Creating Classic Planning Applications in Oracle® Hyperion Planning, Fusion Edition 11.1.2

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Purpose

This tutorial shows you how to create Planning applications using the Classic Planning Administration wizard.

Time to Complete

Approximately 1 hour.

Overview

You can create Planning applications using Classic Application Administration. To use Classic Application Administration, you must be assigned the appropriate roles, as described in the Oracle Hyperion Enterprise Performance Management System User and Role Security Guide.

For Classic Planning applications, you use Classic Application Wizard to create and delete applications, and register with Hyperion® Shared Services. When you create Classic applications, you can set them up to calculate business rules by using Business Rules or Calculation Manager.

Software and Hardware Requirements

The following is a list of software requirements:

Oracle Hyperion Planning Plus 11.1.2

Oracle Hyperion Planning Plus 11.1.2 includes the following components:

Oracle Hyperion Enterprise Performance Management System Release 11.1.2 - Start Here: Installation Documents and Readmes
Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition Release 11.1.2
Hyperion Enterprise Performance Management System Foundation Services Release 11.1.2
Oracle Hyperion Enterprise Performance Management System Additional Content Release 11.1.2
Oracle Hyperion Calculation Manager Release 11.1.2
Oracle Essbase Release 11.1.2
Oracle Essbase Clients Release 11.1.2
Oracle Essbase Spreadsheet Add-in Release 11.1.2
Oracle Hyperion Enterprise Performance Management Reporting and Analysis Core Components Release 11.1.2
Hyperion Web Analysis Release 11.1.2
Prerequisites

Before starting this tutorial, you should:

1. Have administrator access to a working installation of Oracle Hyperion Planning 11.1.2.

2. Have access to relational storage used to create a Planning data source.

3. Have administrator access to Administration Services Console.

4. Have defined an Essbase Server view in Administration Services Console.

Managing Planning Data Sources

Dimensions and members are stored in the Essbase databases and in the Planning repository (Planning relational database). Each Planning application requires a Planning repository.

To create Planning data sources:

1. Log on to Workspace.

2. Select Navigate, then Administer, then Classic Application Administration, and then Planning Administration.
3. In the left pane, click **Manage Data Source**.

You can also click the **Manage Data Source** button in the content pane.
4. Click **Create Data Source**.

   To create a data source, click Create Data Source.
   To edit a data source, select a data source and click Edit Data Source.
   To delete data sources, select data sources that are not associated with an application and click Delete Data Source.

5. Perform the following actions for the application database:

   Select a database platform. In this example, **Oracle** is selected.
   Enter the server that hosts your database. In this example, **localhost** is entered.
   Enter the database port number. The default port for the Oracle database is **1521**.
   Enter the Oracle service name or system identifier (SID). In this example, the Oracle SID is **ORCL**.
   Enter the user associated with the database schema. In this example, **ST01PLN2** is used.
   Enter the schema password.
   Click **Validate Database Connection**.

   The following message confirms that the connection was successful:
6. Enter the connection information to your Essbase Server, and click Validate Essbase Connection.

![Essbase Server Connection Form]

The following message confirms that the connection was successful:

![Essbase Connection Success Message]

7. Click Finish.

Creating a Classic Planning Application

To create a classic Planning application in Classic Application Administration:

1. In the left pane, click Create Application.

![Create Application Menu]

You can also click Create from Classic Application Wizard to start the application creation process.
2. On the Select tab, perform the following actions:

   Select a datasource. In this example, the ST01PLN2 datasource created in the previous topic is selected.
   Enter the name of the application. The name can contain up to eight characters. It must be different than an
   existing Essbase application. In this example, we name the application PlanBud.
   Enter an application description. In this example, Planning and Budgeting application is entered.
   Select a Shared Services Project (application group). In this example, the PlanBud application will be grouped
   under the Default Application Group.
   Select an instance (cluster) to use for the application. In this example, Default is selected.
   Select an application type. In this example, General is selected.
   For Calculation Module, select Business Rules or Calculation Manager. In this example, Calculation Manager
   is selected.

3. Select the Calendar tab.
4. Select the base time period, fiscal start year, fiscal start month, weekly distribution, and total years.

5. Select the **Currencies** tab.

6. Select the default application currency. If the application supports multiple currencies, select **Yes**.

7. Select the **Plan Types** tab.

8. Perform the following actions:

   Select **Plan Type 1** and **Plan Type 2**, and clear all other plan type selections. Enter a name for both plan types. In this example, **Incstmt** and **Balsheet** are entered.
9. Select the **Finish** tab.

10. Review your selections and click **Finish** to create the application.
Opening the Planning Application

When the application creation is successfully completed, the following message is displayed:

To open the Planning application in Workspace after creating it in Classic Application Administration:

1. In Workspace, select Navigate, then Applications, and then Refresh.

The Refresh menu option updates the navigation menu with new applications.

2. Select Navigate, then Applications, then Planning, and then [Application Name].
In this example, you open the *PlanBud* application.

3. The PlanBud application is displayed. After creating Classic Planning applications, you can add dimension members, data forms, menus, business rules, and task lists.

4. Select *Administration*, then *Manage*, and then *Dimensions*. 
You can manage dimensions, set performance settings, and change the evaluation order in Dimension Editor.

5. Select Administration, the Manage, and then Data Forms and Ad Hoc Grids.
The Data Form Management page is displayed.

6. After making changes to your application, you must refresh the Essbase database outline.

Select **Administration**, then **Application**, and then **Refresh Database**.

7. Make your selections and click **Refresh**.
The following example displays a Planning application with defined dimensions, members, data forms, and other Planning objects.

**Loading Data Into the Application**

Prior to loading data to the application, ensure that you:

- Have a Planning application with the required metadata.
- Have a data file that maps to the metadata defined in the application.
- Have administrator access to Planning and Administration Services Console.
- Have defined an Essbase Server view in Administration Services Console.

This tutorial shows you how to load data into the Incstmt plan type in the PlanBud application. To load data into the application:

1. Log on to **Administration Services Console**.

2. In the left pane, expand **Enterprise View**, then **Essbase Servers**, then [Server View], then **Applications**, then **Planbud**, and then [Plan Type].

   In this example, the PlanBud application is accessed from the UPKPS1RC4:1423 Essbase Server view. The Incstmt plan type is selected. Essbase refers to plan types as databases.
3. Select **Actions**, and then **Load data for "]Plan Type / Database]"**.

4. In the Data Load dialog box, click **Find Data File**.
5. Select the **File System** tab, locate your data file, and click **OK**.
6. Click OK to execute the data load process.

You can also select the **Abort on Error** option in the Data Load dialog box to stop the loading process when an error occurs.

The following progress box is displayed during the data load process:
7. When the data load process is completed, the Data Load Results dialog box displays a status of Success.

8. Open a data form in your Planning application to verify that data was loaded successfully.
Summary

In this tutorial, you have learned how to:

- Manage Planning datasources.
- Create a Classic Planning application.
- Open the Classic Planning application that you created.
- Load data into Planning applications.

Resources

- Oracle Essbase Database Administrator's Guide

To learn more about Oracle EPM System products, refer to OBEs, demos, and tutorials on the Learning Library.