



ORACLE® HYPERION PLANNING

Release 11.1.2.4

New Features



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Features Introduced in Earlier Releases

Use the Cumulative Feature Overview tool to create reports of new features added in earlier releases. This tool enables you to identify your current products, your current release, and your target release. With a single click, the tool quickly produces a customized set of high-level descriptions of the product features developed between your current and target releases. This tool is available here:

<https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1092114.1>

Simplified Interface

Administrators can make a simplified interface available to access common tasks. The new simplified interface presents an engaging visual way for administrators to create and manage an application, and for planners to build, analyze, report on, and approve plans. Home page icons make navigating the application easy.

Get Started

For helpful information on getting started, explore the resources under the **Academy** icon on the Home page. From the icon, you can click or tap the Oracle Help Center to access videos that demonstrate how to optimize your work.

From the **Academy** icon, you can also:

- Learn how to accomplish common tasks on the “Getting Started for Administrators” and “Getting Started for Planners” pages.
- Read “Best Practices for Designing Your Application.”
- Learn about the phases and steps to creating your Oracle Hyperion Planning application. Linked online tutorials demonstrate the steps.
- Click or tap a link to the Oracle Help Center to view videos, tutorials, and documentation.

Also, two new guides, available on the **Books** tab of the Oracle Help Center, show you how to accomplish your business objectives using Planning:

- *Oracle Hyperion Planning Simplified Interface Administrator's Guide*
- *Oracle Hyperion Planning Simplified Interface User's Guide*

Enhanced Performance in Simple Forms

- Because Planning forms now use the latest client-side scripting technologies in the new simplified user interface you'll enjoy faster response times when you scroll, enter data, and when you press Tab and Shift+Tab. You'll also find new shortcut keys and new actions such as **Undo** and **Wrap Text**.

- Because most work is now done on the client side, server requests are greatly reduced. We estimate that servers can now handle 33 percent more load than before in the same response time.
- Planning is, by default, configured to preload data when you open forms. To optimize performance, turn on compression by updating your web server or Load Balancer configuration. The Oracle HTTP Server instance that you install from the EPM System installer is configured to support compression. If you are using a different web server, see your web server or Load Balancer documentation for instructions to turn on compression.

Control the Look and Feel of the Interface

Use the **Settings** icon on the Home page to customize your UI. For example, you can add your company logo to the Home page. Or create a watermark background by including a URL to an image file.

Manage the Application with the Console

From the **Console** icon on the Home page:

- Get a visual overview of the application.
- View a graphic of the number of dimensions by plan type. (You can add plan types.)
- See the total number of tasks, plans, rules, and approval hierarchies in the application.
- Refresh the application.

Schedule Recurring Jobs

A new Job Scheduler enables administrators to automate many functions. Schedule and manage jobs such as importing and exporting data or metadata, launching a business rule, and refreshing the database. You can start the job immediately or schedule it to run at intervals.

Manage Dimensions

- Create or rename dimensions.
- View the details of a dimension.
- Set the order of dimensions to determine how calculations are performed.
- Set the evaluation order to specify which data type prevails when an intersection has conflicting data types.

Easy Import and Export

- After creating an import file for each artifact, you can import dimensions, Smart Lists, and exchange rates. You can import from a file or Planning Inbox.

- After importing metadata, you can populate your application with data by importing it from a file. The file can be on your computer, on an FTP site, or the Planning Outbox.
- You can export metadata locally to your computer, to an FTP site, or to a Planning Outbox.
- The import and export file can be in tab- or comma-delimited format.

Enhanced Planning Capabilities

Planners can now:

- Easily create dashboards in Planning to provide a quick, visual view of key data. Just drag forms, charts, and external links to a dashboard.
- Analyze data in robust ad hoc grids by zooming in and out on members, and pivoting dimensions. Change which members to work with.
- Format and save ad hoc grids as reports for viewing in Planning or in Oracle Hyperion Financial Reporting.
- Format forms to emphasize certain data. For example, set the font size and color. Bold, italicize, or underline data. Set the background color. You can save or clear the formatting.
- Visualize tasks by status or by type.
- View planning unit status in a graphic.

Create Reports for Sharing Data

View and distribute static or dynamic reports that summarize data, in either PDF or HTML format.

Undo Feature

When working with a simple form in the simplified interface, if an administrator has set up the form to support Undo, you can undo your actions by pressing Ctrl+Z (or clicking or tapping **Undo** on the **Data** tab). Press Ctrl+Z repeatedly to successively undo actions that you've taken since you last opened or refreshed the form. When you use Undo, dependent cells, such as those that are dynamically calculated, are reevaluated.

Instant Save

Built-in intelligence now quickly saves new or changed data in simple forms when planners click or tap **Save**. Instant save works unless the structure of the form has changed (for example, if a row was suppressed because it had no data). The *Oracle Hyperion Planning Administrator's Guide* describes the form options that prevent instant save.

Automatic Save

Administrators can set up a simple form so that planners' data is automatically saved when they move out of a cell, and values are aggregated immediately. The affected cells are displayed in green. To enable automatic save, the administrator selects the new **Grid Properties** option **Enable Autosave**. With that option selected, administrators can also select **Run Form Rules on Autosave**, which updates dynamically calculated cells that depend on the changed cell values.

New Shortcut Keys

New shortcut keys are available when you access simple forms in the simplified interface from the desktop.

- Navigation shortcuts—Planners can now navigate the form using new keyboard shortcuts. For example, to move to the first cell in the form, press Ctrl+Home.
- Data entry shortcuts—New data entry shortcuts provide built-in calculators. For example, to enter the value in thousands, enter 5K for 5,000.
- Formatting shortcuts—Key combinations enable planners to quickly format values. For example, to bold a value, press Ctrl+Alt+B.

Support for Dynamic Dimension Members

Users can now add children whenever they want and name them whatever they want. If a parent member is enabled for adding dynamic children, users can create a new member by entering its name in the runtime prompt.

Classic User Interface

Planning no longer supports the Classic user interface (that is, up to and including Planning Release 11.1.2.1).

Performing Key Tasks On The Go With Oracle EPM Mobile

In its first release, Oracle Enterprise Performance Management Mobile enabled you to manage approvals and workflow across Planning, Oracle Hyperion Tax Provision, and Oracle Hyperion Financial Management. The latest release of the mobile app supports critical Close Manager and Oracle Data Relationship Governance functionality.

What's New

Download Oracle EPM Mobile 11.1.2.4 to perform these tasks:

- Using Close Manager, coordinate and complete all period-end close activities such as the following:
 - Viewing, submitting, approving, and rejecting tasks
 - Responding to notification alerts, such as investigating and resolving task errors or delays
 - Automatically managing and tracking task status
- In Oracle Data Relationship Governance, manage and submit change request approval workflows by performing tasks such as:
 - Filtering worklists to find your requests
 - Emailing participants associated with requests
 - Approving, escalating, rejecting, and pushing back on requests
 - Viewing invalid requests

For information about Oracle EPM Mobile, see the *Oracle Enterprise Performance Management Mobile User's Guide* : <http://www.oracle.com/oll/epmmobile>.

Downloading Oracle EPM Mobile

Download the mobile app:

- The Apple App Store: <https://itunes.apple.com/us/app/oracle-enterprise-performance/id845082117>
- Google Play: <https://play.google.com/store/apps/details?id=oracle.epm.mobile.OracleEPM&hl=en>

Public Sector Planning and Budgeting Enhancements

This release enables these capabilities:

- PeopleSoft Commitment Control decision package users can reuse existing revision members and track revision data in PeopleSoft by unique transaction ID.
- Planners can transfer employees and positions across decision packages and reverse transfers made in error. Planners need not share a budget request to transfer employees and positions.
- You can generate custom decision package reports using templates. Administrators create templates by downloading and modifying the provided reports, and then uploading them and associating them with particular reports. This action enables planners to report on a variety of decision package data using a more personalized layout.
- You can organize and present decision package data in reports using up to three attributes.
- You can report on three years of decision package data.
- You can report on decision package totals for up to three versions and scenarios, enabling you to evaluate total values and perform variance reporting by specific budgeting scenarios or stages.

- You can report on additional decision package and compensation budget data in Oracle Hyperion Financial Reporting and Oracle Smart View for Office using the new Decision Package aggregate storage plan type (DP ASO). This plan type provides robust reporting capabilities.

Project Financial Planning Enhancements

- Integration with Oracle Primavera P6 Enterprise Project Portfolio Management Oracle Fusion Project Portfolio Management

In Release 11.1.2.4, Oracle Project Financial Planning integrates with Oracle Primavera P6 Enterprise Project Portfolio Management (P6 EPPM). This integration enables you to import projects from P6 EPPM into Project Financial Planning and then export the approved project status from Project Financial Planning back into P6 EPPM. You can also import the projects and resource assignment details from Project Financial Planning into P6 EPPM.

- Ability to enable features when creating an application

When you create an application in Release 11.1.2.4, you can select the features that will be displayed in Oracle Project Financial Planning, based on your project requirements.

- Support for the Vendor dimension

Release 11.1.2.4 includes support for the Vendor dimension. The Vendor dimension is required when you have different labor, equipment, or standard resource rates from different vendors, and if you want to see expense reports based on vendors.

Predictive Planning Enhancements

- The Predictive Planning feature of Planning can now be used with Oracle Hyperion Planning ad hoc grids, reports, Oracle Smart View for Office Smart Queries, and saved ad hoc grids.
- You can now use Quick Predict, an ease-of-use feature that enables you to run and paste predictions with a few mouse clicks or keystrokes.
- Prediction chart enhancements enable you to directly manipulate predicted data series. You can now adjust predictions without retyping predicted values.
- The following new forecasting techniques improve forecast accuracy, particularly at long lead times: Damped Trend Smoothing Nonseasonal, Damped Trend Additive Seasonal, and Damped Trend Multiplicative Seasonal. Each technique includes standard, simple lead, weighted lead, and holdout methods.

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Planning New Features, 11.1.2.4

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