



ORACLE® HYPERION PLANNING, FUSION
EDITION

RELEASE 11.1.1.3

USING ADMINISTRATOR FEATURES



Oracle Hyperion Planning, Fusion Edition contains significant enhancements to administrator features. Oracle Hyperion EPM Architect, Fusion Edition is a feature in Planning that enables administrators to manage, create, and deploy applications within one interface. This document describes key administration tasks in Classic Planning and in Planning with Performance Management Architect.

You can create applications using Performance Management Architect or Classic application administration. Different menus and options are available for each type of application. For example, for applications created with Performance Management Architect application administration, you manage Smart Lists within Performance Management Architect. For applications created with Classic administration, you can select Administration, then Smart Lists to use the feature within Planning.

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Key Planning Administration Tasks

Table 1 Key Planning Administration Tasks

Category / Action	Classic Planning	Planning with Performance Management Architect
Application Creation, Database Refresh		
Managing data sources	<p>Select Navigate, then Administer, then Classic Application Administration, and then Planning Administration. Click Manage Data Source. Update instances in Oracle's Hyperion Enterprise Performance Management System Configurator.</p> <p>In Planning, you can also select Administration, then Manage Data Source, then select appropriate options, such as Create Data Source, Edit Data Source, and Delete Data Source.</p>	<p>In the Application Library (Navigate, then Administer, then Application Library), select Tools, then Manage Planning Data Source to start the data source wizard. Update instances in Oracle's Hyperion Enterprise Performance Management System Configurator.</p>
Configuring system properties	<p>Select Administration, then Manage Properties to review and modify application and system properties stored in the system database.</p>	<p>From Oracle Enterprise Performance Management Workspace, Fusion Edition, open the Planning application by selecting Navigate, then Applications, then Planning, and then the application name. Select Administration, then Manage Properties to review and modify application and system properties.</p>
Creating applications	<p>Select Administration, then Create Application. Define the application by completing the tasks in the application wizard.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), select File, then New, then Application to launch the application wizard. Complete the tasks in the application wizard to create the application. This does not create the application within Planning until the application is validated and deployed. You can also use the application wizard to create blank applications, and drag dimensions from the Shared Library to the application.</p> <p>You can modify application properties in the Properties Grid, such the starting year, calendar, plan types and names, and multiple currencies.</p>
Opening applications	<p>Select Navigate, then Applications, then Planning, and then select the application name.</p> <p>You can also log on to Planning and select an application.</p>	<p>Select Navigate, then Applications, then Planning, and then select the application name. After you deploy an application, you can open it in Planning.</p>
Registering applications	<p>Select Navigate, then Administer, then Classic Application Administration, and then Planning Administration. Click Register Application.</p>	<p>Select Navigate, then Administer, then Classic Application Administration, and then Planning Administration. Click Register Application.</p>

Category / Action	Classic Planning	Planning with Performance Management Architect
	In Planning, you can also select Administration , then Register Application .	You can register applications again if necessary by right-clicking an application in the Application Library (Navigate , then Administer , then Application Library) and selecting Reregister .
Deleting applications	Select Navigate , then Administer , then Classic Application Administration , then Planning Administration . Click Delete Application . In Planning, you can also select Administration , then Delete Application .	In the Application Library (Navigate , then Administer , then Application Library), right-click a deployed application and select Delete . You can delete applications with a status of Deployed or Not Deployed.
Creating and refreshing the database, generating security filters	Select Administration , then Manage Database , then select appropriate options, such as Database , Security Filters , Shared Members , and Validate Limit . After selecting options, click Create or Refresh .	Cube Create and Cube Refresh are combined in the Deploy operation. In the Application Library (Navigate , then Administer , then Application Library), right-click an application and select Deploy . Select appropriate options, such as Create Outline , Refresh Outline , Security Filter Validation , and Shared Members .
Viewing jobs in the Job Console	Select Tools , then Job Console . View the status of these operations: Clear Cell Details, Copy Data, and calculations for business rules, rulesets, and sequences. You can filter jobs by user, job type, run status, start time, end time, or job name, and enable notification by e-mail when a launched job completes or generates an error. You can also set properties for the threshold time at which the job moves to background execution.	Select Navigate , then Administer , then Library Job Console . View the status of operations for dimensions, applications, transactions, comparisons, export, and logs.
Sending bulk messages	Select Tools , then Broadcast Message .	Use task automation to create an e-mail message. In the Application Library (Navigate , then Administer , then Application Library), select an application and then select Administration , then Manage Taskflows . In the taskflow editor, click Add Stage . Then set parameters such as E-mail .
Metadata and Data Loads		
Performing initial and incremental metadata loads	Load metadata with: <ul style="list-style-type: none"> ● The Planning Outline Load utility using flat files ● Oracle Data Integrator Adapter for Planning 	Create an import profile by creating: <ul style="list-style-type: none"> ● An *.ads flat file and an import profile that references it. ● An interface table data source and an import profile that references it.

Category / Action	Classic Planning	Planning with Performance Management Architect
	<ul style="list-style-type: none"> ● Oracle's Hyperion® Data Integration Management Adapter for Planning 	<p>You can then execute the import profile to load metadata to the Shared Library or to an application from flat files or interface tables.</p>
Scheduling metadata updates	<p>Schedule updates with the built-in scheduling options in:</p> <ul style="list-style-type: none"> ● Data Integrator Adapter for Planning ● DIM Adapter for Planning <p>You can also write scripts that run the Planning Outline Load utility.</p>	<p>Use taskflows to schedule imports and updates for the Shared Library and application. (You must have already deployed the application and defined an Import Profile.)</p> <p>Use the Batch Client for interactive scripting updates for the Shared Library and application. See the <i>Oracle Hyperion Enterprise Performance Management Architect Batch Client User's Guide</i>.</p>
Loading data	<p>Load data with the Planning Outline Load utility using flat files and data files.</p>	<p>Load data using the interface tables included with the Data Synchronization module.</p> <p>Open the Data Synchronization module (select Navigate, then Administer, then Data Synchronization). Select File, then New, then Synchronization. Use the wizard to define the source and target information. For the source, select the Data Interface Area option (for data loaded using a relational database) or External Source (for data loaded using flat files). For the target information, select the appropriate Planning application.</p> <p>You can predefine external files and data interface information. In the Data Synchronization module (Navigate, then Administer, then Data Synchronization), select File, then New, then Data Interface Table Definition, or File, then New, then External File Definition before building the synchronization. You can manually execute the synchronization or schedule it using Task Automation or the Batch Client.</p>
Scheduling data loads	<p>Schedule updates with the built-in scheduling options in:</p> <ul style="list-style-type: none"> ● Data Integrator Adapter for Planning ● DIM Adapter for Planning <p>You can also write scripts that run the Planning Outline Load utility.</p>	<p>Data loads can be scheduled using taskflows or a third-party scheduler that can integrate with a script created for the Batch Client. In the Dimension Library (Navigate, then Administer, then Dimension Library), select Administration, then Manage Taskflows to add a stage for data synchronization.</p> <p>Use the Batch Client to integrate with a third-party scheduler.</p>
Creating dimensions	<p>Select Administration, then Dimensions. Click Add Dimension.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), perform one task:</p>

Category / Action	Classic Planning	Planning with Performance Management Architect
		<ul style="list-style-type: none"> ● Import dimensions into the Dimension Library by creating and importing a flat file or importing information from interface tables (File, then Import, then Create Profile). You can also initiate imports using taskflows or the Batch Client. ● Select File, then New, then Dimension. Enter a name and description, and select the dimension type.
Creating dimension members	<p>Select Administration, then Dimensions. Select a current member and select Add Child or Add Sibling to add a member. You can also load members with the Planning Outline Load utility, Oracle Data Integrator Adapter for Planning, Oracle's Hyperion® Data Integration Management Adapter for Planning, or Oracle Hyperion Financial Data Quality Management Adapter for Planning, Fusion Edition.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), right-click a member. Select Create Member, then As Child or As Sibling.</p> <p>Import dimension members into the Dimension Library by creating and importing a flat file or importing information from interface tables.</p> <p>You can also use the Batch Client in interactive mode or script mode to create new members.</p>
Creating attribute dimensions	<p>Select Administration, then Dimensions. Select the root member of a sparse dimension, such as Entity. Click Custom Attributes, and click Create. Enter an attribute name, and select the data type.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), select File, then New, then Dimension. Enter a name and description, and select the attribute dimension type. Associate the new dimension with the base dimension by right-clicking the base dimension, (such as Entity, and selecting Create Associations. Select the appropriate type of dimension, such as Currency, and the dimension with which to associate, such as Base Currency. Click Save.</p> <p>These associations must be activated to make them valid for an application. (Right-click the application name, then select Activate all associations.) You can also create attribute dimensions using the Batch Client.</p>
Creating attribute dimension members	<p>Select Administration, then Dimensions. Select the root member of a sparse dimension, such as Entity. Click Custom Attributes, and select the attribute. Above the Attribute Values column, click Create. Enter a name and click Save.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), right-click a member, then select Create Member, then As Child or As Sibling.</p> <p>Import dimension members into the Dimension Library by creating and importing a flat file or importing information from interface tables.</p> <p>You can also create attribute dimension members using the Batch Client.</p>

Category / Action	Classic Planning	Planning with Performance Management Architect
Creating Smart Lists	<p>Select Administration, then Manage Smart Lists. Click Create, then define the Smart List properties.</p> <p>On Entries, click Add and define the drop-down list items. Preview the Smart List and click Save.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), select File, then New, then Dimension. Enter a name and description, and select the Smart List type.</p> <p>After the Smart List is created, you can add members. (Right-click a member and select Create Member, then As Child or As Sibling.)</p> <p>You can also import Smart List dimensions using flat files or interface tables, or create them using the Batch Client.</p>
Creating alias tables	<p>Select Administration, then Alias Tables. Click Add to add an alias table.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), select File, then New, then Dimension. Enter a name and description, then select the Alias type.</p> <p>After the Alias dimension is created, you can add members. (Right-click a member and select Create Member, then As Child or As Sibling.)</p> <p>Associate the new dimension with the base dimension, such as Entity or Account, by right-clicking the application name, then selecting Activate all associations.</p> <p>You can also import alias tables using flat files or interface tables, or create them using the Batch Client.</p>
Creating UDAs	<p>Select Administration, then Dimensions, then select a dimension and a dimension member and click Edit. On the UDA tab, select UDA members or create them by clicking Add and entering a name. Select UDAs for the member by moving them to the Selected UDA list.</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), select File, then New, then Dimension. Enter a name and description, then select the UDA type.</p> <p>After the UDA dimension is created, you can add members. (Right-click a member, then select Create Member, then As Child or As Sibling.)</p> <p>Associate the new dimension with the base dimension, such as Entity or Account, by right-clicking the application name, then selecting Activate all associations.</p> <p>You can also import UDA members using flat files or interface tables, or create them using the Batch Client.</p>
Creating exchange rate tables	<p>Select Administration, then Manage Exchange Rates. Click Create, specify a name and description, and click Save. Enter</p>	<p>In the Dimension Library (Navigate, then Administer, then Dimension Library), assign the Exchange Rate Table property to Planning Scenario members in the Property Grid. In Planning, select Administration,</p>

Category / Action	Classic Planning	Planning with Performance Management Architect
	values in the exchange rate table for the proper currency conversions.	then Manage Exchange Rates . Click Create , specify a name and description, and click Save . Enter values in the exchange rate table.
Editing member properties	Select Administration , then Dimensions . Select a member and click Edit . Modify member properties and click Save .	Perform one task: <ul style="list-style-type: none"> ● Select a member in the Dimension Library (Navigate, then Administer, then Dimension Library), then make changes in the Properties Grid. You can update application members by selecting a member in an application and making changes in the Properties Grid. The changes apply to that application only, and do not impact the properties defined in the Dimension Library. (For the Member Name property, you cannot rename members.) ● Edit dimensions in the *.ads flat files. Then reload to the Dimension Library in replace or merge mode. You can also load the modified dimensions using the interface tables within the profile. ● Update member properties using the Batch Client. The application must be redeployed when member properties are updated in Performance Management Architect.
Organizing dimensions	Select Administration , then Dimensions . To sort dimensions, select a sort option, then click the Sort Ascending or Sort Descending button. You can also expand or collapse the dimension hierarchy.	In the Dimension Library (Navigate , then Administer , then Dimension Library), select File , then New , then Folder . Enter the folder name and click OK . To add dimensions to the folder, in the Shared Library, right-click the folder and select Add Dimensions .
Moving a member within the hierarchy	Select Administration , then Dimensions . To move members or branches up or down one position, select the member or branch and click the Move Up or Move Down button. To move members including parents and children, click Cut , select the destination member, and click Paste . You can also use the Sort Member utility.	Perform one task: <ul style="list-style-type: none"> ● In the Dimension Library (Navigate, then Administer, then Dimension Library), right-click the member and select Cut. Right-click the destination member and select Paste, then As Child or As Sibling. ● Edit dimensions in the *.ads flat files. Then reload to the Dimension Library in replace or merge mode. You can load the modified dimensions through the interface tables within the profile.
Reordering child members	Select Administration , then Dimensions . To move members or branches up or down one position, select the member or branch and	You can reorder children in the Dimension Library (Navigate , then Administer , then Dimension Library).

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	click the Move Up or Move Down button. To move members including parents and children, click Cut , select the destination member, and click Paste . You can also use the Sort Member utility.	Drag a member up or down to change the order. You can also right-click the dimension and select Reorder Children . Reorder members, then click OK .
Searching for members	Select Administration , then Dimensions . Select a search option, enter search text, and click the Search Up or Search Down button.	In the Dimension Library (Navigate , then Administer , then Dimension Library), right-click a dimension and click Find Members . Select to search by the member name, alias, or property, then click OK .
Security		
Application Creator role	The global Oracle's Hyperion® Shared Services role of Application Creator or <product> Application Creator (for example, Planning Application Creator) allows users to create and deploy applications. See the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> .	The global Shared Services role of Application Creator or <product> Application Creator (for example, Planning Application Creator) allows users to create and deploy applications. Required, in addition to the Dimension Editor role, to navigate to the Planning Classic application administration options. See the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> .
Dimension Editor role	The global Shared Services role of Dimension Editor creates and manages dimensions.	The global Shared Services role of Dimension Editor creates and manages dimensions within Performance Management Architect. Also required to access Planning Classic application administration options.
Dimension security	Dimension modifications can be made by users provisioned as Administrators through Shared Services for the application. Dimension access permissions are defined in Shared Services or in the Planning Dimension page.	Dimension security is assigned by the Dimension Editor or the Dimension Owner.
Calculation Manager Administrator	Rules are maintained in Oracle's Hyperion® Business Rules.	Planning Calculation Manager Administrator enables you to create business rules using Hyperion Calculation Manager.
Financial Data Management		
Importing data from Oracle E-Business Suite	To import data from Oracle E-Business Suite into Oracle Hyperion Financial Data Quality Management, Fusion Edition: <ul style="list-style-type: none"> ● Generate the data from E-Business Suite Financials. ● Set up an import format in FDM to enable FDM to import the data file generated by the adapter. ● Assign the import formats to a location. 	Use Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications to import data from Oracle E-Business Suite. To use ERP Integrator: <ul style="list-style-type: none"> ● Login to Workspace and select Navigate, then Administer, and then ERP Integrator. ● In ERP Integrator, register the source systems. Then, map segments in the

Category / Action	Classic Planning	Planning with Performance Management Architect
		<p>source system to dimensions in the target application.</p> <ul style="list-style-type: none"> ● Run a dimension extract to import members and hierarchies into Classic Planning or Performance Management Architect applications. ● Define data rules and run the data rules to extract data from the source system and push into target applications. ● If using FDM and ERP Integrator together: <ul style="list-style-type: none"> ○ Load metadata using Performance Management Architect or Classic Planning. ○ Load data using a flat file through Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications and then use the flat file in Oracle Hyperion Financial Data Quality Management, Fusion Edition to push the data into the target application.

Administration Tasks for Managing Business Rules

With the previous release, Oracle Hyperion Financial Management, Fusion Edition and Planning users working with Performance Management Architect applications could use a new calculation module, Calculation Manager, to create and administer their business rules in a graphical environment. However, classic Financial Management application users could only use Financial Management to create their business rules; Classic Planning application users and Oracle Essbase BSO users could only use Business Rules to create and administer their business rules.

In this release, Financial Management and Planning users working with Classic or Performance Management Architect applications, and Essbase BSO application users, can create and manage their business rules in Calculation Manager.

This table compares business rules features in Calculation Manager, in Business Rules (for Classic Planning and Essbase users), and in Financial Management (for Financial Management users).

Table 2 Comparison of business rules features in Calculation Manager, Financial Management, and Business Rules

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
Creating business rules	You can create a business rule graphically in a flow	You can create a business rule in the Business Rules	You can create a business rule in the Rules Editor or

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	<p>chart within the Rule Designer.</p> <p>There are five components for Planning and Essbase, and six components for Financial Management that you use to design business rules:</p> <ol style="list-style-type: none"> 1. Formula component 2. Script component 3. Condition component 4. Loop component 5. Member range component 6. (Financial Management users only) Data range component <p>You can use members, variables, and functions in the components.</p>	<p>Graphical Designer and in the Business Rules node of the Administration Console of Oracle Essbase Administration Services.</p> <p>There are four actions and eight formulas you can use to design graphical business rules:</p> <ol style="list-style-type: none"> 1. Aggregate Data action 2. Copy Data action 3. Clear Data action 4. Create Blocks action 5. Pro-Rata Ration formula 6. Distribution Factor formula 7. Evenly-Split formula 8. Increase-Decrease formula 9. Units-Rates formula 10. Combined formula 11. Custom formula 12. Variable formula 	<p>in a text editor. You can use Visual Basic and Financial Management functions and members in Financial Management business rules.</p>
<p>Using system templates (in Calculation Manager) and actions and formulas (in Business Rules) to design business rules</p>	<p>There are eight Planning and Essbase system templates in Calculation Manager:</p> <ol style="list-style-type: none"> 1. The Aggregation template aggregates data. 2. The Copy Data template copies data. 3. The Clear Data template deletes data. 4. The Allocation Simple template allocates data from one location to another. 5. The Allocation Level to Level template allocates data from multiple levels. 6. The Amount-Rate-Unit template calculates one variable when you 	<p>There are four actions in Business Rules that function like several of the system templates in Calculation Manager:</p> <ol style="list-style-type: none"> 1. The Aggregate Data action functions like the Aggregation template in Calculation Manager. 2. The Copy Data action functions like the Copy Data template in Calculation Manager. 3. The Clear Data action, together with the Create Blocks action, functions like the Clear Data template in Calculation Manager. 4. The Create Blocks action, together with the Clear Data action, 	<p>Not applicable</p>

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	<p>supply values for the other two.</p> <p>7. The Export Data template exports data to a database or file.</p> <p>8. The SET Commands template enables you to enter script commands that optimize the performance of calculation scripts.</p> <p>There are eight Financial Management system templates in Calculation Manager:</p> <p>1. The Financial Round template rounds data using financial rounding instead of statistical rounding. The Financial Round function rounds data to the specified number of decimals using the 4 down/5 up method.</p> <p>2. The Get Days In Month template generates the number of days in a month based on a specified year and month number. The month can be entered as a number outside of the usual range of 1 to 12, and the function offsets. For example, if you enter the year 2008 and the period number 0, the number of days for December 2007 is returned. If you enter the year 2008 and the period number 14, the number of days for February 2009 is returned. This function also accounts for Leap years.</p> <p>3. The Is In List template tests whether a</p>	<p>functions like the Clear Data template in Calculation Manager.</p> <p>Business Rules also provides formulas that function like Calculation Manager system templates:</p> <p>1. The Pro-Rata Ratio formula functions like the Allocation Simple template in Calculation Manager.</p> <p>2. The three Units-Rates formulas function like the Amount-Rate-Unit template in Calculation Manager.</p>	

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	<p>specified dimension member is a member of a specified member list.</p> <p>4. The Average Balance Sheet template calculates average balance sheet ratios for MTD, QTD, HYTD, and YTD frequencies. Data can be entered as MTD< QTD, HYTD< YTD, or the cumulative daily balance.</p> <p>5. The Opening Balance template calculates the opening balance of an account based on a specified retrieval method. The retrieval of the opening balance can be from the same value currency or from the Entity Currency Total.</p> <p>6. The Complex Consolidation template is a pre-built consolidation rule that consolidates and eliminates for each entity in the consolidation group based on the consolidation method (Holding, Global, Proportional, or Equity) assigned to each entity. It calculates for Capital, Investment, Net Income, and standard elimination. Audit transactions are generated based on the audit flag set by the user. The consolidation rule in this template provides most of the calculations for typical Statutory requirements.</p>		

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	<p>7. The Standard Consolidation template is a pre-built consolidation rule that consolidates and eliminates for each entity in the consolidation group using the default consolidation process.</p> <p>8. The Entity Allocation template allocates the source account from the group parent entity to the destination account for each entity in the list based on the allocation weight specified.</p>		
Creating custom-defined templates (in Calculation Manager) and macros (in Business Rules) to design business rules	You can use a wizard to design reusable custom-defined templates to perform calculations unique to your business. You can copy a system template and save it with a new name to use as a starting point for a custom-defined template.	You can design reusable macros to perform calculations unique to your business.	Not applicable
Creating design time prompts	You can use a wizard to create design time prompts for custom-defined templates in Calculation Manager.	You can use variables in macros to prompt for information.	Not applicable
Sharing components	You can share script and formula components across plan (for Planning) and calculation (for Financial Management) types and applications.	Not applicable	Not applicable
Dragging and dropping components	You can drag and drop components into a business rule's flow chart within the Rule Designer.	You can drag and drop actions and formulas into the business rule's process bar in the Graphical Designer.	Not applicable
Showing and hiding detail	You can zoom in or out within a flow chart to display more (or less) detail.	Not applicable	Not applicable

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
Editing a business rule calc script	You can edit a business rule in calc script format, and return to editing it graphically in the Rule Designer.	You can edit a business rule in calc script format, but you cannot return to editing it graphically.	You can edit a business rule in text mode only.
Validating business rules	<p><i>If you are working with a Performance Management Architect application, you can validate a Planning business rule against Performance Management Architect and/or Planning. You can validate a Financial Management business rule against Performance Management Architect only. You may want to validate against Performance Management Architect, for example, when the application you are validating against is not deployed, or when the application in Oracle Hyperion EPM Architect, Fusion Edition is not synchronized with the applications that are deployed to Financial Management and Planning.</i></p> <p><i>If you are working with a classic Financial Management or a classic Planning application: you can validate business rules against only Financial Management or Planning, respectively.</i></p>	You can validate a business rule against Essbase or Classic Planning.	You can use the Scan function to scan the Visual Basic script file to ensure the functions are valid with the correct number of parameters and the dimension members are valid for the application.
Deploying business rules	You can deploy one business ruleset per calculation type to Financial Management; you can deploy one or more business rules to Planning and Essbase; you can deploy one or more business rulesets to Planning. You must deploy business rules and business rulesets to launch them from within Financial Management or Planning.	Not applicable	Not applicable

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	The applications and calculation types, plan types, or databases you deploy them to determine their launch locations.		
Launching business rules	After you deploy them from Calculation Manager, you launch Financial Management business rulesets and Planning business rules from within Financial Management and Planning. After you deploy Essbase business rules you can launch them from within Administration Services. Launch locations are determined by the locations to which you deploy business rules and business rulesets. You can define multiple launch locations for a business rule by creating shortcuts for it in Calculation Manager.	You can launch business rules from one or all locations by selecting the locations from which they can be launched. You can launch business rules from the Rules node of the Oracle Essbase Administration Services Administration Console, the Business Rules Graphical Designer, the Business Rules Web Launcher, a command line prompt, or from Planning Web.	You execute business rules when you perform calculations, translations, consolidations, and allocations.
Working with views	Calculation Manager contains four views of the objects to which you have access: <ol style="list-style-type: none"> 1. The System View 2. The Custom View 3. The Deployment View 4. The List View 	Business Rules does not contain views. You view business rules and other objects in a flat list, by object type, from within the Administration Console.	Not applicable
Using the System View	The System View displays a hierarchical list of the Financial Management, Planning, and/or Essbase applications, their calculation types, plan types, and/or databases, and the objects to which you have access. This view enables you to see which application and calculation type, plan type, or database a business rule is designed against. (This is the default view in Calculation Manager.)	Not applicable	Not applicable

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
Using the Custom View	The Custom View displays a list of folders you create and objects you drag and drop into them. This view enables you to organize objects in a way that is meaningful to you.	Not applicable*	Not applicable
Using the Deployment View	The Deployment View displays a list, by application type and application, of the rules and rulesets that are deployed and not deployed, and their deployment and validation status.	Not applicable	Not applicable
Using the List View	The List View displays a list of the objects you select from the Filter dialog. The filter dialog enables you to create a filtered list, by application type, of applications, calculation and plan types, and objects to which you have access.	Not applicable	Not applicable
Migrating business rules	<p>You can migrate business rules and other objects from the previous release of Business Rules to this release of Calculation Manager.</p> <p>Note: To migrate Financial Management business rules, you use the Import feature of Calculation Manager.</p>	You can migrate business rules from the previous release of Business Rules to this release of Calculation Manager and from previous releases of Business Rules to this release of Business Rules.	You can migrate business rules from the previous release of Financial Management to this release of Calculation Manager and from previous releases of Financial Management to this release of Financial Management.
Importing business rules	You can import business rules (and other objects such as templates and components) into Calculation Manager from Business Rules or from another Financial Management or Planning application within Calculation Manager. You can also import Essbase calc scripts into Calculation Manager. When you import calc	You can import business rules from an .xml file into Business Rules.	You can use the Load Rule option to import a valid Visual Basic script file into the application.

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	script files, they become graphical business rules in Calculation Manager.		
Exporting business rules	You can export one or more business rules and other objects from Calculation Manager to an .xml file.	You can export business rules and other objects from Business Rules to an .xml file.	You can use the Extract Rule option to export business rules from Financial Management to an external Visual Basic script file.
Using business rule shortcuts	You can create shortcuts to a business rule in multiple applications and calculation or plan types. When you deploy business rules with shortcuts, a copy of the rule is deployed to the applications and calculation or plan types for which you created a shortcut.	Not applicable	Not applicable
Working with variables	<p>There are four variable types for Planning, two variable types for Financial Management, and three variable types for Essbase in Calculation Manager:</p> <ol style="list-style-type: none"> 1. Global: can be used in any Planning or Financial Management application 2. Application: can be used only in the Planning, Financial Management, or Essbase application for which it was created 3. Plan type or database: can be used only in the Planning plan type or Essbase database for which it was created 4. Business rule: can be used only in the Planning or Essbase business rule for which it was created 	<p>There are two variable types in Business Rules:</p> <ol style="list-style-type: none"> 1. Global: can be used in any business rule 2. Local: can be used only in the business rules for which they are created 	<p>There are two variable types in Financial Management:</p> <ol style="list-style-type: none"> 1. Global: apply to the whole calculation process 2. Local: apply to the individual subroutines only
Assigning access permissions to create and edit business rules	In Calculation Manager, your ability to create, view, and edit business rules	In Business Rules, you assign permission to edit business rules and other	In Financial Management, you do not need access

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	<p>and other objects is determined by the role you are assigned in Shared Services and your ownership of the object in Calculation Manager. By default, a user owns the business rules and other objects the user creates. As an administrator or owner of the object, you can assign ownership of it to another user.</p> <p>Users need one of these roles to create business rules in Calculation Manager:</p> <ul style="list-style-type: none"> ● Oracle's Hyperion® Shared Services roles: <ul style="list-style-type: none"> ○ Calculation Manager Administrator ○ Planning Calculation Manager Administrator ○ Financial Management Calculation Manager Administrator ● Planning roles: <ul style="list-style-type: none"> ○ Planning Administrator ○ Planning Interactive User 	<p>objects by selecting which users and groups can modify them.</p> <p>Users need one of these roles to create business rules in Business Rules:</p> <ul style="list-style-type: none"> ● Planning roles: <ul style="list-style-type: none"> ○ Planning Administrator ○ Planning Interactive User ● Essbase roles: <ul style="list-style-type: none"> ○ Essbase Administrator ○ Essbase Application Manager <p>Note: Planning Planners or View Users do not have access to business rules.</p>	<p>permissions to create or edit business rules.</p>
<p>Assigning access permissions to launch business rules</p>	<p>You assign permission to launch business rules and business rulesets in Financial Management or Oracle Hyperion Planning, Fusion Edition; you assign permissions to launch business rules in Essbase. Assigning permissions occurs after the business rules and business rulesets are deployed from Calculation Manager.</p>	<p>You assign permission to launch business rules and sequences in Oracle's Hyperion® Business Rules by selecting the database location (or all locations) from which they can be launched and by selecting which users and groups can launch them.</p>	<p>You assign permission to execute a calculation process in Oracle Hyperion Financial Management, Fusion Edition by assigning the correct role security access for the application to which it belongs. For example, to run a Consolidate process, the user must have role security for Consolidate.</p>

Feature / Action	In Calculation Manager	In Business Rules (for Classic Planning and Essbase users)	In Financial Management (for Financial Management Users)
	<p>Hyperion Calculation Manager business rules that are deployed into Essbase become calculation scripts and the permissions to launch calculation scripts can be assigned in Oracle Essbase by an Essbase Administrator, an Application Manager, or a Database Manager.</p>		

*In Business Rules, you can create projects to organize your business rules, sequences, macros, and variables in ways that are meaningful to you.

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Planning Using Administrator Features, 11.1.1.3

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