

Sign up for Kscope12 using the code **IRC** for a discount on Registration!

JW MARRIOTT.
SAN ANTONIO HILL COUNTRY



ODTUG Kscope12



SAN ANTONIO, TEXAS * JUNE 24-28

TOPICS:

- * Application Express
- * Database
- * Developer's Toolbox
- * Fusion Middleware
- * Business Intelligence
- * EPM Business Content
- * EPM Beginner
- * Essbase
- * Hyperion Applications

www.kscope12.com

Top Reasons You Don't Have to “Code” or “Customize” Hyperion Planning

Edward Roske

info@interrel.com

BLOG: LookSmarter.blogspot.com

WEBSITE: www.interrel.com

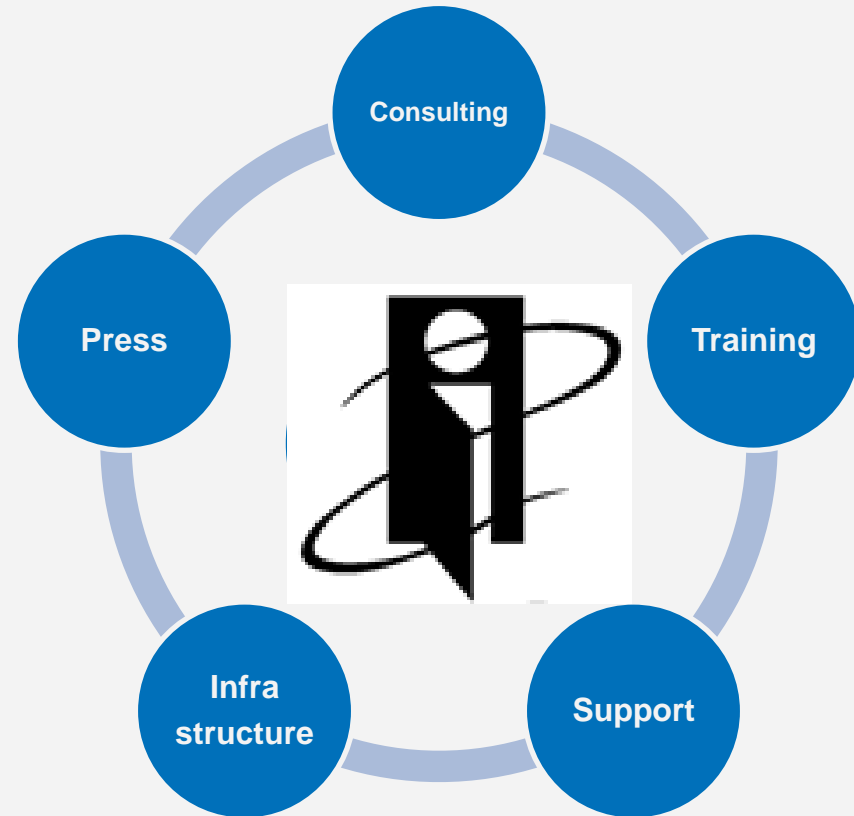
TWITTER: Eroske

Top Reasons You Don't Have to “Code” or “Customize” Hyperion Planning

AKA

Ignore *Everything* Edward or
Tracy said before today

- **Reigning Oracle Award winner EPM & BI Solution of the year**
- **Three** Oracle ACE Directors for Hyperion
- Oracle Platinum Partner
- One of the 100 fastest growing tech companies in the USA (CRN Magazine, 2007-2010)
- Authors of the 8 Best Selling books on Hyperion & Essbase
- Essbase Studio book released April 11, 2011
- All available on LuLu.com



Focused exclusively on
Oracle EPM & BI





Look Smarter Than You Are[®]
with Oracle Hyperion Planning[™]

An Administrator's Guide



by Edward Roske
and Tracy McMullen

8 Hyperion Books Available:

- Essbase (7): Complete Guide
- Essbase System 9: Complete Guide
- Essbase System 9: End User Guide
- Essbase 11: Admin Guide
- Essbase Studio 11
- Smart View 11: End User Guide
- Planning: End Users Guide
- Planning: Administrators

To order, check out www.LuLu.com or
Visit our booth in the exhibit hall

Typical Customizations or “Hacking”

- Validations
- Styles
- Relational tables
- Manual Planning migrations from dev to prod



Top Reasons Why You Don't Have to Customize Planning

1. **New Data Form Designer**
2. Validation Rules
3. ASO Reporting Cubes Integration
4. Utilities
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
8. Batch Bursting
9. LCM
10. Adhoc Grids





Data Form Design Editor

- Combined data form and composite grids
- New interface – grid/layout
- Improved member search capabilities
- Improved member selection capabilities
- Data Validations
 - Grid, row, column or cell level
 - Tied to a form
- Content properties displayed in right panel (like FR)
- Formula rows or columns can be added; added as a separate segment
 - Can add validations to formula rows and columns
- Live preview (tab removed)
- Save keeps you in form designer; Finish takes you out of designer (implicit save)



Combined Data Form Definition for Simple/Composite Forms

Properties



Simple Data Form Composite Data Form

Data Form:

Description:

Plan Type: ▼

Enter Instructions:

Help Preview Save Previous Next Cancel Finish



- POV, Page, Rows Columns
- Grid properties – suppression options, grid validation rules

Data Form: DF2

Properties | **Layout** | Other Options | Business Rules

Point of View

Local

Page

IDescendants(AllSegments) | ILvl0Descendants(All Channels) | ILvl0Descendants(TotalGeography)

	Columns		
Rows	A	B	C
	FY08	FY08	
	Forecast	Forecast	Variance
	Working	What If	
	IDescendants(Q1)	IDescendants(Q1)	
1	IDescendants(410000)		#

Grid Properties

Rows

Allow users to dynamically add row

Suppress missing blocks

Suppress missing data

Columns

Suppress missing data

Column width: Medium

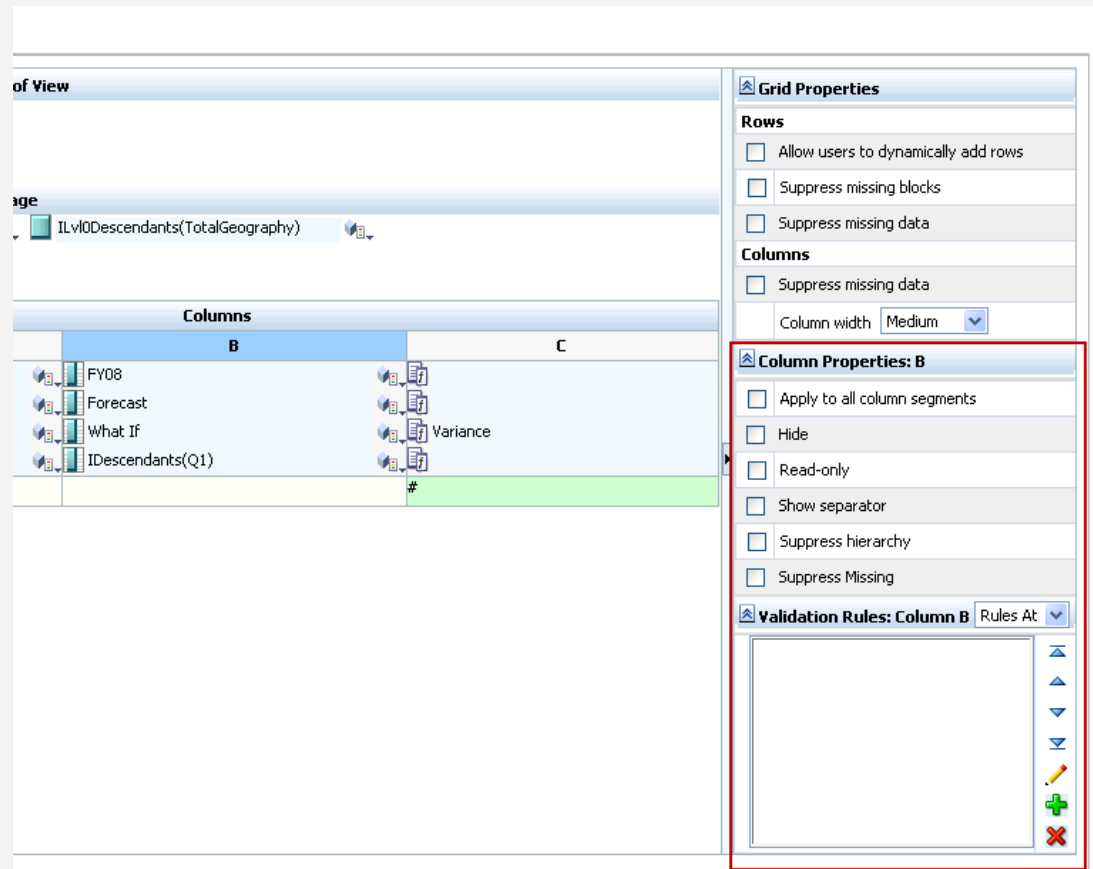
Validation Rules

Help | Preview | Save | Save As... | Previous | Next | Cancel



Column and Row Properties

- All segments / columns and rows are now visible
- Apply to all column segments
- Hide
- Read only
- Show Separator
- Suppress Hierarchy
- Suppress Missing
- Validation Rules



The screenshot displays a software interface with a grid view and a properties pane on the right. The grid shows columns B and C, and rows for FY08, Forecast, What If, and IDescendants(Q1). The properties pane is divided into several sections:

- Grid Properties:**
 - Rows:**
 - Allow users to dynamically add rows
 - Suppress missing blocks
 - Suppress missing data
 - Columns:**
 - Suppress missing data
 - Column width: Medium
- Column Properties: B** (highlighted with a red box):
 - Apply to all column segments
 - Hide
 - Read-only
 - Show separator
 - Suppress hierarchy
 - Suppress Missing
- Validation Rules: Column B** (highlighted with a red box):
 - Rules At: [dropdown]
 - [Empty text area]
 - [Add (+) icon]
 - [Remove (X) icon]



Formulas in Rows

- Much like Financial Reporting
- Formula rows to create blank rows

Data Form: DF2

Properties | Layout | Other Options | Business Rules

Formula: Select ▼ Column[B]-Column[C] ✓ fx

Point of View

Local ▼

Page

IDescendants(AllSegments) ▼ ILV0Descendants(All Channels) ▼ ILV0Descendants(TotalGeography) ▼

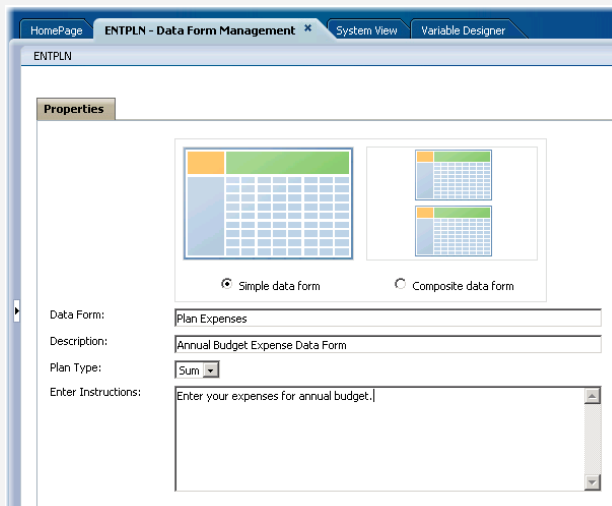
	Columns			
	A	B	C	D
Rows				
FY08	FY08	FY08	FY08	
Plan	Plan	Forecast	Forecast	
Final	Final	Working	What If	Variance
Q1	Q1	IDescendants(Q1)	IDescendants(Q1)	
1	IDescendants(410000)			#

A red arrow points from the formula bar down to the 'Variance' cell in the grid.



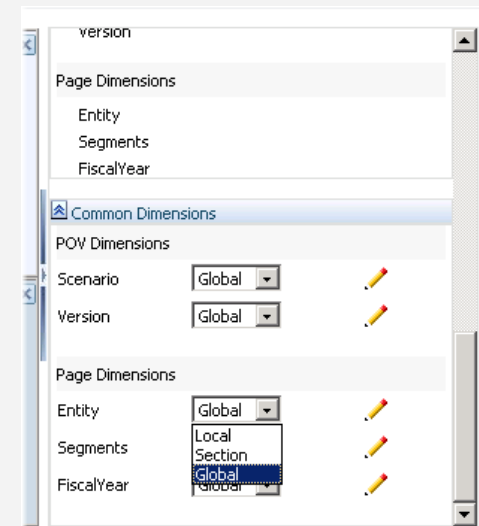
Data Form Designer – Composite Forms

- Now included in Data Form Designer
 - Global shared dimensions and/or section shared dimensions – you control how you want page and povs to share within the composite



The screenshot shows the 'Data Form Management' window with the 'Properties' tab selected. It displays two form layout icons: 'Simple data form' (selected) and 'Composite data form'. Below the icons, the following fields are visible:

- Data Form: Plan Expenses
- Description: Annual Budget Expense Data Form
- Plan Type: Sum
- Enter Instructions: Enter your expenses for annual budget.



The screenshot shows the 'Common Dimensions' configuration panel. It includes the following settings:

- version: (dropdown)
- Page Dimensions: Entity, Segments, FiscalYear
- Common Dimensions: (expanded)
- POV Dimensions: Scenario (Global), Version (Global)
- Page Dimensions: Entity (Global), Segments (Local Section), FiscalYear (Global)



Define Layout for Composite

Composite data form: Forecast Revenue and Synergies

Properties

Layout

Business Rules

Select a layout.

Select Layout



Section Properties

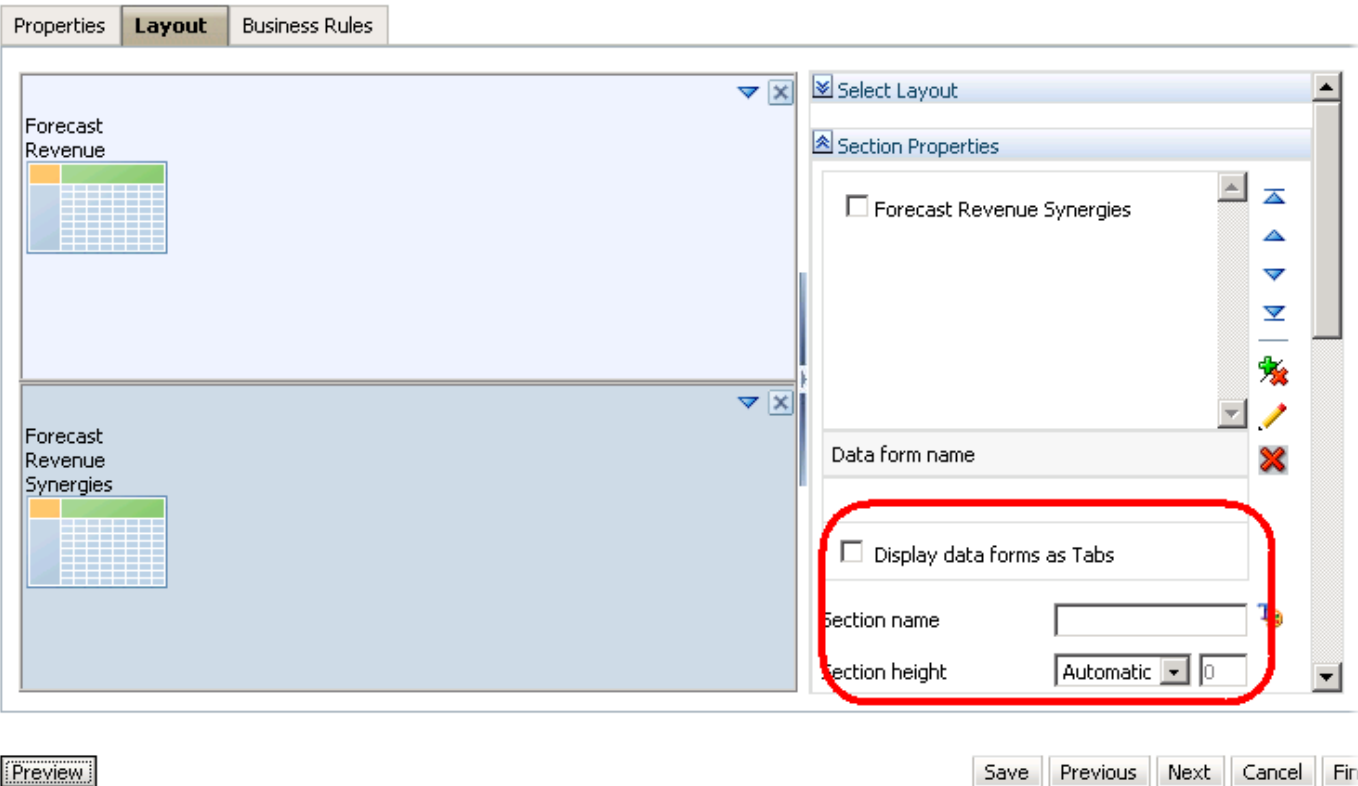
Data form name



New - Display as Tabs

Composite data form: Forecast Revenue and Synergies

Properties **Layout** Business Rules



Forecast Revenue

Forecast Revenue Synergies

Select Layout

Section Properties

Forecast Revenue Synergies

Data form name

Display data forms as Tabs

Section name

Section height Automatic 0

Preview Save Previous Next Cancel Finish

- Open tabs as different worksheets in a workbook in SV



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
- 2. Validation Rules**
3. ASO Reporting Cubes Integration
4. Utilities
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
8. Batch Bursting
9. LCM
10. Drill Through via FDM



The Old Way

- ValidateData.js in the \<default web application directory>\<Planning>\web\WEB-INF
- customCellEnterPre
- customCellEnterPost
- customCellValidatePre
- customCellValidatePost

```

////////////////////////////////////
function validateForm() {
    var valid = true;
    if (equalsIgnoreCase(applicationName,"Planning")) { // It is possible to limit your custom JavaScript to specific Applications,
        if (equalsIgnoreCase(FormName,"forecast")) { // or even to specific forms
            valid = validateOnSave();
        }
    }
    return valid; // Returning true allows the save to proceed.
                // Returning false cancels the save
}

function customSaveFormPost() {
    // This function is called when a Save has been requested and all other Hyperion Planning
    // logic has run, but before the data is actually sent to the server
    // can be used in the same manner as validateForm (a different level of priority- built-in before custom
    // Note: CANNOT CANCEL SAVE from within this function.
    return(true);
}

function drawCustomButtons() {
    // This function is called when the data entry page is being created. It allows the addition of
    // custom button(s) to the UI of this page. The custom buttons will appear on the same row as the
    // Save, Refresh, etc. buttons after all of the built-in buttons.
    // Custom buttons may either be links to other web resources (HTML, PDF, etc) or they may be set up to
    // launch further custom JavaScript code.
    // use DrawCmdBtn(btnId, stText, stHref, stClick, stTooltip) where
    // stText = the text which appears on the button
    // stHref = the URL which the browser will go to if the button is clicked (use null if invoking a javascript function
    // stClick = the Javascript code to be executed when the button is clicked (use null if using a URL)
    // stTooltip = the tooltip which appears if the mouse hovers over the button
    // example:
    if (equalsIgnoreCase(applicationName,"Planning")) {
        if (equalsIgnoreCase(FormName,"forecast")) {

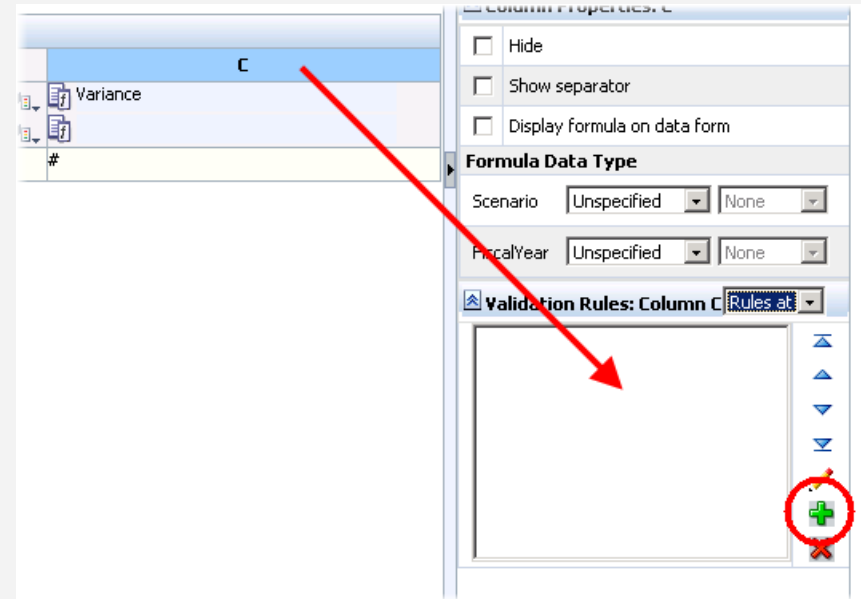
            // if you are displaying multiple buttons, you can use a table to organize the layout
            document.writeln('<table cellspacing=0 cellpadding=0 border=0><tr><td>');

            // the DrawCmdBtn produces a simple button along the lines of the save button.
            // the parameters are a label for the button itself
            // the URL to open when the button is clicked
            // the javascript to run when the button is clicked
            // the tooltip which displays when the user hovers over the button with the mouse
            // the URL or the javascript can be empty or they can be used together
            // the following code creates a button which, when clicked, will open the pdf file
            // BudgetProcess.pdf in the current window.
            DrawCmdBtn("BudgetBtn", "Budgeting Process", "BudgetProcess.pdf", "", "View the budgeting process guidelines");
        }
    }
}

```



- Validation rule is tied to a data form
- Copy and paste validation rules
- Defined at grid, row/column and/or cell level
- Precedence for multiple validation rules



Validation Rule Creation

http://epm1112:19000 - Data Validation Rule Builder: New Rule - Microsoft Internet Explorer

Add Rule Delete Duplicate View Rule

Location: Column C

Name: New Rule

Description:


Enable validation rule
 Custom grouping

	Condition	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
-	IF	Current Cell Value		<	Value	0	<input checked="" type="checkbox"/>	
	THEN	Process Cell					<input checked="" type="checkbox"/>	
	ELSE	Process Cell					<input checked="" type="checkbox"/>	

Help Validate Ok Cancel

http://epm1112:19000 - Process Cell - Microsoft Internet Explorer

Format Cell

Cell Background Color : 

Validation Message:

Display message in the Data Validation Messages pane

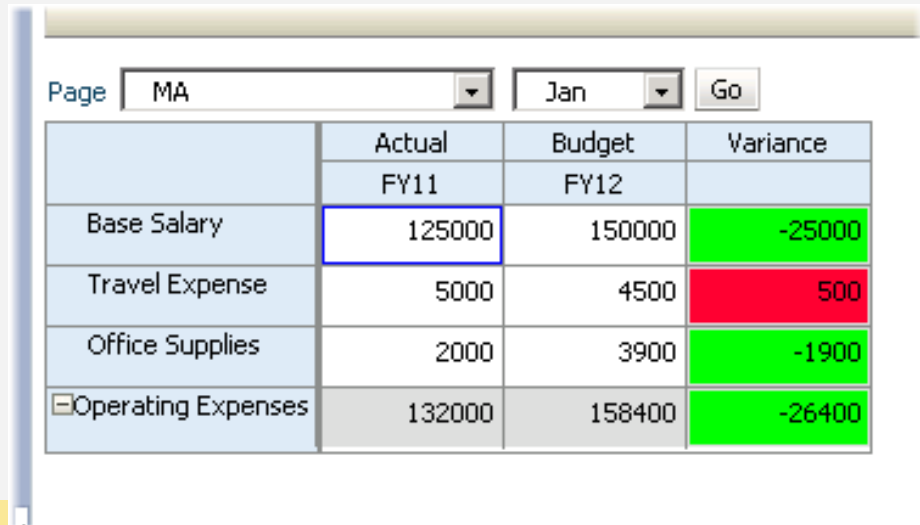
Process Management

None Update Promotional Path Do Not Promote



Validation Rule Result

- Traffic lighting only
- Doesn't prevent the user from saving data*
- *Workflow is the way to “catch” this
- Use validation rules to show valid data intersections



Page MA Jan Go

	Actual FY11	Budget FY12	Variance
Base Salary	125000	150000	-25000
Travel Expense	5000	4500	500
Office Supplies	2000	3900	-1900
<input type="checkbox"/> Operating Expenses	132000	158400	-26400



- Do not promote
- Update Promotion path
 - Before moving to selected Entity
 - Send to selected person as Owner, Reviewer, Notify
 - Sender/Receiver messages

Process Cell - Microsoft Internet Explorer

Format Cell

Cell Background Color:

Validation Message:

Process Management

None
 Update Promotional Path
 Do Not Promote

Add Delete Copy Paste

	Planning Unit Hierarchy	Planning Units	Promotional Path Condition		Assign		Annotations	
			Position	Planning Units	Role	Users	Sender Message	Reviewer Message
1	1 - Entity by Account and programs	1044	Before	10010	Reviewer	Arnold	need to ro...	this ratio...



So if Plan doesn't pass validation...

- No promotion ...

Process Definition

Select a valid scenario and version, and then click Go.

Scenario: Version:

[Out of Office Assistant](#)

Select Mine

<input type="checkbox"/>	Planning Unit	Process Status	Sub-Status	Current Owner	Location	Path	Action
<input type="checkbox"/>	Agencies	Under Review		No Owner		Details	
<input type="checkbox"/>	Administration and Finance	Under Review		No Owner		Details	
<input type="checkbox"/>	Education	Under Review		Robert_1	1000	Details	
<input type="checkbox"/>	Bureau of State Office Buildings	Under Review	No Additional Approval Required	No Owner		Details	
<input type="checkbox"/>	Department of Elementary & Secondary Education	Under Review	Failed: Invalid Data	Robert_1	1000	Details	
<input type="checkbox"/>	Department of Elementary & Secondary Education - 000 - Social Ed - English second language	Under Review		Robert_1	1000	Details	



On-the-Fly Task List to Fix Issue

- For the entity, a task list is generated on the fly to help you fix all invalid plans

Oracle Hyperion Planning, Fusion Edition - Microsoft Internet Explorer

Address: http://plandev3:8300/HyperionPlanning/LaunchPlanningCentral.jsp?Application=demo&RND=0.6776993797175803

Budget - Governor_1 - 1044

Enter Data - Elementary & Secondary Education Expenses Tracy Task 2 of 2 - Jan:Governor_1
Task List : Budget - Governor_1 - 1044

Currency: Local Fund: 01 Project: 0000000 BusinessUnit: 00000

1.0 Elementary & Secondary
1.1 Jan:Governor_1

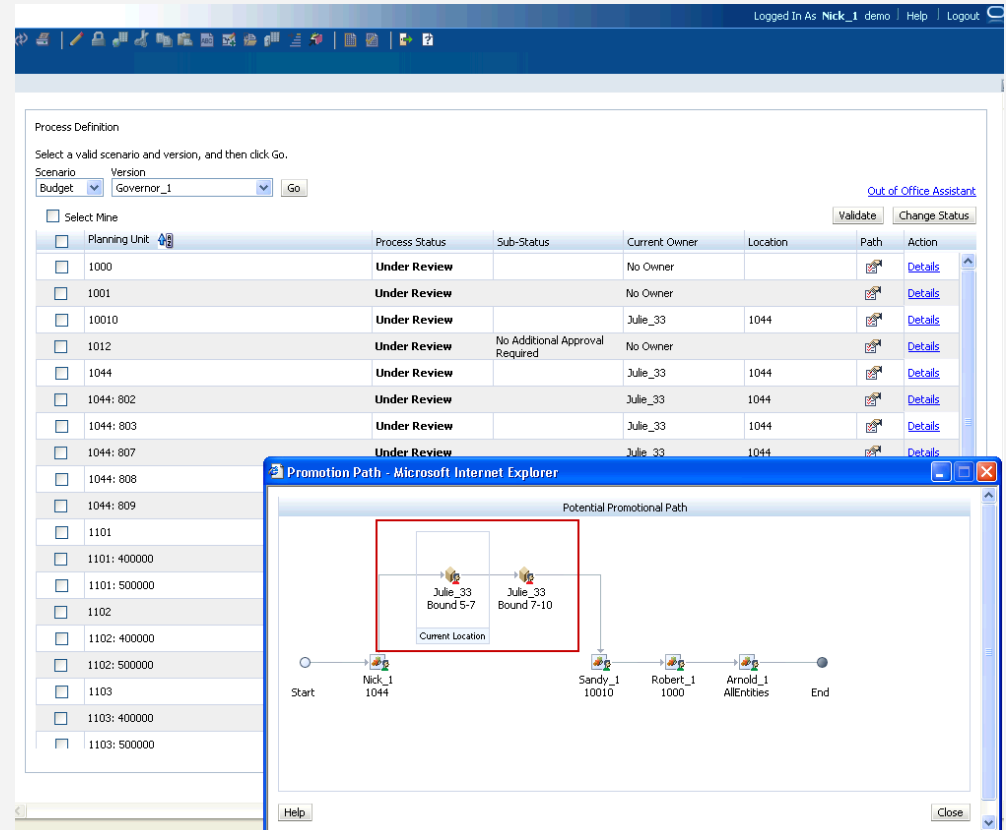
	Budget						Budget	Actual
	FY10						FY10	FY09
	591100	522200	571100	511100	560900	500000	500000	
802	0	5	5		100	110		
803								
807					200	200		
808								
1044	20				30	50		
1044	Tota	20	5	5	330	360		
10010	Tota	2862	2174	1861	1876	8773		
Education ratio	Form	4.1034993730	4.1034993730	4.1034993730	4.1034993730	4.1034993730	4.1034993730	

Complete Previous Incomplete Previous Next Next Incomplete



So if Plan doesn't pass validation...

- Dynamic promotional path
- Alternate reviewers/owners



The screenshot displays a web application interface for process management. The main window shows a 'Process Definition' section with a table of planning units. The table columns include 'Planning Unit', 'Process Status', 'Sub-Status', 'Current Owner', 'Location', 'Path', and 'Action'. The 'Process Status' for all units is 'Under Review'. A 'Promotion Path - Microsoft Internet Explorer' window is overlaid on the bottom right, showing a 'Potential Promotional Path' diagram. The diagram starts at 'Start' and goes through 'Nick_1 1044', 'Sandy_1 10010', 'Robert_1 1000', and 'Arnold_1 AllEntities' to 'End'. A red box highlights two nodes: 'Julie_33 Bound 5-7' and 'Julie_33 Bound 7-10', with 'Current Location' indicated below them.

Planning Unit	Process Status	Sub-Status	Current Owner	Location	Path	Action
1000	Under Review		No Owner			Details
1001	Under Review		No Owner			Details
10010	Under Review		Julie_33	1044		Details
1012	Under Review	No Additional Approval Required	No Owner			Details
1044	Under Review		Julie_33	1044		Details
1044: 802	Under Review		Julie_33	1044		Details
1044: 803	Under Review		Julie_33	1044		Details
1044: 807	Under Review		Julie_33	1044		Details
1044: 808	Under Review		Julie_33	1044		Details
1044: 809	Under Review		Julie_33	1044		Details
1101	Under Review		No Owner			Details
1101: 400000	Under Review		No Owner			Details
1101: 500000	Under Review		No Owner			Details
1102	Under Review		No Owner			Details
1102: 400000	Under Review		No Owner			Details
1102: 500000	Under Review		No Owner			Details
1103	Under Review		No Owner			Details
1103: 400000	Under Review		No Owner			Details
1103: 500000	Under Review		No Owner			Details



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
- 3. ASO Reporting Cubes Integration**
4. Utilities
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
8. Batch Bursting
9. LCM
10. Drill Through via FDM



The Old Way

- Report Script >> Text File/SQL table >> Load Rule
- CalcExport Script >> Text File/SQL table >> Load Rule

- Place temporary place to store data before loading
- Multiple manual steps
- Maxl to automate



- Map Planning data to ASO application
- Map Smart Lists to Dimensions in ASO application
- Benefit
 - ASO Benefits (many dimensions, members)
 - Easy way to integrate data (no partitions required)
 - Report on Smart Lists (subtotal, “text” displays)
- Process
 - Planning application exists
 - ASO application exists
 - Create mapping
 - Push or Clear and Push Data



Create a Mapping – Step 1

Select Applications | Map Dimensions | Point of View

Details

Application Mapping Name:

Description:

Source Application

Application: demo

Plan Type:

Reporting Application

<input type="checkbox"/>	Default:plandev3
<input type="checkbox"/>	plandev2
<input type="checkbox"/>	plandev3
<input type="checkbox"/>	Demo
<input type="checkbox"/>	Sample
<input type="checkbox"/>	Sample_U
<input type="checkbox"/>	Samppart
<input type="checkbox"/>	Sampeast
<input type="checkbox"/>	ASOsamp
<input type="checkbox"/>	totplan3
<input type="checkbox"/>	TP_ASO

Add Server | Delete Server | Edit Server

Help



Create a Mapping – Step 2

- Map source dimensions to reporting dimensions
- Available options – Not Linked, Dimension to Dimension or Smart List to Dimension

Select Applications | **Map Dimensions** | Point of View

Dimension used for Smart List mapping: Account

Planning Application (demo)			Reporting Application (PSB_ASD)
Mapping Type	Dimension / Smart List Name	Member Selection	Dimension Name
Dimension to Dimension	Account	Salary Element Cost,Business Unit Segm	Account
Dimension to Dimension	Period	ILvl0Descendants(Period)	Period
Dimension to Dimension	Year	ILvl0Descendants(Year)	Year
Dimension to Dimension	Scenario	Budget	Scenario
Dimension to Dimension	Currency	ILvl0Descendants(Currency)	Currency
Dimension to Dimension	Entity	ILvl0Descendants(Entity)	Entity
Smart List to Dimension	Business_Unit_List	Business Unit Segment	BusinessUnit
Smart List to Dimension	Fund_list	Fund Segment	Fund
Smart List to Dimension	Program_list	Program Segment	Program
Smart List to Dimension	Project_list	Project Segment	Project
Not Linked	Employee	ILvl0Descendants(Employee)	Employee
Dimension to Dimension	Version	Governor_1	Version




Help | Save | Save As... | Back | Next | Cancel



Create a Mapping – Step 3

Select Applications | Map Dimensions | **Point of View**

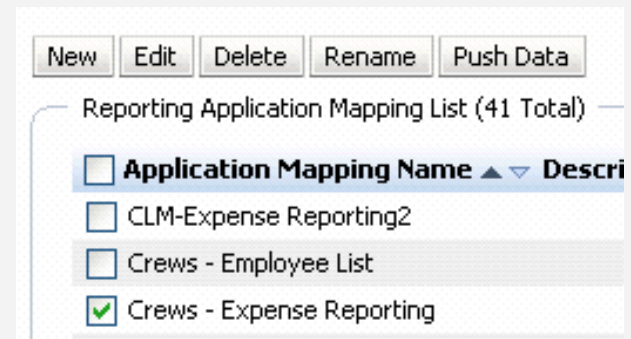
Point of View Dimension(s) demo

Dimensions	Member
Position	<input type="text" value="New Position1"/> 
LineItem	<input type="text" value="Distribution1"/> 
Elements	<input type="text" value="NoElement"/> 



Push Data

- Consider Clear and Push (don't want to duplicate data)
- Behind the scenes, calc script export to get the data
- Logical clear for ASO database
- Load to an ASO slice*



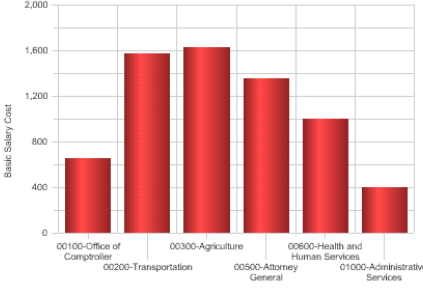
Available for Reporting and Analysis

Oracle BI Dashboards

Expenses | **By Fund, program, BU and Project** | Employee lists

By Business Unit

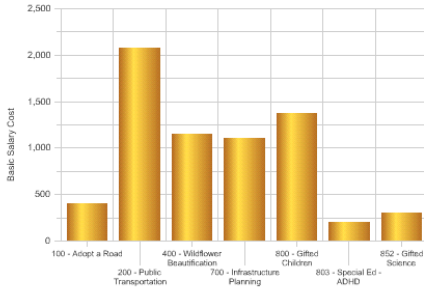
Business Units	Basic Salary Cost
00100-Office of Comptroller	650
00200-Transportation	1,570
00300-Agriculture	1,830
00500-Attorney General	1,350
00600-Health and Human Services	1,000
01000-Administrative Services	400
TB-Total Business Units Total	6,600



Gen4,Version is equal to Governor_1
[Refresh](#)

By program

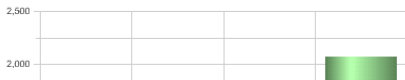
Programs	Basic Salary Cost
100 - Adopt a Road	400
200 - Public Transportation	2,060
400 - Wildflower Beautification	1,150
700 - Infrastructure Planning	1,100
800 - Gifted Children	1,370
803 - Special Ed - ADHD	200
852 - Gifted Science	300
Program Total	6,600



[Refresh](#)

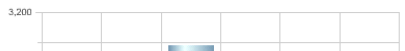
By Fund

Funds	Basic Salary Cost
01 - General Fund	1,780
02 - Eroheat	1,250
03 - Clean Energy Fund	1,500
04 - Lottery Commission	2,070
Fund Total	6,600



By Project

Projects	Basic Salary Cost
0000000 - Unspecified Project	300
1000000 - Administrative Project	2,430
2221010 - Joint Project	2,770
3000020 - Low Income Housing Project	800
3015000 - Retainage Project	200
3020000 - Safe Schools Program	100
Project Total	6,600



HomePage | Salary by Fun... | demo - Map R... | Oracle BI Ans...



Sync ASO Members to Smart List

- You can sync members from ASO to Smart List values

Create Edit Delete Synchronize

Smart Lists (41 Total)

<input type="checkbox"/>	Smart Lists
<input type="checkbox"/>	Approval_Status
<input type="checkbox"/>	Business_Unit_List
<input type="checkbox"/>	Business_Unit_List_desc
<input type="checkbox"/>	Custom_Salary_Spreads
<input type="checkbox"/>	Department_List
<input type="checkbox"/>	Department_List_desc
<input type="checkbox"/>	earning_type
<input type="checkbox"/>	ElemType
<input type="checkbox"/>	Emp_status
<input type="checkbox"/>	Employee_Type
<input type="checkbox"/>	Frequency
<input type="checkbox"/>	FTStatus
<input checked="" type="checkbox"/>	Fund_list
<input type="checkbox"/>	fund_list_desc



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
3. ASO Reporting Cubes Integration
4. **Utilities**
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
8. Batch Bursting
9. LCM
10. Drill Through via FDM



BroadCastMessage.cmd	1 KB	Windows Command ...	12/17/2
CalcMgrCmdLineLauncher.cmd	1 KB	Windows Command ...	12/17/2
CubeRefresh.cmd	1 KB	Windows Command ...	12/17/2
DeleteSharedDescendants.cmd	1 KB	Windows Command ...	12/17/2
ExportSecurity.cmd	1 KB	Windows Command ...	12/17/2
FormDefUtil.cmd	1 KB	Windows Command ...	12/17/2
HBRMigrateSecurity.cmd	1 KB	Windows Command ...	12/17/2
HspCssMigrator.dll	116 KB	Application Extension	12/17/2
HspUnlockApp.cmd	1 KB	Windows Command ...	12/17/2
ImportFormDefinition.bat	1 KB	Windows Batch File	12/17/2
ImportSecurity.cmd	1 KB	Windows Command ...	12/17/2
MemberFormula.cmd	1 KB	Windows Command ...	12/17/2
MemberFormulaSync.cmd	1 KB	Windows Command ...	12/17/2
OutlineLoad.cmd	1 KB	Windows Command ...	12/17/2
PasswordEncryption.cmd	1 KB	Windows Command ...	12/17/2
PropFileMig.cmd	1 KB	Windows Command ...	12/17/2
ProvisionUsers.cmd	1 KB	Windows Command ...	12/17/2
setHPenv.bat	4 KB	Windows Batch File	12/17/2
setHPenv.upd	4 KB	UPD File	12/17/2
SortMember.cmd	1 KB	Windows Command ...	12/17/2
start.bat	1 KB	Windows Batch File	12/17/2
stop.bat	1 KB	Windows Batch File	12/17/2
TaskListDefUtil.cmd	1 KB	Windows Command ...	12/17/2
UpdateUsers.cmd	1 KB	Windows Command ...	12/17/2
UserMigrUtil.exe	179 KB	Application	12/17/2




























Suppressing Password Prompts

- Passwords can be suppressed when running utilities
 - Helpful when you don't want to stay up until 2am to launch a process
 - Optional
- PasswordEncryption utility
 - Creates a file that stores the password in encrypted form
 - Each password file contains one password
 - You choose the directory when running the utility
- After the password file is created, you can use the `-f:passwordfile` option as the first parameter in the command line
 - Will skip the password prompt and use the password from the encrypted file



ExportSecurity.cmd

 BroadcastMessage.cmd	1 KB	Windows Command ...	12/17/2
 CalcMgrCmdLineLauncher.cmd	1 KB	Windows Command ...	12/17/2
 CubeRefresh.cmd	1 KB	Windows Command ...	12/17/2
 DeleteSharedDescendants.cmd	1 KB	Windows Command ...	12/17/2
 ExportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 FormDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 HBRMigrateSecurity.cmd	1 KB	Windows Command ...	12/17/2
 HspCssMigrator.dll	116 KB	Application Extension	12/17/2
 HspUnlockApp.cmd	1 KB	Windows Command ...	12/17/2
 ImportFormDefinition.bat	1 KB	Windows Batch File	12/17/2
 ImportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormula.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormulaSync.cmd	1 KB	Windows Command ...	12/17/2
 OutlineLoad.cmd	1 KB	Windows Command ...	12/17/2
 PasswordEncryption.cmd	1 KB	Windows Command ...	12/17/2
 PropFileMig.cmd	1 KB	Windows Command ...	12/17/2
 ProvisionUsers.cmd	1 KB	Windows Command ...	12/17/2
 setHPenv.bat	4 KB	Windows Batch File	12/17/2
 setHPenv.upd	4 KB	UPD File	12/17/2
 SortMember.cmd	1 KB	Windows Command ...	12/17/2
 start.bat	1 KB	Windows Batch File	12/17/2
 stop.bat	1 KB	Windows Batch File	12/17/2
 TaskListDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 UpdateUsers.cmd	1 KB	Windows Command ...	12/17/2
 UserMigrUtil.exe	179 KB	Application	12/17/2



ExportSecurity.cmd

- Export Planning access permissions to the SecFile.txt file
 - Exports security for members, data forms, data form folders, task lists, Calculation Manager business rules, Calculation Manager business rules folders
 - Can export users or groups
- You can then export / import access permissions across applications



ExportSecurity.cmd

- `ExportSecurity.cmd [-f:passwordFile]
/A=appName, /U=username,
[/S=searchCriteria|/S_USER=user|/S_G
ROUP=group],
[/S_MEMBER=memberName|/S_MEMBER_ID=m
emberName
|/S_MEMBER_D=memberName|/S_MEMBER_IC
=memberName|/S_MEMBER_C=memberName],
[/DELIM=delim] ,
[/DEBUG=true|false], [/TO_FILE=fileNa
me], [/HELP=Y]`



SecFile.txt

```
User1,DataForm2,read,MEMBER,SL_COMPOSITE
```


























```
User2,Folder3,write,MEMBER,SL_FORMFOLDER
```

```
User3,DataForm4,write,MEMBER,SL_FORM
```

```
"North America",Account101,write,MEMBER,SL_CALCFOLDER
```



ImportSecurity.cmd

 BroadCastMessage.cmd	1 KB	Windows Command ...	12/17/2
 CalcMgrCmdLineLauncher.cmd	1 KB	Windows Command ...	12/17/2
 CubeRefresh.cmd	1 KB	Windows Command ...	12/17/2
 DeleteSharedDescendants.cmd	1 KB	Windows Command ...	12/17/2
 ExportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 FormDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 HBRMigrateSecurity.cmd	1 KB	Windows Command ...	12/17/2
 HspCssMigrator.dll	116 KB	Application Extension	12/17/2
 HspUnlockApp.cmd	1 KB	Windows Command ...	12/17/2
 ImportFormDefinition.bat	1 KB	Windows Batch File	12/17/2
 ImportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormula.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormulaSync.cmd	1 KB	Windows Command ...	12/17/2
 OutlineLoad.cmd	1 KB	Windows Command ...	12/17/2
 PasswordEncryption.cmd	1 KB	Windows Command ...	12/17/2
 PropFileMig.cmd	1 KB	Windows Command ...	12/17/2
 ProvisionUsers.cmd	1 KB	Windows Command ...	12/17/2
 setHPenv.bat	4 KB	Windows Batch File	12/17/2
 setHPenv.upd	4 KB	UPD File	12/17/2
 SortMember.cmd	1 KB	Windows Command ...	12/17/2
 start.bat	1 KB	Windows Batch File	12/17/2
 stop.bat	1 KB	Windows Batch File	12/17/2
 TaskListDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 UpdateUsers.cmd	1 KB	Windows Command ...	12/17/2
 UserMigrUtil.exe	179 KB	Application	12/17/2



ImportSecurity.cmd

- Load access permissions for users and groups from a text file
- Imports security for members, data forms, data form folders, task lists, Calculation Manager business rules, Calculation Manager business rules folders
- Overwrites existing permissions
- SL_CLEARALL clears existing access permissions




























ImportSecurity.cmd

- `ImportSecurity.cmd [-f:passwordFile]
"appName,username,[delimiter],[RUN_SILENT],
[SL_CLEARALL]"`
- `ImportSecurity.cmd "entbud,admin,SL_TAB,1"`
 - 0 no messages, 1 messages



FormDefUtil.cmd

 BroadCastMessage.cmd	1 KB	Windows Command ...	12/17/2
 CalcMgrCmdLineLauncher.cmd	1 KB	Windows Command ...	12/17/2
 CubeRefresh.cmd	1 KB	Windows Command ...	12/17/2
 DeleteSharedDescendants.cmd	1 KB	Windows Command ...	12/17/2
 ExportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 FormDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 HBRMigrateSecurity.cmd	1 KB	Windows Command ...	12/17/2
 HspCssMigrator.dll	116 KB	Application Extension	12/17/2
 HspUnlockApp.cmd	1 KB	Windows Command ...	12/17/2
 ImportFormDefinition.bat	1 KB	Windows Batch File	12/17/2
 ImportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormula.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormulaSync.cmd	1 KB	Windows Command ...	12/17/2
 OutlineLoad.cmd	1 KB	Windows Command ...	12/17/2
 PasswordEncryption.cmd	1 KB	Windows Command ...	12/17/2
 PropFileMig.cmd	1 KB	Windows Command ...	12/17/2
 ProvisionUsers.cmd	1 KB	Windows Command ...	12/17/2
 setHPenv.bat	4 KB	Windows Batch File	12/17/2
 setHPenv.upd	4 KB	UPD File	12/17/2
 SortMember.cmd	1 KB	Windows Command ...	12/17/2
 start.bat	1 KB	Windows Batch File	12/17/2
 stop.bat	1 KB	Windows Batch File	12/17/2
 TaskListDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 UpdateUsers.cmd	1 KB	Windows Command ...	12/17/2
 UserMigrUtil.exe	179 KB	Application	12/17/2




























- Move data forms between Planning applications
- Export or import form definitions to and from an XML file
- -all allows you to import / export all forms
- `formdefutil [-f:passwordFile]import|exportfilename|formname|-all server name user name application`



- **Import a form definition**
 - `FormDefUtil.cmd import c:\Hyperion\products\Planning\bin\form1.xml localhost admin entbud`
- **Export a form definition**
 - `FormDefUtil.cmd export Form1 localhost admin entbud`
- **Check out results in FormDefUtil.log**



OutlineLoad.cmd

 BroadCastMessage.cmd	1 KB	Windows Command ...	12/17/2
 CalcMgrCmdLineLauncher.cmd	1 KB	Windows Command ...	12/17/2
 CubeRefresh.cmd	1 KB	Windows Command ...	12/17/2
 DeleteSharedDescendants.cmd	1 KB	Windows Command ...	12/17/2
 ExportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 FormDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 HBRMigrateSecurity.cmd	1 KB	Windows Command ...	12/17/2
 HspCssMigrator.dll	116 KB	Application Extension	12/17/2
 HspUnlockApp.cmd	1 KB	Windows Command ...	12/17/2
 ImportFormDefinition.bat	1 KB	Windows Batch File	12/17/2
 ImportSecurity.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormula.cmd	1 KB	Windows Command ...	12/17/2
 MemberFormulaSync.cmd	1 KB	Windows Command ...	12/17/2
 OutlineLoad.cmd	1 KB	Windows Command ...	12/17/2
 PasswordEncryption.cmd	1 KB	Windows Command ...	12/17/2
 PropFileMig.cmd	1 KB	Windows Command ...	12/17/2
 ProvisionUsers.cmd	1 KB	Windows Command ...	12/17/2
 setHPenv.bat	4 KB	Windows Batch File	12/17/2
 setHPenv.upd	4 KB	UPD File	12/17/2
 SortMember.cmd	1 KB	Windows Command ...	12/17/2
 start.bat	1 KB	Windows Batch File	12/17/2
 stop.bat	1 KB	Windows Batch File	12/17/2
 TaskListDefUtil.cmd	1 KB	Windows Command ...	12/17/2
 UpdateUsers.cmd	1 KB	Windows Command ...	12/17/2
 UserMigrUtil.exe	179 KB	Application	12/17/2



Outline Load Utility

- Used to load metadata or data for Account, Period, Year, Scenario, Version, Currency, Entity, user-defined dimensions, attributes, UDAs and exchange rates
- Steps
 - Set the `DIRECT_DATA_LOAD` AND `DATA_LOAD_FILE_PATH` system variables if loading data
 - Create the load file for each dimension and/or data set to load
 - Test the load files
 - Run the utility
- 25 different parameters
- You can now export metadata too in 11.1.2.1!





Update Metadata

```
Parent, Child, Alias, Storage, Consol  
Account, Metrics, , Label, ~  
Metrics, Avg_wolverines_Juggled, Average wolverines Juggled, Stored, ~  
Metrics, Avg_wolverines_Dropped, Average wolverines Dropped, Stored, ~  
Metrics, Headcount, , Stored, ~
```

```
C:\Hyperion\products\Planning\bin>OutlineLoad  
/A:test /U:admin /M /N  
/I:c:\outline1_ent.csv /D:Account  
/L:c:/outlineLoad.log /X:c:/outlineLoad.exc
```



 Properties have been saved to the system database. The changes will take effect when the Application Server is restarted. 

Application Properties

System Properties

Add

Property Name	Property Value
DATA_LOAD_FILE_PATH	C:\HyperionWorkFiles\OutlineLoad\PlanSamp.txt
DIRECT_DATA_LOAD	False
SECURITY_PROVIDER	CSS
SMART_VIEW_DISPLAY_WARNING	yes
SMART_VIEW_FORCE_INSTALL	no
SMART_VIEW_INSTALL_FILES_DIR	C:\Hyperion\products\Planning\bin\SmartView
SMARTVIEW_COMPRESSION_THRESHOLD	-1



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
3. ASO Reporting Cubes Integration
4. Utilities
- 5. Full Planning functionality in Smart View Excel**
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
8. Batch Bursting
9. LCM
10. Drill Through via FDM



Smart View and Planning

- Data Validation / Traffic Lighting
- Task List in Outlook
- Task List in Excel
- Composite Forms
- Process Management/Workflow
- Dynamic User Variables
- User Preference Setting
- Copy Version
- Job Console
- Task List Reports
- Context Sensitive Right Click Menus on Forms
- Document Attachment for Data Cells and Process Management
- Cell Level Launch Menus



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
3. ASO Reporting Cubes Integration
4. Utilities
5. Full Planning functionality in Smart View Excel
- 6. OBIEE for Reporting Against Planning Repository**
7. Drill Through with FDM / ERPI
8. Batch Bursting
9. LCM
10. Adhoc Grids



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
3. ASO Reporting Cubes Integration
4. Utilities
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
- 7. Drill Through with FDM / ERPI**
8. Batch Bursting
9. LCM
10. Adhoc Grids



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
3. ASO Reporting Cubes Integration
4. Utilities
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
- 8. Batch Bursting**
9. LCM
10. Adhoc Grids



Batch Bursting

- Easier way to distribute reports
- Previous – You could use custom code macros, FR command line schedule, and other to burst reports
- Run a batch for more than one dimension member on the Batch POV
- Output to:
 - File system
 - Repository
 - Email
- Can send different members to different emails
- Burst on one dimension



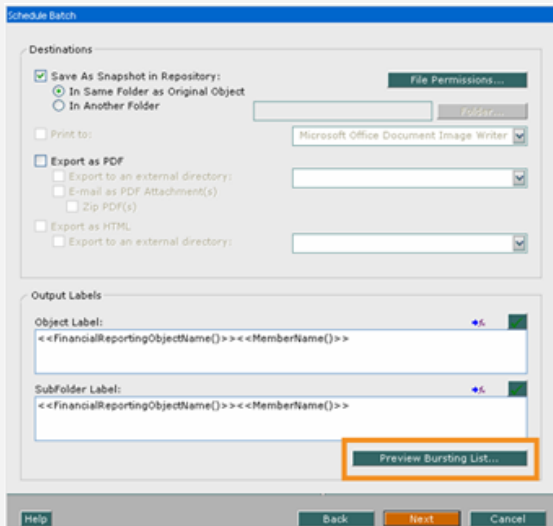
Batch Bursting Features

- Select multiple dimension members and generate separate batch out files for each (e.g. PDF, Snapshot)
 - Specify output folder and file names
 - Email PDF output to different recipients
 - Option to zip output
- Change the subject and body text of the email that the Batch Scheduler sends
 - Group email attachments for each recipient
 - Limit the attachment size (via properties file setting)
- Setup may be done using the bursting destination file
 - CSV format (use Excel to edit and save as csv)
 - Define members, email addresses, object and folder names (if defined at the member level)
 - Create via export option



Bursting Destination List

- Bursting destination file allows you to send different outputs to
- Bursting list preview displays fields in the Bursting Destination file
- Create (initial) Bursting Destination file via Export



Schedule Batch

Destinations

Save As Snapshot in Repository:

In Same Folder as Original Object

In Another Folder

Print to: Microsoft Office Document Image Writer

Export as PDF

Export to an external directory:

E-mail as PDF Attachment(s)

Zip PDF(s)

Export as HTML

Export to an external directory:

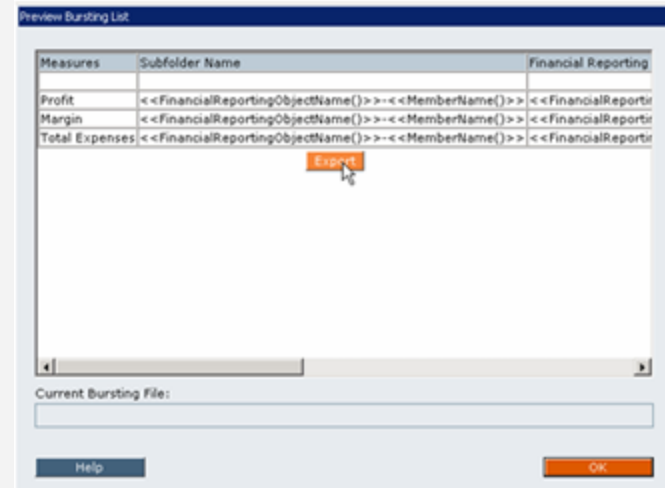
Output Labels

Object Label: <<FinancialReportingObjectName()>><<MemberName()>>

Subfolder Label: <<FinancialReportingObjectName()>><<MemberName()>>

Preview Bursting List...

Help Back Next Cancel



Preview Bursting List

Measures	Subfolder Name	Financial Reporting
Profit	<<FinancialReportingObjectName()>><<MemberName()>>	<<FinancialReporti
Margin	<<FinancialReportingObjectName()>><<MemberName()>>	<<FinancialReporti
Total Expenses	<<FinancialReportingObjectName()>><<MemberName()>>	<<FinancialReporti

Export

Current Bursting File:

Help OK



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
3. ASO Reporting Cubes Integration
4. Utilities
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
8. Batch Bursting
- 9. LCM**
10. Adhoc Grids



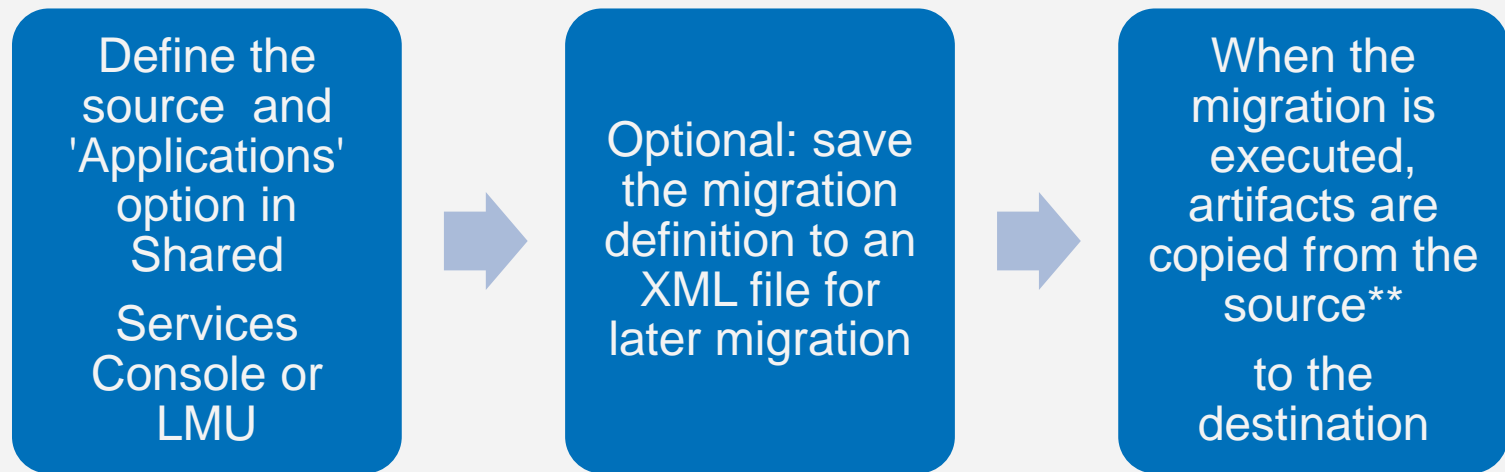
What is LCM?

- Life Cycle Management
- Provides a consistent application migration
- Integrated into Shared Services Console
- Ability to do migration
 - Live
 - Scheduled
 - Selected artifacts
 - All Artifacts



Application to Application Migration

- If Both Servers are registered in the same instance of Shared Services



•**Application or Server



Planning Migration

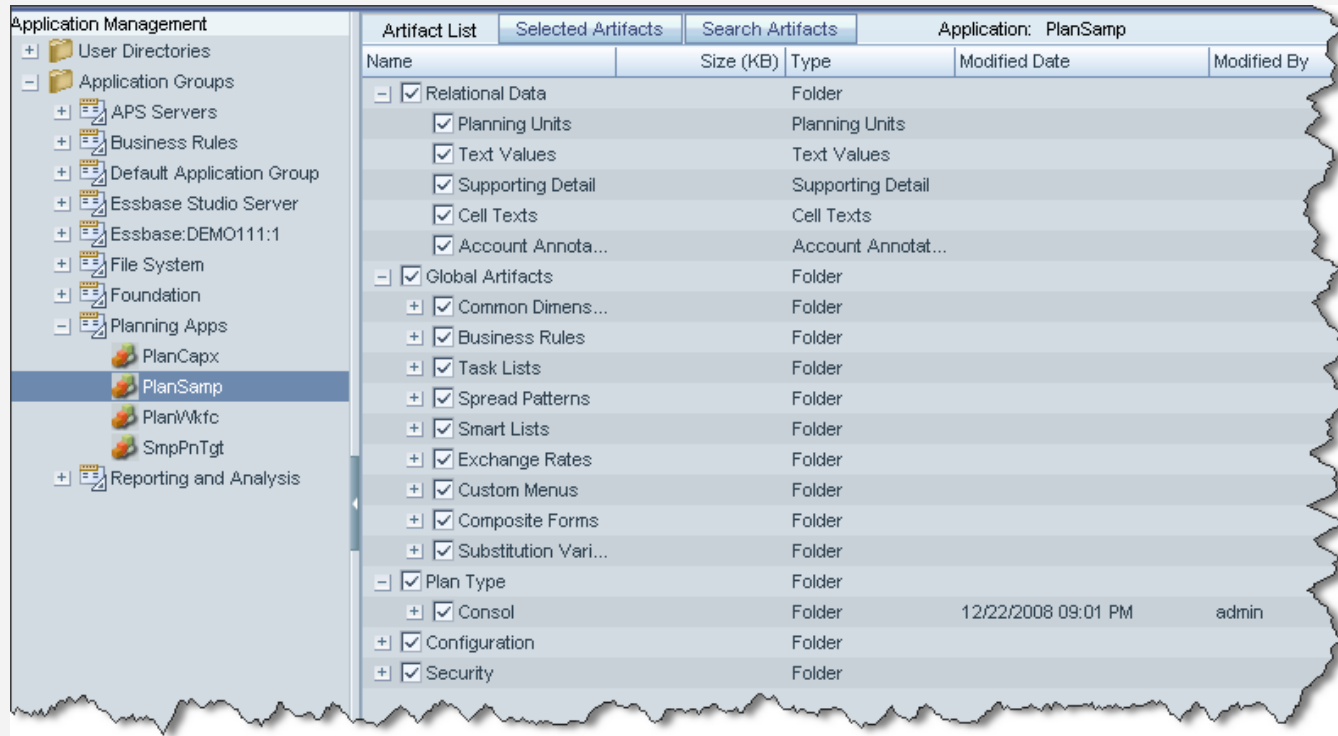
- Substitution Variables
 - Rule Files
 - Calculation Scripts
 - Report Scripts
 - Excel Files
 - Location Aliases
 - Security Filters
 - Text Files
 - Database Outlines
 - Data (New in 11.1.2)

 - Creates target app in 11.1.2.1
- *No more backend steps for relational repository exports and Essbase object copies ... though sometimes I miss the good ol' days*



Planning Migration

- Select the PlanSamp (source) Planning application and click the top level artifact nodes (Relational Data, Global Artifacts, Plan Type, Configuration, and Security). The individual artifacts will be selected as well.



The screenshot displays the 'Application Management' interface for the 'PlanSamp' application. The left pane shows a tree view of application components, with 'PlanSamp' selected. The right pane shows the 'Artifact List' for 'PlanSamp', which includes the following items:

Name	Size (KB)	Type	Modified Date	Modified By
<input checked="" type="checkbox"/> Relational Data		Folder		
<input checked="" type="checkbox"/> Planning Units		Planning Units		
<input checked="" type="checkbox"/> Text Values		Text Values		
<input checked="" type="checkbox"/> Supporting Detail		Supporting Detail		
<input checked="" type="checkbox"/> Cell Texts		Cell Texts		
<input checked="" type="checkbox"/> Account Annota...		Account Annotat...		
<input checked="" type="checkbox"/> Global Artifacts		Folder		
<input checked="" type="checkbox"/> Common Dimens...		Folder		
<input checked="" type="checkbox"/> Business Rules		Folder		
<input checked="" type="checkbox"/> Task Lists		Folder		
<input checked="" type="checkbox"/> Spread Patterns		Folder		
<input checked="" type="checkbox"/> Smart Lists		Folder		
<input checked="" type="checkbox"/> Exchange Rates		Folder		
<input checked="" type="checkbox"/> Custom Menus		Folder		
<input checked="" type="checkbox"/> Composite Forms		Folder		
<input checked="" type="checkbox"/> Substitution Vari...		Folder		
<input checked="" type="checkbox"/> Plan Type		Folder		
<input checked="" type="checkbox"/> Consol		Folder	12/22/2008 09:01 PM	admin
<input checked="" type="checkbox"/> Configuration		Folder		
<input checked="" type="checkbox"/> Security		Folder		



Top Reasons Why You Don't Have to Customize Planning

1. New Data Form Designer
2. Validation Rules
3. ASO Reporting Cubes Integration
4. Utilities
5. Full Planning functionality in Smart View Excel
6. OBIEE for Reporting Against Planning Repository
7. Drill Through with FDM / ERPI
8. Batch Bursting
9. LCM
- 10. Adhoc Grids**



Flexibility for End Users

- Anyone miss the Planning Spreadsheet Add-in?
 - Too much freedom
 - But for some users, it was important
- Where did the _users go?
- Then we had Adhoc write access

- Now a more complete solution for users with Adhoc capabilities in both the web and Smart View



Adhoc Grids in Planning



Still May Have to Do These...

- Audit Trail tables; archiving
- Style Sheets
- Essbase Studio Drillthrough



- First you must have a relational source that contains tables for each of the drill through dimensions that match the dimensions in the Planning application
 - Hierarchies, member names
- Create Essbase Studio components for the Planning application
 - Data Sources, Mini-model, Hierarchies (only need those dimensions for the Drill Through reports), Cube Schema, Essbase Model, Drill through reports
- Studio Redeployment of cube model to the Planning Application >> Update All Hierarchies
 - Will associate the drill through reports with the defined dimensions
- Must Redeploy / “Update All Hierarchies” after every refresh

- Non-Hacking alternatives include FDM and ERPI



Thank You!!

Edward Roske

info@interrel.com

BLOG: LookSmarter.blogspot.com

WEBSITE: www.interrel.com

TWITTER: Eroske