Oracle® Hyperion Planning

Simplified Interface Administrator's Guide

Release 11.1.2.4

Updated: June 2016

Planning Simplified Interface Administrator's Guide, 11.1.2.4

Authors: EPM Information Development Team

Contents

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Feedback

Send feedback on this documentation to: epmdoc_ww@oracle.com

Follow EPM Information Development on these social media sites:

LinkedIn - http://www.linkedin.com/groups?gid=3127051&goback=.gmp_3127051

Twitter - http://twitter.com/hyperionepminfo

Facebook - http://www.facebook.com/pages/Hyperion-EPM-Info/102682103112642

Google+ - https://plus.google.com/106915048672979407731/#106915048672979407731/posts

YouTube - https://www.youtube.com/user/EvolvingBI

1 Getting Started with Administering the Planning Simplified Interface

In This Chapter

About the Planning Simplified Interface

Designed for busy administrators, the Oracle Hyperion Planning simplified interface's easy-to-navigate pages help you accomplish your common administration tasks quickly. This guide shows you how to administer Planning, including:

- Creating a custom or sample application. See Chapter 2, "Creating a Planning Application."
- Managing the application, including managing plan types and dimensions, and importing and exporting dimensions and data. See Chapter 3, "Managing Applications."
- Managing and scheduling Planning jobs, such as exporting data or refreshing the database. See Chapter 4, "Managing Jobs."
- Selecting members for forms, rules, user and dynamic variables, and data export. See Chapter 5, "Using the Member Selector."
- Managing application settings, including making announcements, and customizing the appearance of your display. See Chapter 6, "Managing Planning Settings."
- Navigating to Oracle Hyperion Enterprise Performance Management Workspace to access full Planning functionality. See Chapter 7, "Navigating to EPM Workspace."

Launching the Simplified Interface

You can launch the simplified interface in one of two ways:

- From the Planning landing page, click **Simplified Interface**. This will launch a new browser window showing the simplified interface.
- Enter the following URL in a new browser window:

  `https://`*`Oracle PBCS service name`*`/HyperionPlanning`; for example, `https://testnew1-testnew1.pbcs.us1.oraclecloud.com/HyperionPlanning`

For information about enabling access to Planning artifacts on mobile devices and for considerations when using the simplified interface, see “Using the Simplified Interface” in the *Oracle Hyperion Planning Administrator's Guide*.

2 Creating a Planning Application

In This Chapter

You can create a Planning application using the simplified interface. The first time you log in, you'll see a screen with three options:

- **Sample Application**: Quickly and automatically creates an application using the sample application that's provided. See "Creating a Sample Application" on page 11.
- **Simple Planning**: Steps you through the process of manually creating a basic custom application. See "Creating a Custom Application" on page 12.
- **Advanced Planning**: Steps you through the process of manually creating an advanced custom application. See "Creating a Custom Application" on page 12.

Click **Take Product Tour** to view best practices for determining your requirements and designing your application. For more information, see "Taking the Product Tour" on page 14.

Creating a Sample Application

Planning provides a sample application, called Vision, that lets you quickly create a Planning application with artifacts and data.

Note: To manually create a custom application, see "Creating a Custom Application" on page 12.

To automatically create an application using the sample application, click or tap **Sample Application**. Planning automatically creates the Vision application with artifacts and data. When application creation is completed (this will take several minutes), Planning displays an **Application created successfully** message.

To manage the application after it's created, click or tap **Console** on the Home page. See Chapter 3, "Managing Applications."

Note: The application console is available only if you are accessing the simplified interface from the desktop.

Creating a Custom Application

The Planning simplified interface helps you manually create a custom application by stepping you through the application creation process. Before creating a custom application, you'll need to decide whether you want to create a simple or advanced Planning application.

Need help deciding? See the following sections:

- "Creating a Simple Application" on page 12
- "Creating an Advanced Application" on page 13

Note: To quickly and automatically create a sample application with artifacts and data, see "Creating a Sample Application" on page 11.

To view and manage an application after it's created, click or tap **Console** on the Home page. See Chapter 3, "Managing Applications."

Note: The application console is available only if you are accessing the simplified interface from the desktop.

Creating a Simple Application

A simple Planning application creates a basic application with one plan type and the core components that you need to get up and running quickly. If you later decide that you need more complex business logic, you can convert a simple application into an advanced application.

A simple application:

- Consists of one plan type
- Allows you to add up to 20 total dimensions
- Allows MDX member formulas only
- Doesn't support business rules, map reporting, copy data, copy version, exchange rates, or currency conversion
- Can be converted into an advanced application

  Note: To convert a simple application into an advanced application, see "Converting an Application from Simple to Advanced" on page 23.

Default dimensions and characteristics for a simple Planning application:

- Account—Only the root member is provided.
- Entity—Only the root member is provided.

- Period—Members are created based on the answers provided during setup. Users can add an alternate hierarchy later. The Beginning Balance and Year Total periods are provided.
- Year—Number of years, history, and future years are broken up based on the values chosen during application creation. An All Year parent is provided. More years can be added later. The default number of years is 10.
- Scenario—Five scenarios are provided: Plan, Actual, Forecast, Variance, and Variance Comments.
- Version—Three versions are provided: Base, What If, and Final. Hierarchical versions are allowed, for example, Base (child member)+What If (child member)=Final (parent member).

Note: Generic members aren't added to the dimensions.

➤ To create a simple application:

1 **Click or tap Simple Planning.**

2 **Name your application and enter a description.**

> **Note:** Ensure that you adhere to the application naming restrictions outlined in Appendix A, “Naming Restrictions” in *Oracle Hyperion Planning Administrator's Guide*.

3 **Planning provides setup options that you can select to help you create the initial framework for your planning process. If you need help deciding which options to choose, see Chapter 12, “Working with Planning Application Administration” in *Oracle Hyperion Planning Administrator's Guide*.**

> **Note:** The plan type name defaults to the application name. You can change the plan type name, but only during application creation. After a plan type is added, it cannot be renamed or deleted.

4 **Review the summary screen, and, if the selections you made are correct, click Create.**

After you create the application, populate it by performing these steps:

- Import metadata using the Planning import feature. See “Importing Metadata” on page 18.
- Populate Planning data by importing data from your source system. See “Importing and Exporting Data” on page 20.

Creating an Advanced Application

An advanced Planning application creates an application with two plan types and the option to add more plan types. You can add up to seven total plan types—three block storage plan types and four aggregate storage plan types. Complex business logic, such as business rules and allocations, is supported. You cannot convert an advanced application into a simple application.

An advanced application:

- Allows you to add up to 20 dimensions total
- Supports custom calendars (up to weeks of the month)
- Supports business rules
- Allows member formulas
- Cannot be converted into a simple application

➤ To create an advanced application:

1 **Click or tap Advanced Planning.**

2 **Name your application and enter a description.**

> **Note:** Ensure that you adhere to the application naming restrictions outlined in Appendix A, "Naming Restrictions" in *Oracle Hyperion Planning Administrator's Guide*.

3 **Planning provides setup options that you can select to help you create the initial framework for your planning process. If you need help deciding which options to choose, see Chapter 12, "Working with Planning Application Administration" in *Oracle Hyperion Planning Administrator's Guide*.**

> **Note:** The aggregate storage plan type name defaults to the application name. The block storage plan type name defaults to "Plan1." You can change the plan type names, but only during application creation. After a plan type is added, it cannot be renamed or deleted.

4 **Review the summary screen, and, if the selections you made are correct, click Create.**

After you create an application, populate it by performing these steps:

- Import metadata using the Planning import feature. See "Importing Metadata" on page 18.
- Populate Planning data by importing data from your source system. See "Importing and Exporting Data" on page 20.

Taking the Product Tour

Clicking or tapping **Take Product Tour** links you to useful information about getting started with Planning. It also provides best practices for determining your requirements and designing your application, tutorials for administering Planning, and links you to the Help Center where the documentation library is located.

➤ To take the product tour:

1 **Click or tap Take Product Tour.**

2 **Click or tap the buttons at the bottom of the screen to page through the tour screens.**

3

Managing Applications

In This Chapter

Application Overview

After an application is created, you can view and manage it using the application console.

The application overview shows the application properties (including the application type) and application statistics, such as the number of tasks, forms, rules, and planning units in your application. It also lists the dimensions (for simple applications) and plan types (for advanced applications) used by the application.

➤ To view the application overview:

1 **On the Home page, click or tap Console.**

2 **On the left, click or tap**  **, and then click or tap the Overview tab.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

Managing Plan Types

For advanced applications, the plan type editor lets you view or add plan types. Up to seven total plan types can be added to an advanced application. After a plan type is added, it will behave like any other Planning plan type.

➤ To manage plan types:

1 **On the Home page, click Console.**

2 **On the Application tab, click Plan Types.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 **Perform one task:**

- To view the details of a plan type, click the name of the plan type that you want to view.
- To add a plan type, click **Create**, then complete the plan type details, and then click **Done**.

Note: You can only rename a plan type during application creation. After a plan type is added, it cannot be renamed or deleted.

Managing Dimensions

Dimensions categorize data values. These dimensions are provided with Planning: Account, Entity, Scenario, Version, Period, Currency (for a multicurrency application), and Year.

Dimensions on the **Dimensions** page are listed in order of precedence. The order of dimensions is critical for the structure and performance of a Planning application. The order of your dimensions determines how your data calculations will perform. **Evaluation Order** enables you to specify which data type prevails when a data intersection has conflicting data types. For example, if Account members are set to the Currency data type, and Product members are set to the Smart List data type, you can set whether the Currency or Smart List data type prevails at an intersection.

➤ To manage dimensions:

1 **On the Home page, click Console.**

2 **On the Application tab, click Dimensions.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 **Perform a task:**

- To filter the dimensions by plan type, see "Filtering the Dimension View by Plan Type" on page 17.
- To view the details of a dimension, click the name of the dimension that you want to view.
- To reorder the dimensions, click the up or down arrow in the **Order** column next to the dimension that you want to move.

- To set a different evaluation order, click the **Evaluation Order** field next to the dimension that you want to update.
- To rename a dimension, click the name of the dimension that you want to rename, and then enter a new name in the **Dimension** field.
- To create a dimension, click **Create**. See "Creating Dimensions" on page 17.
- To import metadata, click **Import**. See "Importing Metadata" on page 18.
- To export metadata, click **Export**. See "Exporting Metadata" on page 20.

Filtering the Dimension View by Plan Type

For an advanced application, you can filter the dimension view by plan type. When you select a plan type, only members used in that plan type are displayed on the **Dimensions** tab.

➤ To filter the dimension view by plan type:

1. **On the Home page, click Console.**
2. **On the Application tab, click Dimensions.**

   Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.
3. **Click the down arrow to the right of Plan Type to filter the list of dimensions.**

By default, Planning displays all plan types for an advanced application. If the dimension list is filtered, Planning displays only the members used in the selected plan type.

Filtering by plan type (rather than viewing all plan types) also enables you to view these details about a dimension:

- Order of precedence
- Dimension density
- Evaluation order

For information about order of precedence, dimension density, and evaluation order, see "Working with Dimensions" in *Oracle Hyperion Planning Administrator's Guide*.

Creating Dimensions

Creating a dimension adds it to the end of the dimensions listed in the dimension view.

➤ To create a dimension:

1. **On the Home page, click Console.**
2. **On the Application tab, click Dimensions.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 Click **Create.**

4 On the **Create Dimension** page, enter or select values for the properties that are displayed.

For descriptions of the properties, see "Working with Dimensions" in *Oracle Hyperion Planning Administrator's Guide*.

Importing Metadata

You can import metadata from or export metadata to a file in a comma-delimited or tab-delimited format. The following artifacts are supported in the imports and exports:

- Dimensions
- Smart Lists
- Exchange rates

To import metadata using the simplified interface, perform these tasks:

- Create an import file for each artifact that you want to import. See "Creating the Import File" on page 18.
- Load the import file or files (you can import multiple dimension files at the same time). See "Loading the Import File" on page 18.

Creating the Import File

Before you begin loading, you must create an import file for each artifact (dimensions, smart lists, and exchange rate tables) you want to import. The import file must contain a header record, and then below the header record, a list of metadata records that you want to import or update. The file format can be comma-delimited or tab-delimited.

Note: For a sample import file and for instructions about creating an import file, see "Creating the Metadata Flat File" in *Oracle Hyperion Planning Administrator's Guide*.

Loading the Import File

➤ To load the import file:

1 Create an import file for each artifact (dimensions, smart lists, and exchange rate tables) that you want to import. See "Creating the Import File" on page 18.

2 On the Home page, click **Console.**

3 On the **Application** tab, click **Dimensions**, and then click **Import.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

4 **On the Import Metadata page, select the source environment of the import file or files:**

- **Local**—Loads the import file or files from a location on your computer. Click **Browse** to select the import file on your computer for the artifact you're importing.
- **Planning Inbox**—Loads the import file or files from the server. Enter the name of the file in **Source File**. See "Using the Planning Inbox/Outbox" on page 24.

5 **Select Comma delimited or Tab delimited for File Type.**

6 **Select Refresh Database to refresh the database after importing.**

7 **Select Clear Members to delete members not explicitly specified in the load file before performing the import.**

Note the following:

- Any member not specified is deleted from the Planning outline after importing the dimension unless it is an ancestor of a member that was specified, or it is a base member of a shared member that was specified.
- If **Clear Members** isn't selected, the import will only add or update existing members. Oracle recommends loading the metadata file without selecting **Clear Members** to make sure the file loads successfully. Then, select **Clear Members** and execute the import again

8 **Repeat steps 4 through 7 for each artifact that you want to import.**

Note: You can select multiple import files to load before clicking **Import**.

9 **Optional: If the source environment selected is Planning Inbox, click Save as Job to save the import operation as a job, which you can schedule to run right away or at a later time. You cannot select this option if Local is selected.**

Note: Saving an import operation as a job is useful to batch a load sequence; for example, import metadata, then import data, then run rules when the data load is complete. See Chapter 4, "Managing Jobs."

10 **Optional: Click Validate to test whether the import file format is correct.**

11 **Click Import to run the import operation.**

If the plan types listed in the import file do not match the plan type names in the application, Planning will ignore unrecognized plan type columns.

If the import fails, a **Failed** status will display in the **Recent Activity** column. Click to view the detailed status. If the load is successful, select **All** (instead of **Errors**) in the drop-down on the Status screen to see details about the import.

Exporting Metadata

➤ To export metadata to a file:

1 On the Home page, click **Console.**

2 On the **Application** tab, click **Dimensions**, and then click **Export.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 On the **Export Metadata** page, select the target environment of the export file:

- **Local**—Saves the export file to a location on your local computer.
- **Planning Outbox**—Saves the export file to the server. See "Using the Planning Inbox/ Outbox" on page 24.

4 Select the artifact or artifacts to export.

5 Select an option:

- **Comma delimited**—Creates a .csv file for each artifact.
- **Tab delimited**—Creates a .txt file for each artifact.

6 Click **Export**, and then specify where to save the export file.

Planning creates an export file for each artifact (.txt or .csv, depending on the file type), and all export files are consolidated into one zip file. You must extract the .csv or .txt files from the zip file if you want to use the files as import files (for example, when importing into another application).

Importing and Exporting Data

Subtopics

After the dimensions are imported, you can populate Planning data using the Planning simplified interface. You cannot do a direct data load. You must import data from a file.

Importing Data

➤ To import data:

1 On the Home page, click **Console.**

2 On the **Application** tab, click **Actions**, and then click **Import Data**.

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 **Select the location of the data import file:**

- **Local**—Imports the data import file from a location on your computer.
- **Planning Outbox**—Imports the data import file from the server. Enter the name of the file in **Source File**. See "Using the Planning Inbox/Outbox" on page 24.

4 **Select the Source Type of the data import file:**

- **Planning**—If selected, choose between the **Comma delimited** or **Tab delimited** file type.
- **Essbase**—If selected, choose a plan type.

5 **Enter or select the source file name.**

6 **Optional: Click Save as Job to save the import operation as a job, which you can schedule to run later.**

Note:

- **Save as Job** is available only when **Planning Outbox** is selected.
- Saving an import operation as a job is useful to batch a load sequence, for example, import metadata, then import data, then run rules when the data load is complete. See Chapter 4, "Managing Jobs."

7 **Optional: Click Validate to test whether the import file format is correct.**

8 **Click or tap Import to run the import operation.**

Note: There is no option in the simplified interface to clear data before import. Therefore, the import will not overwrite existing data values with #missing values.

Caution! If the evaluation order in the Planning application is changed after exporting data, the import may have unexpected results.

Exporting Data

➤ To export data to a file:

1 **On the Home page, click Console.**

2 **On the Application tab, click Actions, and then click Export Data.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 **On the Export Data page, select the target environment of the data export file:**

- **Local**—Saves the data export file to a location on your local computer.
- **Planning Outbox**—Saves the data export file to the server. See "Using the Planning Inbox/Outbox" on page 24.

4 **Specify the plan type and file type, and then define the slice of data to be exported.**

5 **Optional: Click Save as Job to save the export operation as a job, which you can schedule to run immediately or at a later time.**

Note:

- **Save as Job** is available only when **Planning Outbox** is selected.
- For more information about scheduling jobs, see Chapter 4, "Managing Jobs."

6 **Click Export, and then specify where to save the data export file.**

Note: To reduce the size of data export files, if a form has an entire row of #missing values, the row will be omitted from the data export file.

Viewing Data Import and Export Status

➤ To view the status of a data import and export:

1 **On the Home page, click Console.**

2 **On the left, click or tap**  **.**

3 **Click or tap the name of the import or export job under Recent Activity.**

Refreshing the Database

On the **Application** page, you can refresh the application database, which is used to store data in Planning for each plan type in an application. Databases are structured according to dimensions, hierarchical members, attributes, and other data specified in an application.

You must refresh the application database whenever you change the application structure. Changes made to an application aren't reflected to users performing data entry and approvals tasks until you refresh the Planning databases for the application. For example, when you modify properties of an Entity member, add a Scenario, or change access permissions, these changes are stored in the Planning relational database until you refresh the application database.

When you refresh the database, all other tasks are unavailable to other users. All users must be logged off from the Planning application before Planning databases can be refreshed. Planning doesn't log out users during refresh. Oracle recommends that you send a broadcast message to all users, asking them to save their work and close the application before the Planning application is refreshed. To send broadcast messages, navigate to EPM Workspace. See Chapter 7, "Navigating to EPM Workspace."

Caution! Before you refresh, Oracle recommends that you back up your outline file and export data from all databases.

➤ To refresh the database:

1 On the Home page, click **Console.**

2 On the **Application** tab, click **Actions**, and then click **Refresh Database.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 Review the confirmation message. To continue, click **Refresh.** After the update completes, click **Finish.**

Converting an Application from Simple to Advanced

Planning lets you convert a simple application to an advanced one. During conversion, Planning adds a plan type (with associated dimensions) to the application. After conversion, you can add up to seven additional plan types.

Note: You cannot convert an application from advanced to simple.

➤ To convert a simple application to an advanced application:

1 On the Home page, click **Console.**

2 On the **Application** tab, click **Actions**, and then click **Convert to Advanced Application.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

Removing an Application

Removing an application will delete it and all of its contents. Any scheduled jobs for the application will be deleted as well. This action cannot be undone. Oracle recommends that you back up the application first.

➤ To remove an application:

1 On the Home page, click **Console.**

2 On the **Application** tab, click **Actions**, and then click **Remove Application.**

Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3 Review the confirmation message. To continue, click **Yes.**

Using the Planning Inbox/Outbox

The Planning Inbox/Outbox enables you to upload files to the server/inbox and download the files from the server to your local computer. It also lets you view the files that are in the inbox/outbox and then use the files to schedule import and export jobs.

➤ To view and upload files in the Planning Inbox/Outbox:

1. On the Home page, click **Console.**
2. On the **Application** tab, click **Actions**, and then click **Inbox/Outbox Explorer.**

   Note: The **Application** tab is available only if you are accessing the simplified interface from the desktop.

3. On the **Inbox/Outbox Explorer** page, you can filter by name, refresh the listing, and upload files from the server.

4

Managing Jobs

In This Chapter

Jobs Overview

Jobs are actions, such as exporting data or refreshing the database, which you can start right away or schedule to run at intervals. The Jobs console lets administrators manage jobs in the simplified interface.

What types of jobs can be managed in the Jobs console?

- Rules
- Import data
- Import metadata
- Export data
- Export metadata
- Refresh database
- Plan type map

Viewing Pending Jobs and Recent Activity

The Jobs console lists jobs that are in a pending state under **Pending Jobs**. Jobs that are processing, have run and are completed, or have errors are listed under **Recent Activity**.

➤ To view the job listings in the Jobs console:

1 **On the Home page, click or tap Console.**

2 **On the left, click or tap**  **.**

The **Jobs** console lists pending jobs and recent activity.

3 **Perform a task:**

- To filter the list of pending jobs and recent activity, click or tap , select filter options, and then click or tap **Apply**.
- To search for a job, enter text in the **Search** field, and then click or tap .
- To view details for jobs, click or tap the name of the job.

Scheduling Jobs

You can schedule when to run jobs (now or at a future time) and how often (once, daily, weekly, monthly, and yearly).

➤ To schedule jobs:

1 **On the Home page, click or tap Console.**

2 **On the left, click or tap .**

3 **Click or tap Schedule Jobs.**

4 **On the Schedule Job page, make selections for job type, when to run the job, and how often.**

Job type descriptions:

- **Rules**—Launches a business rule. The **Business Rules** page lists the business rules that were created for the application. Select a rule, and then click or tap **OK** to continue. If no rules are displayed, create one. See *Oracle Hyperion Calculation Manager Designer's Guide*.
- **Import Data**—Runs a data import operation. The **Import Data** page lists the import operations that were saved as a job. Select a job to continue. If no import jobs are displayed, create one. See “Importing Data” on page 20.
- **Import Metadata**—Runs a metadata import operation. The **Import Metadata** page lists the import operations that were saved as a job. Select a job to continue. If no import jobs are displayed, create one. See “Importing Metadata” on page 18.
- **Export Data**—Runs a data export operation. The **Export Data** page lists the export operations that were saved as a job. Select a job to continue. If no export jobs are displayed, create one. See “Exporting Data” on page 21.
- **Export Metadata**—Runs a metadata export operation. The **Export Metadata** page lists the export operations that were saved as a job. Select a job to continue. If no export jobs are displayed, create one. See “Exporting Metadata” on page 20.
- **Refresh Database**—Launches the database refresh operation.

- **Plan Type Map**—Runs a mapping operation. The **Map Reporting Application** page in EPM Workspace lists the mapping configurations. You can access this page by clicking or tapping the **Navigator** icon on the Home page.

5 **Enter a name for the job; for example, MyWeeklyCubeRefresh, and then click or tap Next to continue.**

Note: In the job listing in the **Jobs** console, the name you enter will display along with a system-generated job name; for example, **MyWeeklyCubeRefresh : Refresh Database**.

6 **Review your selections, and then click or tap Finish.**

Editing and Deleting Jobs

You can only edit pending jobs and only jobs that are pending or completed can be deleted. If a job is in a processing state, you cannot edit or delete it.

Note: If a rules type job is in a processing state, you can cancel it. See “Canceling Rules Jobs” on page 28.

➤ To edit or delete a job:

1 **On the Home page, click or tap Console.**

2 **On the left, click or tap**  **.**

3 **To the right of a pending job, click or tap**  **, and then select Edit or Delete.**

4 **If editing a job:**

a. On the **Edit Job** page, make selections for when to run the job and how often, and then click or tap **Next**.

Note: You can only edit the schedule of the job. You cannot edit the job type or the job name.

b. Review your selections, and then click or tap **Finish**.

5 **Alternatively, you can delete one job or multiple jobs at once by selecting the check box next to the job or jobs you want to delete, and then clicking or tapping Delete.**

Tip: You can clear all recent activity by clicking or tapping **Actions**, then selecting **Select all recent activity**, and then clicking or tapping **Delete**.

Canceling Rules Jobs

The only types of jobs that can be canceled are rules jobs and they can only be canceled while in a processing state. You cannot cancel import, export, refresh, or mapping types of jobs.

You can cancel a rule or a ruleset. You can identify a rule or a ruleset by the icon in front of the job name:

- is a rule
- is a ruleset

➤ To cancel a rules job:

1 **On the Home page, click or tap Console.**

2 **On the left, click or tap .**

3 **Choose a cancel operation:**

- If canceling a rules job ( ), to the right of a job in a processing state (under **Recent Activity**), click or tap , and then click or tap **Cancel**.
- If canceling a ruleset ( ), click or tap the name of the job that's in a processing state (under **Recent Activity**). On the **Job Details** page next to the rule that is running, click or tap , then click or tap **Cancel**, and then click or tap **Close**.

5 Using the Member Selector

In This Chapter

Working with Members

Use the **Member Selection** dialog box to select members to use with the following features in the simplified interface:

- Business rule runtime prompts
- User variables
- Dynamic variables
- Data export
- Ad hoc forms

If variables and attributes are defined, you can select variables and attributes. You can display and select members by member name or alias. The display options that you define for the **Member Selection** dialog box override those defined as an application default by an administrator, and those specified as an application preference.

Selecting Members

Only members to which you have access are displayed. The **Selections** pane only displays if you invoke the member selector for multiple member selection.

Note: For descriptions of the settings, filter, or function options, see "Using the Member Selector" in *Oracle Hyperion Planning Administrator's Guide*.

➤ To select members:

1. **Click or tap** .
2. **Optional:** **Perform these tasks:**

- To enter search criteria (member name or alias only), press **Enter** (from the desktop) or click or tap **Search** (on mobile).
- To change display options such as viewing variables and attributes, showing alias names, showing member counts, sorting alphabetically, or refreshing the member list, click or tap next to **Search**, and then select from the list of display options.
- To filter the members that are displayed in the member list, under next to **Search**, select **Add Filter**, and then select from the list of filter options.

  Note: Android users can click or tap to view and select filter options.
- To scroll the member list to the left or to the right, click or tap or at the bottom of the screen.

3 **Make selections by clicking or tapping the check box next to each member in the member list.**

Note: Selected members display a check mark and are moved to the **Selections** pane, if applicable.

4 **Optional: Perform these tasks:**

- To insert a member with functions in the **Selections** pane, click or tap f_x to the right of the member.
- To move or remove members in the **Selections** pane, click or tap next to **Selections**.
- To highlight the location of a selected member within the dimension hierarchy, double-click the member name in the **Selections** pane.

  Note: To highlight the location of a selected member on a mobile device, tap the member name in the **Selections** pane, and then tap **Locate** under next to **Selections**.

5 **When you are done making selections, click or tap OK.**

6 Managing Planning Settings

In This Chapter

Making Announcements

Need to alert users about upcoming system maintenance or announce an upcoming company event? Administrators can use **Announcements** to display a Home page message to all Planning users.

➤ To create an announcement:

1 **From the Home page, click or tap Settings.**

2 **On the left, click or tap**  **.**

3 **Click or tap Create.**

4 **In Create Announcement, enter the Subject, Start Date, and Content of your announcement.**

Note the following:

- The **End Date** is optional.
- You may need to select an editing mode (rich text or source code) before entering text in the **Content** field.

Customizing the Appearance of Your Display

Want to change the theme of your display or add your company logo to the Home page? Use **Appearance** to customize the appearance of the simplified interface:

➤ To customize the appearance of your display:

1 **From the Home page, click or tap Settings.**

2 **On the left, click or tap**  **.**

3 In **Appearance**, make selections for theme, logo URL, and the shape of the logo.

4 To see your updates, sign out of the application, and then sign in again.

7 Navigating to EPM Workspace

Need to access full Oracle Hyperion Planning functionality in EPM Workspace? The **Navigator** icon on the Home page displays a list of links that connect you to the corresponding functionality in Oracle Hyperion Enterprise Performance Management Workspace.

Note: The **Navigator** icon is available only if you are accessing the simplified interface from the desktop.