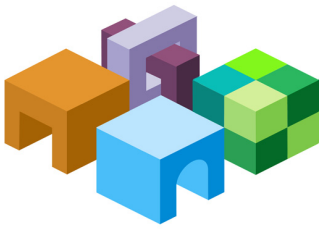


RELEASE 9.3.1.1

GETTING STARTED WITH ORACLE® DATA INTEGRATOR ADAPTER FOR HYPERION PLANNING

ORACLE | Hyperion

Contents In Brief

Sample Files for Practice

This document guides you through the use of the sample files that are included with Oracle® Data Integrator Adapter for Hyperion Planning. The sample files are intended to familiarize you with the adapter and provide practice in using it to load metadata and data into Oracle's Hyperion® Planning – System 9.

The sample files are delivered in the `odiap_93110_samples.zip` file, which you can extract to any folder. The `odiap_93110_samples.zip` file contains these folders:

- `data`, which contains these files:
  - `Accounts.csv`
  - `DataLoad.csv`
  - `Entities.csv`
  - `Segments.csv`
- `work_repository`, which contains the `planning_samples.zip` file

Planning Sample Application Prerequisites

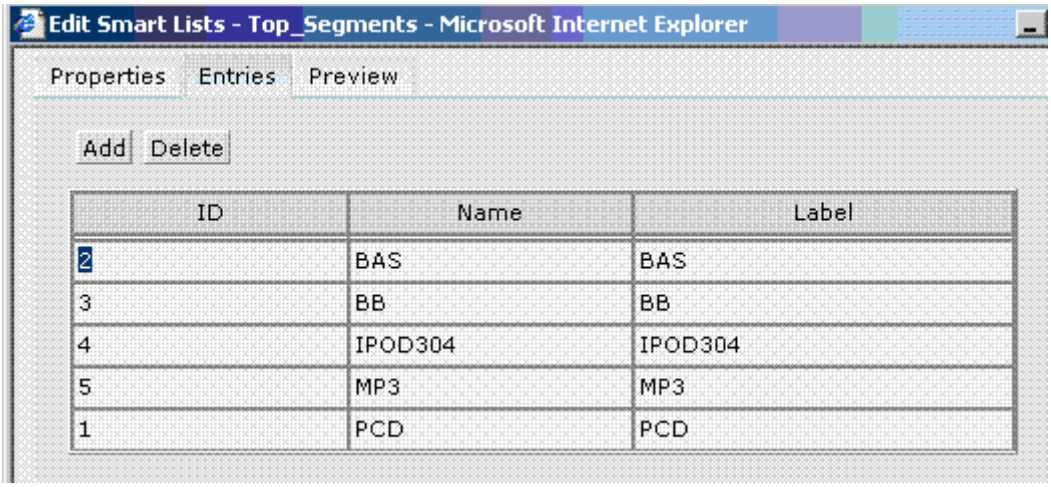
Your Planning sample application must meet these requirements before you can use the sample files that are provided with this release:

- The Planning 9.3.1 sample application must be installed as RefApp931 with a cube name of Consol.

  Note:

  You can update the `.csv` data files to change the cube name to a name that is appropriate for your environment. If the Planning reference application is being used, no changes are needed.

- The Smart List named Top_Segments must exist in the Segments dimension and contain the members BAS, IPOD304, BB, PCD, and MP3.



Note:

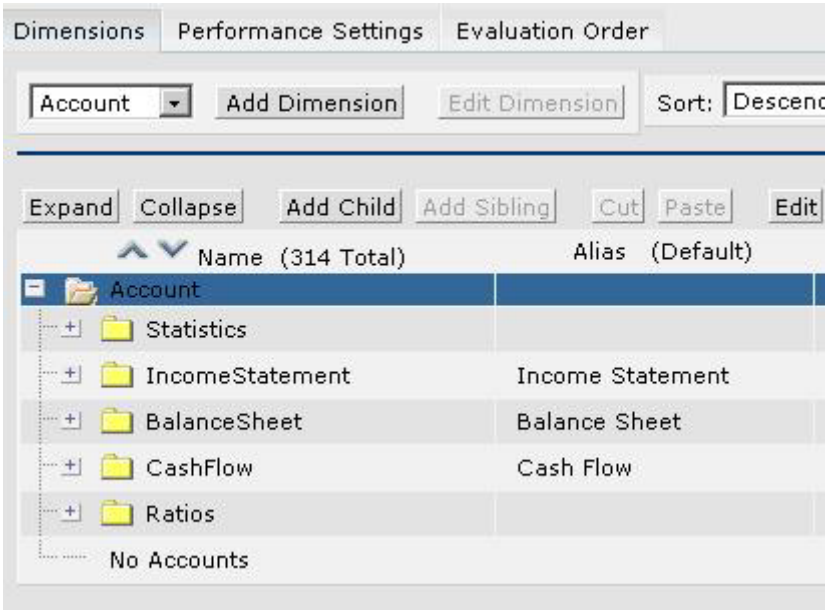
For Planning installations earlier than Release 9.3.1, you can create a sample application and create a Smart List named Top_Segments with entries as shown in the preceding figure.

- The dimensions and members must be set up as described in "Dimensions Reference" on page 3.

See the *Hyperion Planning - System 9 Administrator's Guide* for help on creating the Planning 9.3.1 Sample Reference Application, associated Planning metadata, and Planning settings.

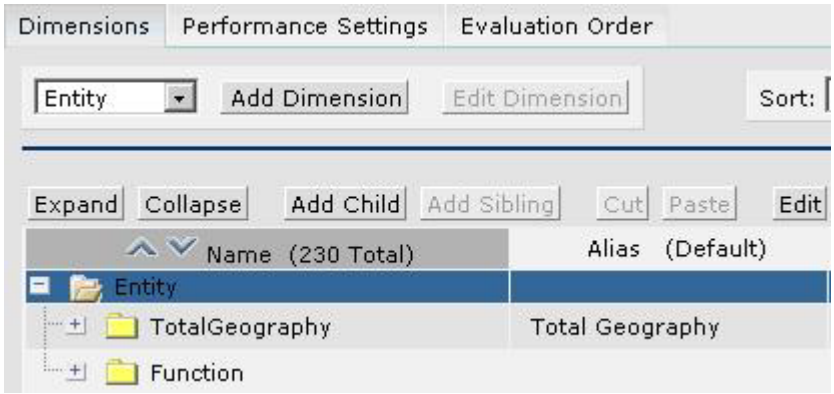
Dimensions Reference

Account—Default Members



Currency—Default Members

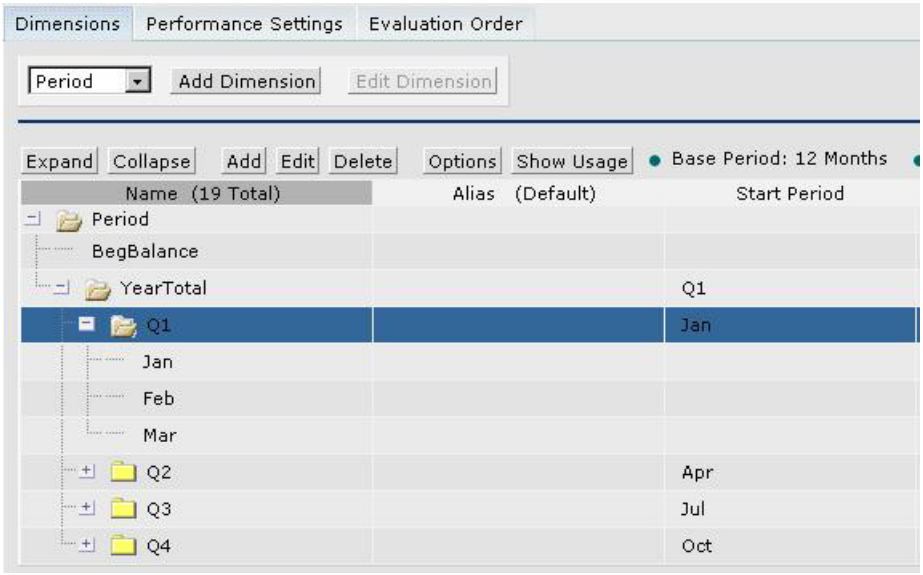
Entity Default



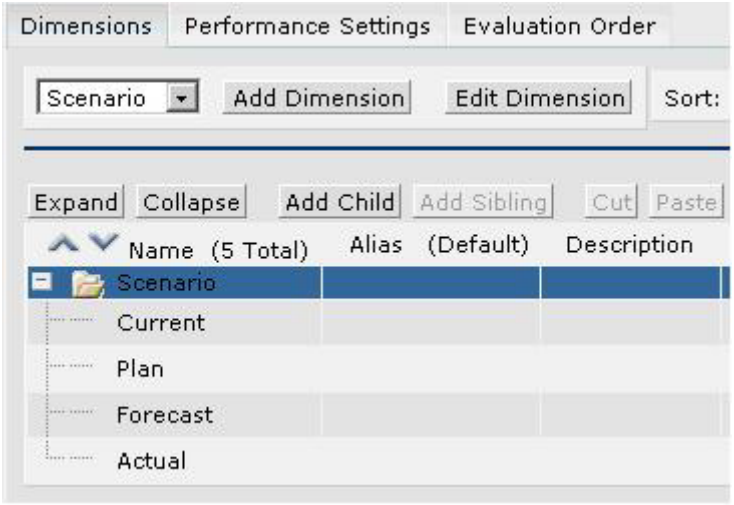
Note:

For Planning applications earlier than Release 9.3.1, the sample includes a mapping to load the Entities dimension. You can run that mapping to build your Entity hierarchy. This step is not required if you use the Planning 9.3.1 sample application.

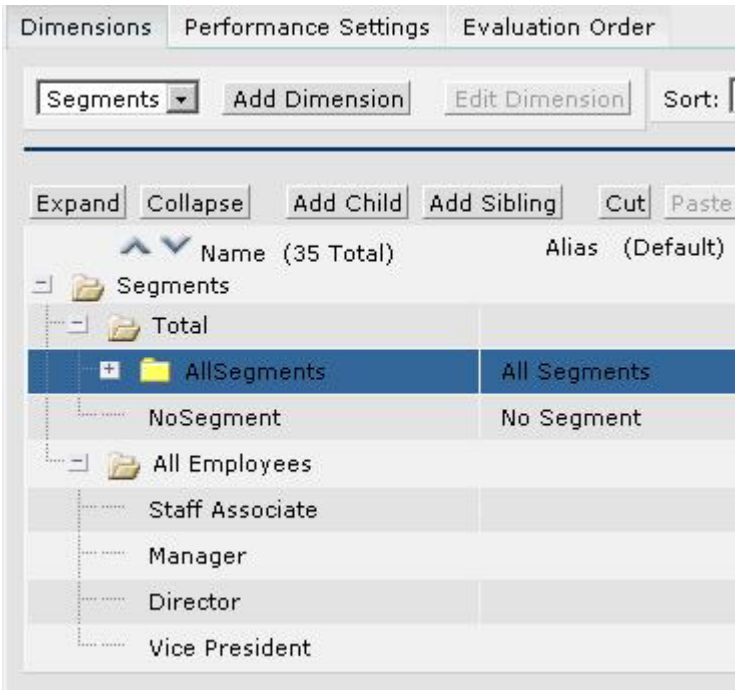
Period – Quarters – Months



Scenario—Default Members



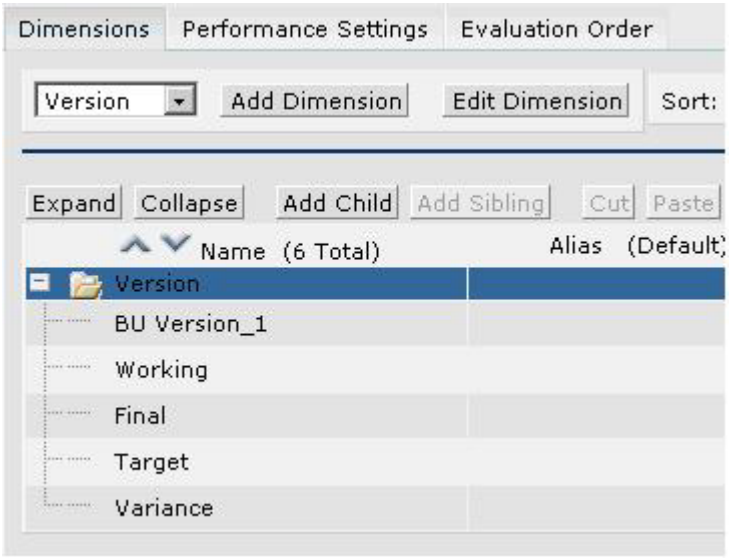
Segments—Default Members



Note:

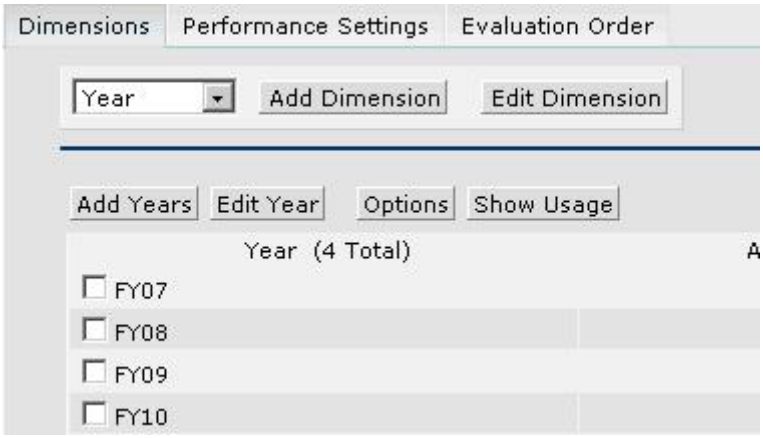
In the Planning 9.3.1 sample application, the segment hierarchy has all required members. If you are setting up this application with an earlier release of Planning, you can build the Segments dimension using the interface loadSegments that is included with the samples.

Version—Default Members



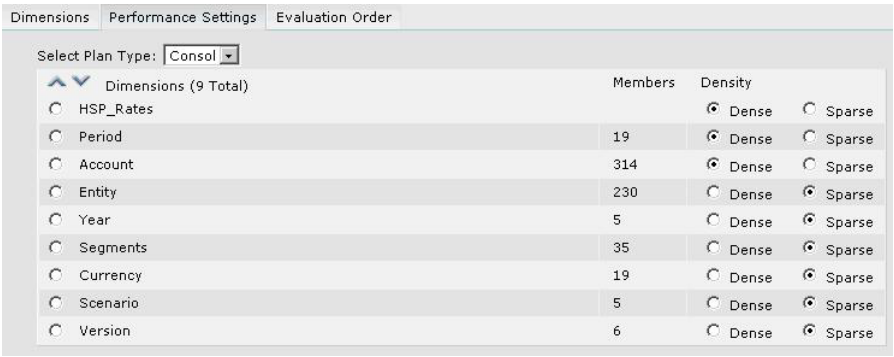
Year

The application must contain the year FY07.



Performance Settings

You can make changes as needed on Performance Settings:



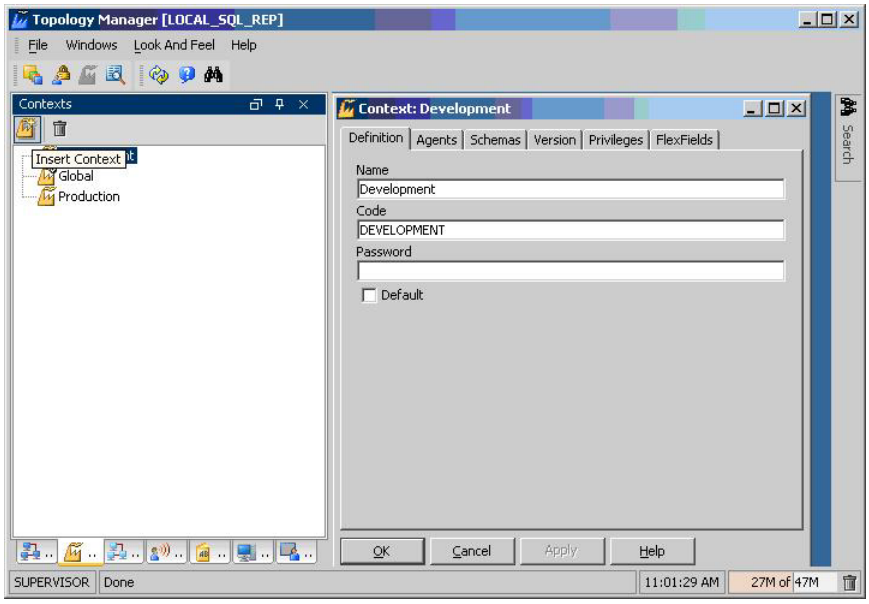
Setting Up an Environment

Before you load the metadata from the sample files, you must set up the sample environment in Oracle Data Integrator, as described in these topics:

- "Creating the Context" on page 7
- "Setting Up the Hyperion Planning Data Server" on page 8
- "Setting Up a Work Repository" on page 12

Creating the Context

Launch the Topology Manager, and create a context called Development. See the *Oracle Data Integrator User's Guide* for instructions.



Setting Up the Hyperion Planning Data Server

Use Oracle Data Integrator to create a data server for the Hyperion Planning technology and create a physical schema and logical schema for the data server.

See the *Oracle Data Integrator User's Guide* for more information about creating data servers.

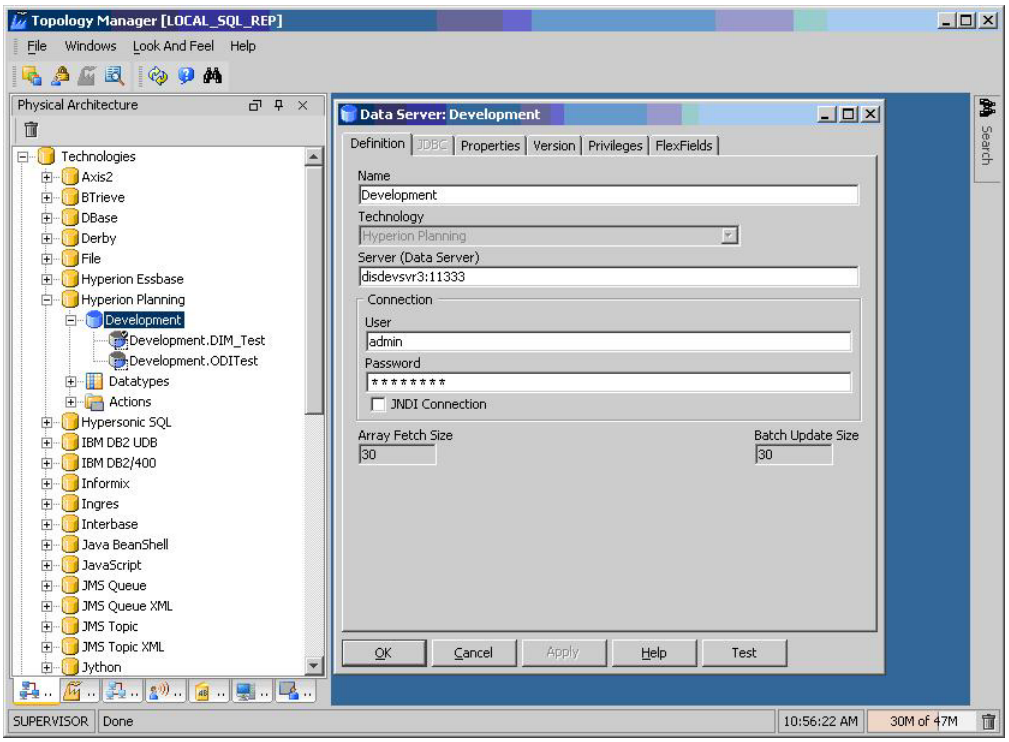
➤ To set up a Hyperion Planning data server:

1 **Using the Topology Manager, create a data server under the Hyperion Planning technology:**

Note:

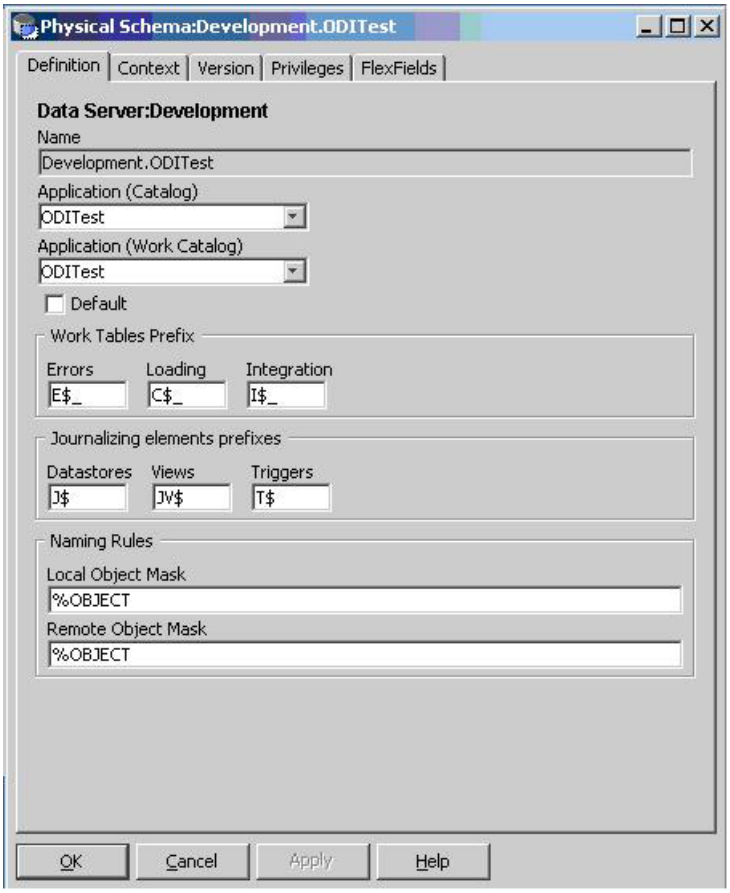
If the Hyperion Planning technology is not listed in the Topology Manager, you must import it. See the *Oracle Data Integrator User's Guide* for instructions.

You can give the data server any name. This figure shows a data server named Development:



2 **Create the physical schema to point to your Planning application.**

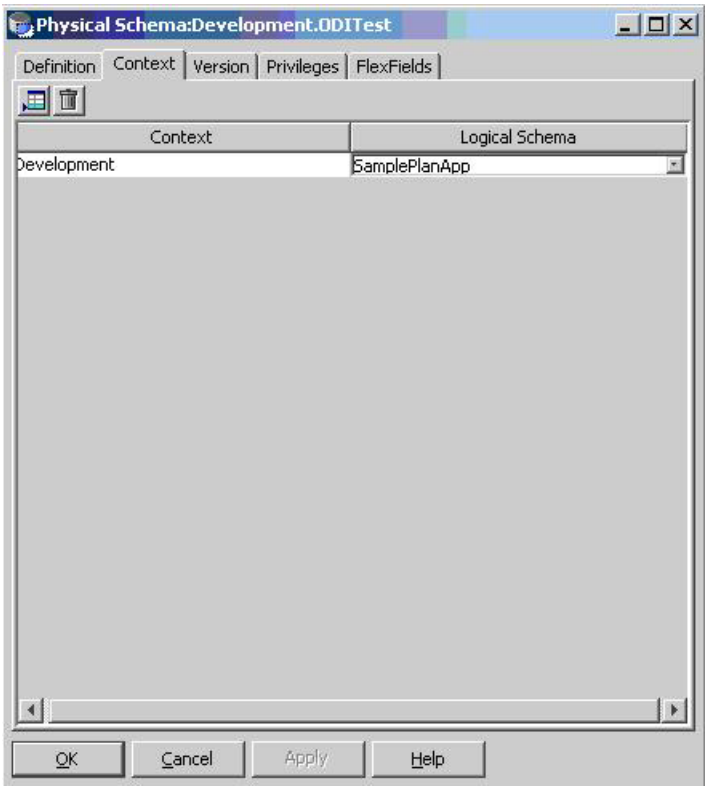
In this figure, the physical schema points to a Planning application called ODITest:



3 On the **Context** tab:

a. Set the **Context** to Development.

b. Enter the logical schema name SamplePlanApp, as shown in this figure:



Caution!

If you give the logical schema a different name, update the models and interfaces to point to the name that you used. Otherwise, you might be unable to run the packages and interfaces after importing the work repository.

c. Click **OK**.

See the *Oracle Data Integrator User's Guide* for more information about setting up a data server.

Setting Up a File Physical Schema

Use Oracle Data Integrator to create a physical schema for the File technology, and create a physical schema for the File data server.

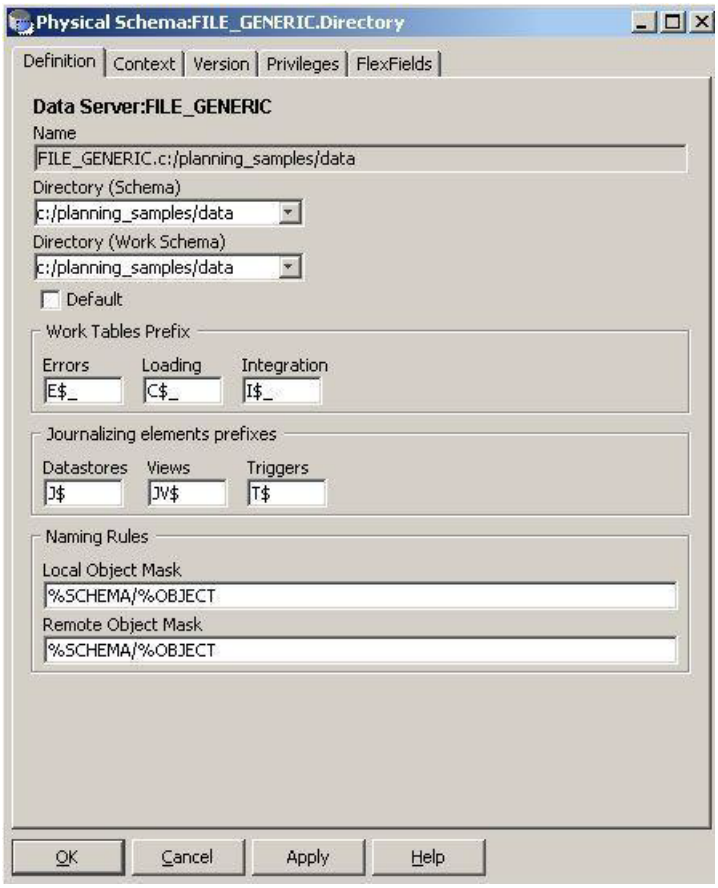
Note:

This procedure is required because the sources for the samples are delimited flat files.

➤ To set up a File physical schema:

1 **Using the Topology Manager, create a physical schema under the File technology for the FILE_GENERIC data server.**

2 **In Directory (Schema), select the `data` folder (extracted from `odiap_93110_samples.zip`), as shown in this figure:**

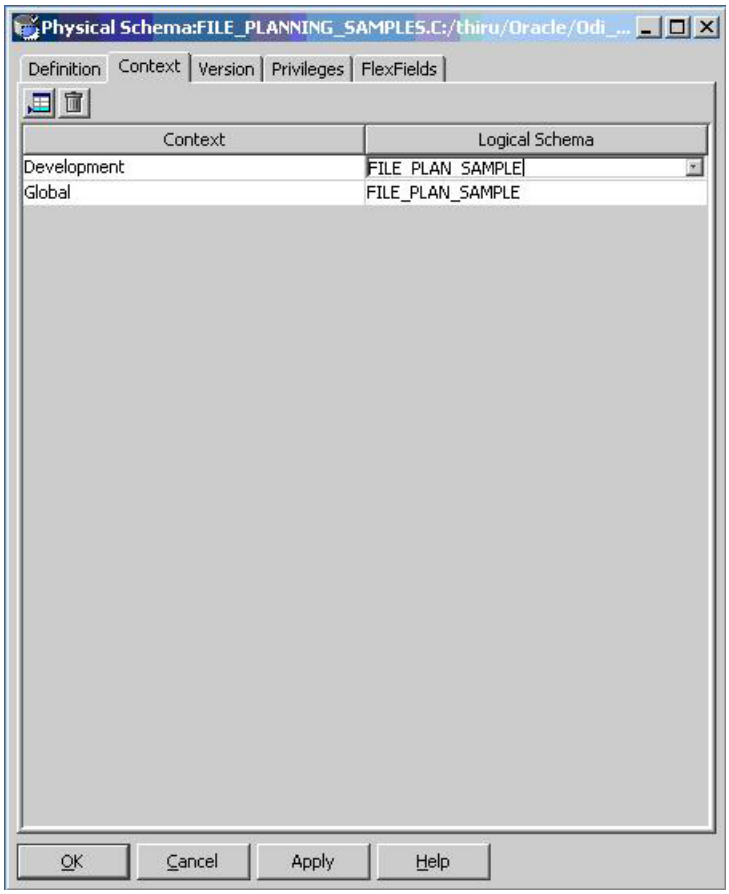


The data folder contains the samples source files.

3 **On the Context tab:**

a. Set the **Context** to Development.

b. For **Logical Schema**, enter FILE_PLAN_SAMPLE, as shown in this figure:



c. Click **OK**.

Setting Up a Work Repository

The `odiap_93110_samples.zip` that is delivered with Oracle Data Integrator Adapter for Hyperion Planning includes a work repository export file called `planning_samples.zip`. (For more information about `odiap_93110_samples.zip`, see "Sample Files for Practice" on page 2.) The `planning_samples.zip` file contains the Oracle Data Integrator models, interfaces, packages, and KMs that are required for loading metadata and data into the sample Planning application. Use Oracle Data Integrator to create a work repository for your work with the Adapter for Hyperion Planning samples and import `planning_samples.zip` into the work repository.

➤ To set up a work repository:

1. **Using the Topology Manager, connect to a master repository and create a work repository named ODI_PLANNING_SAMPLE. See the *Oracle Data Integrator User's Guide* for instructions.**
2. **Launch Designer, and connect to the ODI_PLANNING_SAMPLE work repository.**
3. **Select File > Import > Work Repository.**
4. **Select an import mode.**

The INSERT_UPDATE mode is recommended.

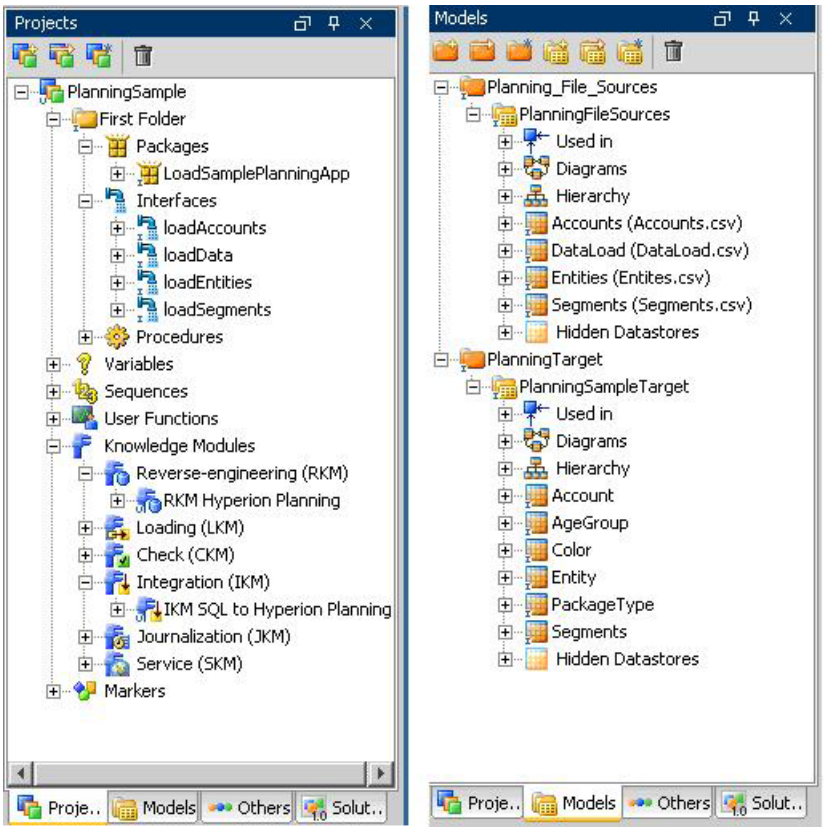
5 **Navigate to the folder containing `planning_samples.zip`, and click OK.**

These interfaces are added to the work repository:

- loadAccounts
- loadEntities
- loadSegments
- loadData

The import also adds two packages called LoadMetadata and LoadData, which chain those interfaces for metadata and data load. You can double-click an interface to open it and see the column mapping and IKM options (in the Flow tab).

This figure shows how the Projects and Models trees look when the import succeeds:



Loading the Sample Application

Loading the samplePlanning application involves this task sequence:

- Loading metadata into the Account, Entity, and Segments dimensions

  See "Loading Metadata into the Sample Application" on page 14.

- Refreshing the application's cube

See "Refreshing Metadata for RefAp931" on page 16

- Loading data into the application

  See "Loading Data" on page 16.

Loading Metadata into the Sample Application

Load metadata into the Planning sample application following the procedures in these topics:

- "Loading Account Dimension Metadata" on page 14
- "Loading Entity Dimension Metadata" on page 15
- "Loading Segments Dimension Metadata" on page 15

Loading Account Dimension Metadata

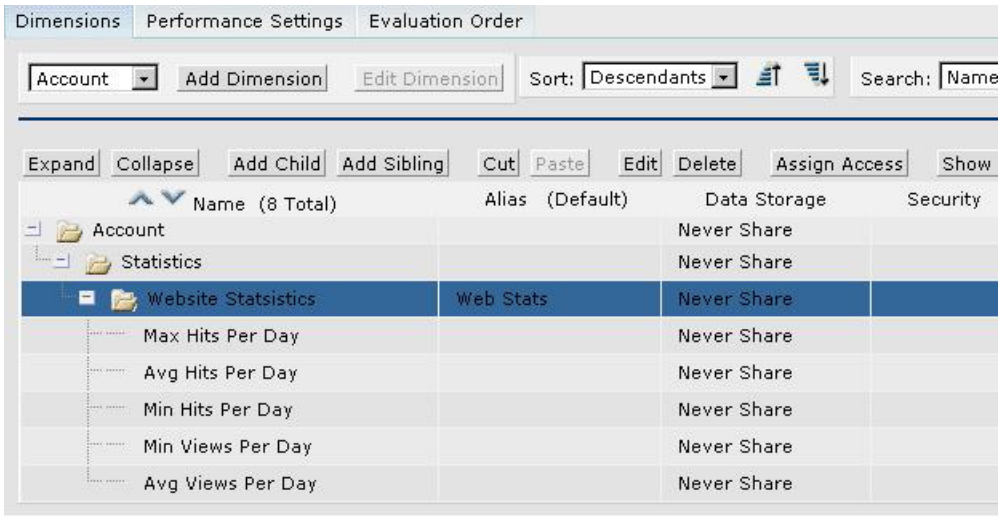
The sample package includes an interface called loadAccounts, which loads metadata into the Account dimension.

Note:

For instructions on building this interface or others like it, see "Creating Interfaces to Load Metadata and Data" on page 19.

➤ To load metadata into the Account dimension:

1. **Run the loadAccounts interface.**
2. **Check the Operator log to see if the interface ran successfully.**
3. **Validate the Account dimension:**
   a. Log on to Planning Web.
   b. Select **Administration** > **Dimensions**.



Loading Entity Dimension Metadata

The sample package includes an interface called loadEntities, which loads metadata into the Entity dimension.

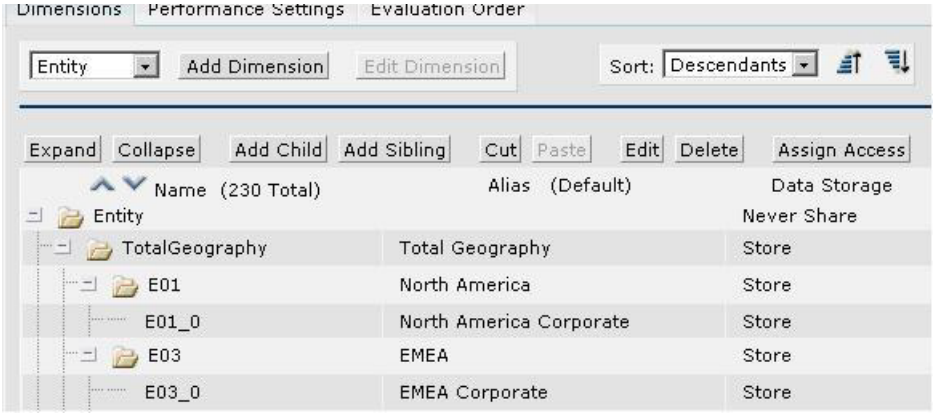
Note:

This procedure is not required if you use the Planning reference sample application that is included with Release 9.3.1, which has the required hierarchy setup.

➤ To load metadata into the Entity dimension:

1. **Run the loadEntities interface.**
2. **Check the Operator log to see if the interface ran successfully.**
3. **Validate the Entity dimension:**
   a. Log on to Planning Web.
   b. Select **Administration** > **Dimensions**.

This figure shows how the Entity dimension should look:



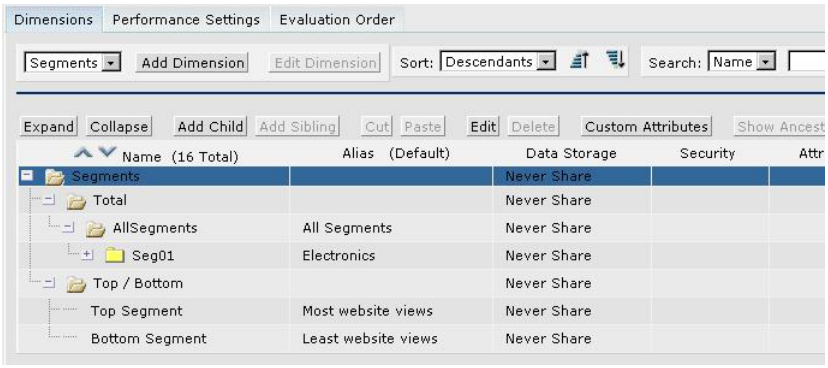
Loading Segments Dimension Metadata

The sample package includes an interface called loadSegments, which loads metadata into the Segments dimension.

➤ To load metadata into the Segments dimension:

1. **Run the loadSegments interface.**
2. **Check the Operator log to see if the interface ran successfully.**
3. **Validate the Segments dimension:**
   a. Log on to Planning Web.
   b. Select **Administration** > **Dimensions**.

This figure shows how the Segments dimension should look, with the Smart List member Top Segment displayed:



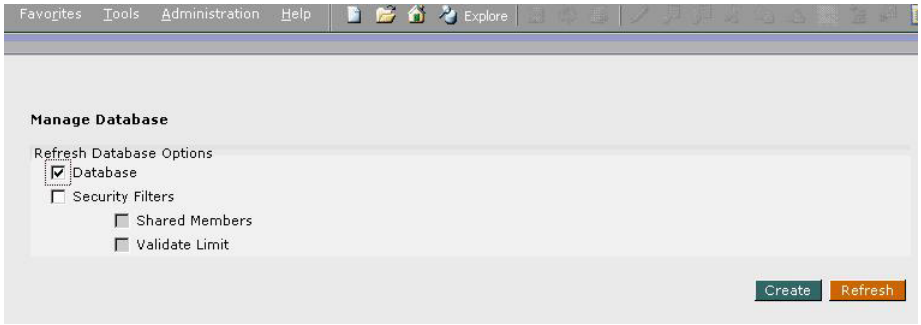
Refreshing Metadata for RefAp931

Note:

This procedure is not required if you are using a Planning 9.3.1 server. The loadSegments interface has the REFRESH_DATBASE option set to Yes, so the refresh is performed after you run the loadSegments interface.

➤ To refresh metadata for RefAp931:

1. **Log on to Planning Web.**
2. Select **Administration > Manage Database.**



Metadata is added to the Oracle's Hyperion® Essbase® – System 9 application database.

Loading Data

Use the Oracle Data Integrator Planning KM to load data into a Planning application.

Note:

Before you can load data into a Planning application using Oracle Data Integrator, you must set up the data load driver dimensions in Planning Web. You might also need to modify `dataload.csv` file to change the cube name (Consol) to match you environment.

➤ To load data into a Planning application:

1 **Specify parameters for data to load:**

a. Select **Administration** > **Data Load Administration**.

b. For **Available Data Load Dimensions**, select a dimension, and click **Go**.

The dimension is the dimension to which you load metadata using Hyperion Application Link, and corresponds to the method in the Adapter for Hyperion Planning.

c. For **Available Driver Dimensions**, select the dimension to which you are loading data in an EssbaseOracle's Hyperion® Essbase® – System 9 database; for example, select the Account dimension.

d. Select the members of the driver dimension to load with data; for example, select the members of the Segments dimension: BAS, HTAS, IPOD304, BB, PCD, MP3, Top Segment, and Bottom Segment.

The members that you select become ports (fields) in the Adapter for Hyperion Planning.

e. Click **Save**.

2 **Run the loadData interface.**

3 **Check the Operator log to see if the interface ran successfully.**

4 **Validate the data load by creating a Planning Web Form to retrieve data or checking Oracle's Essbase® Administration Services to ensure that blocks were created in the appropriate cube.**

Creating and Reverse-Engineering the Sample Source Models

Use Oracle Data Integrator Designer to create and reverse-engineer the Adapter for Hyperion Planning sample source models.

➤ To create and reverse-engineer the sample source models:

1 **In the Models view, insert a new model folder called `Planning_File_Sources`**

2 **Right-click the `Planning_File_Sources` model folder, and select Insert Model.**

3 **Name the model PlanningFileSources, and set Technology to File and Logical Schema to FILE_PLAN_SAMPLE.**

4 **On the Reverse tab, set Context to Development, and click OK.**

5 **Right-click PlanningFileSources, and select Insert DataStore.**

6 **Set Name to Accounts, Entities, Segments, or DataLoad, depending on which file source you are defining.**

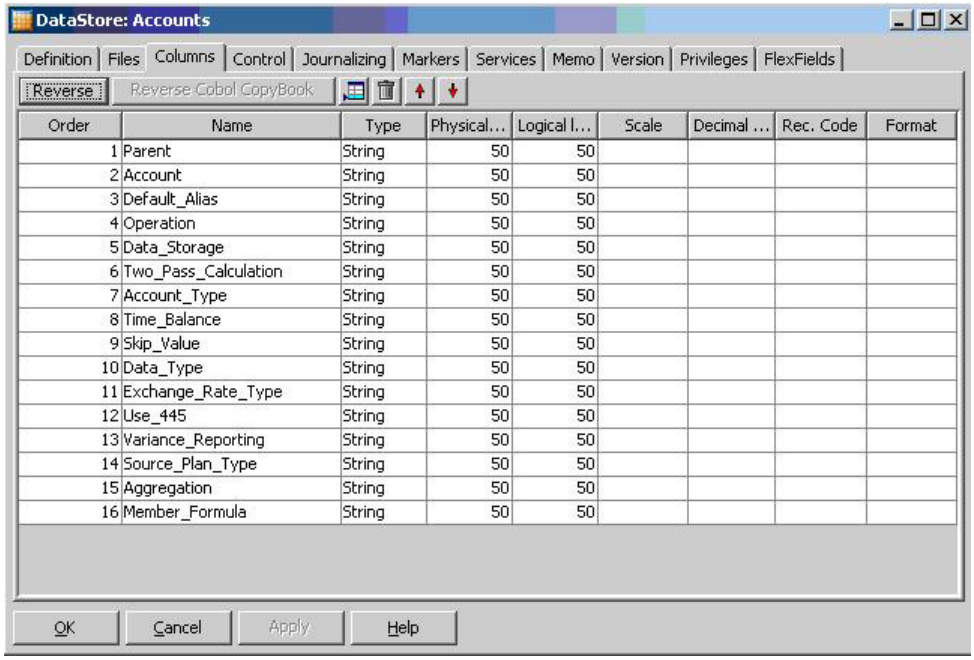
7 Click the **Browse** button next to Resource Name, and select the file for the source that you are defining (Accounts, Entities, DataLoad, or Segments).

8 Select the **File** tab.

9 Set **File Format** to Delimited, **Heading (Number of lines)** to 1, and **Field Separator** to , (comma).

10 Click the **Columns** tab, and then click **Reverse**.

This figure shows how the page should look:



11 Repeat step 5 through step 10 for each remaining file source.

Creating and Reverse-Engineering the Sample Target Models

Use Oracle Data Integrator Designer to create and reverse-engineer the Adapter for Hyperion Planning target models.

Caution!

Before completing the reverse-engineering process in this procedure, ensure that data load administration is set up in Planning to set the Data Load Dimension and Driver dimension and its members correctly; see Dimensions Reference. Otherwise, the required ports for data load are not in the Account DataStore.

➤ To reverse-engineer the sample target models:

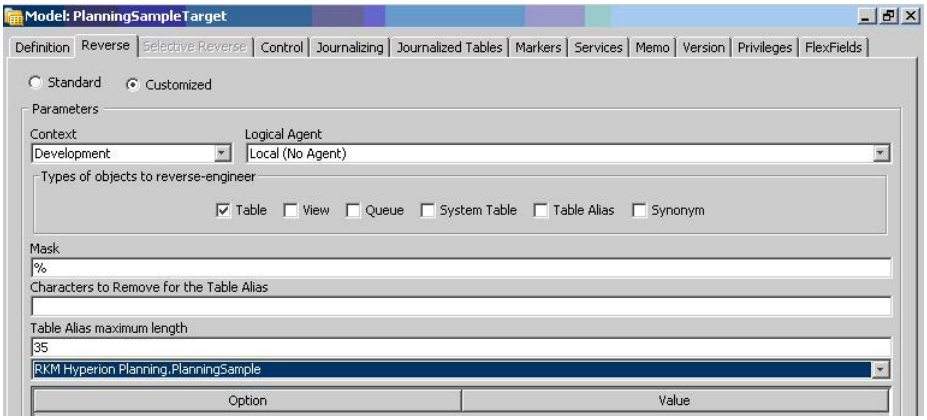
1 In the **Models** view, insert a new model folder called PlanningTarget.

2 Right-click the **PlanningTarget** model folder and select **Insert Model**.

3 Name the model PlanningSampleTarget, set **Technology** to Hyperion Planning, and set **Logical Schema** to SamplePlanApp.

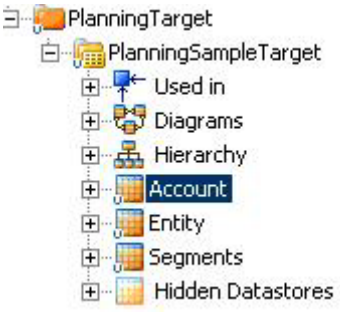
4 Click the **Reverse** tab, and select **Customized** (at the top of the page).

5 Set **Context** to Development, and select **RKM Hyperion Planning, Planning Sample**, as shown in this figure:



6 Click **Reverse**, click **Yes** to validate the changes, and then click **OK**.

This figure shows how the PlanningSampleTarget models are displayed when the reverse-engineering succeeds:



If the PlanningSampleTarget models are not displayed, check the Operator log to determine why the reverse process failed.

Creating Interfaces to Load Metadata and Data

You can create an interface for loading the Account dimension into the sample Planning application. Using this interface as a model, you can create interfaces for loading the Entity, Segments and DataLoad dimensions with corresponding sources and targets.

You can also chain the interfaces into a package so that you can run them in a single process. See "Creating a Package to Load Metadata and Data" on page 21.

➤ To create an interface for loading accounts:

1 Launch Designer, and expand the **Interfaces** node under the **PlanningSample** project.

2 Right-click, and select **Insert Interface**.

3 Name the interface loadAccounts, and set **Context** to Development.

4 Select **Staging Area Different from Target**, and select a staging area that is appropriate to your environment.

Note:

If there is no data server defined in your topology that can be used as a staging area, use Sunopsis Memory Engine as the staging area

5 Click the **Diagram** tab.

6 In the **Models** view drag **Account DataStore** from the **PlanningTarget/PlanningSampleTarget** model to the **Target DataStore** pane.

7 Drag the **Accounts** source from the **Planning_File_Sources/PlanningFileSource** model to the **Sources** area.

A prompt is displayed that asks if you want to use automatic mapping.

8 Click **Yes** to select automatic mapping.

9 Manually map any columns that were not mapped automatically.

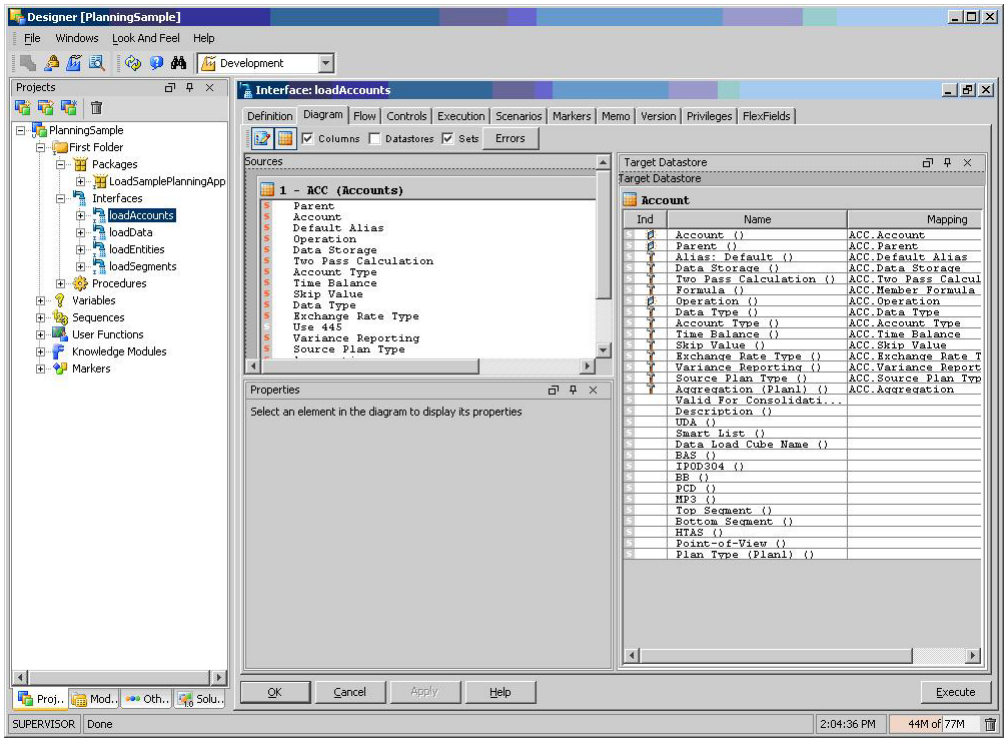
10 Click the **Flow** tab, select the **SS_0**, and ensure the **LKM** is set to LKM File to SQL.

11 Click **Target**, and ensure that **IKM** is set to IKM SQL to Hyperion Planning

12 Set **IKM** options.

13 Click **Apply**.

This figure shows how the page should look when you finish:



14 To validate the data load, use either method:

- Create a Oracle's Hyperion® Planning – System 9 data form to retrieve data.

- Check Oracle's Essbase® Administration Services to ensure that blocks were created in the appropriate cube.

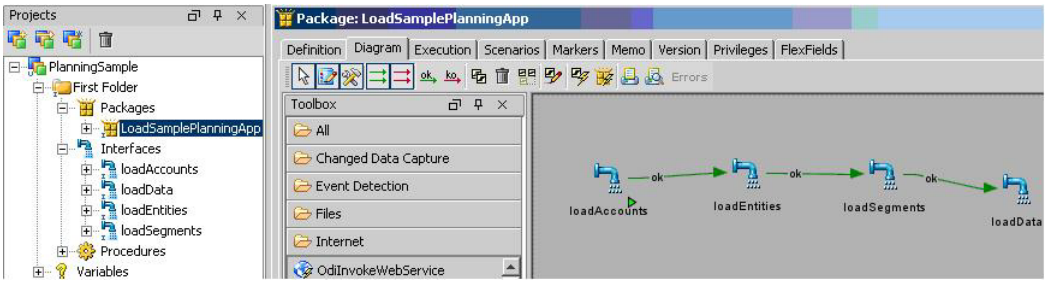
Creating a Package to Load Metadata and Data

You can chain interfaces into a package so that you can run them in a single process.

➤ To create a package for loading metadata and data:

1. Launch Designer.
2. Right-click **Packages**, and select **Insert Package**.
3. Name the package LoadSamplePlanningApp (or any other name).
4. Click the **Diagram** tab.
5. Drag the **loadAccounts**, **loadEntities**, **loadSegments**, and **loadData** interfaces into the diagram area.
6. Connect the interfaces in sequence, using the **ok—>** green arrows.
7. Click **Apply**.

This figure shows how the page should look when you finish:



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