyperion® Data Integration Management Adapter for Planning
- Oracle Hyperion® Data Integration Management Adapter for Translation Manager
- Oracle Hyperion® Data Integration Management Adapter for Planning

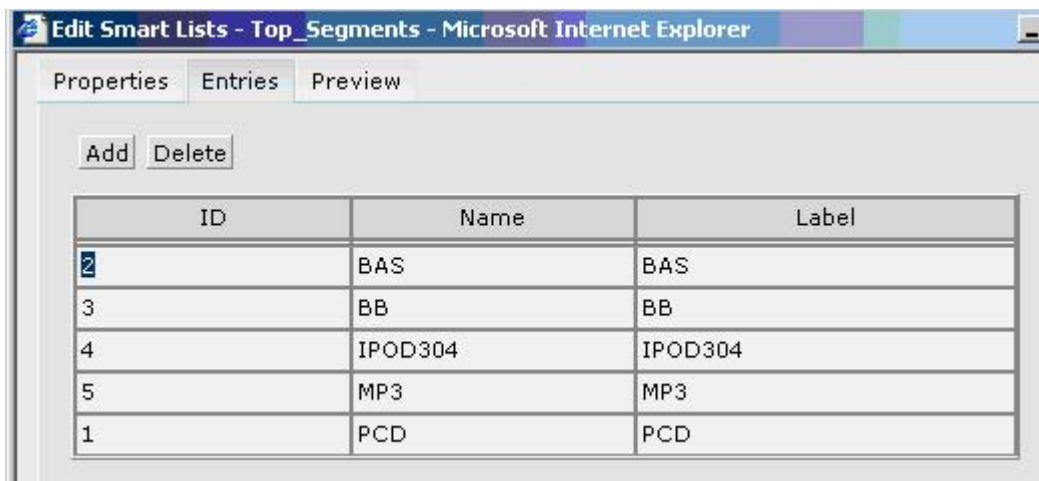
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## Setting Up the Sample Planning Application

The settings of mappings that are included with these samples are based on the sample application that is included with Release 11.1.1.1 of Planning. The sample mappings can also be used against an earlier release of Planning if the following conditions are met:

- The Planning sample application is installed as RefApp931 with a cube name of Consol. If you are using the Planning reference application, no changes are needed. Otherwise, update the data (.csv) files to change the cube name from Consol to a name that is appropriate for your environment.
- Smart List – Top\_Segments exists within the Segments dimension and contains the members BAS, IPOD304, BB, PCD, and MP3.



ID	Name	Label
2	BAS	BAS
3	BB	BB
4	IPOD304	IPOD304
5	MP3	MP3
1	PCD	PCD

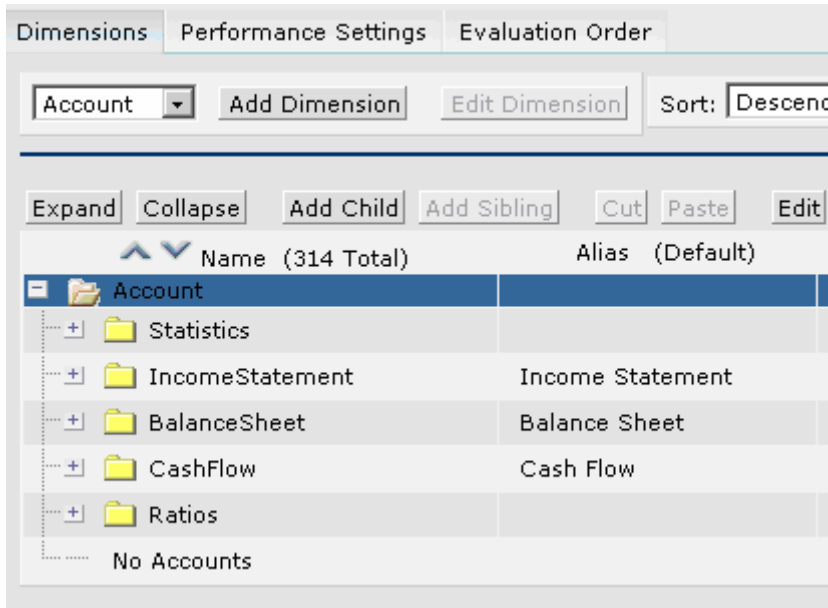
**Note:** For a Planning release earlier than 9.3.1 you can create a sample application and create a Smart List called Top\_Segments with entries as shown in the preceding figure.

- The Dimensions and members shown in the following topic, “Dimension Reference,” exist.

See the *Oracle Hyperion Planning, Fusion Edition User's Guide* for help on creating the Release 11.1.1.1 Sample Planning Reference Application, associated Planning metadata, and Planning settings.

## Dimensions Reference

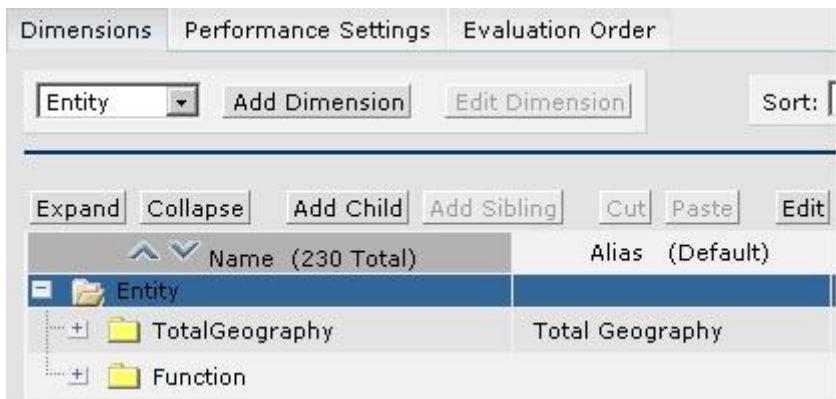
- Accounts – Default Members



- Currency – Default Members



- Entity – Default



**Note:** For applications created with Planning releases earlier than 9.3.1, the sample includes a mapping to load the Entities dimension. You can execute that mapping to build your Entity hierarchy. This step is not required if you are using the Planning Release 9.3.1, 11.1.1, or 11.1.1.1 sample application.

- Period – Qtrs – Months

Dimensions Performance Settings Evaluation Order

Period Add Dimension Edit Dimension

Expand Collapse Add Edit Delete Options Show Usage Base Period: 12 Months

Name (19 Total)	Alias (Default)	Start Period
Period		
BegBalance		
YearTotal		Q1
Q1		Jan
Jan		
Feb		
Mar		
+ Q2		Apr
+ Q3		Jul
+ Q4		Oct

- Scenario – Default Members

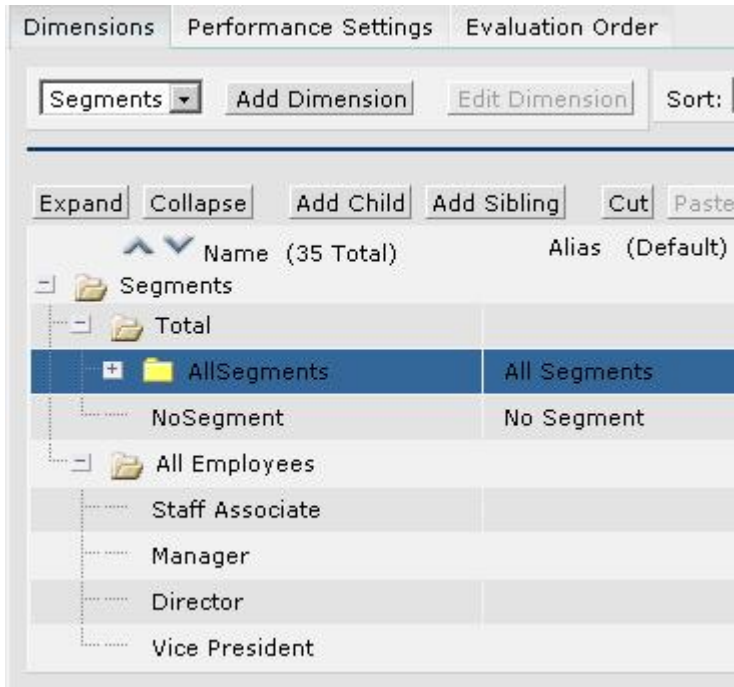
Dimensions Performance Settings Evaluation Order

Scenario Add Dimension Edit Dimension Sort:

Expand Collapse Add Child Add Sibling Cut Paste

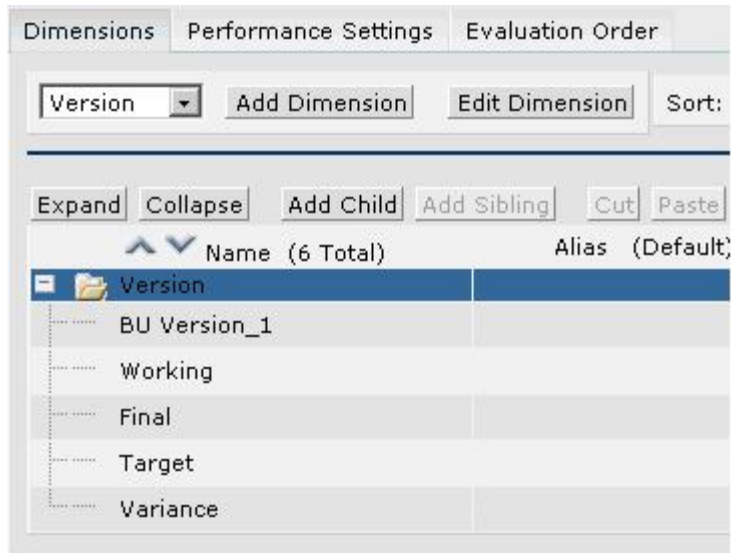
Name (5 Total)	Alias (Default)	Description
Scenario		
Current		
Plan		
Forecast		
Actual		

- Segments – Default Members

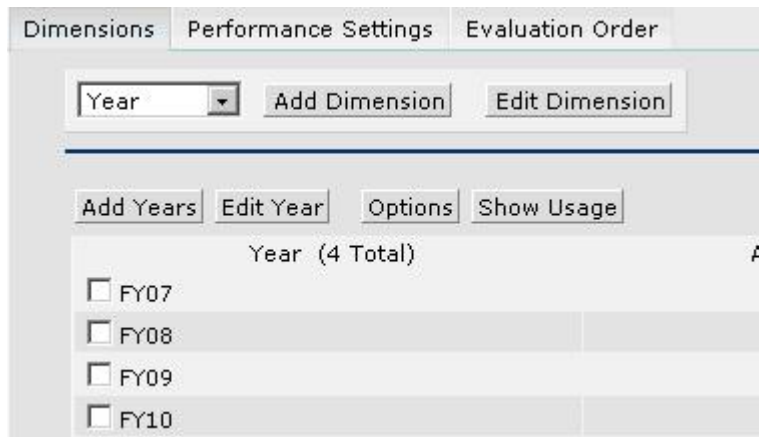


**Note:** In the Planning 9.3.1, 11.1.1, and 11.1.1.1 sample applications, the segment hierarchy already has all the required members. If you are setting up an application with an earlier Planning release, you can use the `m_FF_TO_PLAN_SEGMENTS` mapping file that is included with the samples to build the Segments dimension.

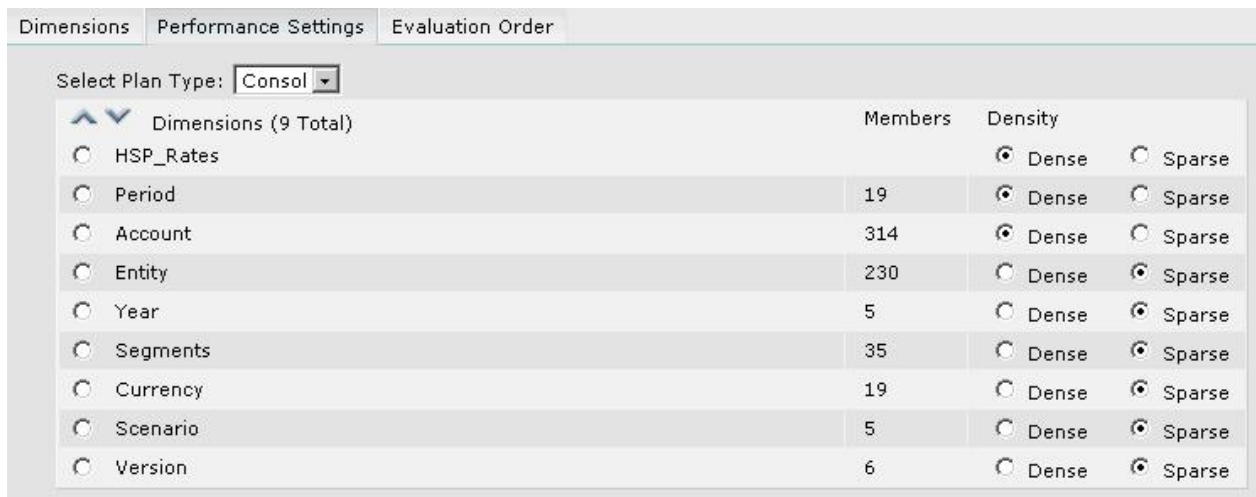
- Version – Default Members



- Year – Must contain Year FY07



- Performance Settings – May be changed as needed



## Loading Metadata into the Sample Application

Loading the sample application described in the preceding section involves loading metadata into the Account, Entities, and Segments dimensions, refreshing the cube, and then loading data, as described in the following topics.

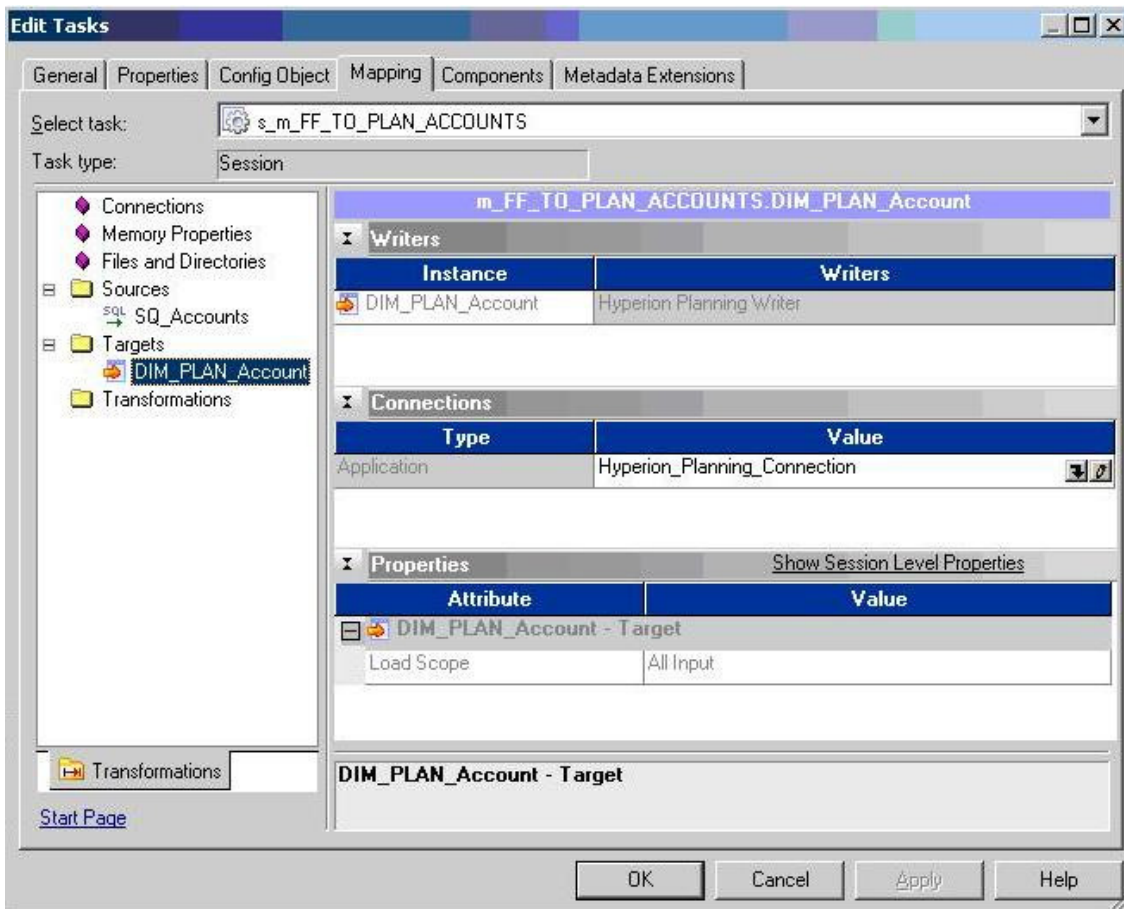
### Loading Metadata into the Accounts Dimension

The sample includes a mapping called `m_FF_TO_PLAN_ACCOUNTS`, which loads metadata into the Account dimension. Import this mapping into the samples folder in your repository or into another folder.

**Note:** You can build this mapping and similar mapping yourself following the instructions in Appendix A.

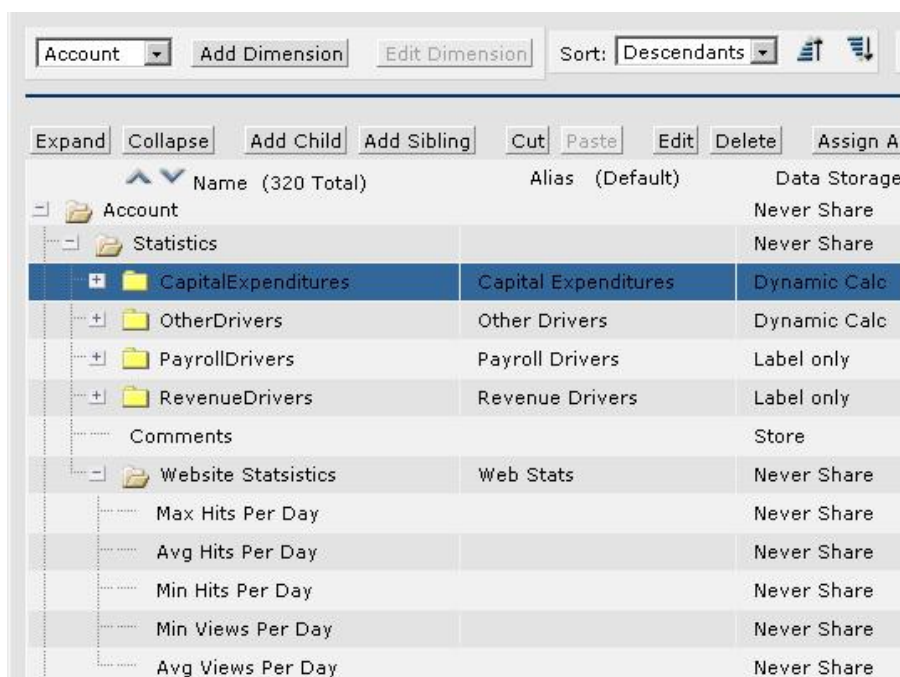
After you import the mapping, create a workflow that uses the mapping, and execute the workflow to load the Accounts dimension:

1. Launch Workflow Manager, and create a workflow
2. Add a Session task that points to the Accounts mapping
3. From **Workflow Manager**, select **Connections > Applications**
4. Set up a connection to your Planning application
5. On the **Mapping** tab of the Session properties page, set the connection value for the target to the connection that you set up in the preceding step.



6. Connect the Start task to the session task
7. Save the workflow
8. Start the workflow
9. Validate the Account dimension by logging on to Hyperion Planning 9 Web and selecting **Administration > Dimensions**.

The following figure shows how the Account dimension should look:





## Loading Metadata into the Entities Dimension

The sample includes the `m_FF_TO_PLAN_ENTITIES` mapping file, which loads metadata into the Entities dimension. Import this mapping into the samples folder in your repository or into another folder.

**Note:** You need not import the mapping if you are using the reference sample application that is included with Planning Release 9.3.1, 11.1.1, or 11.1.1.1, because that sample already has the required hierarchy setup.

After you import the mapping, create a workflow that uses the mapping, and execute the workflow to load the Entities dimension. Create the workflow using the procedure described in the preceding section for loading metadata into the Accounts dimension.

The following figure shows how the Entities dimension should look when you validate it:



The screenshot shows the 'Dimensions' tool interface. At the top, there are tabs for 'Dimensions', 'Performance Settings', and 'Evaluation Order'. Below the tabs, there is a dropdown menu set to 'Entity', and buttons for 'Add Dimension' and 'Edit Dimension'. To the right, there is a 'Sort:' dropdown set to 'Descendants' and two arrow icons. Below this, there is a toolbar with buttons for 'Expand', 'Collapse', 'Add Child', 'Add Sibling', 'Cut', 'Paste', 'Edit', 'Delete', and 'Assign Access'. The main area displays a tree view of the 'Entity' dimension. The tree is expanded to show the following structure:

Name (230 Total)	Alias (Default)	Data Storage
Entity		Never Share
TotalGeography	Total Geography	Store
E01	North America	Store
E01_0	North America Corporate	Store
E03	EMEA	Store
E03_0	EMEA Corporate	Store

## Loading Metadata into the Segment Dimension

The sample includes the `m_FF_TO_PLAN_SEGMENTS` mapping file, which loads metadata into the Segments dimension. Import this mapping into the samples folder in your repository or into another folder.

After you import the mapping, create a workflow that uses the mapping, and execute the workflow to load the Segments dimension. Create the workflow using the procedure described in the section "Loading Metadata into the Accounts Dimension."

The following figure shows how the Segments dimension should look when you validate it, with the Smart List member Top Segment displayed:

Segments		
Add Dimension		Edit Dimension
Sort: Descendants		
Expand	Collapse	Custom A
Add Child	Add Sibling	Cut
Paste	Edit	Delete
Name (38 Total)	Alias (Default)	Data Storage
Segments		Store
Total		Store
AllSegments	All Segments	Store
NoSegment	No Segment	Store
All Employees		Store
Staff Associate		Store
Manager		Store
Director		Store
Vice President		Store
Top / Bottom		Never Share
Top Segment	Most website views	Never Share
Bottom Segment	Least website views	Never Share

## Refresh Metadata for RefAp931

To refresh metadata for RefAp931, log on to Hyperion Planning Web and select **Administration > Manage Database**.

The metadata is included in the Essbase application and database.

## Load Data Using Adapter for Planning

You can use DIM Adapter for Planning to load data into a Planning application, but this is necessary only if you are loading data to a member that is associated with a Smart List; to load any other data into the application, use DIM Adapter for Essbase. The following procedure loads data into Planning using DIM Adapter for Planning.

To load data into a Planning application using DIM Adapter for Planning, you must set up the Data Load and Driver dimensions in Hyperion Planning Web. You may need to edit the `dataLoad.csv` file to match your environment. The unedited `dataLoad.csv` file assumes that the cube name is `Consol`.

To specify parameters for data to load:

1. Select **Administration > Data Load Administration**.
2. For **Available Data Load Dimensions**, select a dimension, and click **Go**.
3. For **Available Driver Dimensions**, select the dimension to which you are loading data in an Essbase database. For this example, select **Accounts** dimension.
4. Select Driver dimension members to which to load data values. For this example, select the members of the Segments Dimension:  
BAS,HTAS,IPOD304,BB,PCD,MP3,DV1000,DV2000,DV3000,DV4000,"Top Segment","Bottom Segment".

The selected members become ports in DIM Adapter for Planning.

5. Click **Save**.

## Mapping for Data Load

The sample includes the `m_FF_TO_PLAN_DATA_LOAD`, which loads data values. Import this mapping into the samples folder in your repository or into another folder.

**Note:** You can build this mapping and similar mappings yourself following the instructions in Appendix B.

After you import the mapping, create and run a workflow to load the data:

1. Launch Workflow Manager, and create a workflow.
2. Add a Session task that points to the `Accounts_Data_load` mapping.
3. Connect the Start task to the session task.
4. Edit the session properties to set the Planning connection and point to the `DataLoad.csv` file that is included with the sample.
5. Save the workflow.
6. Start the workflow.
7. Verify that the workflow was completed.
8. Use one of these methods to verify that the data was loaded:
  - Create a Planning Web Form to retrieve data.
  - Check Essbase Administration Services to ensure that blocks were created in the correct cube.

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## Appendix A

### Importing Account.csv as a Flat File Source

1. From PowerCenter Designer – Source Analyzer, select **Sources > Import from Flat File**.
2. Import the `Accounts.csv`. For information about importing flat files, see Informatica PowerCenter online help.
3. Select **Import field names from first line**.
4. Set **User default text Length** to 80.
5. Ensure that all columns are of the text type and have the correct lengths. (You must change Account and Parent to text and their lengths to 80.)

The following figure shows how the source should look:

The screenshot shows a window titled "Source Analyzer" with a sub-window "Accounts (Flat File)". It displays a table with two columns: "Name" and "Dataty". The table lists various account-related dimensions and their data types, all of which are "string".

Name	Dataty
Parent	string
Account	string
Default_Alias	string
Operation	string
Data_Storage	string
Two_Pass_Calculation	string
Account_Type	string
Time_Balance	string
Skip_Value	string
Data_Type	string
Exchange_Rate_Type	string
Use_445	string
Variance_Reporting	string
Source_Plan_Type	string
Aggregation	string
Member_Formula	string

6. Save the repository.
7. Repeat the preceding steps to build sources for the `Segments.csv` file.

**Note:** If you are not building to the sample application, you must also import the `entities.csv` file.

## Importing the Accounts Dimension from a Planning Target

From PowerCenter Designer – Warehouse Designer:

1. Click **Sources > Import from Hyperion Planning**.
2. Set up a Hyperion Planning DSN and open a connection.
3. Select the **Account** dimension and click **OK**.

The following figure shows how the target should look:

The screenshot shows a window titled "Warehouse Designer" with a sub-window "Dim\_PLAN:Account (Hyperio...". It displays a table with two columns: "Name" and "Data". The table lists various account-related dimensions and their data types, all of which are "Text".

Name	Data
Account	Text
Parent	Text
Alias: Default	Text
Valid For Consolidati...	Text
Data Storage	Text
Two Pass Calculation	Text
Description	Text
Formula	Text
UDA	Text
Smart List	Text
Data Type	Text
Operation	Text
Data Load Cube Name	Text

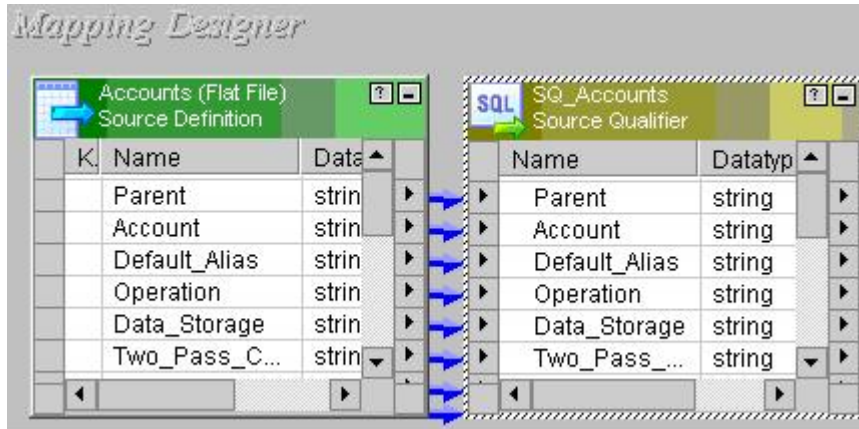
4. Save the repository.
5. Repeat the preceding steps to create a Planning target for the Segment dimension.

**Note:** If you are building to the Planning Release 9.3.1, 11.1.1, or 11.1.1.1 sample application, you must create the Entities dimension target.

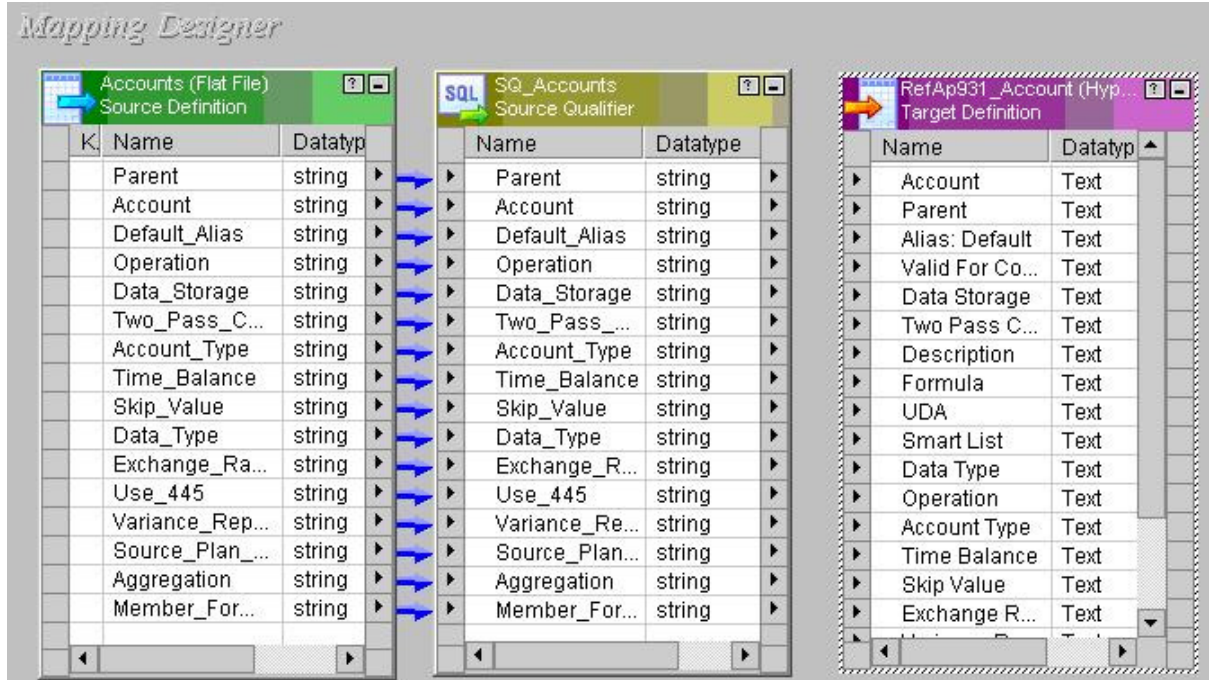
## Creating a Mapping Between the Account.csv Flat File Source and the Planning Accounts Dimension Target

1. From the sources folder in Repository Navigator, drag the **Accounts** source from the **FlatFile** folder.

This step creates a source qualifier for Accounts.

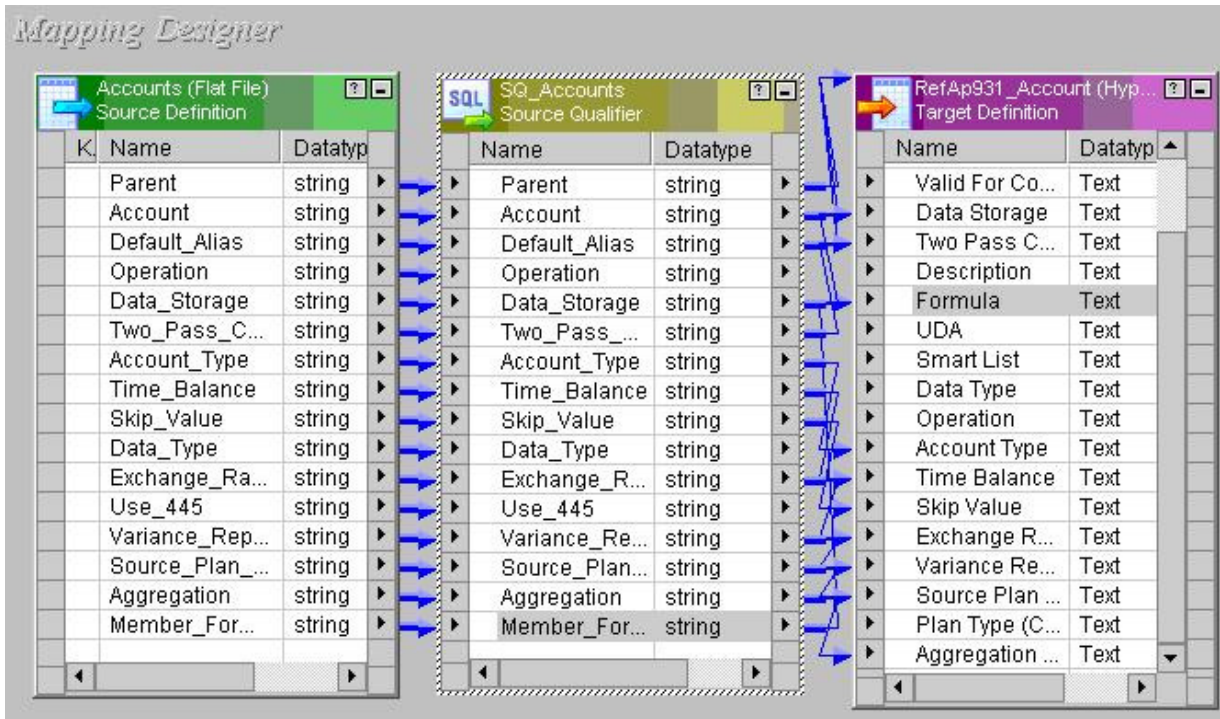


2. From the targets folder in Repository Navigator, drag the **PLAN:Account** target.



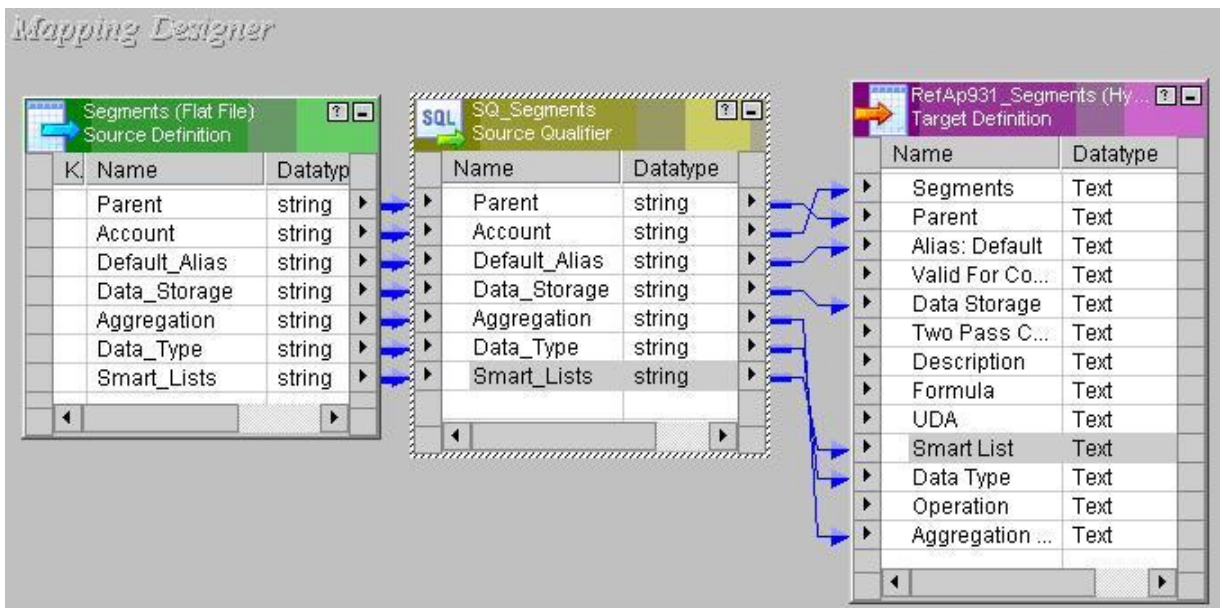
3. Link the source qualifier and target by dragging and dropping related ports.





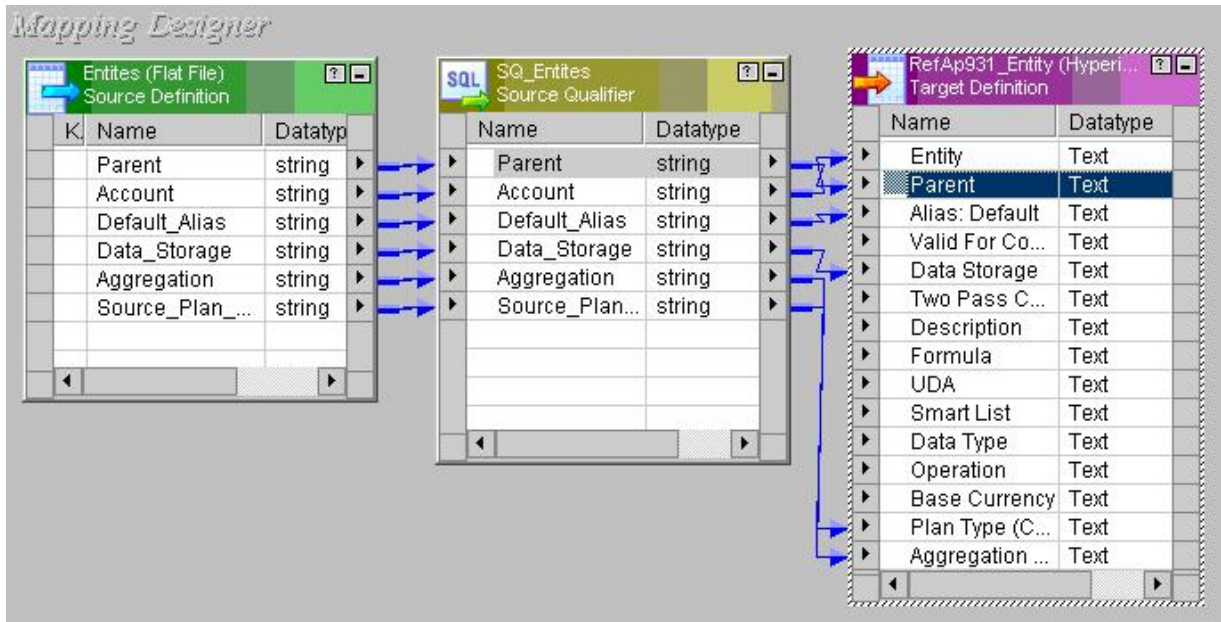
4. Save the repository.
5. Repeat the preceding steps to create a mapping for the Segment source and target.

The Segment dimension also uses a Smart List, "Top\_Segments," which enables you to set the top segment for an intersection. The data file contains this member to add.



**Note:** If you are not building to the Planning Release 9.3.1, 11.1.1, or 11.1.1.1 sample application, you must create the Entities dimension target.

6. Repeat steps 1-4 to create a mapping for the Entity source and target.



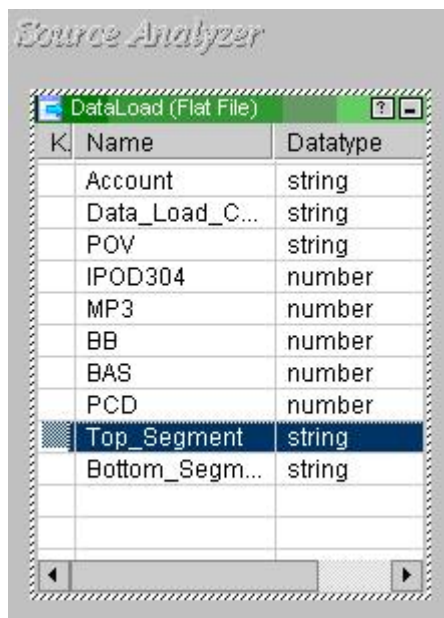
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## Appendix B

### Import DataLoad.csv as a Flat File Source

1. From PowerCenter Designer – Source Analyzer, select **Sources > Import from Flat File**.
2. Import the `DataLoad.csv` file. For information about importing flat files, see Informatica PowerCenter online help.
3. Select **Import field names from first line**.
4. Set **User default text Length** to **80**.
5. Ensure that all text columns are of the text type and have the correct length. (You must change Account and Parent to text and their lengths to 80.)
6. Ensure that all data columns are of the number type with the correct precision.

The following figure shows how the source should look:



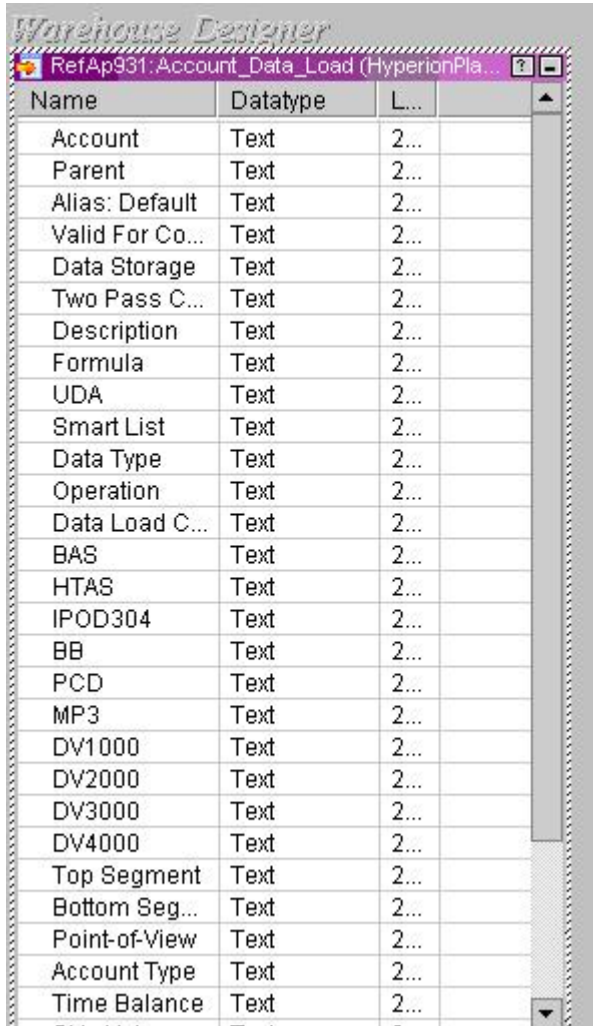
## Importing a Planning Dimension for Data Load from a Planning Target

1. From PowerCenter Designer – Source Analyzer, select **Sources > Import from Hyperion Planning**.
2. Set up Hyperion Planning DSN and open a connection.
3. Select the Account Dimension and Click **OK**.

The target will already exist as RefAp931.

4. Rename RefAp931 as Account\_Data\_Load.

The following figure shows how the target should look, with a port for each member set in the Driver dimension:



Name	Datatype	L...
Account	Text	2...
Parent	Text	2...
Alias: Default	Text	2...
Valid For Co...	Text	2...
Data Storage	Text	2...
Two Pass C...	Text	2...
Description	Text	2...
Formula	Text	2...
UDA	Text	2...
Smart List	Text	2...
Data Type	Text	2...
Operation	Text	2...
Data Load C...	Text	2...
BAS	Text	2...
HTAS	Text	2...
IPOD304	Text	2...
BB	Text	2...
PCD	Text	2...
MP3	Text	2...
DV1000	Text	2...
DV2000	Text	2...
DV3000	Text	2...
DV4000	Text	2...
Top Segment	Text	2...
Bottom Seg...	Text	2...
Point-of-View	Text	2...
Account Type	Text	2...
Time Balance	Text	2...

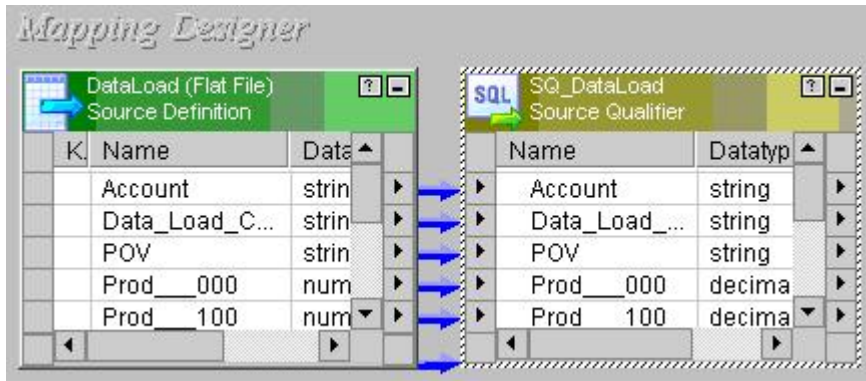
5. Save the repository.

## Creating a Mapping between the DataLoad.csv Flat File Source and the Planning DIM\_PLAN:Accounts\_Data\_Load Target

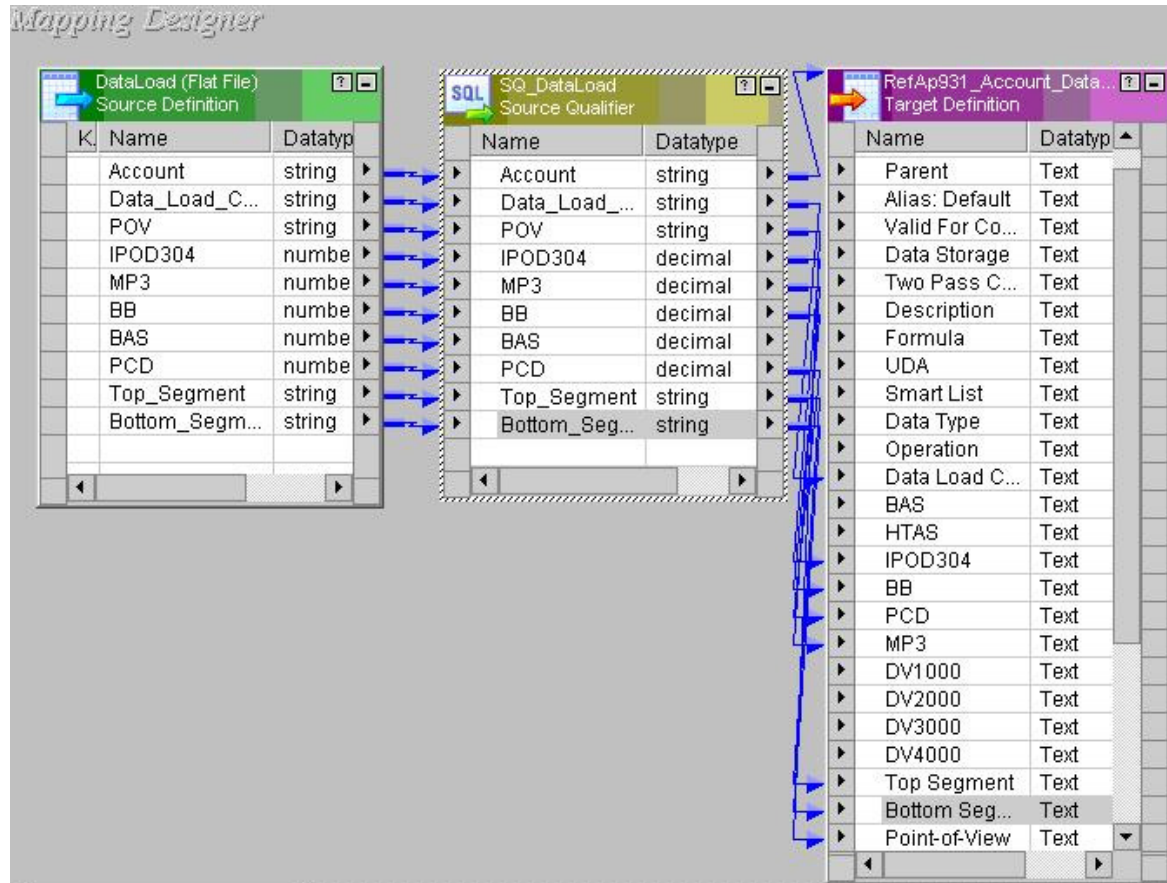
1. From the sources folder in Repository Navigator, drag the **DataLoad** source from the FlatFile folder.

This step creates a source qualifier for DataLoad.





- From the targets folder in Repository Navigator, drag the **RefAp931:Account\_Data\_Load** target.



- Link the source qualifier and target by dragging and dropping related ports.

The ports to connect are Account, Data Load Cube Name, POV, and Driver Dimension. POV is the combination of dimension members not used the Data Load or Driver dimension. The POV port expects a comma delimited set of values, as in the `DataLoad.csv` file.

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