Oracle® Hyperion Financial Data Quality Management, Fusion Edition Adapter for Hyperion Enterprise

Release G4-H

Readme

Purpose

This document includes important, late-breaking information about this release of the *Oracle®
Hyperion Financial Data Quality Management, Fusion Edition* (FDM) adapter for *Oracle Hyperion
Enterprise* (Enterprise). Review this information thoroughly before installing the adapter.

Overview

The FDM adapter for Enterprise is a target adapter that allows users to load data from FDM into
Enterprise.

Date Created:	12/01/2010
Adapter Versions:	HE6x-G4-H.xml
	upsHE6xG4H.exe
Compatibility:	See the *FDM 11.1.2.1 Readme* for FDM and Enterprise compatibility information.

Installation

This section includes important information about installing this release of the FDM Adapter for Enterprise.

> To add the Enterprise adapter to an FDM application:

1. From FDM Workbench, open an FDM application.

2. Select the **Adapters** tab.

3. Select **File > Import**.
   The Open Metadata Import File dialog box is displayed.

4. Browse to find the file `HE6x-G4-H.xml` and click **Open**.

5. Select **File > Register Adapter**.
   The Register Adapter dialog box is displayed.

6. Browse to find the file `upsHE6xG4H.exe` and click **Open**.

Configuration

> To configure the adapter:

1. In FDM Workbench, from the **Adapters** tab, select the adapter.

2. Expand the adapter, right-click **Machine Profiles**, and then click **Add Machine Profile**.

   The Add Machine Profiles dialog box is displayed.

3. In the **Source Machine** field, enter the name of the FDM server that connects to Enterprise.

4. In the **Target Machine** field, enter the Enterprise server name.

   Note: When user information is provided in the Machine Profile it will override the Unified Logon setting.

2. Right-click and select **Options**.

   The Adapter Options dialog box is displayed. The Options menu enables you to select any of the options and change the option settings.

3. Set the adapter options per the guidelines in the following table:

Option Name	Information Required
Application Name (required)	Name of Enterprise application in which to load data.
Enable Consolidation	On/Off switch to enable consolidation in Enterprise.
Enable Load	On/Off switch to enable load to Hyperion Enterprise.
Enable Validation Report	On/Off switch to enable the creation of a Check report.
Enable Drill Back Functionality from HE to FDM	On/Off switch to allow drill through from Enterprise to FDM. This should be enabled only when integrating with Hyperion Enterprise 6.5.1.

Option Name	Information Required
Dimension Cache Switch	On/Off Switch for enabling the caching Enterprise members. When this option is enabled, FDM will retrieve the Enterprise members from the dimension lookup table. You must have executed the `HET_UpdateDimensionCache` script prior to enabling this option.
Hyperion Organization(s)	Used when the `HET_UpdateDimensionCache` script is executed. This defines the member level in which to retrieve.
Consolidation Type	0-Impacted, 1-All With Data, 2-All, 3-Entity Only, 4-Force Entity Only. This option indicates the type of consolidation to be performed. Refer to Hyperion Enterprise documentation consolidation type descriptions.
Default Decimal Indicator	Period (.) or Comma (,). Default is period.
Number of Periods	Select 12, 52, 360, or 365.
Default DAT file Delimiter	Comma (,), Pipe (|), Tilde (~).
Logon Method	1-Unified, 2-Global. If the Machine Profile contains a username/password then this setting is ignored.
Global Logon Information	UserID and Password of Enterprise user. If the Machine Profile contains a username/password then this setting is ignored.
Use Full Account Description	On/Off switch. This option is used in conjunction with the execution of the `HET_UpdateDimensionCache` script.
Load Method	Option for loading to Enterprise. Select Replace, Merge, or Accumulate.
View	Category, Year-to-Date, or Periodic.
Scale	None, Units, Tens, Hundreds, Thousands, Ten Thousands, Hundred Thousands, Millions, Ten Millions, Hundred Millions, or Billions. Use this option to scale the values that are exported from FDM.
List3	Not used.
Calc	Not used.
Zero No Data	On/Off switch. Enable this option to zero accounts with no data. Refer to Hyperion Enterprise documentation for additional information about Zero No Data.
Switch2	Not used.
Status3	Not used.

Using the Adapter

Information on using the Enterprise adapter is included in the *FDM Administrator's Guide.*

Known Issues

Base Entities when using Unified Security

If a user connecting to Enterprise does not have access to the base name selected when setting up the target system integration, the integration will not work. This issue is more likely to occur when using unified security in Enterprise, where, by design, users won't have access to all base entities. In this case, it is recommended to create a base entity solely for FDM access and not for data entry.

Notes

- Adapter supports SSO Integration with Enterprise; requires VBScriptSSO Authentication Script Refer to the `Authentication Script.txt` included in the adapter zip file.

- This release of the adapter supports additional languages. See the Oracle Hyperion Enterprise Performance Management System Certification Matrix (http://www.oracle.com/technology/products/bi/hyperion-supported-platforms.html) for information about localization for this adapter.

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