ORACLE® HYPERION ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

HYPERION® BUSINESS RULES

RELEASE 11.1.1

WEB LAUNCHER USER'S GUIDE

ORACLE®

ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Contents

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Introduction

This section describes the features and benefits of using Oracle's Hyperion® Business Rules, the roles in Business Rules, and the concepts and terminology you should be familiar with before you use Business Rules. It also describes the components of Business Rules and how to start using them to create and launch business rules.

About Business Rules

Business Rules guides users through the creation, execution, and management of business rules on Oracle Essbase server.

In a traditional multidimensional application, users must program complicated calculations to perform the business rules they need. In addition, business rule logic creation, validation, and error detection are usually time consuming and frustrating for users. Also, users must modify the calculations often, sometimes weekly or hourly, to keep up with business demands. These frequent changes create high maintenance and incur high cost for the customers of analytic applications.

Business Rules improves the response time to changing business application needs, shortens application development cycles, increases business user productivity, improves reuse of application components, and increases the overall return on analytic application investments.

Business Rules Features and Benefits

Business Rules makes it easy to create, run, and manage business rules and sequences in a multidimensional analytic application. The features and benefits of Business Rules are described in the following topics.

Easy to Create

- Macros simplify the creation of business rules and sequences, and save business rule designers time by enabling them to reuse pieces of business rules in other business rules or macros.

- Variables of the saved selection type can be used at runtime and during design time to make business rules easier to design.

- Predefined and reusable formulas that define cost and revenue calculations save business rule designers time during the design process. The following formulas are provided:

  - Pro-Rata Ratio
  - Units-Rates
  - Variable
  - Custom

- The graphical depiction of components, formulas, and processes makes it easy to construct business rules in a multidimensional application.

Easy to Use

- Business rules can be launched by business users from within Oracle Essbase Administration Services, the Business Rules Web Launcher, the Business Rules Command Line Launcher, and the Oracle Hyperion Planning, Fusion Edition Web Client.

- Business rules can be launched in all Essbase server environments.

- Business rules can be stored and run on a server across a wide area network (WAN).

- Business rules with runtime prompts ensure valid inputs from budget preparers.

- Entry of runtime prompt values during launching makes a single, centrally created business rule reusable by several users.

Easy to Maintain

- The Business Rules architecture supports enterprise-wide maintenance and methods of use that can be successfully managed and deployed to multiple business users.

- Business rules, sequences, macros, variables, and projects can be stored in any of these repositories: Microsoft Access, Microsoft SQL Server, Oracle, or DB2 for shared, enterprise-wide access.

- Use of a central repository makes administration and maintenance of business rules easy, because the repository stores information for applications in one database.

- The logical organization of business rules, sequences, macros, and variables into projects makes them easier to find and maintain.

Business Rules Roles

The following table summarizes the Business Rules roles and the tasks that can be performed by the users and groups who are assigned these roles.

Note:

You set up users and groups, and assign roles to them, in Oracle's Hyperion® Shared Services . For more information, see the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

Hyperion Business Role	Tasks that Can Be Performed
Administrator	A user or group with the role of *administrator* can do any of the following tasks: ● Create, launch, edit, validate, and manage business rules, sequences, macros, variables, and projects ● Assign access privileges to business rules, sequences, macros, variables, and projects ● Create and edit users, groups, and roles ● Set up the repository and log file
Interactive User	A user or group with the role of *interactive user* can do any of the following tasks: ● Create, launch, edit, validate, and manage business rules, sequences, macros, variables, and projects ● Assign access privileges (except the ability to launch business rules, which can only be assigned by an administrator) to business rules, sequences, macros, variables, and projects
Basic User	A user or group with the role of *basic user* can do any of the following tasks: ● Launch business rules and sequences to which the user has access ● View business rules and sequences to which the users has access ● View all variables and macros ● Edit business rules, sequences, macros, variables, and projects for which the user has editing privileges

Business Rules Product Components

This release of Business Rules contains these three components:

● *Administration Services Administration Console (Administration Console):* Administrators use the Administration Console to create, edit, validate, launch, and maintain graphical and *non-graphical* business rules.

● *Business Rules Web Launcher (Web Launcher):* Business users use the Web Launcher to select a business rule, enter runtime prompts, and launch the business rule on the Web.

- *Business Rules Command Line Launcher (Command Line Launcher):* Administrators use the Command Line Launcher to schedule business rules to run from outside of Business Rules by creating a command line launch (or shortcut) on the desktop.

Business Rules Prerequisite Knowledge

This section introduces Business Rules and the concepts that are important to know before using Business Rules. Oracle Hyperion Enterprise Performance Management System recommends that users have introductory Essbase training, knowledge of their multidimensional applications, and familiarity with their business processes before using Business Rules.

Before Using the Administration Console

Users should have the following Essbase knowledge before using the Administration Console:

- An understanding of the Essbase application, including database dimensionality and outline structure
- Knowledge of where the data is stored in the database, how the data is stored and aggregated, and at what level the data gets loaded into the database

For more information on Essbase, see the *Oracle Essbase Database Administrator's Guide.*

Users should also know the following about their business processes:

- The order of calculations
- The sequence of business rules
- The key assumptions being used to drive the calculations

Before Using the Web Launcher

Users should have the following information about their business rules before using the Web Launcher:

- Which business rules they need to run
- Where to get the values for runtime prompts that need to be entered
- When the business rules need to run
- Which application and the database outline they need to use

Using the Administration Console

To use the Administration Console, theAdministration Services server must be running. In addition, theEssbase server must be running for you to select a database outline to refer to as you create your business rules, sequences, macros, and variables. See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide.*

➤ To access the Administration Console:

1 Select **Start > Programs > Hyperion > Administration Services > Start Administration Services Console**.

2 On the **Analytic Administration Services Login** dialog box, enter a server name or select one from the drop-down list. Then enter your user name and password, and click **OK**.

The Administration Services window is displayed with Business Rules collapsed in the left frame of the window.

3 Expand the nodes under the Business Rules node to view their contents.

Business Rules contains these three nodes:

- The My Projects node lists the projects in the Business Rules repository that were created by the logged on user. Projects enable you to organize business rules, sequences, macros, and variables into logical groupings of information.

- The Repository View node lists all of the repository objects (business rules, sequences, macros, variables, and projects) that are in the Business Rules repository. You use the features in this node to create, edit, validate, launch, and manage repository objects.

- The Administration node lists the properties of the client and server. You use the features in this node to change the level of error reporting in the log file, to migrate the repository, to import and export business rules, and to work with locations and clusters.

See the *Hyperion Business Rules Administrator's Guide* for information about the Administration Console.

Using the Web Launcher

The Web Launcher is designed for business users who need to run business rules that address their particular business needs. Business users use the Web Launcher to run business rules that you create for them. In order to use the Web Launcher, a business user must have Calculate access to at least one database on the Essbase server. Follow the instructions in this guide to use the Web Launcher.

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Using the Web Launcher

This section provides information on launching a business rule using the Business Rules Web Launcher.

Note:

In addition to launching a business rule from the Web Launcher, you can launch a business rule from within the Business Rules node of the Administration Console. See the *Hyperion Business Rules Administrator's Guide.*

Logging On to the Business Rules Web Launcher

To log on to the Business Rules Web Launcher, you need to enter a user name and password and select a server name.

➤ To log on to Business Rules Web Launcher:

1   **Enter the URL for the Web Launcher.**

Business users must browse to the URL that their administrators provide, using Microsoft Internet Explorer.

The URL for the Business Rules Web Launcher is:

`http://[Computer name]:[port]/hbrlauncher`

where `[Computer name]:[port]` is the name and port where the Administration Services server is running. (10080 is the default port.)

Your administrator can provide you with the computer name and port number, if the default port number is not used.

After you enter the Web Launcher URL, a page to launch Business Rules Web Launcher is displayed.

2 Click the link to launch Business Rules Web Launcher.

> **Note:**
>
> If you want to launch the Web launcher without any browser toolbars, select the check box, "Check here to launch without browser toolbars."

The Web Launcher Logon Page is displayed.

3 Enter the requested information in the Web Launcher Logon page.

a.   In the **User Name** text box, enter your user name.

b.   In the **Password** text box, enter the password that corresponds with your user name.

c.   In the **Server Name** text box, select a server name from the drop-down list.

4 Click **Logon**.

Selecting a Business Rule to Launch

Use the Business Rules Home Page to select a business rule to launch. You can select from one of these views to launch a business rule:

- Rules (see Launching a Rule From the Rules View)
- Sequences (see Launching a Rule From the Sequences View)
- Projects (see Launching a Rule From the Projects View)
- Locations (see Launching a Rule From the Locations View)

Launching a Rule From the Rules View

The Rules view displays all the business rules available to launch. The available business rules are those defined in Business Rules within Administration Services. All business rules in the repository for the server specified in the Logon URL and to which you have launch access are displayed.

➤ To launch a business rule:

1 On the Business Rules Home page, click the plus sign (+) next to **Rules** and select a rule.

2 Verify the Execution Database Name.

The Execution Database Name is the name of the Essbase or Planning database against which you want to launch the rule.

When you create a rule, you can associate a database for which the rule is valid. This is the database that appears under Execution Database Name. If desired, you can change the database in the Execution Database Name field.

3 If the rule contains runtime prompts, enter the requested information.

See .

4 Click **Validate** to validate the rule.

If the rule validates with no errors, the Confirmation page displays; otherwise, an error page displays.

5 Select the desired option on the Confirmation page, and click **Launch**.

You can Launch and Await Completion or Launch and Send Email When Complete. See and .

Launching a Rule From the Sequences View

The Sequences view displays the available sequences. A sequence contains one or more business rules. When you launch a sequence, the business rules in the sequence launch.

The available sequences are the sequences defined in the Business Rules node within Administration Services. All sequences in the repository for the server specified in the Logon URL and to which you have launch access are displayed.

➤ To launch a sequence:

1 On the Business Rules Home page, click the plus sign (+) next to **Sequences** and select a sequence.

2 Verify the Execution Database Name.

The Execution Database Name is the name of the Essbase or Planning database against which you want to launch the rule.

When you create a rule, you can associate a database for which the rule is valid. This is the database that appears under Execution Database Name. If desired, you can change the database in the Execution Database Name field.

3 If any of the rules in the sequence contain runtime prompts, enter the requested information.

See .

4 Click **Validate** to validate the sequence.

If the sequence validates with no errors, the Confirmation page displays; otherwise, an error page displays.

5 Select the desired option on the Confirmation page, and click **Launch**.

You can Launch and Await Completion or Launch and Send Email When Complete. See and .

Launching a Rule From the Projects View

The Projects view displays the available projects. Use this view to select a business rule that is part of a specific project. The available projects are the projects defined in the Business Rules

node of Administration Services. All projects in the repository for the server specified in the Logon URL and to which you have access are displayed. You can view the contents of one project at a time.

➤ To launch a business rule in a project:

1 On the Business Rules Home page, click the plus sign (+) next to **Projects** and select a project.

2 From within the selected project, select the business rule to launch.

3 Verify the Execution Database Name.

The Execution Database Name is the name of the Essbase or Planning database against which you want to launch the rule.

When you create a rule, you can associate a database for which the rule is valid. This is the database that appears under Execution Database Name. If desired, you can change the database in the Execution Database Name field.

4 If the rule contains runtime prompts, enter the requested information.

See "Entering Runtime Prompts" on page 15.

5 Click **Validate** to validate the rule.

If the rule validates with no errors, the Confirmation page displays; otherwise, an error page displays.

6 Select the desired option on the Confirmation page, and click **Launch**.

You can Launch and Await Completion or Launch and Send Email When Complete. See "Launch and Await Completion" on page 17 and "Launch and Send Email When Complete" on page 17.

Launching a Rule From the Locations View

The Locations view displays the business rules associated with an Essbase or Planning database. You associate rules with a database in the Business Rules node of Administration Services. All business rules in the repository for the specified database and to which you have launch access are displayed.

➤ To launch a business rule:

1 On the Business Rules Home page, click the plus sign (+) next to **Locations** and select the Essbase or Planning database location.

2 From the within the selected location, select the business rule to launch.

When you select a rule, the Essbase or Oracle Hyperion Planning, Fusion Edition database appears under Execution Database Name.

3 If the rule contains runtime prompts, enter the requested information.

See "Entering Runtime Prompts" on page 15.

4 Click **Validate** to validate the rule.

If the rule validates with no errors, the Confirmation page displays; otherwise, an error page displays.

5   Select the desired option on the Confirmation page, and click **Launch**.

You can Launch and Await Completion or Launch and Send Email When Complete. See "Launch and Await Completion" on page 17 and "Launch and Send Email When Complete" on page 17.

Entering Runtime Prompts

Runtime prompts are values needed to launch a business rule. The runtime prompts that appear are the runtime prompts defined in the Business Rules node of Oracle Essbase Administration Services. The number and type of runtime prompts may vary. For example, you may be required to enter a member name, a number, or a percentage for a dimension.

Use the Runtime Prompts Entry page to enter any requested runtime prompts. You can also check that the runtime prompts you entered are valid.

Entering Runtime Prompts

➤ To enter a runtime prompt, type the runtime prompt value or click the button to the right of the text box to use the Member Selector.

Valid types of runtime prompts include:

- **Single Member** or **Multiple Members** — Click the Member Selector button to the right of the runtime prompt to choose members as runtime prompt values.

- **Number** — Enter a numerical value. Depending on how the administrator set this up, minimum and maximum limitations may exist.

- **Dimension** — Enter a dimension from the database.

- **String** — Enter text.

   Note:

   If you enter a member name as a runtime prompt value, enclose it in quotes. If you use the Member Selector, the quotes are automatically included.

Validating Runtime Prompts

➤ To validate a runtime prompt:

1   After entering a runtime prompt for a business rule, click **Validate**.

If one or more entries are invalid, an error message displays on the top of the screen.

2   Correct any invalid entries.

3 Click **Validate** again to correct the next invalid entry.

Selecting Members as Runtime Prompt Values

Review the following sections for information on:

- Selecting a Member
- Selecting Multiple Members
- Removing Members
- Moving Members Up and Down

Selecting a Member

➤ To select a member as a runtime prompt value:

1 Click the **Member Selector** button.

2 In the Single Member Selector dialog box, select the member to use as a runtime prompt value and click **OK**.

The selected member displays at the bottom of the screen.

Selecting Multiple Members

➤ To select multiple members as a runtime prompt value:

1 Click the **Member Selector** button.

2 From the **Available** frame, select the desired member. Press the **Shift** key to select more than one member at a time.

3 Click the **right arrow** to add the members to the **Selected Members** frame.

Removing Members

➤ To remove a member from a runtime prompt:

1 Click the **left arrow** to remove the member from the **Selected Members** frame.

2 Click the **double left arrow** to remove all members from the **Selected Members** frame.

Moving Members Up and Down

➤ To move members up and down:

1 From the **Selected Members** frame, select the desired member. Press the **Shift** key to select more than one member at a time.

2 Click the **up arrow** to move the member up in the list in the **Selected Members** frame.

3 Click the **down arrow** to move the member down in the list in the **Selected Members** frame.

Launching a Business Rule

Use the Confirmation page to ensure that you are launching the correct business rule and to choose whether to wait for completion or continue with other tasks while the rule launches. You can select one of the following options:

● Launch and Await Completion

● Launch and Send Email When Complete

Review the following topics for information on each of these options.

Launch and Await Completion

Select this option to monitor the launch progress of a business rule.

➤ To launch a business rule and wait for its launch to complete:

1 Ensure that the name of the business rule to launch is correct.

2 Select **Launch and await completion**.

3 Click **Launch**.

If the execution takes longer than five seconds, a Progress page displays. When the execution completes, the message "Execution Complete" displays on the page.

Launch and Send Email When Complete

Select this option to continue with other tasks while the business rule launches. When the launch completes, an email is sent to the email address you specify.

Note:

To receive the processing results via email, go to <EAS_INSTALL_DIR>\eas\server \OlapServer.properties and set SMPT_HOST to your SMPT host computer.

➤ To launch a business rule and send an email when the launch completes:

1 Ensure that the name of the business rule to launch is correct.

2 Select **Launch and send email when complete**.

3 In the **Email Address** text box, enter the desired email address.

4 Click **Launch**.

If the execution takes longer than five seconds, a Progress page displays. When the execution completes, the message "Execution Complete" displays on the page.

Glossary

access permissions A set of operations that a user can perform on a Oracle Hyperion Enterprise Performance Management System resource.

alias An alternative name. For example, for a more easily identifiable column descriptor you can display the alias instead of the member name.

business rules Logical expressions or formulas that are created within an application to produce a desired set of resulting values.

calc script A set of commands that define how a database is consolidated or aggregated. A calculation script may also contain commands that specify allocation and other calculation rules separate from the consolidation process.

cell (1) The data value at the intersection of dimensions in a multidimensional database; the intersection of a row and a column in a worksheet. (2) A logical group of nodes belonging to one administrative domain.

component range A selected portion of the database that represents the dimensions that are common to a particular component in an allocation process.

cube A block of data that contains three or more dimensions. An Essbase database is a cube.

destination A block of the database where calculated values are stored

dimension A data category used to organize business data for retrieval and preservation of values. Each dimension usually contains a hierarchy of related members grouped within it. For example, a Year dimension often includes members for each time period, such as quarters and months.

enhanced calc script A calculation script that may contain values for runtime prompts.

formula A combination of operators and calculation functions, as well as dimension names, member names, and numeric constants, used to perform specific calculations on members of a database.

function A predefined routine that returns a value, a range of values, a Boolean value, or one or more database members.

interactive user Interactive users can review and approve budgets, set up email notification to other users, create Web-based data forms, create worksheets using Oracle Hyperion Smart View for Office, Fusion Edition, create reports using Oracle's Hyperion Reporting and Analysis, create and launch integrations using Oracle's Hyperion® Application Link, create and launch business rules using Business Rules and/or Oracle Essbase, and enter and view data in Web data forms and Oracle Hyperion Smart View for Office, Fusion Edition.

launch The process of running a business rule, calculation script, or sequence against a database to return calculated values.

macro A reusable part of a business rule that can be referenced by other business rules and macros to save users time when they are writing their business rules. A macro can contain variables and other macros, but it cannot contain a copy of itself.

member A discrete component within a dimension. A member identifies and differentiates the organization of similar units. For example, a time dimension might include such members as Jan, Feb, and Qtr1.

metadata A set of data that defines and describes the properties and attributes of the data stored in a database or used by an application. Examples of metadata are dimension names, member names, properties, time periods, and security.

migration The process of copying an application or users from one environment or computer to another.

outline The database structure of a multidimensional database, including all dimensions, members, tags, types, consolidations, and mathematical relationships. Data is stored in the database according to the structure defined in the outline.

provisioning The process of granting users and groups specific access permissions to Hyperion resources.

range A set of values that includes an upper and lower limit, and the values that fall between the limits. A range can consist of numbers, amounts, or dates.

relational database A type of database that stores data in the form of related two-dimensional tables. *Contrast with access permissions*.

repository Stores metadata, formatting, and annotation information for views and queries.

role The means by which access permissions are granted to users and groups for Hyperion resources.

runtime prompt A system variable that allows values to be entered during the execution of an allocation process. Values can be members, strings, or numbers.

saved assumptions Planning assumptions, created globally or locally, that can be named, saved and referenced in planning methods and allocations to help drive plan and budget values.

saved selection An explicitly defined set of members across multiple dimensions. This selection does not change as the dimension is maintained.

source A block of the database or a number that is referenced in a calculation.

validate The process of checking a business rule or sequence against a database to ensure that its syntax is valid

Web Launcher A component of Oracle's Hyperion® Business Rules that enables you to launch business rules and enter runtime prompts via a Web interface

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