Oracle® Hyperion Planning, Fusion Edition

Release 11.1.2.0.000 Patch Set 1 (PS1): 11.1.2.1.000

Readme

Purpose

This document includes important, late-breaking information about this release of Oracle Hyperion Planning, Fusion Edition. Review this Readme thoroughly before installing Planning.

New Features

See the *Oracle Hyperion Planning, Fusion Edition New Features*.

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*.

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.

Enterprise Performance Management Architect Required Post-Installation Patch

If you use Planning with Enterprise Performance Management Architect, after the installation and configuration of Enterprise Performance Management Architect 11.1.2.1.000, you must install Enterprise Performance Management Architect patch 11804477.

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

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

Note: For this release, Arabic is not supported on Planning Web, even through customization. However, Arabic is supported within Smart View.

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 *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

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.

Defects Fixed in this Release

Defect Number	Defect Fixed

• 11657035	When **Use Members on Data Form** and **Run on Save** options are selected in a composite data form, the runtime prompt displays the default value set at the time of business rule creation. But if the same rule is used in a simple data form, it displays correctly. This is because business rules attached directly to composite data forms cannot read the context from data forms.
	
	Note: Though this has been fixed in this release, be aware of the following related issues that are documented in the Known Issues section of this Readme:
	
	    • 9900514
	
	    • 11075506

• 11057165	Using the **Supporting Details** option on the **Clear Cell Details** page deletes the data in the selected cells. This works in the same way that CLEARDATA deletes the data for non-supporting detail intersections in a selection.
• 10410568	The Planning **Manage Clusters** panel option in Oracle's Hyperion Enterprise Performance Management System Configurator needs to be disabled.
• 10404472	Under the Account dimension, reordering children does not work if there is a shared member among children. After redeployment, the child members sort differently in Planning than in the dimension library. But if there is no shared member under the parent, it works correctly.
• 10337273	You cannot select anyone other than the previous owner when rejecting a planning unit.
• 10306734	In Public Sector Planning and Budgeting, when you assign an existing employee to a position, the business rule does not save the assignment.
• 10282980	In Public Sector Planning and Budgeting, terminating an approved position does not clear it from the FTE columns.
• 10282853	In Public Sector Planning and Budgeting, the single-step employee transfer operation does not complete as expected.
• 10282834	You cannot create applications in which the fiscal year starts in the previous calendar year or on a date other than January 1.
• 10274583	The most recently entered **Description** for a new or existing member is duplicated whenever a subsequent member with an empty **Description** is edited. For example, enter and save a description for member A, open member B (which has no description) and edit to view properties. The description for member A is added to the description in member B even though the description was not edited.
• 10266788,	Users created in Shared Services cannot log on to Planning if the provider is not

Defect Number	Defect Fixed
10219085	reachable.
• 10266779	Applications containing a large number of dimension members load slowly when the application is deployed for the first time.
• 10266772	Planning needs to display a message if the business rule execution time exceeds the maximum configured wait time.
• 10266312	Lifecycle Management import fails if a group is only made up of Planning administrators.
• 10247879	In Public Sector Planning and Budgeting, composite data form tabs containing employee details contain no data when they are invoked from the **Maintain employees by position** task.
• 10240404	In Public Sector Planning and Budgeting, the `AllocDistCost` predefined business rule causes the application to stop responding.
• 10236113	Lifecycle Management import fails if a group is provisioned to an application but does not have access permissions associated to it.
• 10231043	In Public Sector Planning and Budgeting, when you select the **Employee** tab in the **Maintain Position data** form and right-click to **Delete Employee Assignment**, the system stops responding.
• 10169459	When scrolling on a data form, the data side does not stay in sync with the members side.
• 10102861	Unnecessary rows display in Excel spreadsheets.
• 10096117	Tab names in composite data forms do not display after Lifecycle Management migration.
• 10095690	For composite data forms that have data validation rules enabled, the tabs in a composite data form block the navigation arrow.
• 10089348	When you view a data form in Mozilla Firefox, the vertical scrollbar causes the header row to be out of sync with the rest of the column.
• 10072171	For composite data forms, business rules should not run on any given tab until that tab is visited and the data form is saved.
• 10059421	The data synchronizer stops processing when it encounters errors in some rows (for example, commas in the data column for text data). If the data synchronizer encounters errors during processing, it should continue processing and report problematic records as errors.
• 10058867, 9290560	Business rules artifacts that exist on the destination environment are not updated or overwritten during a Lifecycle Management import.
• 10034397	If a dimension added to an ad hoc grid causes asymmetry, rows are automatically grouped.
• 10031609	After assigning new dimensions as dense or sparse, you cannot reorder them in the dimensional hierarchy.
• 9978006	The Oracle Real Application Clusters URL for a Planning application cannot exceed 255 characters.
• 9928211	If business rules are associated with a data form, a progress indicator needs to display when the data form is saved.
• 9857952	When cells are hidden because the parent row or column is collapsed, cells are not updated by time period spreading or Grid Spread.

Defect Number	Defect Fixed
• 9756770	Performance issues are experienced when opening data forms in Planning 11.1.2.
• 9616112	Running the Performance Management Architect File Generator Utility for a Planning application disables the dimension editor for that application.
• 9589191	Recalculating compensation expenses may not reflect the expenses of terminated positions.
• 9561216	If the data form grid property **Suppress missing blocks** is set, selecting dimension members individually rather than using Essbase functions can result in access permission issues. For example, a user with read-only access to a member may be able to edit that member.
• 9377924	You get an error if you try to open a data form in Offline mode if a condition in the data form is not supported. For example, Offline mode does not support: • A data form definition that has an Essbase substitution variable assigned to the Page dimension. • An invalid data form definition (for example, no rows or no columns). **Note:** Data forms with user-created substitution variables or dynamic substitution members (dynamic POV) in Offline mode are not supported in this release. See 10383127 in the "Known Issues" section.
• 9306489, 9321229	Keep the following in mind when using the **Use Single Sign-on** URL task option: • If you are using Planning within EPM Workspace, the target application must be an EPM Workspace application. You cannot target a stand-alone Planning application. • If you are using a stand-alone Planning application, the target application must be a stand-alone Planning application. You cannot target an EPM Workspace application. • If you are using Planning with Smart View, the target application must be a stand-alone Planning application.
• 9280345	If Planning stops (for example, the Planning server is restarted), the status of jobs that were processing at the time display as "Processing" in the Job Console. You cannot delete these jobs using the Job Console, nor do they get deleted by the purge feature.
• 9114301	In the Planning Logon page, when updating an existing name in the **User Name** field, you cannot select the text by double-clicking or dragging the cursor across it.
• 9046759	When you run the `ImportSecurity` utility, if the import file contains a user who is not provisioned for the application, the import operation fails for all users, with the message `Java Null Pointer Exception`.
• 8913498	You cannot load a dimension using the Planning Outline Load utility if the dimension name contains a space.
• 8207900	For data forms with hidden dimensions, column width is always set to **Size-to-Fit**.
• 7420399	On a large data form with many rows, when you press Ctrl+F to search for a member, the data form does not move and is not aligned with the found row. This makes it difficult to scroll or tab to the found row to enter data.
• 6766998	Member formula comments with line breaks are not supported.

Defects Fixed in Release 11.1.2.0

Defect Number	Defect Fixed
• 9496149	Sometimes, special characters in member names, such as the question mark (?) or equal sign (=), are truncated in the **Member Selector** members list.
• 9457036	During Push Data for reporting application mapping with localized non-Unicode Planning and reporting applications, if Essbase or Planning is on a UNIX environment, Planning displays errors about not finding dimension or member names.
	Workaround: Wet a codepage property in the `setCustomParamsHyperionPlanning.sh` file, installed by default in `MIDDLEWARE_HOME/user_projects/EssbaseServer/essbaseserver1/`. This property allows Planning to generate export and transformation files based on the Essbase codepage setting.
	For example, on a UNIX environment, when mapping reporting applications for Traditional Chinese applications, if ESSLANG is set as "ESSLANG="TraditionalChinese_Taiwan.EUC-TW@Binary"", set the JVM parameter to `-Dcom.hyperion.planning.codepage=EUC-TW` (even though LANG is set to the big5 codepage, "`LANG="Zh_TW.big5"`").
	Make sure the ESSLANG value set in `setCustomParamsHyperionPlanning.sh` matches the ESSLANG value set for the Essbase server. Setting the codepage property will not resolve these errors if the Planning and Reporting applications are located on Essbase servers using different ESSLANG variables or codepage settings.
• 9443874	When using Turkish, set the Web browser language to Turkish, but do not include Turkish characters in the Planning application name. Turkish characters in the application name cause currency conversion to fail.
• 9409103	To browse for a document to attach to a data form cell, ensure that Financial Reporting is installed and configured. This product provides the file repository for these documents.
• 9395872	If you select **Assign Owners** and then select **Expand Descendants** to assign planning unit access, you cannot select the first user in the list. To avoid this problem, change the number of records displayed. To reduce the number of records displayed, use the **Expand** or **Collapse** member icons on the **Owners** tab, or change the number of records displayed in **User Preferences**.
• 9377485	The **Reapply settings on each move** option is unnecessary. Planning automatically applies the rules that determine whether a planning unit or entity is included in approvals each time a member is added to the planning unit hierarchy.
• 9366374	Sometimes in composite data forms that contain members of type **Text** and members of type **Currency**, adding supporting detail to a member of type **Text** may add double-quote marks to the display in each cell for rows containing members of type **Text**.
• 9321997	You cannot add comments or cell-level documents to formula row or formula column cells.
• 9319975	If **Suppress missing blocks** is set for a data form, a user may have write access to members for which they are assigned only read access.
• 9077691	Broadcast Messages functionality is now available only to administrators, not to planner and interactive user types.
• 9075696	In Japanese, when you try to save a planning unit annotation with a title longer than 16 characters, an error is displayed.

Defect Number	Defect Fixed
• 9050411	You can now reuse task lists after their completion by clearing the status, due dates, and alerts for all tasks in a task list.
• 9032135	Microsoft Excel restricts worksheet tab names to thirty-one characters. Composite data form display names that are longer than this limit are truncated to thirty-one characters when displayed as tab names in composite data forms in Smart View.
• 8938258	When using Smart View, Mass Allocate is not supported in ad hoc analysis mode.
• 8917362	When text is entered into a cell whose **Data Type** is **Text**, double quotation marks ("") display in all cells of the column.
• 8849061	When you filter on **Users** in the Job Console, user names entered with capital letters are converted to lowercase.
• 8838834	For read-only data forms for target versions, when the data form includes multiple row dimensions that contain any level of members except level 0 members, Smart List member values are not displayed on the data form.
• 8826998	As documented in the *Oracle Hyperion Planning Administrator's Guide* and the *Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide*, Planning does not allow members with the same names as Report Writer commands. If a member with the same name as a Report Writer command is added in Performance Management Architect, Planning deployment fails.
• 8726059	In Planning data forms, row members do not display as indented if **Suppress Missing Blocks** or **Suppress Hierarchy** is selected. If you want to display indentation for rows, ensure that these options are cleared for the data form.
• 8722348	On the **Manage Process** page, after you select a scenario and version, you should be able to filter the list to control which planning units are visible and can be updated.
• 8693291	In a Classic Planning application that uses a custom calendar, the Outline Load utility imports some Scenario members with a Start Period or End Period that does not match the Base Period.
• 8675917	In data forms, you cannot use different background colors for different member levels within a row, such as one color for the summary row and another color for level 0 rows.
• 8660966	Planning units cannot be assigned to a group. They can, however, be assigned to multiple reviewers.
• 8618113	When using `FormDefUtil.cmd` to import data form definitions to an application, all access security associated with the data form is removed.
• 8600701	When navigating exchange rate tables, the Tab key is the only available navigation key.
• 8600688	You cannot clear due dates and alerts from tasks.
• 8591316	You can use tasks lists from a previous planning cycle as the templates for upcoming cycles.
• 8587402	You do not experience high network traffic due to a large number of unnecessary HTTP requests.
• 8587295	You can search for members by alias in runtime prompt windows.
• 8568076	You can use the Import and Export Utilities with Real Application Clusters (RAC).
• 8561355	Deployment does not fail due to source plan types becoming "None" and uneditable on shared members that you manually add to Performance Management Architect outlines.

Defect Number	Defect Fixed
• 8559996	At times when you select three or more dimensions, then select six or more members for each dimension, and then hide the first dimension selected, Planning performance may be impacted.
• 8543476	Calculation Manager business rules are not initialized in Planning if the default Workforce Planning plan type is renamed.
• 8527999	You can limit the users in different management levels to whom others can promote plans for review and approval. This enables you to quickly ensure that only the appropriate users receive plans.
• 8514450	The e-mail address of any user who promotes or approves data is used as the sending address in workflow notifications.
• 8513538	To avoid confusion and data loss, creating and refreshing Essbase databases are performed separately. Additionally, you are notified that creating an Essbase database permanently deletes all other Essbase databases used in your application, and all associated calculation scripts and data.
• 8475614	To facilitate troubleshooting for large user numbers, the System Out log is not updated when forms using **Ad hoc on all members** are opened.
• 8440251	All user variables for data forms that use the **Enable Dynamic User Variables** option are properly migrated during Lifecycle Management.
• 8372616	User variables do not work as Smart List members.
• 8365274	When data forms are exported to Microsoft Excel, the Microsoft Excel window cannot be resized.
• 8350101	The PDF version of the task list report always shows the number of overdue tasks as zero.
• 8323388	If you select a custom column width in column properties and hide two dimensions in a data form, the custom column width is applied correctly if the last dimension in the selection is visible. However, the custom column width is not applied to the data form if the last column in the selection is hidden.
• 8319836	The e-mail server name can be updated only by the application owner. However, no error message displays if a non-application owner tries to update the e-mail server name.
• 8315413	If you create a business rule in Calculation Manager that contains a runtime prompt variable of type **Member**, and then attach the business rule to a Planning data form with both **User Members on Data Form** and **Hide Prompt** set, you cannot save any values you edit in the data form.
• 8288565	Data forms do not support shared members as runtime prompts.
• 8281619	When Planning data forms include hidden segments, columns and rows are displayed if the data form is retrieved from Smart View.
• 8280228	When using Planning in a locale other than English, to create a particular task list report a second time, close and reopen the application first.
• 8262080	When you select **Hyperion**, then **Forms**, and then **Take Offline** in a locale other than English, the wizard displays in English, rather than the expected locale.
• 8259635	For planners, the search feature is available in data forms, but an error is displayed when they attempt to search.
• 8255534	If you are using a Planning application in the Traditional Chinese locale and that application was upgraded from Classic Planning, one or two of the Workforce Planning business rules that you migrated and deployed after the upgrade may not display in

Defect Number	Defect Fixed
	that application. To correct this situation if it occurs, redeploy the missing business rule or rules.
• 8251279	When you use any Capital Asset Planning business rule that uses a date as a runtime prompt, make sure that the **Date Format** is set to an option other than **Automatically Detect**. Using this option with these business rules may cause problems with the date.
• 8233475	If you hide the first of two dimensions associated with a data form column, opening the data form causes the Microsoft Internet Explorer browser to stop responding. You must clear the hidden setting for the column dimension to resolve the issue.
• 7830283	When running a business rule in Essbase Administration Services and selecting a dimension member for a runtime prompt, not all the dimension members are listed and some members are listed twice.
• 7829503	At times, the upper part of the masthead may be partially hidden behind the browser toolbar. For example, this can occur in Basic mode if you work on a task that has a subordinate task, and then expand the task list in the view pane. It can also occur when you open a data form, launch one of its business rules from the Business Rule page, and then close the status message at the top of the page.
• 7678381	Member aliases for Scenario and Version dimensions are not displayed on the **Manage Process** page when the **Preferences** option **Show Planning Units as Aliases** is set.
• 7667635	When you are working with a Capital Asset Planning application, setting **Date Format** within **Preferences** does not affect the date format. It defaults to MM-DD-YYYY no matter what format you select. To format a date differently, manually enter the date format, rather than set it using **Date Format**.
• 7661707	When Smart List members are summed in top-down versions, they display in data forms as the sum of the Smart Lists IDs. This does not occur when Smart List members are summed in bottom-up versions. Workaround: Set the **Aggregation** option to **Never** to prevent rollups to parent members.
• 7600996	Error messages are not displayed when users enter more than 255 characters in a data cell of type **Text** or enter a date in a data cell of type **Date** that is not of the defined format.
• 7586703	The **Run on Save** option does not work with composite data forms.
• 7540095	If a Sun ONE HTTP Web server is configured in front of the application server that is running Planning, accessing Planning through an HTTPS URL redirects to a HTTP URL. You must manually change the URL back to https to make the connection use the https protocol.
• 7492790	If the **Hide Dimension** column property is set for all dimensions in a column, the column width is displayed correctly only if the **Size-to-Fit** option is selected.
• 7485035	If you launch a business rule from a shortcut menu, it runs correctly. However, if the business rule runs for several minutes, the message **Page cannot be displayed** may display intermittently.
• 7426111, 6589947	When users select members in the **Member Selection** page, Planning displays either the member name or the member name and alias. Users cannot display only the member alias.
• 7417354	You cannot add a data form folder to the Capital Asset Planning data form folder from the **Data Form Management** page.
• 7339918	Using Hyperion Business Rules, if you create a Global Variable as a runtime prompt with a filter for **Children or any Descendants** level, when the business rule is

Defect Number	Defect Fixed
	launched in Planning, the members do not display in the same order as their original hierarchy.
• 7339571	To set the CREATOR_URL Planning application system property: 1. Select **Administration**, and then **Manage Properties**. 2. Select **System Properties** to set properties for all Planning applications. 3. Click **Add**. 4. In the blank row, enter the property name as CREATOR_URL (avoid using spaces). 5. Under **Property Value**, enter the URL to include in the workflow e-mail. 6. Click **Save** and confirm your changes. 7. Restart Planning.
• 7328979	If you have a data form open when you close an application or log off EPM Workspace, you might encounter a JavaScript message the next time you open that application.
• 7300979	Data forms with a hidden column are printed twice.
• 7304489	When users add or edit data in data forms and then, before saving the data, edit user variables, the data form changes are lost.
• 7284598, 6649854	Administrators cannot add dimensions to an Entity in approvals.
• 7120566	Sometimes when composite data forms are displayed, they do not expand to fill the available screen space.
• 7112669	In the dimension library, if you define a new taskflow by entering the taskflow name and application, when you select HBRServer or PlanningSystemDB in the **Processing** tab, the message "an error occurred" displays and a more detailed error message is generated in the taskflow log file.
• 7039385	Users whose names begin with special characters (for example, $HypAdmin), after being provisioned, could not log onto Planning.
• 7028265	A report (select **Administration**, and then **Reporting**) for a data form that has asymmetric rows or columns does not clearly display how the asymmetric rows or columns are set up.
• 7026284	If a user saves a data form locally in Smart View and an administrator revokes that user's privilege to the data form, the user can still read and edit the data form values.
• 7012502	When using FormDefUtil.cmd to move data form definitions between applications, hidden dimensions in the POV are not exported correctly. They are displayed instead of suppressed in the imported data form.
• 6998585	When you add a member of **Data Type Percentage** to a data form as a user variable, the member displays as **Data Type Non-currency**, and you cannot enter percentage values for the user variable.
• 6958098	If you change the default port number for Essbase, 1423, to another number during Essbase configuration, the URL given for the Essbase server when creating a data source must have the format serverName:newPortNumber. For example, if the port number for the Essbase server is set to 1400 during configuration and the Essbase server is run on the local machine, the URL is localhost:1400.
• 6900964	When Alternate Time Periods in the Period dimension contain shared members, it is possible for users to enter data into periods outside the specified Scenario.

Defect Number	Defect Fixed
• 6767636	The **Size-to-Fit** column heading option sometimes reduces data form column headings to an unreadable size.
• 6591414	You can now aggregate Smart Lists through application mappings that push data from a Planning application to a reporting application.
• 6591037	Sometimes Smart Lists associated with data cells near the bottom of the Planning window display outside the Planning window.
• 6580352	There is no utility for copying Smart Lists from one application to another.

Known Issues

The following issues are the noteworthy issues of this patch.

Alias Tables

Defect Number	Known Issues
10259779	When clearing values from an alias table, no error is given, however upon validation, the selected alias table still has data. Workaround: Restart the Planning service after clearing the values from Planning Web client.

Approvals

Defect Number	Known Issues
11677934	The Task List Access Manager role was created but not implemented in this release. As a result, users granted the Task List Access Manager role cannot assign task lists and tasks to other users.
10625731	The following Planning roles are not translated in Shared Services Console: • Approvals Administrator • Approval Ownership Assigner • Approvals Process Designer • Approvals Supervisor • Ad Hoc Grid Creator • Ad Hoc User
10077500	You cannot assign a group as a planning unit reviewer.
8561442	Deleting a member that is the first member in a started planning unit hierarchy causes Planning to stop responding when the database is refreshed. To avoid this issue, move the first member of the hierarchy to a different place in the hierarchy, or stop the Planning unit.

Business Rules

New: Public Sector Planning and Budgeting no longer supports Hyperion Business Rules as a calculation module and tool to define and customize business rules. When creating applications, select Calculation Manager as the calculation module, and use Calculation Manager to handle the business rules you use in applications.

Defect Number	Known Issues
10150284	Planning does not allow you to enter numbers with decimals at runtime.
8835089	**Hide Prompt** does not work with business rules that have unused local variables. For example, this can occur for a business rule that includes a global variable and a local variable that are used in the source code for a Planning location. If you edit the business rule in Essbase Administration Service to remove the source code reference to the local variable without deleting the variable from the business rule, users are prompted to make a selection for both variables when they open the data form and save data. Workaround: Ensure that any unused local variables are removed from business rules.
8672459	Business rules that include runtime prompts defined using a member relationship function may not return all available members in the member selection dialog if more than 100 members qualify.
7485452	When multiple business rules with one or more runtime prompts are assigned to a data form with **Run on Save** checked, an error may occur when the business rules are launched. To avoid this problem, do not assign multiple rules with runtime prompts to data forms with **Run on Save** selected.

Calculation Manager

Defect Number	Known Issues
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.
9964318	If you create two business rules in Calculation Manager, and the names of the rules use the same wording 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. However, the rule names are displayed with the correct spacing in the database.
9438498	When a ruleset has a business rule from a target application that differs from the current application, the member selector does not recognize the limits set on the runtime prompt.

Capital Asset Planning

Defect Number	Known Issues
8587863	You cannot change the name of the Capital Asset Planning plan type to something other than Capex. This applies to both Performance Management Architect and Classic Planning applications.

Data Forms, Composite

Defect Number	Known Issues
9900514	The **Use Members on Data Form** and **Hide Prompt** options for business rules attached to composite data forms apply only for runtime prompt values from the globally shared pages and POVs of a composite data form. In other words, this will only use members that are shared across all component data forms. If users want a business rule to take context from a single component data form, they should attach the business rule to that component data form and include the business rules for that component data form at the composite data form level (<Business rules for componentX>).
9497802	Resizing your Web browser display may cause problems with composite data form display. To resolve the problem, close the composite data form, and then reopen it.
9047894, 8220537	When exporting a composite data form to Microsoft Excel, only the first simple data form in the composite data form is exported.

Data Forms, General Issues and Design

Defect Number	Known Issues
10358200	If a formula column exists in a data form, selecting the **Suppress missing** option does not hide rows that do not contain data.
10324616	Formulas that reference a segment that is moved up, moved down, or deleted may not get updated to reflect the updated segment positions, especially if the segment is used as a part of a range (for example, sum([1:3])). You must manually update the formulas to correctly reflect the changed segment positions or deletions.
10298120	The Round function results are incorrect if rounding to more than 9 decimals.
10266808	If a data form exceeds the available page width, resizing columns causes unexpected behavior.
10266804	Supporting detail becomes disordered after adding a new row to a data form, resulting in calculation errors.
10258990	Internet Explorer memory is not releasing when a data form is saved. Workaround: Reload the data form frequently or use Firefox.
10226960	You cannot open a data form that includes Dynamic Time Series (DTS) members and has the **Suppress Missing Blocks** option selected.
9945942	Undesired behavior occurs when using the **Lock/Unlock Cells** option during data spread. For example, read-only data for months before a **Start Period** is adjusted and **Year Total** is locked.
9734723	Using the **Suppress missing blocks** setting with Dynamic Calc in data forms is not supported.
9690538	If a data form name contains an ampersand character (&), the form cannot be opened in Smart View using the File menu's **Open in Smart View** menu option.
9654763	When printing a data form to a PDF file, the columns are displaying as unformatted - the column width is too small for the name of the member to get displayed. Workarounds: Select **File**, then **Spreadsheet Export** and use the formatting options

Defect Number	Known Issues
	in Excel to resize the fonts and columns. Or use Smart View from within Excel to open and then print the form.
9328504	Click within a data form cell and select the drill through icon to display source data. Using the **Drill Through** option in the **Edit** menu can cause Web browser problems.
9284400	Using the ampersand character (&) in data form names can cause issues.
9223718	When the **Hide dimension** property is set for two data form dimensions, the data form does not open, and the Web browser stops responding.
9094156	If Dynamic Time Series (DTS) members are used in the Page or POV axis, when the data form is refreshed, selections on the Page or POV axis before the refresh do not persist.
9054504	When you edit values in a data form cell, press **Enter** or **Tab**, or click another data form cell to keep the new value (note that this action does not save the new value to the database). Pressing any other key may delete the new value from the data form display and replace it with the old value.
9020384	The message "The Accessibility Mode preference has been changed. Logout and restart the browser for this change to take effect" is displayed the first time users modify user variables. Ignore this message; no error has occurred.
8911320	In data form rows or columns, if you use the `ISiblings()` function to select a dimension that is selected as a user variable, the selected member is not displayed in the data form. This can occur, for example, if you create a user variable for a dimension, select the variable in preferences, create a data form, and then use the `ISiblings` function to select the user variable for a row or column. When you open the data form, the siblings of the selected member are not displayed. Workaround: When creating the data form, use the `ISiblings` function to select the member directly instead of selecting a user variable. The member will be displayed correctly in the data form.
8862285	Using **Find** from the browser **Edit** menu to locate a data form member displays the specified member. However, the member value displayed may be incorrect due to grid display problems.
8735071	When Dynamic Time Series (DTS) members are available, selecting period members in data forms causes an error.
8636593	Problems with submitting data, refreshing data, or running business rules may occur if users work with more than one data form simultaneously.
8585767	If you create a composite data form from an existing composite data form using **Save As** and move the new data form to a different data form folder, the business rules defined for the original composite data form may not be transferred to the new data form.
8579404	Hiding more than one dimension in a data form can cause Microsoft Internet Explorer to stop functioning.
8309383	In multicurrency application data forms, you cannot copy a value from a cell formatted for a thousands separator other than **None** to a cell with a thousands separator set to **None**.
7626059	When data of type **Text** is deleted from data forms, it is not deleted from the Essbase database.
7418009	If a data form contains asymmetric rows or columns, and you use one or more substitution variables exclusively in the asymmetric portion of the data form, the substitution variable(s) do not display in a report.

Data Validation

Defect Number	Known Issues
11667701	When you change a dynamic user variable, the updated variable may not display in the POV and Page when viewed from the planning unit validate task list. Workaround: Reopen the validation report to see the changed value.

Dimensions and Members

Defect Number	Known Issues
7360357	When you try to generate an Access Control Report on a dimension having a large number of members (for example, 30,000), you may get an error.
8556659	Shared Account members do not inherit the **Data Type** of their base members on data forms.
12617012	Search by UDA in the member selector dialog box does not work if the member selector is invoked from the Preferences page in Planning Web.

Exchange Rate Tables

Defect Number	Known Issues
9194390	If an Exchange Rate Table contains only values for Beginning Balance (Beg Bal) and Historical rates, those values are not refreshed to Essbase when Planning is refreshed. Workaround: Enter an Average or Ending rate and then save the table.
7441962	When entering information in the exchange rate table, you must enter only numeric values, even if you set the separator options in the Currency dimension. The Currency dimension properties do not apply to exchange rate table entries.

Lifecycle Management

Defect Number	Known Issues
11787409	Importing a Planning application using Lifecycle Management may cause Essbase to stop responding. Workaround: Restart Essbase and use Lifecycle Management to re-import the Planning application.
10373894	After a Lifecycle Management migration, the Planning artifacts (for example, Business Rules, Custom Menus, and so on) are displaying in a different order on the destination environment than the order in which they were displayed on the source environment.
10336614	After a Lifecycle Management migration, the task list order on the destination environment differs from that of the task list order on the source environment.
10140764	After a Lifecycle Management migration, the directory order on the destination

Defect Number	Known Issues
	application differs from that of the directory order on the source application.
10029734	After you import artifacts using Lifecycle Management, the sequence order of some artifacts may change from the source application.
9463209	Some composite data form artifacts for Performance Management Architect-enabled Planning applications cannot be imported using Lifecycle Management because of cyclic dependency issues.
7011878	ACLs that were removed in the source application are not being updated on the target environment during a Lifecycle Management migration.

Localization

Defect Number	Known Issues
12641862	With WebLogic, Russian symbols in PDF reports display as question marks (?). To work around this, copy the Albany fonts from the `%MIDDLEWARE_HOME%\oracle_common\jdk\jre\lib\fonts` directory to the `%MIDDLEWARE_HOME%\jrockit_160_20\jre\lib\fonts` directory.
9443874	When using Turkish, set the Web Browser language to Turkish, but do not include Turkish characters in the Planning application name. Turkish characters in the application name cause currency conversion to fail.
8970964	Planning does not support non-ASCII characters for passwords, such as Russian characters.
8292737	If you use Planning in a locale other than English and use the Planning Outline Load utility to load a date value into a Date account, the system may display the message **Incorrect format**. Although the date value is not loaded, the utility continues to load other data values. If this occurs, you must enter the date values manually in the Planning data form.
7639511	Oracle recommends limiting planning unit annotations to 1200 characters or fewer in Japanese due to sporadic issues with longer planning unit annotations.

Offline Planning

Defect Number	Known Issues
10410230	If a business rule is launched using the right-click menu on an offline data form, the business rule displays hidden runtime prompts to users.
10383127	Data forms with user-created substitution variables or dynamic substitution members (dynamic POV) are not supported by Offline Planning.
9440181	In a data form for which **Suppress Missing** is selected, taking the data form offline can make some read-only cells writable. Though the cells are displayed as writable in offline mode, on synch back the data will not be saved to read-only cells.
7230774	Shared members do not display in the member selection page when you take a data form offline. However, you can see the shared members when you view the data form in Smart View.

Online Help

Defect Number	Known Issues
9372562	Oracle recommends that you access Planning and online help from within EPM Workspace. To access Planning online help, log in to EPM Workspace, open a Planning application, and then select an option from the Help menu, as described in the product documentation.
	Although it is not supported, it is possible to access Planning and online help in standalone mode from outside EPM Workspace. To view online help in this mode, launch Planning with Oracle HTTP Server (OHS), which runs on port 19000, as in this example: `http://<hostname>:19000/HyperionPlanning`.
	If Oracle HTTP server is running on a different port, substitute that port for 19000, for example, `http://<hostname>:7777/HyperionPlanning`.
	Note: If you launch Planning without using Oracle HTTP Server, you cannot view online help. If you attempt to view online help using a different port, as in this example, `http://<hostname>:8300/HyperionPlanning`, the message Page Not Found is displayed.

Performance Management Architect

Defect Number	Known Issues
11060897	In Performance Management Architect, if an attribute dimension is associated with a shared Account dimension, the Planning application fails to deploy.
	Workaround: Change the base dimension density to **Sparse** (with no attribute dimensions) and then deploy the application. Then add the attribute dimensions and redeploy the application.
10435133	Planning does not support moving an attribute member from one parent to another in an attribute hierarchy. As a result, an incremental deployment from Performance Management Architect to Planning may fail for applications where attributes are moved.
9720515	Unable to deploy two different applications at the same time.

Planning Administration

Defect Number	Known Issues
9155729	User sessions created when business rules associated with Planning locations are edited or run in the Administration Services Console are not deleted when the Administration Services Console closes. The user sessions related to the business rules persist until the Planning service is restarted or the Business Rule session created in Planning times out.
8603489	When you change user preferences from EPM Workspace and then select one of the modified users as a user variable in a data form, the error message "An Error occurred while processing this page. Check the log for details." may be displayed.

Public Sector Planning and Budgeting

Note: Public Sector Planning and Budgeting no longer supports Hyperion Business Rules as a calculation module and tool to define and customize business rules. When you create applications, you must select Calculation Manager as the calculation module, and use Calculation Manager to handle the business rules you use in applications.

Defect Number	Known Issues
11775059	In Public Sector Planning and Budgeting, the Data Storage property of the Total Employees member was changed to Dynamic in this release. The Employee dimension is defined as a Sparse dimension. An error occurs when you define an application mapping and specify `ILvlDescendants(Total Employees)` as the mapping. Workaround: Use `ILvl0descendants(Employee)` as the mapping for the Employee dimension.
11740731	In Public Sector Planning and Budgeting, you cannot view benefits assigned to a position if you navigate to **Review position and employee data** and then view the **Position's Employee Assignments** tab. Workaround: Navigate to **Maintain position data** to view details.
11737150	In Public Sector Planning and Budgeting, in **Employee Budget Detail** you cannot transfer an employee out using **Maintain employee by job**. Workaround: Navigate to **Edit Job Details**, select the job from **Active Jobs**, then **View Job Details**, navigate to the employee tab and transfer out the employee.
11715532	In Public Sector Planning and Budgeting, when specifying employee job assignments, FTE is not updating correctly.
11705127	In Public Sector Planning and Budgeting, the predefined Financial Reporting report, Stage Variance for Positions, is not showing the correct Variance % if the difference is negligible. Also, the thousands separator (,) is missing for the variance value.
11671936	In Public Sector Planning and Budgeting, in the Employee-only budget detail, sometimes Job and Proposed FTE totals are not correct.
11667120	For information on how user variables work, see "Approvals Process" in the "Documentation Updates" section of this Readme. In Public Sector Planning and Budgeting, a planning unit validation report that is opened from a task list may display repeated columns or rows in data forms when user or context user variables are used, if the dimension that makes them a unique column or row is defined to be hidden. Workaround: Unhide the dimension in the data form definition.
11661612	In Public Sector Planning and Budgeting for position only, the **Proposed FTE** and **Available FTE** values do not get rolled up. As a result, **Maintain position data** may not show correct values for **Proposed FTE** and **Available FTE**.
10424698	Public Sector Planning and Budgeting provides predefined Smart List values that may be duplicated after loading values from an external HR system (or other source system). As a result, duplicate entries may appear in employee-related Smart Lists. For example, you might see two Smart List entries for **Regular** and **Temporary** employee types. Administrators must ensure that the following predefined values for these Smart Lists are deleted if they are duplicated: • Full_Time_Status: FullTime (LABEL_FULL_TIME), PartTime (LABEL_PART_TIME) • Employee_Type: Temporary (LABEL_TEMPORARY), Regular (LABEL_EMP_TYPE_REGULAR), Contractor (LABEL_CONTRACTOR)

Defect Number	Known Issues
	To remove these values: 1. Log on to EPM Workspace and select the Planning application. 2. Select **Administration**, then **Manage**, then **Smart Lists**. 3. Select a Smart List (for example, Full_Time_Status) and click **Edit**. 4. Select an item (for example, FullTime) and click **Delete**. 5. Click **Save**.
10415035	In Public Sector Planning and Budgeting in the Employee-only budget detail, FTE numbers are not visible in the following reports because of a formula error: • Stage Variance • FTE and Headcount • Employment Levels Workaround: Remove the formula for Total Employee.
10339351	In Public Sector Planning and Budgeting, the predefined Financial Reporting report named Position Adjustment Report does not display taxes and benefits figures.
10336709	In Public Sector Planning and Budgeting, sometimes the runtime prompt dialog box displays even though its values are already determined from the context.
9475942, 9475732	The Mass Adjust and Mass Update related tasks do not update multiple position, job, and employee rows as expected. For example, selecting **Fill Salary Grades** for a new position without assigned salary grades, only assigns the first of multiple salary grade step options to the new position. Change options that you define for compensation elements may not be correctly applied to new positions. For example, assume you define these change options for an additional earning: 1st Element Change Option 1, Start 1/01/2008, End 6/30/2010, Value 2/month 2nd Element Change Option 1, Start 7/01/2010, End, Value 2.75/mth If you create a new position with a start date of 1/01/2009, only the first change option is applied to the position's additional earnings.
9387269	Runtime prompt windows may not provide a member or segment selection icon if you did not add Smart List entries for the data to select in the window. For example, when adding a default account to a natural account, you cannot select a segment unless you previously specified a Smart List entry.

Security

Defect Number	Known Issues
8553839	Sometimes the **Performed On** column in the Security Audit report displays **Unknown** instead of the server name or address.

Smart Lists

Defect Number	Known Issues
8846436	When `HspCustomMsgs_en.Properties` entries are used in Smart Lists, the entry names rather than the entry values are displayed. For example, suppose `HspCustomMsgs_en.Properties` contains the entry `LABEL_NEW=Sample`. If the value `LABEL_NEW` is added to a Smart List, `LABEL_NEW` is displayed instead of `Sample` when the Smart List is opened in Planning.
8714045	If you define custom values for Smart List IDs, do not use zero as an ID. Using zero as an ID can result in missing data when the Smart List is saved to the Essbase database.
8633509	In data forms that have a drill through icon, cells with Smart List drop-down lists display the icon, but a user is prevented from clicking on this icon.

Smart View

Defect Number	Known Issues
11075506	When you open a data form in Smart View, if a business rule is directly attached to a composite data form that is set to **Use Members on Data Form** and **Hide Prompt**, the runtime prompt values are not picked up. Instead, the Runtime Prompt dialog box is displayed, and the user is prompted to enter a value.
9458442	If the **Suppress missing data** option is set for a data form and shortcut menus do not display, edit the data form and clear this option on the data form **Layout** tab.
9395874	Data forms created from other data forms using **Save As** are displayed as empty Microsoft Excel spreadsheets when you select **Open** in Smart View.
9299556	In Smart View, if you launch a business rule that has a runtime prompt for a Smart List, if the **Use Last Value** option is not selected, the runtime prompt displays blank values, whereas in Planning Web, the runtime prompt displays the first value in the Smart List drop-down list.
9263607	Custom attributes defined in Planning data forms are not displaying in Smart View.
9166166	Using Smart View to open a data form that suppresses rows containing no data or `#missing` can cause these data forms to display all rows. When this occurs, refresh the data form to hide the suppressed rows.
9032377	When using ad hoc analysis in Planning through Smart View, audit information is not saved.
8872764	Substitution variables and user variables are not supported in Smart View.
6779540	When selecting members for runtime prompts in Smart View, shared members are not included in the list displayed.
6769707	If users attempt to start Smart View from Microsoft Excel on a machine where Smart View is not installed, the error message "The Page cannot be displayed" is displayed. Instead, an error message stating that Smart View is not installed should be displayed.

Task Lists

Defect Number	Known Issues

Defect Number	Known Issues
8983629	If you expand a task in the task list, the task name field may display under the address bar, partially obscuring details shown in the **Task List** field.
8460666	Planning checks the format of a task due date, but does not restrict the date specified. When administrators define task due dates, they must ensure that the dates specified for dependant tasks occur in the appropriate order. For example, if Task1 must be complete before Task2, set the due date for Task1 to a date earlier than the due date for Task2.
8401031	URL entries for tasks are not converted to Web addresses.
8350137	The PDF version of the task list report lists the tasks in a random order, rather than the order in the task list.

Utilities

Defect Number	Known Issues
11853223	When specifying parameters for loading data on the Planning **Data Load Settings** page, errors may occur while saving the data load setting if the dimension members selected in advanced settings have double quotes around them. Workaround: Manually remove the quotes around the members and save the data load settings.
9955700	When importing members or attributes that have aliases in the table other than Default, the import fails when importing into an empty application. Workaround: You can create alias tables manually in the import application.
9794656	The `CopyApp` utility cannot copy member formulas longer than 4,000 characters. Workaround: Manually copy and paste long member formulas (longer than 4000 characters) from one application to another using Planning Web.
9787036	The `OutlineLoad` utility does not ignore line breaks in member formulas. Because the `OutlineLoad` utility interprets every line as a separate member, the outline load fails if the `CSV` input file contains member formulas with line breaks. Workaround: Remove the line breaks from the member formulas.
7435804	When you run the `OutlineLoad` utility, the application name parameter is case-sensitive.
7420574	When running Planning on a UNIX system, rename the output file from the `ExportSecurity` utility to `Secfile.txt` before running the `ImportSecurity` utility.

Web Browsers

Defect Number	Known Issues

9265794	Sometimes selecting data form cells with a mouse causes an error, and the following message is displayed.
	
	 `Warning: Unresponsive script`
	
	 `A script on this page may be busy, or it may have stopped responding. You can stop the script now, or you can continue to see if the script will`

Defect Number	Known Issues
	`complete.`
8634123	When you specify a Planning URL, make sure the URL includes either a port number or a forward slash (for example, `http://<servername>:<port>/HyperionPlanning`). Specifying a Planning URL without one of these two elements causes an error and displays the message **Page Cannot Be Displayed**.

Workspace

Defect Number	Known Issues
10252571	If you open **Planning Preferences** from the **Home** page, you get an error. Workaround: Open the application from the menu (for example, select **Navigate** and then **Applications**).
9886144	Data forms and folders are not consistently displaying in the left pane after logging into Planning using Workspace.

Tips and Troubleshooting

- When managing or updating Planning data sources using the Planning Classic Application Wizard or the Planning Upgrade Wizard, the new values are not saved if the data sources cannot be validated. You must test the connections and fix any issues that are noted before you can save the new data source information. For validation information, see the *Oracle Hyperion Planning Administrator's Guide*.

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.

Oracle Hyperion Public Sector Planning and Budgeting User's Guide

Chapter 4, "Preparing Applications" and Chapter 5, "Configuring the Line Item Budget"

In addition to the instructions given in these chapters, ensure that all Account dimension members, including those for Personnel Expense accounts, have Plan Type 1, 2, or 3 as the source plan type. If any members have HCP as the source plan type, change it to Plan Type 1, 2, or 3.

Chapter 5, "Configuring the Line Item Budget"

Step 5 - "Configuring Business Rules"

Replace this section in the guide with the following procedure to add segments or chart fields to your Human Capital Plan for General Ledger allocations.

1. Regardless of your budget detail, edit these business rules in Hyperion Calculation Manager as described in steps 3-8 below:

   o AddDistribution

   o AllocDistCost

   o CriteriaCreateMissingDistributions

   o CriteriaOverWriteDistribution

   o CriteriaOverWriteNonSalElement

   o CriteriaOverWriteSalElement

   o DeleteDistribution

2. Edit the business rules for your budget detail, as described in steps 3-8.

Position	Employee	Position and Employee
AddNewPosition	ActivateJob	AddNewPosition
PositionTransfer	AssignEmployee	EmployeeTransfer
PositionTransferIn	EmpToJobCode	EmployeeTransferIn
PositionTransferOut	EmployeeTransfer	EmployeeTransferOut
SyncSegDescWithSegs	EmployeeTransferIn	PositionTransferIn
SyncSegWithSegDesc	EmployeeTransferOut	PositionTransferOut
TerminatePos	SpreadByPeriod_ExistingFTE	SyncSegDescWithSegs
	TerminateJob	SyncSegWithSegDesc
	TerminateEmp	TerminatePos
		TerminateEmp

3. Search for assignment statements containing **"Fund Segment"** and **"Fund Segment Description"**.

4. Copy all assignment statements that contain **"Fund Segment"** and **"Fund Segment Description"**.

5. Paste each copied statement immediately after the original containing the fund-related code.

6. In the copied statements, replace the following:

   o **Fund Segment** with the name of the new segment added under Segment Information. For example, "Activity Segment".

   o **Fund Segment Description** with the name of the new segment added under Segment Description. For example, "Activity Description Segment".

7. Repeat these steps for all segments or chart fields that you must add to your Human Capital Plan. For example, if you are adding Activity and Budget Year, duplicate the existing code once for Activity, and once for Budget Year. See the bolded code in this example:

```
"Account Segment" = @SHIFT( "Account Segment", dRelative,  @DESCENDANTS("Allocation
Assignments"));
        "Entity Segment" = @SHIFT( "Entity Segment", dRelative,
@DESCENDANTS("Allocation Assignments"));
        "Fund Segment" = @SHIFT( "Fund Segment", dRelative,  @DESCENDANTS("Allocation
Assignments"));
        "Activity Segment" = @SHIFT( "Activity Segment", dRelative,
@DESCENDANTS("Allocation Assignments"));
        "Program Segment" = @SHIFT( "Program Segment", dRelative,
@DESCENDANTS("Allocation Assignments"));
        "Project Segment" = @SHIFT( "Project Segment", dRelative,
@DESCENDANTS("Allocation Assignments"));
        "Account Segment Description" = @SHIFT( "Account Segment Description",
dRelative,  @DESCENDANTS("Allocation Assignments"));
        "Fund Segment Description" = @SHIFT( "Fund Segment Description", dRelative,
@DESCENDANTS("Allocation Assignments"));
        "Activity Segment Description" = @SHIFT( "Activity Segment Description",
dRelative,  @DESCENDANTS("Allocation Assignments"));
        "Program Segment Description" = @SHIFT( "Program Segment Description",
dRelative,  @DESCENDANTS("Allocation Assignments"));
        "Project Segment Description" = @SHIFT( "Project Segment Description",
dRelative,  @DESCENDANTS("Allocation Assignments"));
        "Entity Segment Description" = @SHIFT( "Entity Segment Description",
dRelative,  @DESCENDANTS("Allocation Assignments"));
```

8. Test, and then redeploy the business rules. See Chapter 7, "Validating and Deploying Rules, Rulesets, Formulas, and Scripts" in the Hyperion Calculation Manager Designers Guide.

9. Repeat these steps for each of the business rules that you must configure.

Table 13 - Salary Mapping
- The Entity dimension is not part of the mapping, and should be removed from the table.
- The Employee mapping is incorrect. Use ILvl0Descendants(Total Employees).
- The Budget Item mapping is incorrect. Use ILvl0Descendants(Allocation Assignments).

Table 14 - POV for Salary Mapping
- The Point of View (POV) dimensions in this table do not have a mapping type. They should be listed instead of provided in a table.
- The Entity dimension corresponds in the Reporting Applications to the Entity that represents a cost center or department.

Table 15 - Headcount and FTE Mapping
The mapping for Element is incorrect, and should be Unspecified Element.

"Linking Compensation Data"
Replace the content in Step 9 with the following content:

9. Click **Next** and map these source POV dimensions:

- **Account**—`Allocated Expense`
- **Budget Item**—`level 0 members` For example: `ILvl0Descendants(Allocation Assignments)`
- **Entity**—`ILVl0Descendants(Total Entity)`
- **Employee**—`ILvl0descendants(Employee)`
- **Position**—`ILVl0Descendants(Total Positions)`
- **Element**—`ILVl0Descendants(Total Compensation Expenses)`

Chapter 7, "Defining Salary, Compensation, and Allocation Defaults"

"Maintaining Salary Allocation Defaults"
The following statement is incorrect because percentage allocation cells are read-only:

"In the Percentage Allocation row, enter values in month cells to define the allocation, ensuring the values total 100 percent."

Replace the statement with the following information:

"You cannot modify allocation percentages on the current data form to resolve overlapping allocations. To change allocation percentages, access the position or employee details data form as described in *Correcting Overlapping Allocations*."

Chapter 9, "Calculating, Reviewing, and Allocating Compensation Expense Budgets"

"Reviewing FTE Assignments"
Add the following note to Step 6:

Note: To see updated values for Unapproved FTE and Unapproved Headcount, you must select **Approve** in Step 7 in "Approving Period-Level FTEs."

Chapter 10, "Reviewing and Approving Budgets"

"Approving Period-Level FTEs"
Add the following note to Step 7:

For the Employee-only budget detail: To view updated Unapproved FTE and Unapproved Headcount, you must perform this step.

Chapter 12, "Using Reports and Budget Books"
Replace the descriptions for these predefined Financial Reporting reports with the following descriptions:

- Vacant Positions: Displays all vacant positions, their numbers, and compensation details and expenses by year. Positions without compensation expenses are not displayed.
- Position-Employee Associations: Summarizes all employee position assignments, including the job, position, and total FTE.

Appendix B, "Updating Public Sector Planning and Budgeting Applications from a Previous Release"
The following sections completely replace or add to content in the "Updating Public Sector Planning and Budgeting Applications from a Previous Release" appendix.

Note: Before performing these procedures, ensure you have satisfied the prerequisites listed in the appendix.

IMPORTANT: If you made customizations to your budget details and modified predefined business rules, metadata or data, use caution when performing the following tasks as your customizations may be lost and your data may calculate incorrectly.

Updating Smart Lists Metadata

Perform this procedure before you update dimensional metadata.

Note: The following procedure applies to Classic Planning applications. If you are using Performance Management Architect for managing applications, refer to the Performance Management Architect LCM steps to update Smart Lists from the 11.1.2.1 Performance Management Architect test application to 11.1.2 Performance Management Architect test application and then redeploy the application from Performance Management Architect to Planning.

To update Smart Lists from the source 11.1.2.1 test application to the target 11.1.2.0 application, perform these tasks on the following Smart Lists:

- o Position and Employee Budget Detail - Operation_Status, Position_Status
- o Employee Budget Detail - Operation_Status
- o Position Budget Detail - Operation_Status

1. On the 11.1.2.1 test environment, log on to Shared Services Console as an administrator.
2. Expand **Application Groups** and select the new 11.1.2.1 application in the 11.1.2.1 test environment.
3. Expand **Application**, then **Global Artifacts**, then **Smart Lists,** and then select the required Smart Lists.
4. Click **Define Migration**.
5. Ensure that Application Group and Source Application reference the 11.1.2.1 application.
6. Click **Next**.
7. On **Destination**, select the 11.1.2.0 application, and then click **Next**.
8. Review the destination options and then click **Next**.
9. Click **Execute Migration**, and then click **Migration Status Report** to track the migration process.

Updating Dimensional Metadata

This section completely replaces the Updating Dimensional Metadata topic in the "Updating Public Sector Planning and Budgeting Applications from a Previous Release" appendix.

Note: The following procedure applies to Classic Planning applications only. If you created your applications in Performance Management Architect, similar changes must be applied in Performance Management Architect and then the application must be redeployed.

To update dimensional metadata:

1. In the 11.1.2.0 application, select **View**, and then **Advanced Mode**.
2. Select **Administration**, then **Manage**, and then **Dimensions**.
3. If the 11.1.2.0 application is single currency and uses the Position and Employee budget detail, select the Position dimension, and if the consolidation of Total New Positions and its children is set to Ignore, change it to Addition.

4. Select the Budget Item dimension and verify that Rule Criteria is before Element Changes. If necessary, move members to ensure that Budget Item has the correct structure, similar to the structure in the 11.1.2.1 test application.

5. Perform the following steps for your budget detail type:

   a. **For the Employee budget detail:** Select the Posting Date account, click **Edit**, and ensure it is enabled on the HCP plan type.

   b. **For Position and Employee budget detail and Position budget detail:** Select the Position dimension and move Default Position as the first member under Position dimension.

   c. **For Employee budget detail:** Select the Job Code dimension and move Default Job Code as the first member under Job Code dimension.

6. Select the Account dimension and ensure that General Ledger natural account members that correspond to personnel expenses are disabled in the HCP plan type, but enabled in Plan Type 1, 2, or 3.

7. Ensure that the properties for the members listed in the *Member Properties to Update* section for each budget detail are the same as those in 11.1.2.1 test application by performing the following tasks:

   a. In the 11.1.2.0 application, select **View**, and then **Advanced Mode**.

   b. Select **Administration,** then **Manage**, and then **Dimensions**.

   c. Select a dimension and member as specified in the *Member Properties to Update* section and set the properties similar to the ones in 11.1.2.1 test application. Member properties that changed from 11.1.2.0 to 11.1.2.1 are indicated by an asterisk (*).

   d. After setting the properties for all members, select **Administration**, and then **Refresh Database**, with **Database** and **Update Custom-defined Functions** selected.

8. Perform the steps in "Post Migration Tasks" in the Appendix.

Member Properties to Update

The following tables list the member properties that have changed since Release 11.1.2.0 and must be reviewed and set when updating dimensional metadata. Changed member properties are indicated by an asterisk (*). The tables also list formula for a few members that may have been modified, deleted or added since 11.1.2.0 with an asterisk (*).

Position and Employee Budget Detail:

Dimension	Member Name	Impacted Member Properties		
		Time Balance	Data Storage	Member Formula
Account	Total FTE			*
	Approved FTE	*		*
	Unapproved FTE	*	*	*
	Available FTE			*
	Approval Status			*
	Headcount	*		
	Unapproved Headcount		*	*
	Monthly Spread Factor			*
	Revised FTE	*		

| | | Impacted Member Properties | | |
Dimension	**Member Name**	**Time Balance**	**Data Storage**	**Member Formula**
	Revision Amount		*	*
Employee	Total Employees		*	*

Employee Budget Detail:

| | | Impacted Member Properties | | | |
Dimension	**Member Name**	**Time Balance**	**Data Storage**	**Source Plan Type**	**Member Formula**
Account	Assigned FTE				*
	Headcount	*			
	Monthly Spread Factor				*
	Approved FTE	*			*
	Unapproved FTE	*	*		*
	Approval Status				*
	Posting Date			*	
	Revised FTE	*			
	Revision Amount		*		*
Employee	Total Employees		*		*

Position Budget Detail:

| | | **Impacted Member Properties** | | | |
Dimension	**Member Name**	**Time Balance**	**Data Storage**	**Source Plan Type**	**Member Formula**
Account	Approved FTE	*			*
	Unapproved FTE	*	*		*
	Available FTE				*
	Approval Status				*
	Monthly Spread Factor				*
	Occupancy Status				*
	Headcount	*			
	Revised FTE	*			
	Revision Amount		*		*

Oracle Hyperion Planning Administrator's Guide

Chapter 1, "Using Planning"

"Creating Task Lists"
Remove the reference to "Task List Access Manager" from Table 10.

Chapter 3, "Setting Up Access Permissions"
- 8514416 – In the section "Importing Access Permissions," the example to clear all access permissions for the `ImportSecurity` command (`ImportSecurity.cmd`) has an extra comma. The example command should read as follows:

  `ImportSecurity.cmd "app1,admin,,,SL_CLEARALL"`

Chapter 5, "Loading Data and Metadata"

"Command Line Parameters for the Outline Load Utility"
Parameter: `/8`

Description: Specifies 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. The input, log, and exception files are also set to use UTF-8 encoding if an input file contains a valid UTF-8 BOM marker, whether this parameter is used or not.

Chapter 6, "Managing Data Forms"
Add the following information:

"Specifying How Many Data Forms Each User Can Work in at One Time"
To enable users to work in more than one data form at one time, you can update the DATA_GRID_CACHE_SIZE property, which specifies the number of data grids cached per user for an application. By default, this property is set to 1, allowing each user to have one data form open and active at a time.

CAUTION: Keep in mind that increasing this property results in greater memory utilization by the application server. For example, for an application with 100 users, by default the application server can cache up to 100 data grids. If this property is set to 3, up to 300 data grids can be cached. The impact on memory utilization is greater for applications that have very large data forms.

To specify how many data forms each user can work in at one time:

1. Select **Administration**, then **Application**, and then **Properties**.
2. Select **System Properties** to set properties for all Planning applications.
3. Update the setting:
   - To add the property, click **Add**. In the blank row, enter DATA_GRID_CACHE_SIZE (avoid using spaces). Under **Property Value**, enter a number to represent the number of data forms that a user can have open and active at one time.
   - To change the property, change its value under **Property Value**.
   - To delete the property, select its name, and press **Delete**.
4. Click **Save** and confirm your changes.
5. Restart the Planning server.

"Selecting Business Rules for Composite Data Forms"
Previously in composite data forms (in Planning 11.1.1.3 and earlier releases), all business rules associated with the included data forms would run, even if the rules were not selected for the

composite data form. Administrators now control which included data forms' business rules run in composite data forms by selecting them for the composite data form. Business rules from included data forms do not run unless they are selected for the composite data form itself.

To select business rules for a composite data form:

1. Select **Administration**, then **Manage**, and then **Data Forms and Ad Hoc Grids**.
2. Select the composite data form, click **Edit**, and then click the **Business Rules** tab.

    Select which included data forms' business rules to run from the composite data form.

    For example, to run all the business rules associated with an included data form named **Total Expense Impact**, select **<Business rules for Total Expense Impact>**.

"Setting Row and Column Layout"

Add the following options to Table 43, "Data Form Row and Column Properties":

- Validate only for cells and pages the user has access to

    When enabled, validations will be run as the currently logged in user and not as the administrator, which means the user's security will be applied to the data form members.

- Validate only for pages with existing blocks

    When enabled, Planning intelligently figures out which page combinations have potential blocks and runs the validations only for those page combinations. There are a few exceptions to this. If a page combination has any Dynamic Calc, Dynamic Calc and Store, Label only, or Store with one child member, then that page will always be loaded.

"Planning Offline Considerations"

The following information should be removed. There is no Offline User role for this release, and information about this is not documented in the Oracle Hyperion Enterprise Performance Management System Security Administration Guide or online help:

"For a user to take a data form offline, the administrator must assign that user the Offline User role. For information about the Offline User role, see the Oracle Hyperion Enterprise Performance Management System Security Administration Guide or online help."

Chapter 9, "Managing the Budgeting Process"

"Setting Up E-mail for Approvals Notification"

Add the following information:

Note: Planning only allows you to send e-mail notifications to the SMTP server anonymously. You cannot send email notifications to authenticated SMTP e-mail systems.

"Approvals Process"

Add the following information:

During approvals operations that invoke data validations, user variables and context user variables on the data forms that are present on rows and columns are replaced with the distinct union of the result sets of all possible inputs. This is done with an efficient static replacement algorithm that minimizes function execution and requires no actual duplicate removal but guarantees no duplicates will be present and that all members of the distinct union will be present. User variables and context user variables on the POV will be treated as a page.

Note: To view the results of the user variable substitution, navigate to the data validation report task list. You may need to purposely cause a validation to fail on the data form and then run a validation operation for the planning unit for it to display on the report.

"Managing Task Lists"

Remove the following text about the Task List Access Manager role:

Users who are granted the Task List Access Manager role can assign task lists and tasks to other users.

"Assigning Access to Task Lists"

Remove the following text about the Task List Access Manager role:

Users granted the Task List Access Manager role can assign task lists and tasks to other users.

Chapter 10, "Working with Applications"

"Pushing Data to Reporting Applications"

Add the following information:

After you select **Push Data**, select an option below, and then click **OK**:

- **Clear data on destination and push data -** Select to clear the data in the target reporting application before pushing data to it.

  When the target is an aggregate storage reporting application, note the following when using the **Clear data on destination and push data** option:

  o Members with nonmatching names in the target reporting application are ignored.

  o This option works only with member names, not with member aliases.

  o Use caution when using member relationships (such as Children) when selecting members for the application mapping, because using this option can cause the calculation script to exceed its length limit.

  o If you use member relationships, this option expands the level 0 member list in the source Planning application. If at least one member name in the source application matches a member in the reporting application, this option proceeds without error. If there is no match with at least one member, the option cannot proceed.

  When the target is a block storage reporting application, to proceed successfully, the **Clear data on destination and push data** option requires these conditions:

  o If you use member relationships, all member names in the source application must match all member names in the reporting application.

  o If you map Smart Lists to dimensions, all Smart List entries in the source application must match all member names in the reporting application.

  o If you map Smart Lists to dimensions, the Smart List entry label in the source Planning application must match the member name in the reporting application. If a Smart List entry label does not match a member name in the reporting application, then the Smart List entry name must match the reporting application member name.

  If the above conditions are not met, the **Clear data on destination and push data** option cannot proceed.

- **Push data** - Select to push the data to the reporting application without first clearing the data in the target reporting application.

  If you map Smart Lists to dimensions, Smart List labels must match either member names or aliases in the reporting application. **Push data** does not work with Smart List entry names.

"Adding an Essbase Server for Reporting Applications" and "Editing an Essbase Server for Reporting Applications"

Add the following information:

Note: To configure a data source to support Essbase failover in active-passive clustering mode, replace the **Essbase Server name** value with the APS URL followed by the Essbase cluster name; for example, if the APS URL is `http://<hostname>:13090/aps` and the Essbase cluster name is `EssbaseCluster-1`, then the value in the **Essbase Server name** field would be:

`http://<hostname>:13090/aps/Essbase?clusterName=EssbaseCluster-1`

Entering the Essbase cluster name without the APS URL in the **Essbase Server name** field is not supported in this release.

Chapter 12: "Working with Classic Application Administration"

"Updating References to Data Sources"

Add the following information:

When using Essbase failover in active-passive clustering mode, note that you can specify the APS URL followed by the Essbase cluster name; for example, if the APS URL is `http://<hostname>:13090/aps` and the Essbase cluster name is `EssbaseCluster-1`, then the value in the **Essbase Server name** field would be:

`http://<hostname>:13090/aps/Essbase?clusterName=EssbaseCluster-1`

Entering the Essbase cluster name without the APS URL is not supported in this release.

Chapter 13: "Customizing Planning Web Client"

"Including Your Logo"

Remove this section.

Appendix B: "Naming Restrictions"
"Restrictions for Dimensions, Members, Aliases, and Data Forms"

Delete the following text:

"Distinguish between upper and lower case only if case sensitivity is enabled."

"Dimension and Member Names in Calc Scripts, Report Scripts, Formulas, Filters, and Substitution Variables"

In the list of symbols, { and } are incorrectly identified as brackets. They are braces.

Index

Remove the "Task List Access Manager role" index entry.

Oracle Hyperion Capital Asset Planning Administrator's Guide

Add this information to the "Creating and Initializing Capital Asset Planning Applications" section in "Using Performance Management Architect Application Administration":

On the first screen of the Performance Management Architect application wizard, you must select the Year and Period as default dimensions.

Oracle Hyperion Workforce Planning Administrator's Guide

Add this information to the "Creating and Initializing a Workforce Planning Application" section in "Using Performance Management Architect Application Administration":

On the first screen of the Performance Management Architect application wizard, you must select the Year and Period as default dimensions.

Accessibility Considerations

It is our goal to make Oracle products, services, and supporting documentation accessible to the disabled community. Oracle's Hyperion Planning supports accessibility features, which are described in Appendix D in the *Oracle Hyperion Planning Administrator'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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