

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

This tutorial contains the following sections:

[Purpose](#)

[Time to Complete](#)

[Overview](#)

[Software and Hardware Requirements](#)

[Prerequisites](#)

[Managing Planning Data Sources](#)

[Creating a Classic Planning Application](#)

[Opening the Planning Application](#)

[Loading Data Into the Application](#)

[Summary](#)

[Resources](#)

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 Hyperion Enterprise Performance Management Architect, Fusion Edition 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 Financial Reporting, Fusion Edition 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

Oracle Hyperion Planning, Fusion Edition Release 11.1.2

Optional: Hyperion Data Integration Management Adapters Release 11.1.1.1.0

Optional: Oracle Hyperion Smart View for Office, Fusion Edition Release 11.1.2

Optional: Oracle Data Integrator, Oracle Data Profiling, and Oracle Data Quality for Data Integrator 10g (10.1.3.5.0)

Optional: Oracle Identity Management 11g (11.1.1.1.0)

Relational storage databases are required in the installation and configuration of Oracle Hyperion Planning Plus 11.1.2. This tutorial requires a relational storage for the Classic Planning application. See the *Oracle Hyperion EPM System Release 11.1.2 - Start Here: Installation Documents and Readmes*.

Prerequisites

Before starting this tutorial, you should:

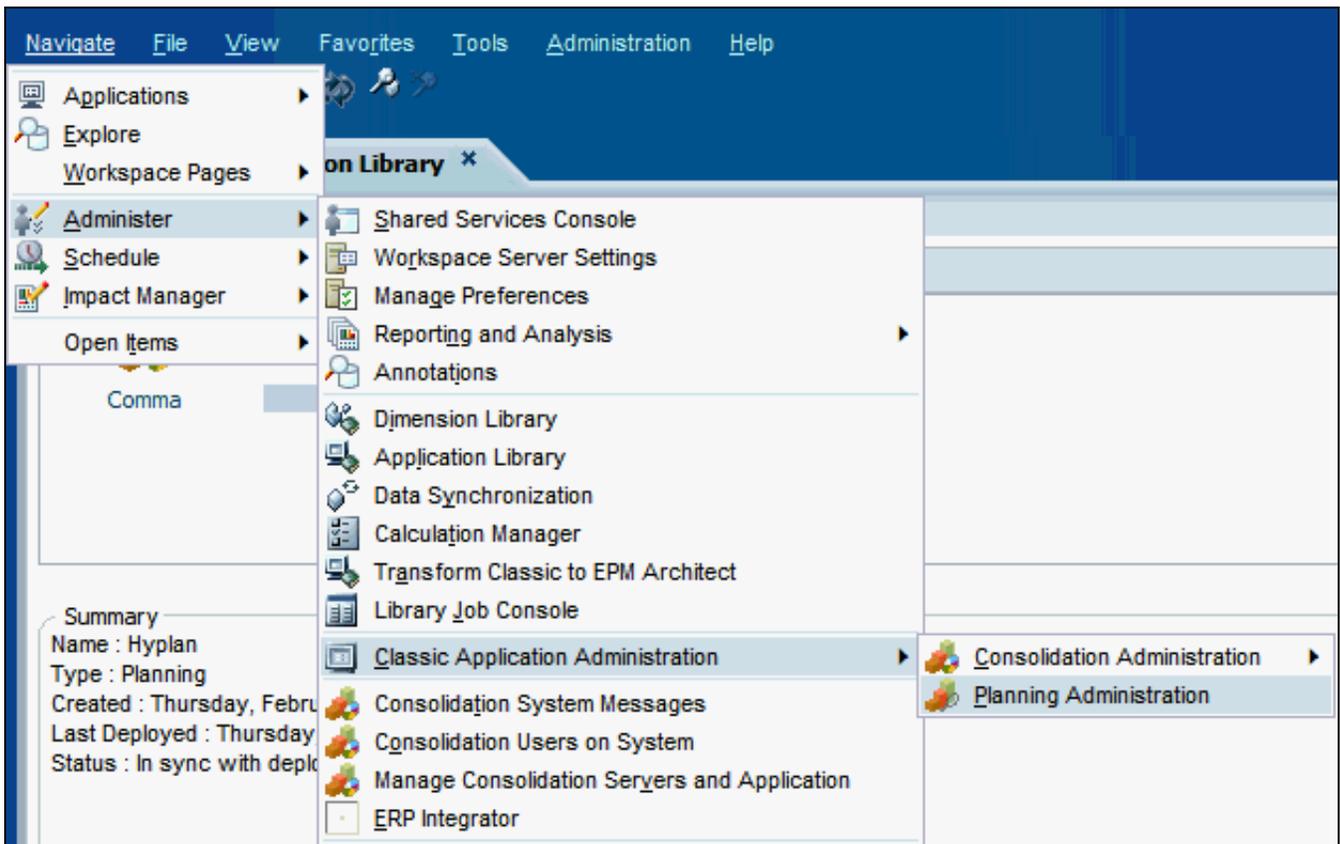
- 1 . Have administrator access to a working installation of Oracle Hyperion Planning 11.1.2.
- 2 . Have access to relational storage used to create a Planning data source.
- 3 . Have administrator access to Administration Services Console.
- 4 . Have defined an Essbase Server view in Administration Services Console.

Managing Planning Data Sources

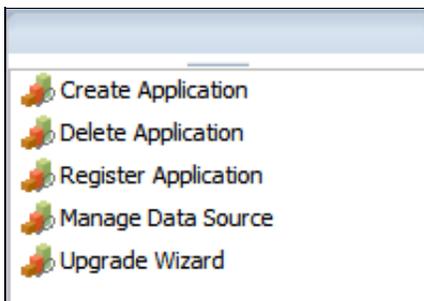
Dimensions and members are stored in the Essbase databases and in the Planning repository (Planning relational database). Each Planning application requires a Planning repository.

To create Planning data sources:

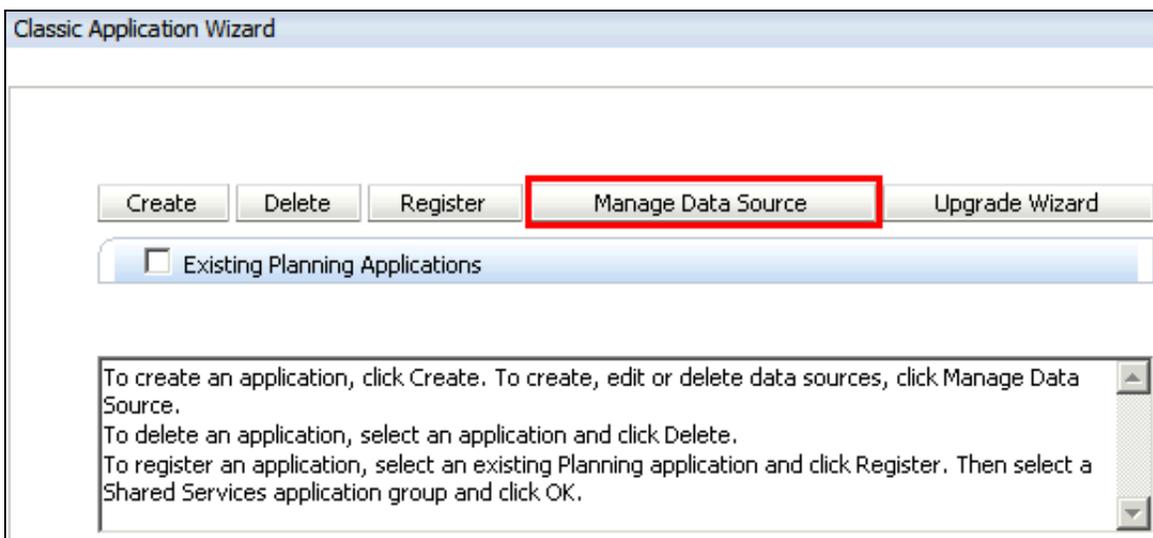
1. Log on to **Workspace**.
2. Select **Navigate**, then **Administer**, then **Classic Application Administration**, and then **Planning Administration**.



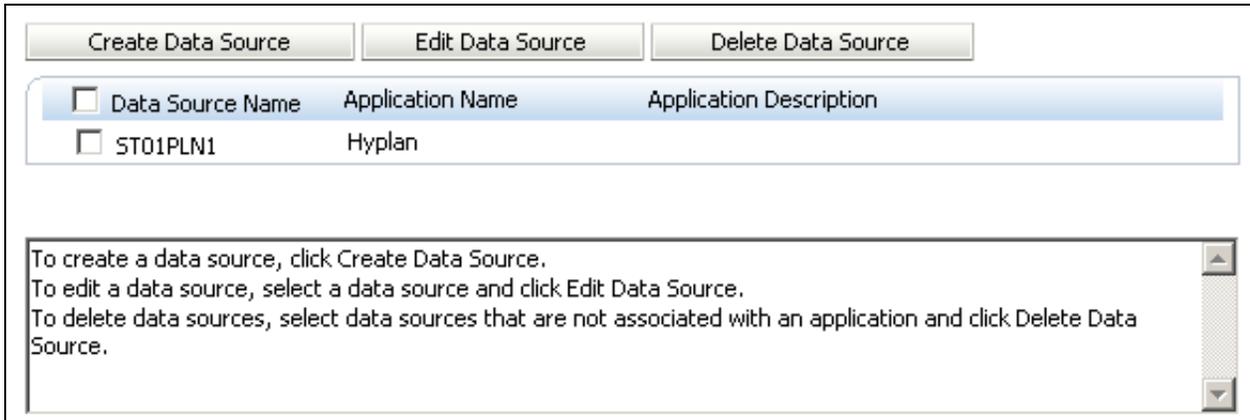
3. In the left pane, click **Manage Data Source**.



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



4. Click **Create Data Source**.

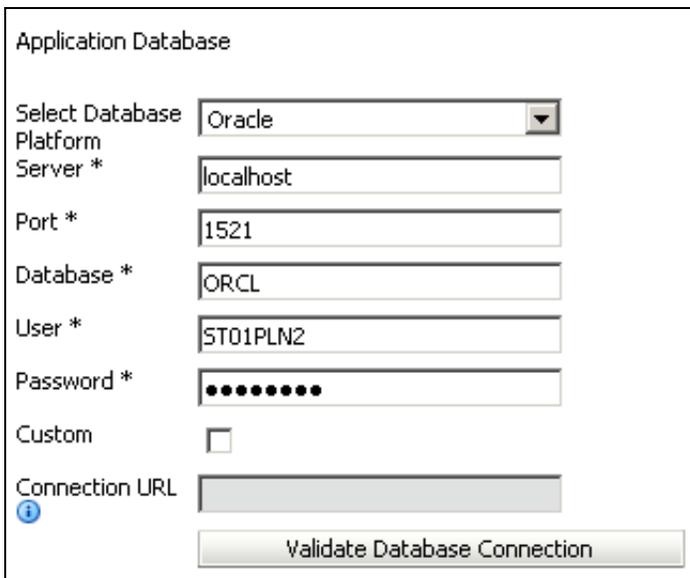


<input type="checkbox"/> Data Source Name	Application Name	Application Description
<input type="checkbox"/> ST01PLN1	Hyplan	

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**.



Application Database

Select Database Platform

Server *

Port *

Database *

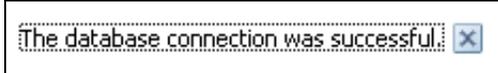
User *

Password *

Custom

Connection URL

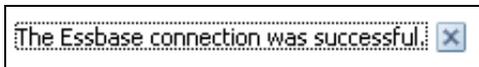
The following message confirms that the connection was successful:



6. Enter the connection information to your Essbase Server, and click Validate Essbase Connection.

A dialog box titled "Essbase Server" with a white background and a thin black border. It contains four input fields: "Server *" with the text "localhost", "User *" with the text "admin", "Password *" with ten black dots, and "Unicode Mode" with an unchecked checkbox. At the bottom center is a button labeled "Validate Essbase Connection".

The following message confirms that the connection was successful:

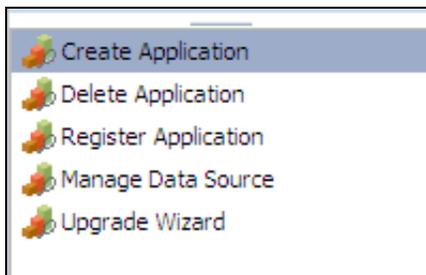


7. Click **Finish**.

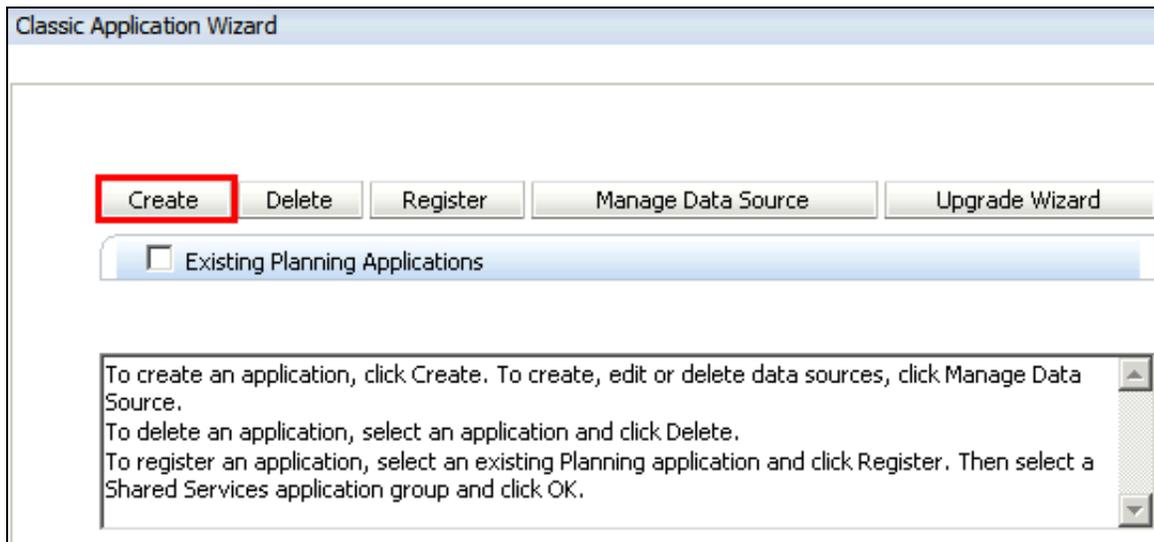
Creating a Classic Planning Application

To create a classic Planning application in Classic Application Administration:

1. In the left pane, click **Create Application**.

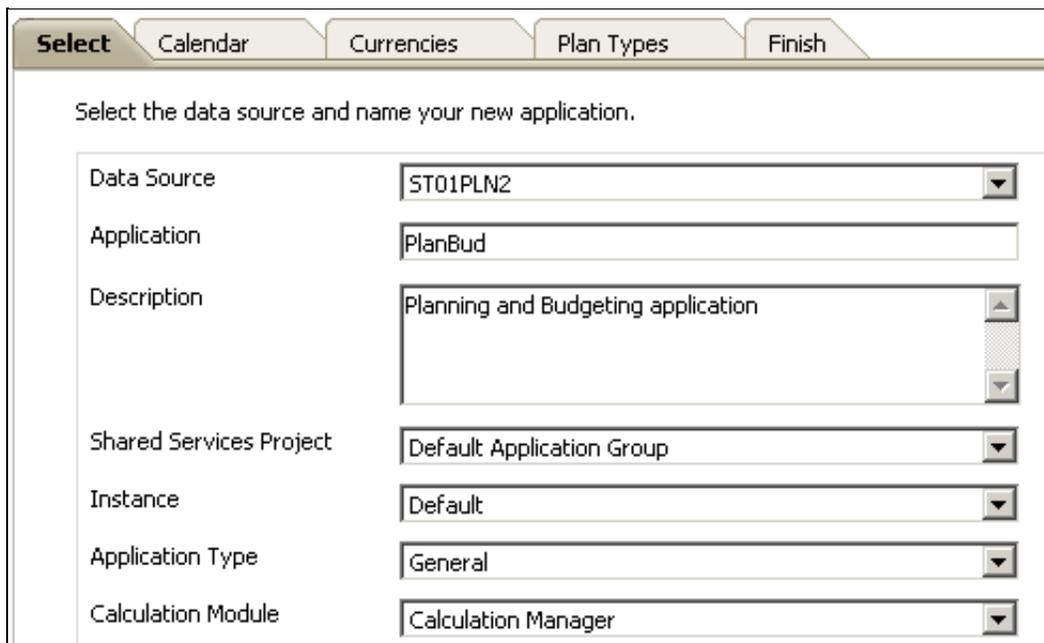


You can also click **Create** from Classic Application Wizard to start the application creation process.



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.

Select the base time period, weekly distribution, and calendar range for the application.

Base Time Period

- 12 Months
- Quarters
- Custom

Custom

Prefix

TP

Periods per Year

13

First Fiscal Year: 2011

Number of Fiscal Years: 5

Fiscal Year First Month: January

Fiscal Year Start Date: Same Calendar Year

Weekly Distribution: Even Distribution

5. Select the **Currencies** tab.

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

Select the default currency for viewing data in the application.

Default Application Currency: USD \$ United States of America dollar

Will your application support multiple currencies?

- Yes
- No

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.

Select Calendar Currencies **Plan Types** Finish

Select and name the plan types for the application.

Standard Plan Types

	Name
<input checked="" type="checkbox"/> Plan Type 1	<input type="text" value="Incstmt"/>
<input checked="" type="checkbox"/> Plan Type 2	<input type="text" value="Balsheet"/>
<input type="checkbox"/> Plan Type 3	<input type="text" value="Plan3"/>

Planning Specialized Modules

	Name
<input type="checkbox"/> Workforce Planning	<input type="text" value="Wrkforce"/>
<input type="checkbox"/> Capital Asset Planning	<input type="text" value="Capex"/>

Note: The name and number of plan types depend on your business requirements.

9. Select the **Finish** tab.

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

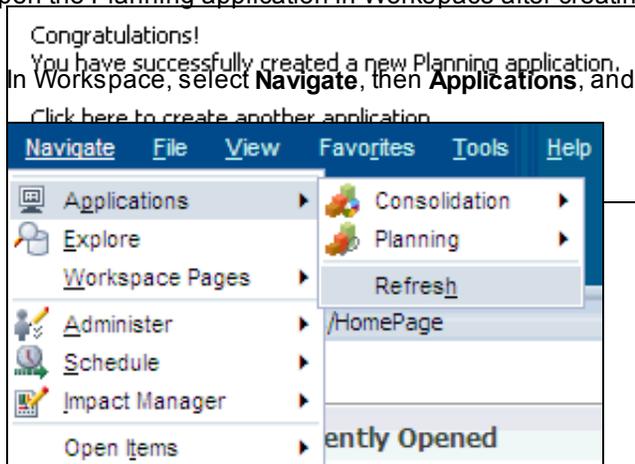
Calendar	Currencies	Plan Types	Finish
Review application settings			
Application	PlanBud		
Data Source	ST01PLN2		
Description	Planning and Budgeting application		
Shared Services Project	Default Application Group		
Instance	Default		
Application Type	General		
Calculation Module	Calculation Manager		
Base Time Period	12 Months		
First Fiscal Year	2011		
Fiscal Year First Month	January		
Weekly Distribution	Weekly Distribution: Even Distribution		
Number of Fiscal Years	5		
Fiscal Year Start Date	Same Calendar Year		
Default Application Currency	USD		
Support for Multiple Currencies	Yes		
Standard Plan Types	Incstmt, Balsheet		
Workforce Planning	Not Selected		
Capital Asset Planning	Not Selected		
To create the application now, click Finish.			
If you want to change any of the application's settings, click Previous.			
If you do not want to create the application now, click Cancel.			

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:

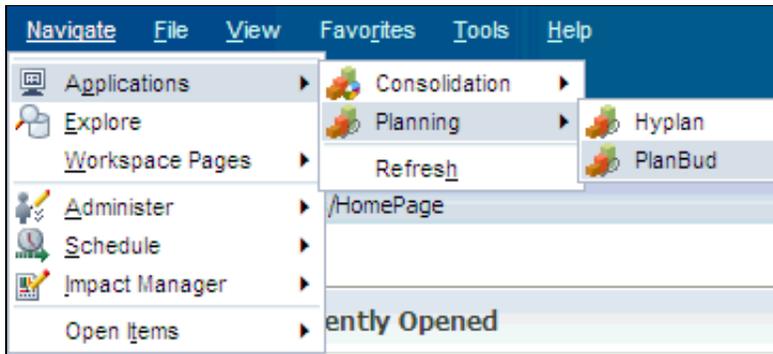
1. In Workspace, select **Navigate**, then **Applications**, and then **Refresh**.



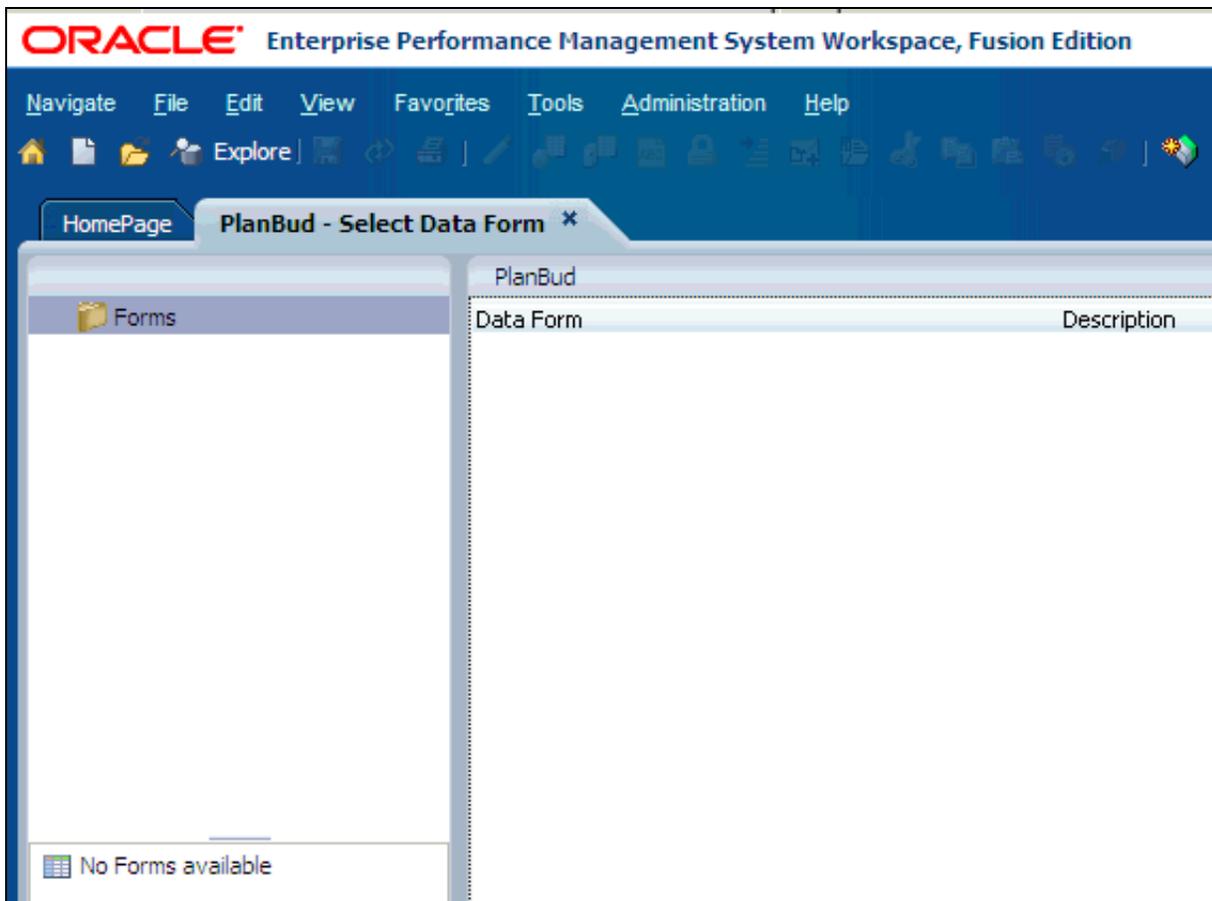
The Refresh menu option updates the navigation menu with new applications.

2. Select **Navigate**, then **Applications**, then **Planning**, and then **[Application Name]**.

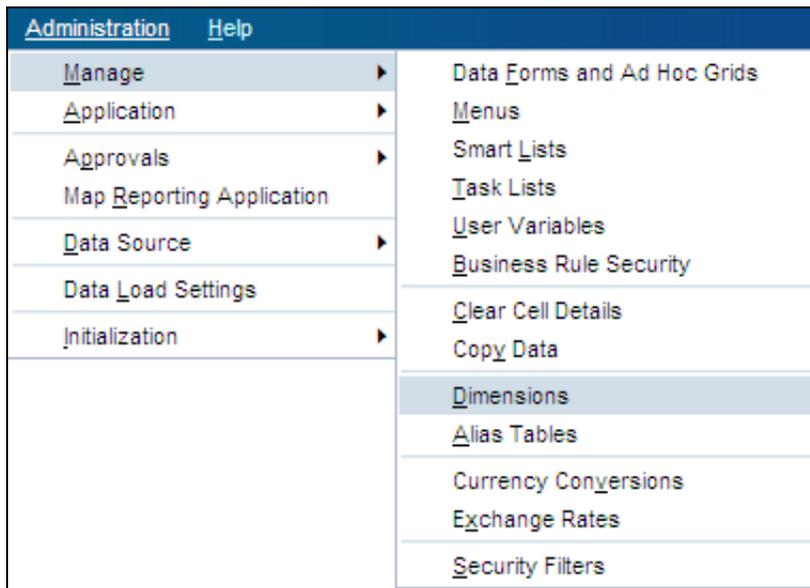
In this example, you open the *PlanBud* application.



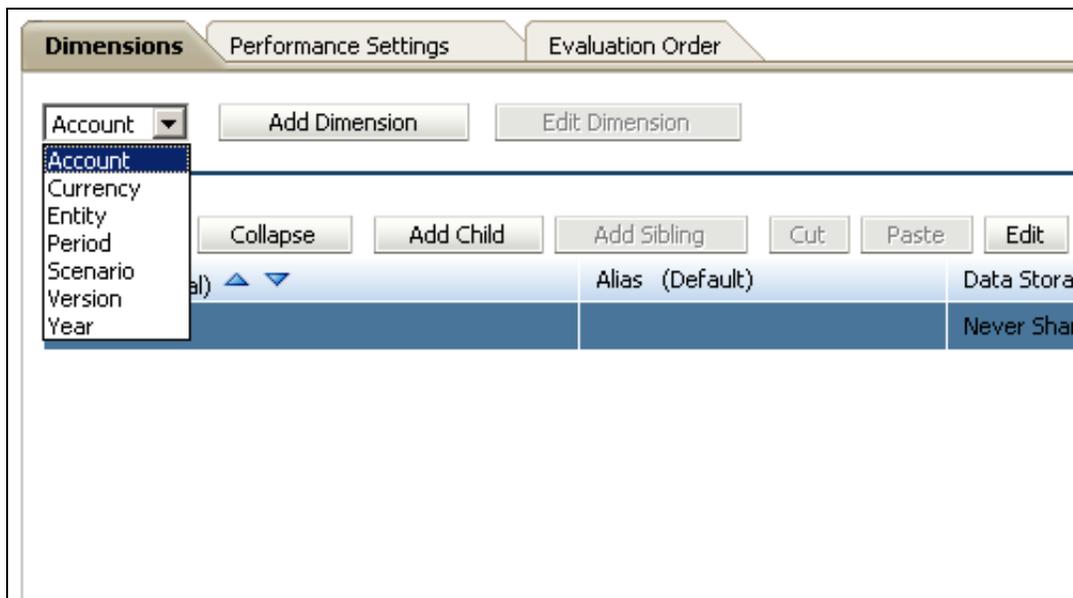
3. The PlanBud application is displayed. After creating Classic Planning applications, you can add dimension members, data forms, menus, business rules, and task lists.



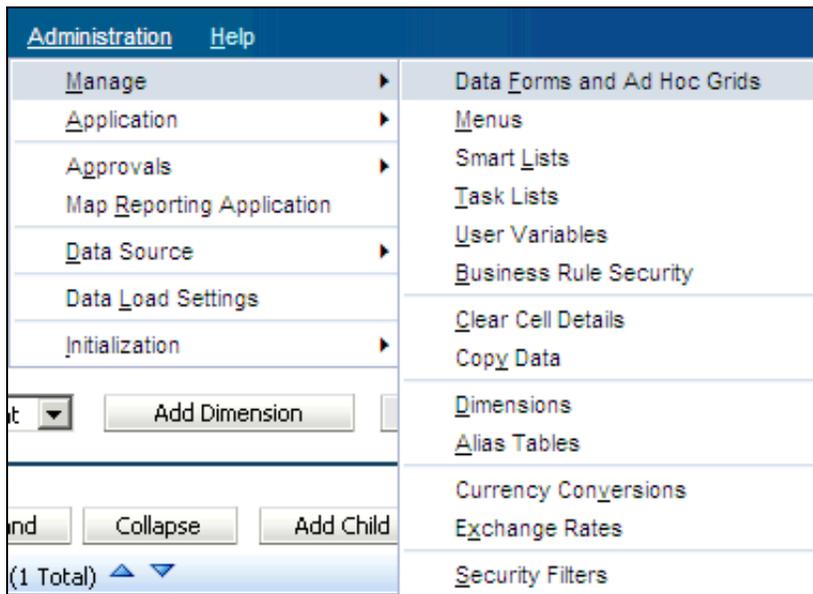
4. Select **Administration**, then **Manage**, and then **Dimensions**.



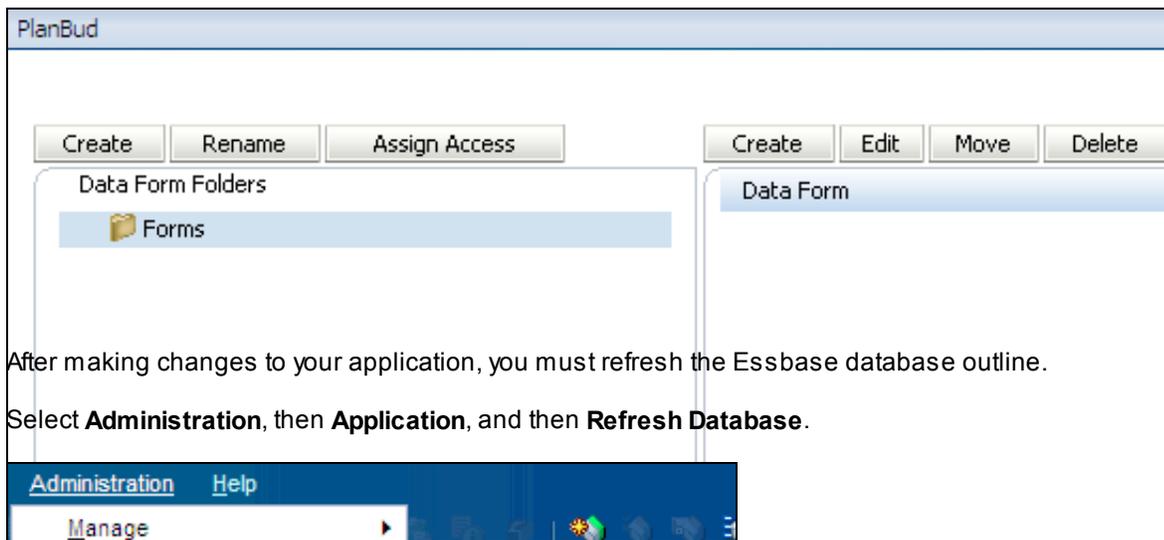
You can manage dimensions, set performance settings, and change the evaluation order in Dimension Editor.



5. Select **Administration**, the **Manage**, and then **Data Forms and Ad Hoc Grids**.

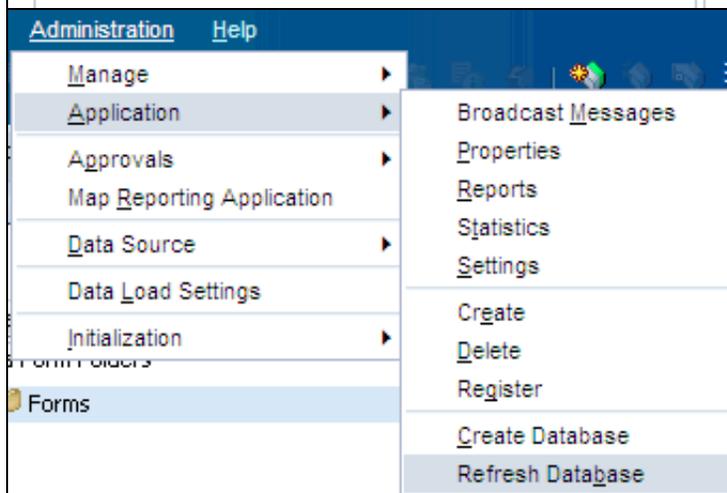


The Data Form Management page is displayed.



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

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



the Data Form Management page.

- Make your selections and click **Refresh**.

Refresh Database

Refresh Database Options

Database

Update custom-defined functions

Security Filters

Shared Members

Validate Limit

The following example displays a Planning application with defined dimensions, members, data forms, and other Planning objects.

	Jan	Feb
5100	#missing	#missing
5120	#missing	#missing
5130	#missing	#missing
5210	#missing	#missing

Loading Data Into the Application

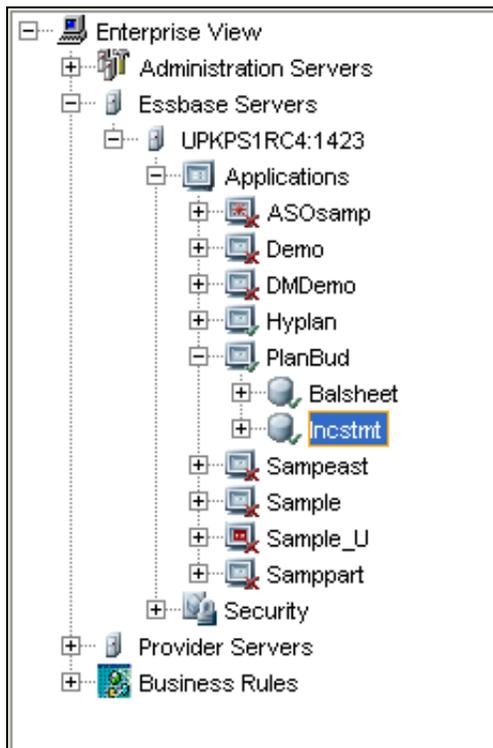
Prior to loading data to the application, ensure that you:

- 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.

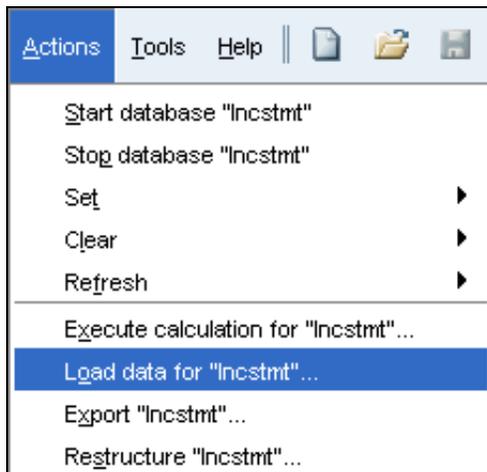
This tutorial shows you how to load data into the *Incstmt* plan type in the *PlanBud* application. To load data into the application:

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]**.

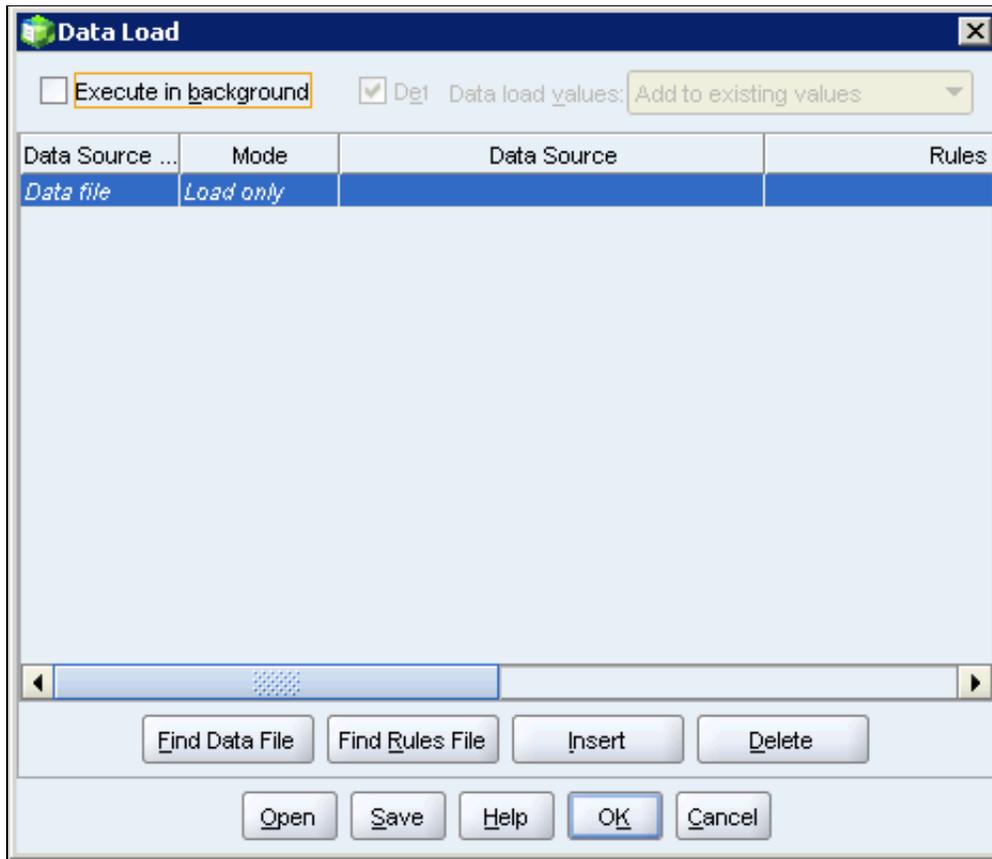
In this example, the *PlanBud* application is accessed from the *UPKPS1RC4:1423* Essbase Server view. The *Incstmt* plan type is selected. Essbase refers to plan types as databases.



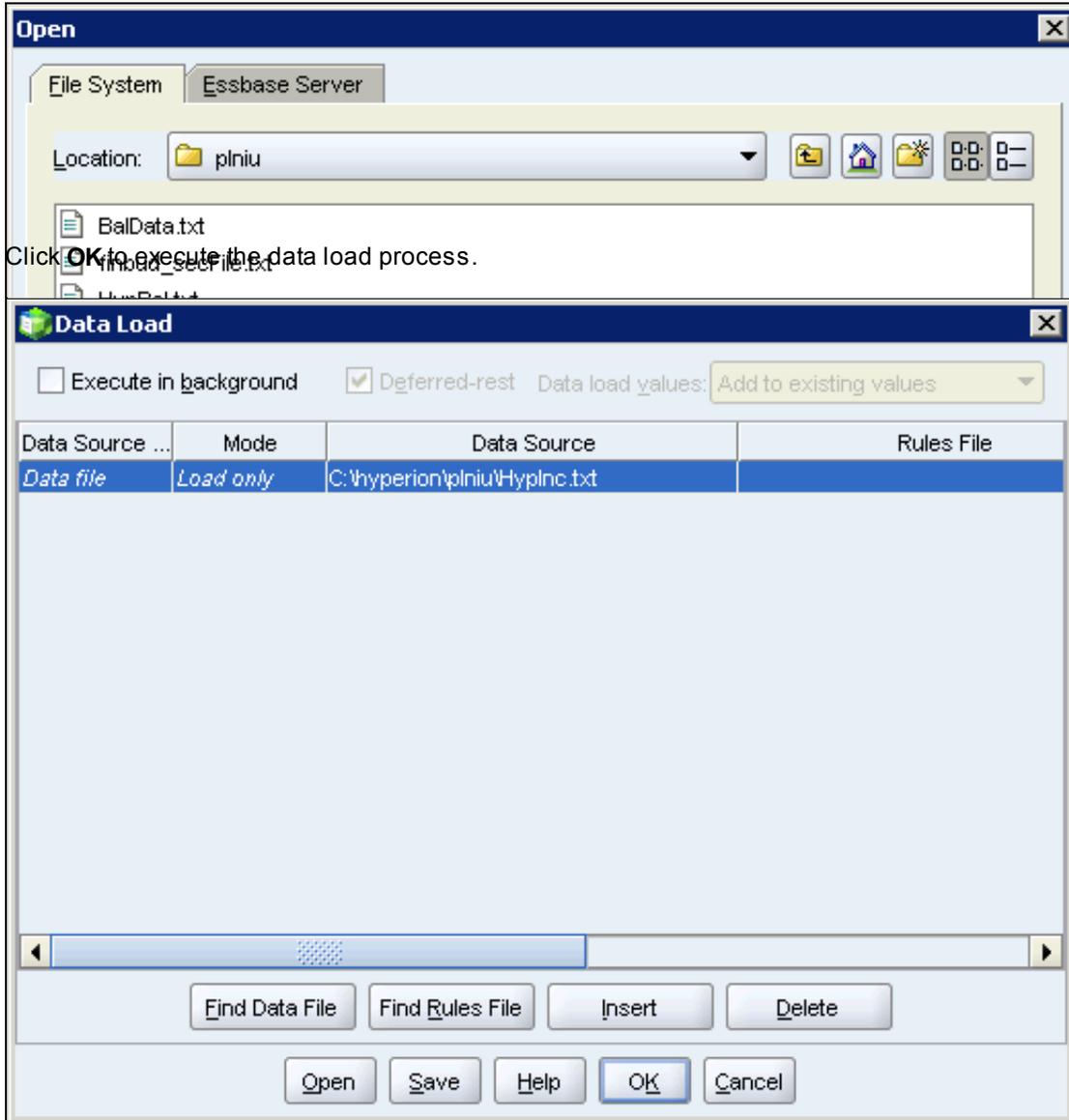
3. Select **Actions**, and then **Load data for "[Plan Type / Database]"**.



4. In the Data Load dialog box, click **Find Data File**.

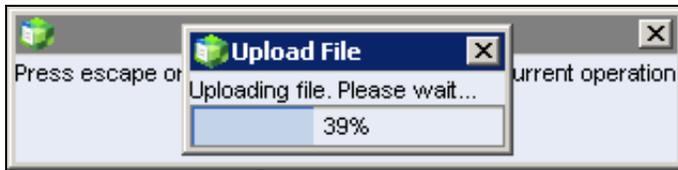


5. Select the **File System** tab, locate your data file, and click **OK**.

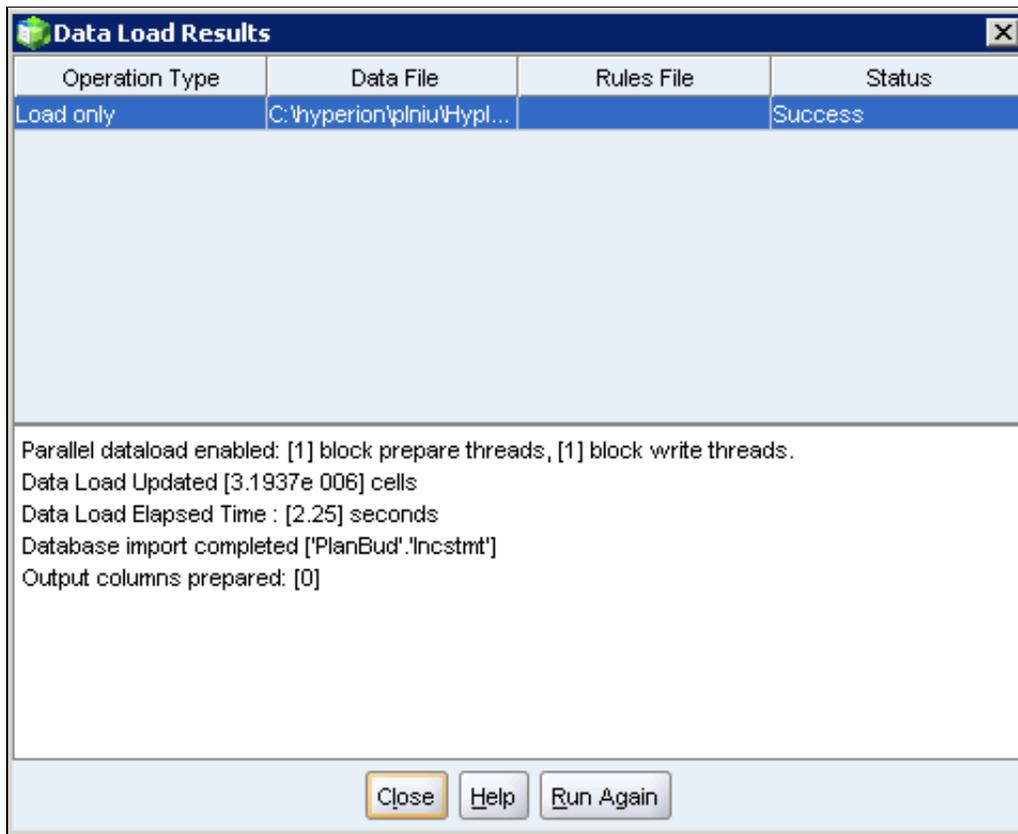


You can also select the **Abort on Error** option in the Data Load dialog box to stop the loading process when an error occurs.

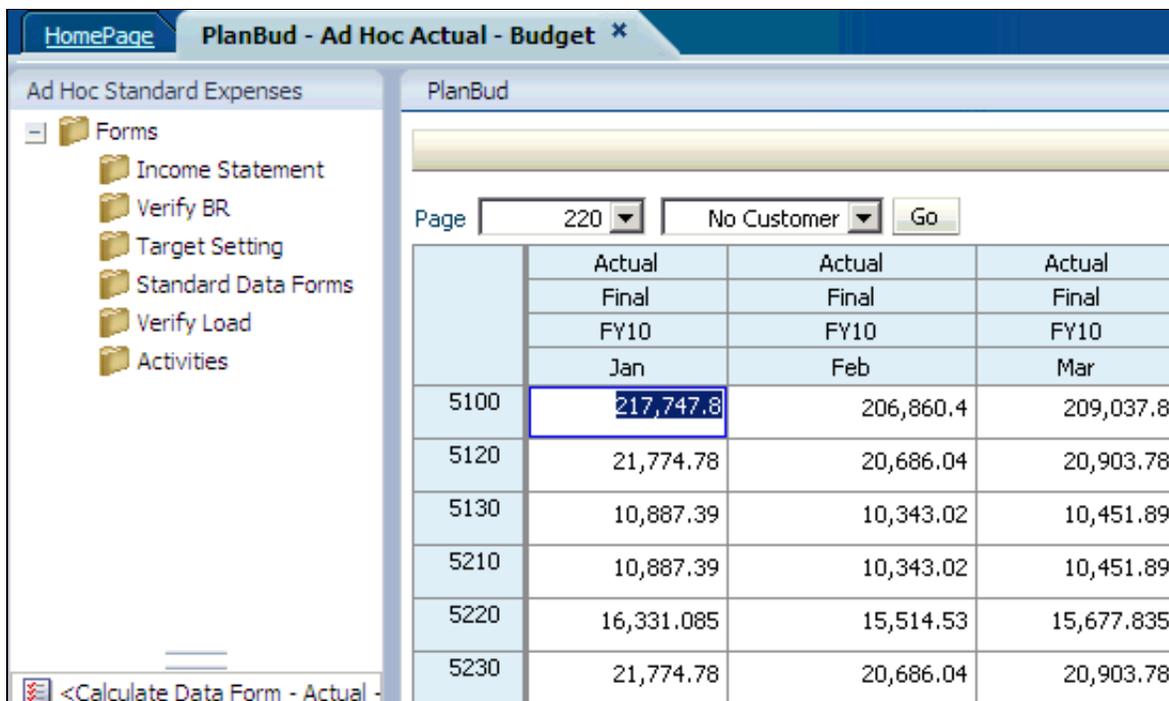
The following progress box is displayed during the data load process:



- When the data load process is completed, the Data Load Results dialog box displays a status of *Success*.



- 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 Hyperion Planning, Fusion Edition Administrator's Guide](#)

[Oracle Essbase Database Administrator's Guide](#)

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

Hardware and Software
Engineered to Work Together

About Oracle |  | Careers | Contact Us | Site Maps | Legal Notices |
Terms of Use | Your Privacy Rights