HYPERION® SYSTEM™ 9 PLANNING™

RELEASE 4.1, 4.1.1, AND 9.2

NEW FEATURES

Hyperion

This document describes the new features included in Hyperion® System™ 9 Planning™ Release 4.1, 4.1.1, and 9.2.

This release expands functionality and provides an enhanced end-user experience throughout the application. It broadens functionality to make the budgeting and planning process a convenient and integral part of the success of all enterprise decision-makers. Its user interface has been further refined to increase usability and productivity. It supports extended collaboration throughout an organization, and ensures a high level of data integrity.

For instructions on using the application, see the *Hyperion System 9 Planning Administrator's Guide*, Hyperion System 9 Planning Administrator's Web online help, *Hyperion System 9 Planning User's Guide,* and Hyperion System 9 Planning User's Web online help.

CONTENTS IN BRIEF

HYPERION SYSTEM 9

Hyperion System 9 is a comprehensive Business Performance Management system. It integrates financial applications with a business intelligence platform to provide a modular system that adapts to any business need.

The major components of Hyperion System 9 are Hyperion System 9 BI+™, Hyperion System 9 Applications+™, and Hyperion System 9 Foundation. Hyperion System 9 Applications+ is a set of packaged applications for planning, consolidation, and scorecarding.

Hyperion System 9 BI+ is a comprehensive business intelligence platform. It provides management reporting and analysis from any data source, including transactional systems, data warehouses, SAP BW, Hyperion Analytic Administration Services™, and Hyperion financial applications.

Hyperion System 9 BI+ offerings:

- User interaction with all types of information in one environment—viewing and processing reports and queries that include parameters, and using dynamic dashboards to view and interact with content

- The richly interactive BI+ user interface, which serves as a single thin client for reporting, analysis, and metrics management

- The broadest set of modular BI functionality in the market, including production reporting, financial reporting, ad hoc query and analysis, and advanced analytics

- Seamless integration and interaction with Microsoft Office

- Flexible and complete content access, which integrates third-party content with Hyperion content in an easy to use interface

- Capabilities including subscription notifications, favorites, and scheduling options to support a wide range of application uses

- Integration with the full Hyperion System 9 Foundation for central provisioning and management of all Hyperion System 9 users

Hyperion System 9 BI+ Module descriptions:

- Essbase Analytics and Enterprise Analytics—Collectively referred to as Analytic Services; provides powerful OLAP capabilities for high performance multidimensional reporting, analysis, and modeling

- Interactive Reporting—Self-service, ad hoc query and analysis for relational databases that enable users to pivot interactively, and to slice and drill from summary to detailed data

- Production Reporting—Visually clear, high volume, enterprise reporting with parameters

- Financial Reporting—Highly formatted financial reports with access to Hyperion System 9 Applications+, Hyperion System 9 BI+ Analytic Services, and SAP BW

- Web Analysis—Interactive, visualization and reporting against Hyperion System 9 BI+ Analytic Services, Hyperion System 9 Applications+, and SAP BW

- Enterprise Metrics—Enterprisewide metrics management and analysis delivered through personalized, interactive dashboards

HYPERION SYSTEM 9 SHARED SERVICES™

Shared Services functionality is programmed into products, such as Planning, Hyperion System 9 Financial Management™, and Analytic Services. Shared Services integrates the products to provide the following functionality:

- User provisioning
- External authentication definition
- Metadata synchronization
- Data synchronization
- Task flow management

Products that implement Shared Services functionality require access to a Shared Services server running Shared Services client and server software, and to a database dedicated to Shared Services.

SUPPORT FOR APPLICATION SYSTEM MEMBERS WHEN MANAGING MODELS

Application system members store critical system information such as currency rates and ownership information. Each product has certain application system members that, when exported to Shared Services, are displayed in the model hierarchy.

You can view the details and properties of an application system member, however you cannot delete, edit, add children to, or rename an application system member in Shared Services.

Application system members will be filtered out of the hierarchy if they are not relevant to the product being viewed. The compare operation filters out any application system members that are not valid for your product. For example, if you are viewing Planning models, Shared Services filters out any application system members that are not valid for Planning.

WHERE TO LEARN MORE

User provisioning functionality is described in the *Hyperion System 9 Shared Services User Management Guide*. See the appendixes in that guide for information on managing users that is specific to each product. External authentication definition is described in the *Hyperion System 9 Shared Services Installation Guide*. Metadata synchronization, data synchronization, and task flow management functionalities are described in the administrator's guides for the products that implement Shared Services.

HYPERION SYSTEM 9 SHARED SERVICES USER MANAGEMENT

Shared Services User Management enables centralized management of user access rights and accessibility to applications created under various projects of different products. The user management process allows the administrator or delegated administrator to associate users and groups to projects and give them specific roles in that application.

User IDs and groups may exist in various authentication systems and also within products in an existing installation. Also, you can create new users and groups and roles at the native level. Every product has product-specific roles defined at the product level.

A project may contain one or more applications. Users or groups can be associated with an application and can be assigned one or more roles per application.

For additional information about managing users, see the *Hyperion System 9 Shared Services User Management Guide* available on the Hyperion Download Center.

For product-specific information on how to use the new User Management functionality with Planning, see the Planning appendix in the *Hyperion System 9 Shared Services User Management Guide*. It describes, for example, how to:

- Access the User Management console from within Planning

- Update, or synchronize, users, groups, and their roles from the User Management console into Planning

- Synchronize users maintained in the User Management console with Planning applications by running a utility—`ProvisionUsers`—outside of Planning

- Migrate users and groups from an earlier release of Planning into the User Management console

HYPERION PRODUCT CONFIGURATION UTILITY

Hyperion System 9 introduces a new common tool, the Configuration Utility, for configuring Hyperion products. The Configuration Utility displays configuration options for installed products and guides you through a series of screens to activate products, to register products with Shared Services, to configure relational databases as data sources, and to automatically deploy products to application servers. If your product has unique configuration requirements, additional options are available to enable you to complete all your configuration tasks through use of the Configuration Utility. For example, the new Configuration Utility includes an option to automatically create the Planning properties file, `HspJSHome.properties`, simplifying the procedure for Planning 4.1.1.

Through use of the Configuration Utility, you can configure multiple products in a single session. You also can reconfigure Hyperion products after you have exited the Configuration Utility. The reconfiguration procedure is identical to the initial configuration process.

For details abut the Configuration Utility and the product configuration file, see the *Hyperion System 9 Planning Installation Guide.*

NEW LICENSE SERVER

Hyperion now uses a common license server to provide you with a more uniform and consistent method of governing the use of your Hyperion products. Hyperion License Server uses a license file specific to your site to assist you in tracking and monitoring the following information:

- The products that you have purchased

- Your feature options

- The number of users that can access each product

- Your maintenance agreements

- The expiration dates of your license and maintenance agreements

License Server also uses a third-party component to give you one, centrally managed administrative tool for handling license issues. This tool provides the following capabilities:

- Ensuring license compliance

- Monitoring use of licenses

- Generating reports of license events

Because License Server is a process, not a physical server, it need not be installed on a dedicated computer. License Server can be installed on a shared computer, so you can install it in an environment that enables the most efficient use of resources.

For more information about Hyperion License Server, see the *Hyperion System 9 Shared Services Installation Guide* available on the Hyperion Download Center.

PLANNING 4.1.1 NEW FEATURES

Planning 4.1.1 provides enhancements to the core functionality to enable administrators to create more flexible, customizable applications while presenting the data in a more user friendly fashion to end users. See the following enhancements for a complete understanding of the new features.

PLANNING 4.1.1 FUNCTIONALITY ENHANCEMENTS

Planning 4.1.1 provides the following enhancements to support the creation and customization of horizontal applications and Core Planning applications.

- Smart Lists—creates a list of similar items that can be used as data values on data forms or Hyperion System 9 Smart View for Office™ forms. Smart Lists can include items such as actions, positions, or locations. Smart Lists allow for reviewing textual information and modifying these values associated with base members, for example, Entities, Employees across dimensions. Smart Lists are also supported in Financial Reporting for advanced analysis and reporting.

- Design of Custom Menus—right click, context sensitive menu options that allow users to launch business rules, URLs, other data forms, or workflow from data forms.

- Member Formulas supported in the Planning Dimension Editor

- Creation and maintenance of UDAs supported in the Planning Dimension Editor

- Data Form enhancements—advanced suppression options intended to improve sparse querying, read only forms, read only segments of forms, hide segments, suppress hierarchy displays, and add segment separators

ENTERPRISE READINESS

Planning 4.1.1 provides additional enterprise readiness support.

64 BIT SUPPORT

Planning 4.1.1 is the first release to support HP-UX and Windows 2003 64 bit on Itanium only for the Application Server tier. See the *Hyperion System 9 Planning Installation Guide*.

Hyperion System 9 Business Rules™ 4.1.1 supports the display of Smart Lists in member selections and runtime Prompts. This facilitates the modification of data over varying dimensional intersections, for example, time periods. Performance has also been optimized to help improve an end user's experience with running calculations.

PLANNING 4.1 NEW FEATURES

Planning 4.1 provides an improved user experience. The following key enhancements enable planners to be more productive.

IMPROVED USER INTERFACE

Planning 4.1 provides enhancements to the Web user interface. The design enables the administrator to tailor the interface to more closely match how an end user interacts with the system, enabling easier navigation and customization. The user interface improves the user experience in the following ways:

- Consistent user interface across the Hyperion System 9 product suite:
  - ❍ Enhanced navigation capabilities such as new shortcut buttons. For example, planners can hide or show the view pane by clicking the Toggle View Pane button
  - ❍ One-touch full screen capability, which minimizes the masthead and view pane at one time
- New toolbar icons to support data form actions such as Supporting Detail and Cell Text
- Added accessibility features for Section 508 compliance, such as the alternative text for graphics to enable the use of screen readers
- Screen and user mode persistence, which lets planners return to the form or task they were working in before they switched modes or logged off. For example, if they were working in a data form when switching to Basic mode, they are returned to the same form when they go back to that mode

USER GUIDANCE THROUGH TASK LISTS

Task lists support a more effective planning process by providing a powerful method for managing and guiding users through a planning process. Task lists enhance application management by enabling efficient and effective structuring of taskflow processes throughout the Hyperion System 9 platform.

Enhanced task list functionality includes:

- Additional administrative task list capabilities, such as improved ability to assign access rights

- Task lists now include status indicators

- Default security access for the creator of a task list is set to Manage and Assign

- Task lists are displayed in the View Pane in Basic mode

- Improved navigation for task lists, including the ability to open tasks from the view pane

ENHANCED APPLICATION ADMINISTRATION

Planning 4.1 provides the following enhancements to facilitate managing applications across a global user base.

- Ability to copy data with supporting detail. Administrators can support the planning effort by using the Copy Data feature to copy all relational data, including supporting detail, from one dimensional intersection to another dimensional intersection.

- Refresh the latest list of users, groups, and roles from the User Management console into Planning with the new Refresh User & Group Lists button.

- Passwords between Planning and other products are automatically synchronized through the User Management console.

- Control which users can manage user provisioning by assigning roles in Shared Services.

- New File menu items provide more navigation flexibility in Planning.

- The new Configuration Utility includes an option for automatically creating Planning's `HspJSHome.properties` file.

- New dialog boxes in Planning prompts you to set up the application so that others can log on:

  - Register the application with Shared Services

  - Add the application to a Project in Shared Services

  - Migrate existing users and groups (if you are upgrading from an earlier release of Planning)

- Use a new Reporting Wizard to create reports on user and group access to application elements from within the User Management console.

- Dimension names in Planning are now consistent with Financial Management: Account, Entity, Scenario, Year, Period, Scenario, and Version dimensions. Also, to be consistent across Hyperion products, forms are renamed data forms.

REFERENCE APPLICATION

Included in the base installation of the product, Planning 4.1.1 provides a Reference Application—sample application designs and application objects. The application, which serves as a reference model for Planning installations, simulates a company that specializes in the production, sales, and installation of audio systems, digital video, televisions, and VCRs. The Reference Application contains a full set of dimensions, sample data forms, business rules, and reports. A data set is included to present a realistic application size and user experience. A wizard is provided to load the data for the application and increase the size of the application (including additional dimension members and data) from a small application to a larger application.

BUSINESS RULES

Hyperion System 9 completes the next generation of Business Rules, which offers improved usability and high performance business rule functionality. Business Rules 4.1.1 supports best-practice approaches in the following ways.

INTEGRATION OF ANALYTIC ADMINISTRATION SERVICES AND BUSINESS RULES INSTALLERS

The Business Rules installer is now integrated with the Hyperion System 9 BI+ Analytic Administration Services (Analytic Administration Services) installer. Business Rules is installed automatically with Analytic Administration Services. Business Rules is no longer installed with Planning.

BUSINESS RULES GRAPHICAL USER INTERFACE

The Business Rules Graphical Designer is no longer available in this release. All of the Graphical Designer functionality is now available in the Analytic Administration Services Administration Console (Administration Console). You can create, edit, and manage all of your business rules in the same location—the Business Rules node within the Administration Console.

The features you use to create business rules are now more intuitive and easier to use. For example, you can use a right mouse click to access some functionality that was not accessible with a right mouse click in previous releases. Also, this release of Business Rules includes enhancements designed to reduce the number of mouse clicks required to work with business rules.

BUSINESS RULES ROLES

Business Rules 4.1 includes the following new and changed roles:

- Basic users can launch business rules, though an administrator must grant them the privilege to launch business rules. Basic users cannot create business rules, but an administrator or interactive user can grant a basic user the right to edit a rule.

- Interactive users can create new business rules and edit the rules they are the owner of, including assigning edit privileges to those rules. Interactive users cannot assign launch privileges to business rules.

- Administrators can edit any business rule, break locks, reassign ownership to business rules, import, export, and migrate business rules, and assign launch privileges.

SMART VIEW FOR OFFICE

This release includes updates for Smart View for Office, which provides a common Microsoft Office interface for Analytic Services, Financial Management, Planning, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis. Tasks that previously were repeated across products are now performed only once. The single interface also enables users to leverage multiple products simultaneously.

For example, data forms enables end users to import Financial Management and Planning forms to Excel. Data form options for Planning include:

- Viewing instructions
- Adjusting data
- Locking and spreading back values to base periods
- Entering and viewing supporting detail
- Entering and viewing cell text
- Executing business rules
- Working offline and then saving the data back to Planning
- Business rule runtime prompt on save
- Formula preservation, enabling planners to manipulate data in a worksheet using formulas, and saving the formulas for future sessions

In addition, this release of Smart View supports the following new features when working with Planning data forms:

- Support for Smart List entry
- Undo/Redo operations introduced
- Formula Preservation, expanded functionality to retain formulas on POV change option
- Use Members on Form option, auto populate Run Time Prompt with POV
- Most Recently Used POV selection, same behavior as Planning Web. For example, open a previously viewed data form and POV set to last view

HYPERION APPLICATION LINK™

This release provides enhanced Application Link functionality:

- Enhanced support for Workforce Planning

- Support for UNIX installations

WHERE TO GET MORE INFORMATION

Except for the most recent information, each topic in this booklet is described in more detail in the documentation.

For answers to questions about the product, contact your authorized technical support provider or visit the Hyperion Solutions Web site.

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