ORACLE® HYPERION PLANNING, FUSION EDITION

RELEASE 11.1.2

USING ADMINISTRATOR FEATURES

ORACLE
ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

CONTENTS IN BRIEF

Oracle Hyperion Planning, Fusion Edition contains significant enhancements to administrator features. Oracle Hyperion EPM Architect, Fusion Edition is a feature in Planning that enables administrators to manage, create, and deploy applications within one interface. This document describes key administration tasks in Classic Planning and in Planning with Performance Management Architect.

You can create applications using Performance Management Architect or Classic application administration. Different menus and options are available for each type of application. For example, for applications created with Performance Management Architect, you manage Smart Lists within Performance Management Architect. For applications created with Classic administration, you manage Smart Lists within Planning using the options in the Administration menu.

Key Planning Administration Tasks

Table 1 Key Planning Administration Tasks

Category / Action	Classic Planning	Planning with Performance Management Architect
Application Creation, Database Refresh		
Managing data sources	Select **Navigate**, then **Administer**, then **Classic Application Administration**, and then **Planning Administration**. Click **Manage Data Source**. In Planning, you can also select **Administration**, then **Data Source**, then **Create** , **Edit**, or **Delete**.	In the Application Library (**Navigate**, then **Administer**, then **Application Library**), select **Tools**, then **Manage Planning Data Source**. Right-click a data source and select **Edit** to start the data source wizard.
Configuring system properties	Select **Administration**, then **Application**, then **Properties** to review and modify application and system properties stored in the system database.	From Oracle Enterprise Performance Management Workspace, Fusion Edition, open the Planning application by selecting **Navigate**, then **Applications**, then **Planning**, and then the application name. Select **Administration**, then **Application**, and then **Properties** to review and modify application and system properties.
Creating applications	Select **Administration**, then **Application**, then **Create**. Define the application by completing the tasks in the application wizard.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), select **File**, then **New**, then **Application** to launch the application wizard. Complete the tasks in the application wizard to create the application. This does not create the application within Planning until the application is validated and deployed. You can also use the application wizard to create blank applications, and drag dimensions from the Shared Library to the application. You can modify application properties in the Properties Grid, such the starting year, calendar, plan types and names, and multiple currencies.
Opening applications	Select **Navigate**, then **Applications**, then **Planning**, and then select the application name. You can also log on to Planning and select an application.	Select **Navigate**, then **Applications**, then **Planning**, and then select the application name. After you deploy an application, you can open it in Planning.

Category / Action	Classic Planning	Planning with Performance Management Architect
Registering applications	Select **Navigate**, then **Administer**, then **Classic Application Administration**, and then **Planning Administration**. Select the application, and click **Register**. In Planning, you can also select **Administration**, then **Application**, and then **Registration**.	Select **Navigate**, then **Administer**, then **Classic Application Administration**, and then **Planning Administration**. Select the application, and then click **Register**. You can register applications again if necessary by right-clicking an application in the Application Library (**Navigate**, then **Administer**, then **Application Library**) and selecting **Reregister**.
Deleting applications	Select **Navigate**, then **Administer**, then **Classic Application Administration**, then **Planning Administration**. Select an application, and then click **Delete Application**. In Planning, you can also select **Administration**, then **Application**, then **Delete**.	In the Application Library (**Navigate**, then **Administer**, then **Application Library**), right-click a deployed application and select **Delete**. You can delete applications with a status of Deployed or Not Deployed.
Creating and refreshing the database, generating security filters	Select **Administration**, then **Application**, then **Create Database** or **Refresh Database**. Select appropriate options, such as **Database**, **Security Filters**, **Shared Members**, and **Validate Limit**. Then click **Create** or **Refresh**.	Cube Create and Cube Refresh are combined in the Deploy operation. In the Application Library (**Navigate**, then **Administer**, then **Application Library**), right-click an application, select **Deploy**, and then select **Application**. Select an available option, such as **Create Outline**, **Refresh Outline**, **Create Security Filters**, **Shared Members Security Filters**, **Validate Security Filter Limit**, and **Full Deploy**.
Viewing jobs in the Job Console	Select **Tools**, then **Job Console**. View the status for Clear Cell Details, Copy Data, and Push Data, and calculations for business rules, rulesets, and sequences. You can filter jobs by user, job type, run status, start time, end time, or job name, type, or ID, and enable notification by e-mail when a launched job completes or generates an error. You can also set properties for the threshold time at which the job moves to background execution.	Select **Navigate**, then **Administer**, then **Library Job Console**. View the status of operations for dimensions, applications, transactions, comparisons, export, and logs.
Sending bulk messages	Select **Administration**, then **Application**, and then **Broadcast Messages**.	Use task automation to create an e-mail message. In the Application Library (**Navigate**, then **Administer**, then **Application Library**), select an application. select **Administration**, then **Manage Taskflows**. In the taskflow editor, create a taskflow and add a stage with an **Email** action.
Metadata and Data Loads		
Performing initial and incremental metadata loads	Load metadata with: ● The Planning Outline Load utility using flat files ● Oracle Data Integrator Adapter for Planning ● Oracle's Hyperion® Data Integration Management Adapter for Planning	Create an import profile by creating: ● An `*.ads` flat file and an import profile that references it. ● An interface table data source and an import profile that references it. You can then execute the import profile to load metadata to the Shared Library or to an application from flat files or interface tables.

Category / Action	Classic Planning	Planning with Performance Management Architect
Scheduling metadata updates	Schedule updates with the built-in scheduling options in: ● Data Integrator Adapter for Planning ● DIM Adapter for Planning You can also write scripts that run the Planning Outline Load utility.	Use taskflows to schedule imports and updates for the Shared Library and application. (You must have already deployed the application and defined an Import Profile.) Use the Batch Client for interactive scripting updates for the Shared Library and application. See the *Oracle Hyperion Enterprise Performance Management Architect Batch Client User's Guide*.
Loading data	Load data with the Planning Outline Load utility using flat files and data files.	Load data using the interface tables included with the Data Synchronization module. Open the Data Synchronization module (select **Navigate**, then **Administer**, then **Data Synchronization**). Select **File**, then **New**, then **Synchronization**. Use the wizard to define the source and target information. For the source, select the Hyperion Data Interface Area option (for data loaded using a relational database) or External Source (for data loaded using flat files). For the target information, select the appropriate Planning application. You can predefine external files and data interface information. In the Data Synchronization module (**Navigate**, then **Administer**, then **Data Synchronization**), select **File**, then **New**, then **Data Interface Table Definition**, or **File**, then **New**, then **External File Definition** before building the synchronization. You can manually execute the synchronization or schedule it using Task Automation or the Batch Client.
Scheduling data loads	Schedule updates with the built-in scheduling options in: ● Data Integrator Adapter for Planning ● DIM Adapter for Planning You can also write scripts that run the Planning Outline Load utility.	Data loads can be scheduled using taskflows or a third-party scheduler that can integrate with a script created for the Batch Client. In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), select **Administration**, then **Manage Taskflows** to add a stage for data synchronization. Use the Batch Client to integrate with a third-party scheduler.
Creating dimensions	Select **Administration**, then **Manage**, then **Dimensions**. Click **Add Dimension**.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), perform one task: ● Import dimensions into the Dimension Library by creating and importing a flat file or importing information from interface tables (**File**, then **Import**, then **Create Profile**). You can also initiate imports using taskflows or the Batch Client. ● Select **File**, then **New**, then **Dimension**. Enter a name and description, select the dimension type, and then click **OK**.

Category / Action	Classic Planning	Planning with Performance Management Architect
Creating dimension members	Select **Administration**, then **Manage**, then **Dimensions**. Select a current member and select **Add Child** or **Add Sibling** to add a member, and then click **Save**. You can also load members with the Planning Outline Load utility, Oracle Data Integrator Adapter for Planning, Oracle's Hyperion® Data Integration Management Adapter for Planning, or Oracle Hyperion Financial Data Quality Management Adapter for Planning, Fusion Edition.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), right-click a member. Select **Create Member**, then **As Child** or **As Sibling**. Import dimension members into the Dimension Library by creating and importing a flat file or importing information from interface tables. You can also use the Batch Client in interactive mode or script mode to create new members.
Creating attribute dimensions	Select **Administration**, then **Manage**, then **Dimensions**. Select the root member of a sparse dimension, such as Entity. Click **Custom Attributes**, and click **Create**. Enter an attribute name, select the data type, and click **Save**.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), select **File**, then **New**, then **Dimension**. Enter a name and description, and select the attribute dimension type. Associate the new dimension with the base dimension by right-clicking the base dimension, (such as Entity, and selecting **Create Associations**. Select the appropriate type of dimension, such as Currency, and the dimension with which to associate, such as Base Currency. Click **Save**. These associations must be activated to make them valid for an application. (Right-click the application name, then select **Activate all associations**.) You can also create attribute dimensions using the Batch Client.
Creating attribute dimension members	Select **Administration**, then **Manage**, then **Dimensions**. Select the root member of a sparse dimension, such as Entity. Click **Custom Attributes**, and select the attribute. Above the Attribute Values column, click **Create**. Enter a name and click **Save**.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), right-click a member, then select **Create Member**, then **As Child** or **As Sibling**. Import dimension members into the Dimension Library by creating and importing a flat file or importing information from interface tables. You can also create attribute dimension members using the Batch Client.
Creating Smart Lists	Select **Administration**, then **Manage**, then **Smart Lists**. Click **Create**, then define the Smart List properties. On Entries, click **Add** and define the drop-down list items. Preview the Smart List and click **Save**.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), select **File**, then **New**, then **Dimension**. Enter a name and description, and select the Smart List type. After the Smart List is created, you can add members. (Right-click a member and select **Create Member**, then **As Child** or **As Sibling**.) You can also import Smart List dimensions using flat files or interface tables, or create them using the Batch Client.
Creating alias tables	Select **Administration**, then **Manage**, and then **Alias Tables**. Click **Add** to add an alias table, then click **OK**.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), select **File**, then **New**, then **Dimension**. Enter a name and description, then select the Alias type. After the Alias dimension is created, you can add members. (Right-click a member and select **Create Member**, then **As Child** or **As Sibling**.) Associate the new dimension with the base dimension, such as Entity or Account, by right-clicking the application name, then selecting **Activate all associations**. You can also import alias tables using flat files or interface tables, or create them using the Batch Client.

Category / Action	Classic Planning	Planning with Performance Management Architect
Creating UDAs	Select **Administration**, then **Manage**, and then **Dimensions**. Select a dimension and a dimension member, and click **Edit**. On the UDA tab, select UDA members or create them by clicking **Add** and entering a name, then clicking **Save**. Select UDAs for the member by moving them to the Selected UDA list.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), select **File**, then **New**, then **Dimension**. Enter a name and description, then select the UDA type. After the UDA dimension is created, you can add members. (Right-click a member, then select **Create Member**, then **As Child** or **As Sibling**.) Associate the new dimension with the base dimension, such as Entity or Account, by right-clicking the application name, then selecting **Activate all associations**. You can also import UDA members using flat files or interface tables, or create them using the Batch Client.
Creating exchange rate tables	Select **Administration**, then **Manage**, and then **Exchange Rates**. Click **Create**, specify a name and description, and click **Save**. Edit the exchange rate table and enter exchange rates for the proper currency conversions, and then click **Save**.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), assign the Exchange Rate Table property to Planning Scenario members in the Property Grid. In Planning, select **Administration**, then **Manage Exchange Rates**. Click **Create**, specify a name and description, and click **Save**. Enter values in the exchange rate table.
Editing member properties	Select **Administration**, then **Manage**, and then **Dimensions**. Select a member and click **Edit**. Modify member properties and click **Save**.	Perform one task: ● Select a member in the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), then make changes in the Properties Grid. You can update application members by selecting a member in an application and making changes in the Properties Grid. The changes apply to that application only, and do not impact the properties defined in the Dimension Library. (For the Member Name property, you cannot rename members.) ● Edit dimensions in the `*.ads` flat files. Then reload to the Dimension Library in replace or merge mode. You can also load the modified dimensions using the interface tables within the profile. ● Update member properties using the Batch Client. The application must be redeployed when member properties are updated in Performance Management Architect.
Organizing dimensions	Select **Administration**, then **Manage**, and then **Dimensions**. To sort dimensions, select a sort option, then click the **Sort Ascending** or **Sort Descending** button. You can also expand or collapse the dimension hierarchy.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), select **File**, then **New**, then **Folder**. Enter the folder name and click **OK**. To add dimensions to the folder, in the Shared Library, right-click the folder and select **Add Dimensions**.
Moving a member within the hierarchy	Select **Administration**, then **Manage**, and then **Dimensions**. To move members or branches up or down one position, select the member or branch and click the **Move Up** or **Move Down** button. To move members including parents and children, click **Cut**, select the destination member, and click **Paste**. You can also use the Sort Member utility.	Perform one task: ● In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), right-click the member and select **Cut**. Right-click the destination member and select **Paste**, then **As Child** or **As Sibling**. ● Edit dimensions in the `*.ads` flat files. Then reload to the Dimension Library in replace or merge mode. You can load the modified dimensions through the interface tables within the profile.

Category / Action	Classic Planning	Planning with Performance Management Architect
Reordering child members	Select **Administration**, then **Manage**, and then **Dimensions**. To move members or branches up or down one position, select the member or branch and click the **Move Up** or **Move Down** button. To move members including parents and children, click **Cut**, select the destination member, and click **Paste**. You can also use the Sort Member utility.	You can reorder children in the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**). Drag a member up or down to change the order. You can also right-click the dimension and select **Reorder Children**. Reorder members, then click **OK**.
Searching for members	Select **Administration**, then **Manage**, and then **Dimensions**. Select a search option, enter search text, and click the **Search Up** or **Search Down** button.	In the Dimension Library (**Navigate**, then **Administer**, then **Dimension Library**), right-click a dimension and click **Find Members**. Select to search by the member name, alias, or property, then click **OK**.
Security		
Application Creator role	The global Oracle's Hyperion® Shared Services role of Application Creator or <*product*> Application Creator (for example, Planning Application Creator) allows users to create and deploy applications. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.	The global Shared Services role of Application Creator or <*product*> Application Creator (for example, Planning Application Creator) allows users to create and deploy applications. Required, in addition to the Dimension Editor role, to navigate to the Planning Classic application administration options. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.
Dimension Editor role	The global Shared Services role of Dimension Editor creates and manages dimensions.	The global Shared Services role of Dimension Editor creates and manages dimensions within Performance Management Architect. Also required to access Planning Classic application administration options.
Dimension security	Dimension modifications can be made by users provisioned as Administrators through Shared Services for the application. Dimension access permissions are defined in Oracle's Hyperion® Shared Services or in the Planning Dimension page.	Dimension security is assigned by the Dimension Editor or the Dimension Owner.
Calculation Manager Administrator	Planning Calculation Manager Administrator enables you to create business rules using Hyperion Calculation Manager. Otherwise, rules are maintained in Oracle's Hyperion® Business Rules.	Planning Calculation Manager Administrator enables you to create business rules using Calculation Manager.
Financial Data Management		

<table>
<tr><th>Category / Action</th><th>Classic Planning</th><th>Planning with Performance Management Architect</th></tr>
<tr><td>Importing data from Oracle E-Business Suite</td><td>To import data from Oracle E-Business Suite into Oracle Hyperion Financial Data Quality Management, Fusion Edition:
Generate the data from E-Business Suite Financials.
Set up an import format in FDM to enable FDM to import the data file generated by the adapter.
Assign the import formats to a location.</td><td>Use Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications to import data from Oracle E-Business Suite. See the Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications Administrator's Guide. To use ERP Integrator:
Log on to Workspace and select Navigate, then Administer, and then ERP Integrator.
In ERP Integrator, register the source systems. Then, map segments in the source system to dimensions in the target application.
Run a dimension extract to import members and hierarchies into Classic Planning or Performance Management Architect applications.
Define data rules and run the data rules to extract data from the source system and push into target applications.
If using FDM and ERP Integrator together:
Load metadata using Performance Management Architect or Classic Planning.
Load data using a flat file through Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications and then use the flat file in Oracle Hyperion Financial Data Quality Management, Fusion Edition to push the data into the target application.</td></tr>
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Administration Tasks for Managing Business Rules

Planning administrators can create and administer business rules in a graphical environment using Calculation Manager. Hyperion Calculation Manager is available for Oracle Hyperion Planning, Fusion Edition applications created with Oracle Hyperion EPM Architect, Fusion Edition and Classic application administration. For information about business rules features, see *Oracle Hyperion Calculation Manager Administrator Features*.

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Planning Using Administrator Features, 11.1.2

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