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*RELEASE 9.3.1.1 USER'S GUIDE*

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ORACLE® DATA INTEGRATOR ADAPTER  
FOR HYPERION PLANNING

ORACLE | Hyperion

Oracle® Data Integrator Adapter for Hyperion Planning, 9.3.1.1 User's Guide

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# 1

# Introduction to Oracle Data Integrator Adapter for Hyperion Planning

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## Purpose

Oracle® Data Integrator Adapter for Hyperion Planning enables you to connect and integrate Oracle's Hyperion® Planning – System 9 with any database through Oracle Data Integrator. The adapter provides a set of Oracle Data Integrator Knowledge Modules (KMs) for loading metadata and data into Planning, Oracle's Hyperion® Workforce Planning, and Oracle's Hyperion® Capital Expense Planning applications.

## Integration Process

### Note:

For instructions on installing Oracle Data Integrator Adapter for Hyperion Planning, see the *Oracle Data Integrator Adapter for Hyperion Planning 9.3.1.1 Readme*, which is delivered with the adapter. You can also download the Readme document from [Oracle E-Delivery](#).

Loading a Planning application with metadata and data using Oracle Data Integrator Adapter for Hyperion Planning involves these tasks:

- Setting up an environment: Importing the Hyperion Planning technology and defining data servers and schemas  
See [Chapter 2, “Setting Up Environments.”](#)
- Reverse-engineering a Planning application using the adapter's Reverse-engineering Knowledge Module (RKM)  
See [Chapter 3, “Reverse-Engineering Planning Applications.”](#)
- Loading metadata and data into the Planning application using the adapter's Integration Knowledge Module (IKM)

See [Chapter 4, “Loading Metadata and Data.”](#)

## Working with the Adapter

Using Oracle Data Integrator Adapter for Hyperion Planning involves these Oracle Data Integrator features:

- Topology Manager—For defining connections to Planning applications  
See [Chapter 2, “Setting Up Environments.”](#)
- Designer—For loading metadata and data into datastores, which are target tables that represent Planning dimensions.

Oracle Data Integrator Adapter for Planning includes the Hyperion Planning RKM, which creates the datastores described in these topics:

- [“Accounts” on page 19](#)
- [“Employee” on page 26](#)
- [“Entities” on page 30](#)
- [“User-Defined Dimensions” on page 35](#)
- [“Attribute Dimensions” on page 39](#)
- [“UDA” on page 40](#)

In Designer, you use the Hyperion Planning RKM to create the datastores. You then run IKM SQL to Hyperion Planning, which the adapter also includes, to load metadata into a datastore. You then use an IKM to load data. For example, you can load an account list into the Accounts datastore and then load data into the accounts in the list.

# 2

# Setting Up Environments

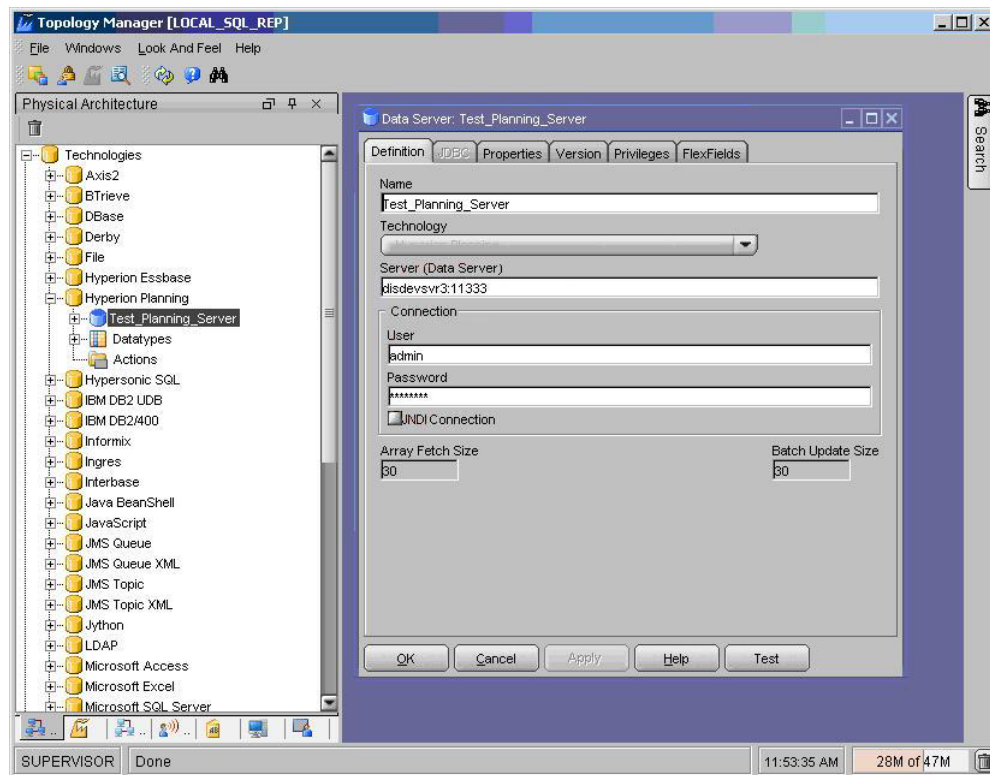
## In This Chapter

- Defining Data Servers ..... 7
- Defining Physical and Logical Schemas ..... 8

## Defining Data Servers

- ▶ To define a data server for connecting to a Planning server:
  - 1 **Expand Technologies**, as shown in [Figure 1](#).

Figure 1 Data Server Definition



- 2 **Right-click Hyperion Planning**, and select **Insert Data Server**.

**Note:**

If the Hyperion Planning technology is not defined in your master repository, you can import it from the `ImpExp` folder.

**3 On the Definition tab:**

- a. Under **Name**, enter a name for the data server definition.
- b. Under **Server (Data Server)**, enter the Planning application host name and RMI port number in this format:

*host:port*

**4 Under Connection, enter your user name and password for connecting to the data server.**

**Note:**

The Test button does not work for a Hyperion Planning data server connection. This button works only for relational technologies that have a JDBC Driver.

**5 Click OK to validate and save the data server definition.**

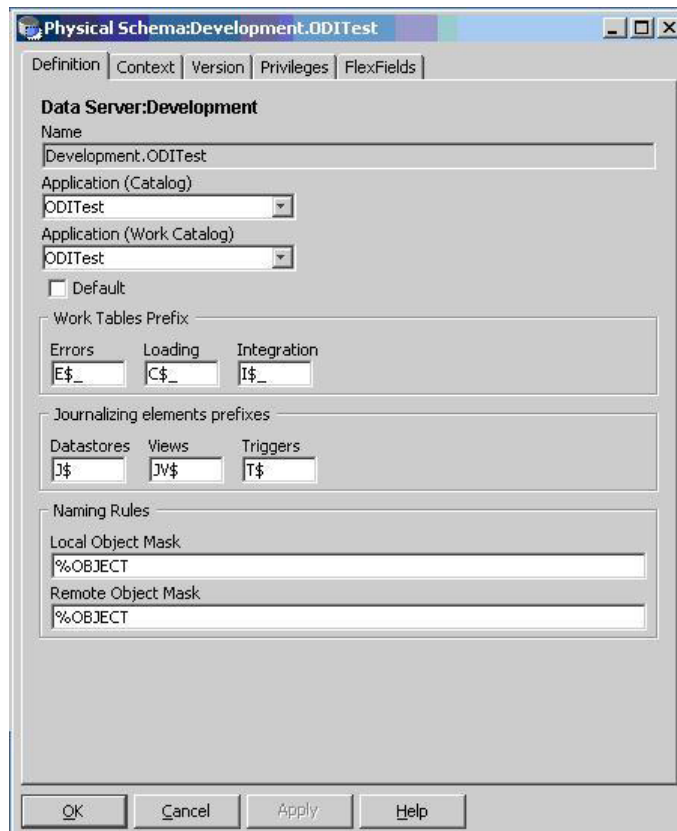
A page for defining a physical schema is displayed. See [“Defining Physical and Logical Schemas” on page 8](#).

## Defining Physical and Logical Schemas

Under a data server, you can define a physical schema corresponding to an application and the logical schemas on which models are based. The page where you define the schemas is displayed when you save a data server definition, as shown in [Figure 2](#).



Figure 2 Schema Definition



You work with Oracle Data Integrator and Adapter for Hyperion Planning through a logical schema. A context is used to link the logical schemas and the physical schemas.

► To specify physical and logical schemas and a context:

**1** On the **Definition** tab of the schemas page, specify a Planning application.

In [Figure 2](#), the specified Planning application is ODITest.

**2** On the **Context** tab:

- a. Select a context and a logical schema.
- b. Select OK to link the logical schema with the physical schema that you specified on the Definition tab.

See the *Oracle Data Integrator User's Guide* for more information about physical schemas, logical schemas, and contexts.



# 3

## Reverse-Engineering Planning Applications

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### What Reverse-Engineering Does

Reverse-engineering a Planning application creates an Oracle Data Integrator model that includes a datastore for each dimension in the application. For more information about reverse-engineering, models, and datastores, see the *Oracle Data Integrator User's Guide*.

### Using the Hyperion Planning RKM

Use Oracle Data Integrator Designer to reverse-engineer applications. For more information about Designer, see the *Oracle Data Integrator User's Guide*.

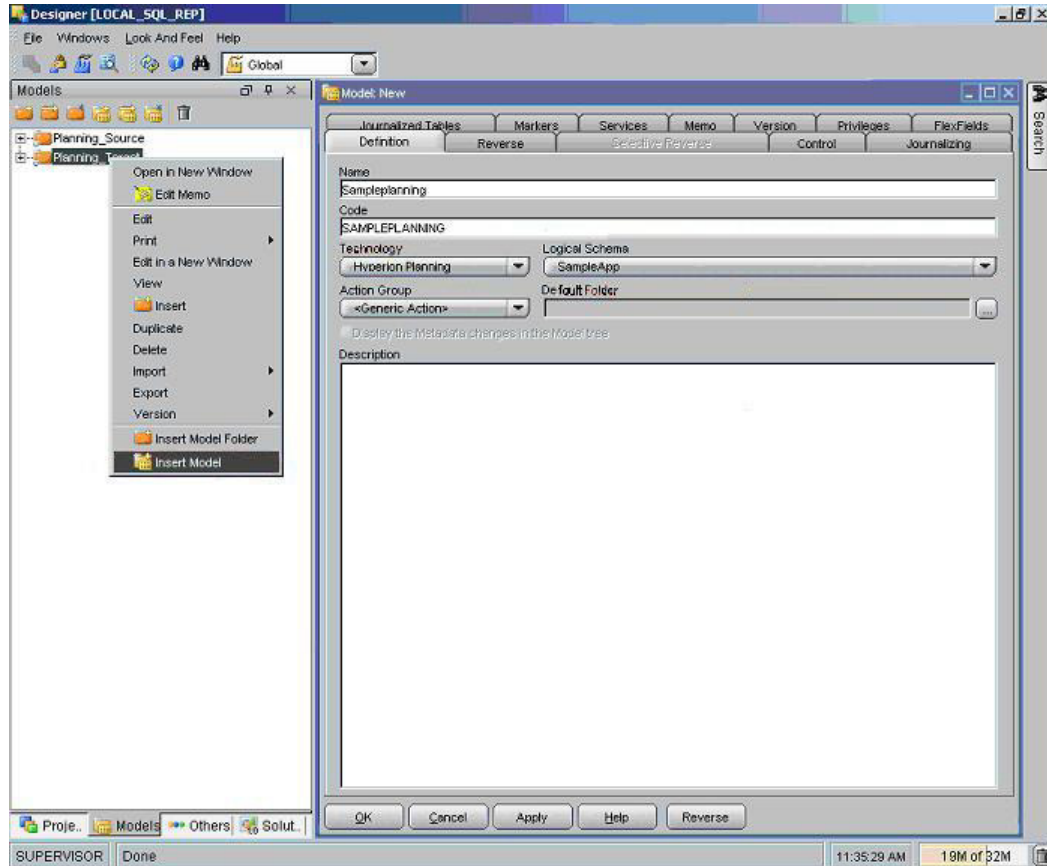
► To reverse-engineer a Planning application:

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

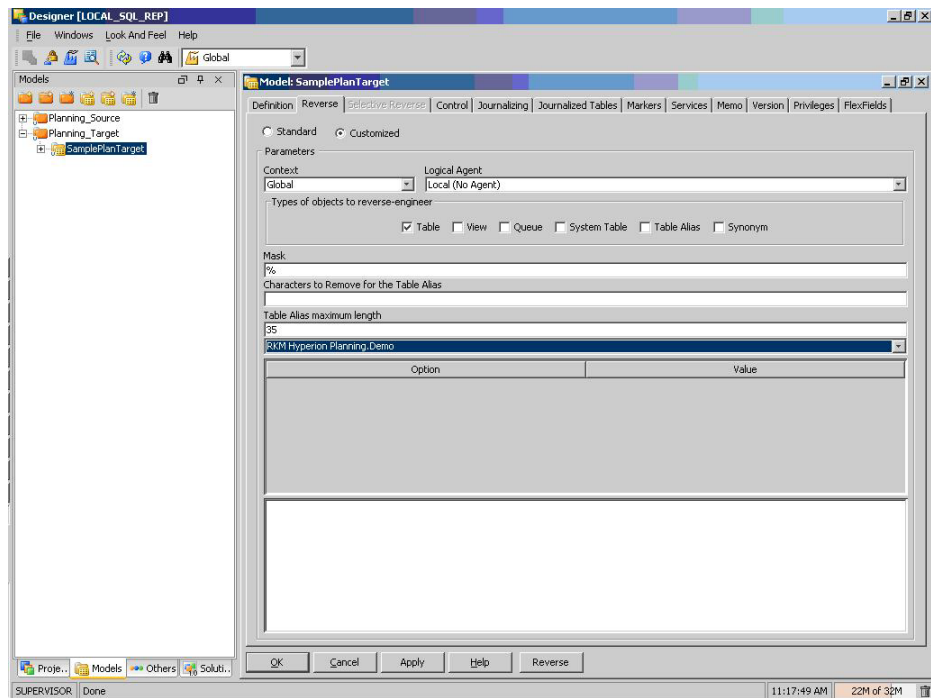
Example: Create a Planning\_Target folder, as shown in [Figure 3](#).

**2** Right-click the Planning\_Target folder, and select **Insert Model**.

Figure 3 Inserting a Model



- 3 Enter a name for the new model, select the **Hyperion Planning** technology, and select a logical schema.
- 4 On the **Reverse** tab:
  - a. Select **Customized**.
  - b. Select a context.
  - c. Select **RKM Hyperion Planning**.
  - d. Click **Reverse**.

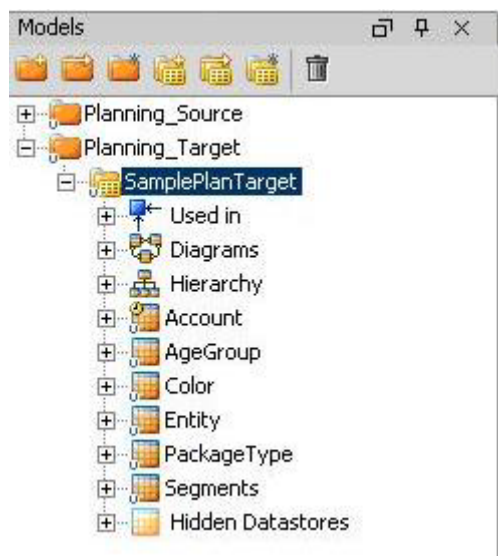


The RKM connects to the application (which is determined by the logical schema and the context) and imports these items:

- A datastore for each dimension in the application, with the same name as the dimension
- A datastore called UDA, for UDA loading

Any errors that occur in the reverse-engineering are listed in the Oracle Data Integrator Operator. For information about Operator, see the *Oracle Data Integrator User's Guide*.

The following figure shows a model after a successful reverse-engineering.





# 4

## Loading Metadata and Data

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## Data Integration Tasks

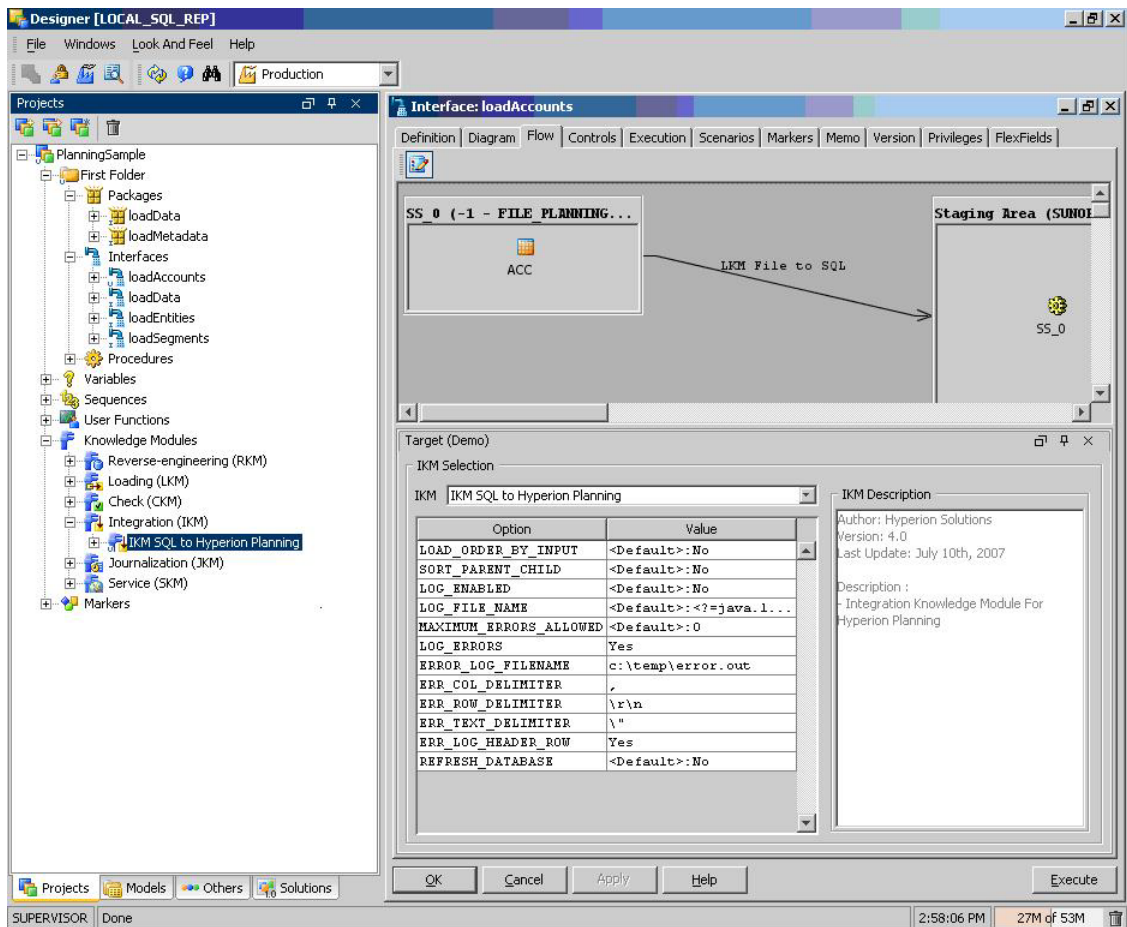
In Oracle Data Integrator, loading a Planning application with metadata and data from a source database involves these tasks:

- Creating interfaces for datastores  
See “[Creating Interfaces](#)” on page 15.
- (Optional) Chaining interfaces into packages so that you can run the interfaces in a single process
- Using interfaces  
See “[Creating Interfaces](#)” on page 15.

For instructions on creating interfaces and chaining them into packages, see the *Oracle Data Integrator User's Guide*.

## Creating Interfaces

After reverse-engineering a Planning application as a model, you can use the datastores in this model as targets of interfaces for loading data and metadata into the application. The following figure shows an example of the flow of an interface targeting Planning.



## Loading Metadata

Metadata consists of dimension members. You must load members, or metadata, before you load data values for the members. For example, before loading salary data for five new employees, you load the employees (as members) to the Planning relational database before you load the data to the Oracle's Hyperion® Essbase® – System 9 database.

You can load members only to dimensions that exist in Planning. You must use a separate interface for each dimension that you load. You can chain interfaces to load metadata into several dimensions at once.

### Note:

You must refresh the Essbase database after loading the dimension members in the application. The Essbase database is refreshed if you set the REFRESH\_DATABASE option in IKM SQL to Hyperion Planning to Yes. See [“Load Options” on page 18](#).

- To load metadata into a Planning application:
  - 1 Create an interface.



You can give the interface any name, and you can use the interface for loading data as well as metadata. See the *Oracle Data Integrator Users Guide* for instructions on creating interfaces.

**2** On the diagram, drag and drop the target datastore from a Hyperion Planning model

**3** Define the source datastores.

**4** Define the mapping between source and target data.

**5** On the **Flow** tab:

a. Ensure that **IKM SQL to Hyperion Planning** is selected.

b. Specify load options. See [“Load Options” on page 18](#).

**6** Click **Execute**.

Running the interface loads the metadata into the application.

**7** Validate the dimension:

a. Log on to Planning Web.

b. Select **Administration > Dimensions**.

## Loading Data

You can load data into selected dimension members that are already created in Planning. You must set up the Planning, Workforce Planning, or Capital Expense Planning application before you can load data into it.

Before loading data, ensure that the members (metadata) exist in the Planning relational database and the Essbase database. A data load fails if the members do not exist. (This includes the driver member and the members specified in the point of view.) If necessary, load metadata and refresh the Essbase database to synchronize the members.

Before loading data into a Planning, Workforce Planning, or Capital Expense Planning application, you must set up the relevant data load and driver dimensions in Planning. After you set up the data load and driver dimensions in Planning, you must determine the point of view for the members whose data you are loading.

► To load data into a Planning application:

**1** In Planning, specify parameters for data to load:

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

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

c. For **Available Driver Dimensions**, select the dimension to which you are loading data in an Essbase database; for example, select the Account dimension.

d. Select the members of the driver dimension to load with data.

After the Hyperion Planning data load is set up, use Hyperion Planning RKM to perform the reverse-engineering process. Reverse-engineering retrieves and updates the datastore for the data load dimension with additional columns (fields) required for the data load.

- e. Click Save.
- 2 In Oracle Data Integrator Designer, run an interface for loading data.

**Note:**

You can use the same interface for loading metadata and data.

- 3 Check the Operator log to see if the interface ran successfully.
- 4 To validate the data load, use either method:
  - Create a Planning data form to retrieve data.
  - Check Oracle's Essbase® Administration Services to ensure that blocks were created in the appropriate cube.

## Load Options

IKM SQL to Hyperion Planning supports these options for defining how Oracle Data Integrator Adapter for Hyperion Planning loads data:

- **LOAD\_ORDER\_BY\_INPUT**  
Possible values: Yes or No; default: No  
If set to Yes, members are loaded in the same order as in the input records.
- **SORT\_PARENT\_CHILD**  
Possible values: Yes or No; default: No  
If set to Yes, incoming records are sorted so that all parents are inserted before children.
- **LOG\_ENABLED**  
Possible values: Yes or No; default: No  
If set to Yes, logging is done during the load process to the file specified by the **LOG\_FILE\_NAME** option.
- **LOG\_FILE\_NAME**  
The name of the file where logs are saved; default value: *Java temp folder/dimension.log*
- **MAXIMUM\_ERRORS\_ALLOWED**  
Maximum number of errors before the load process is stopped; default value: 0  
If set to 0 or a negative number, the load process is not stopped regardless of the number of errors.
- **LOG\_ERRORS**  
Possible values: Yes or No; default: No  
If set to Yes, error records are logged to the file specified by the **ERROR\_LOG\_FILE** property.
- **ERROR\_LOG\_FILE**

The name of the file where error records are logged; default value: *Java temp folder/dimension.err*

- ERR\_COL\_DELIMITER

The column delimiter used for the error record file; default value: comma (,)

- ERR\_ROW\_DELIMITER

The row delimiter used for the error record file; default value: \r\n

**Note:**

Row and column delimiters values can also be specified in hexadecimal. A value that starts with 0x is treated as hexadecimal; for example, 0x0041 is treated as the letter A.

- ERR\_TEXT\_DELIMITER

The text delimiter to be used for the column values in the error record file

- ERR\_LOG\_HEADER\_ROW:

Possible values: Yes or No; default: Yes

If set to Yes, the row header (with all column names) is logged in the error records file.

- REFRESH\_DATABASE:

If set to Yes, completion of the load operation invokes a cube refresh.

Possible values: Yes or No; default: No

## Datastore Tables

IKM SQL to Hyperion Planning loads columns in tables to create datastores. These topics describe the columns in each datastore:

- [“Accounts” on page 19](#)
- [“Employee” on page 26](#)
- [“Entities” on page 30](#)
- [“User-Defined Dimensions” on page 35](#)
- [“Attribute Dimensions” on page 39](#)
- [“UDA” on page 40](#)

### Accounts

Column	Description
Account	Takes the name of the account member you are loading. If this member exists, its properties are modified; otherwise, the record is added. This field is required.  The value for this field must meet these requirements:

Column	Description
	<ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string.</p>
Parent	<p>Takes the name of the parent of the member you are loading. It is used to create the hierarchy in the dimension.</p> <p>When you load data for a member and specify a different parent member that from the parent member in the application, the member is updated with the parent value that you specify.</p> <p>Example: If Member 1 has a parent value of Member A in your Planning application and you load Member 1 with a parent value of Member B, your application is updated, and Member B becomes the parent of Member 1. Member 1 and its descendants are moved from Member A to Member B. If the column is left blank, it is ignored during the load.</p> <p>The record is not loaded if one of the following situations occurs:</p> <ul style="list-style-type: none"> <li>● The specified parent is a descendant of the member that you are loading.</li> <li>● The specified parent does not exist in the Planning application.</li> </ul>
Default Alias	<p>Takes an alternate name for the member being loaded. If you are modifying properties and do not specify a value, the alias is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, the alias in the Planning application is deleted.</p> <p>The value for this column must meet the following requirements for a successful load:</p> <ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string; default value: a null string.</p>
Additional Alias	<p>Can take an alternate name for the member being loaded. There will be as many Alias columns as there are Alias tables defined in Planning. The value for multiple alias columns must conform to the same requirements as those listed for the default alias column.</p>
Data Storage	<p>Takes the storage attribute for the member being loaded.</p> <p>Valid values:</p>

Column	Description
	<ul style="list-style-type: none"> <li>● Store</li> <li>● Dynamic Calc</li> <li>● Dynamic Calc and Store</li> <li>● Shared</li> <li>● Never Share (default)</li> <li>● Label Only</li> </ul> <p>This value is passed as a string.</p>
Two Pass Calculation	<p>Boolean value to indicate whether the member being loaded has the Two-Pass Calculation associated attribute. Valid values: 0 for False (default), or any other number for True. Values are valid only when the Data Storage value is Dynamic Calc or Dynamic Calc and Store; otherwise, the record is rejected.</p>
Account Type	<p>Takes the account type of the member that is being loaded. Valid values: Revenue, Expense, Asset, Liability, Equity, and Saved Assumption. The default is taken from the parent of the member that is being loaded, or it is Expense if the member is being added to the root dimension.</p>
Time Balance	<p>Takes a type for members with an account type of Saved Assumption only or when the record is rejected. Valid values: Flow, First, Balance, Average, and two averaging options, Actual_365 and Actual_Actual. (Actual_365 assumes the actual number of days in each month and 28 days in February; Actual_Actual accounts for 29 days in February during leap years.)</p> <p>The default is taken from the parent of the member being loaded or is Flow if the member is being added to the root dimension. This value is passed as a string. Default values of Time Balance for Account types:</p> <ul style="list-style-type: none"> <li>● Revenue-Flow</li> <li>● Expense-Flow</li> <li>● Asset-Balance</li> <li>● Liability-Balance</li> <li>● Equity-Balance</li> </ul> <p><b>Note:</b> When Time Balance is Flow, records with any valid Skip Values are loaded, but Skip Value is disabled for all account types.</p>
Skip Value	<p>Takes the skip option that is set for the Time Balance property. When the Time Balance property is set to First, Balance, or Average, these Skip options are available:</p> <ul style="list-style-type: none"> <li>● None-Indicates that zeros and #missing value are considered when the parent value is calculated</li> <li>● Missing-Excludes #missing values when calculating parent values</li> <li>● Zeros-Excludes zero values when calculating parent values</li> <li>● Missing and Zeros-Excludes #missing and zero values when calculating parent values</li> </ul> <p><b>Note:</b> When Time Balance is Flow, records with any valid Skip Values are loaded, but Skip Value is disabled for all Account types.</p>
Data Type	<p>Takes the data storage value. Valid values:</p> <ul style="list-style-type: none"> <li>● Currency-Stores and displays the member's data value in the default currency.</li> <li>● Non-currency-Stores and displays the member's data value as a numeric value.</li> </ul>

Column	Description
	<ul style="list-style-type: none"> <li>● Percentage–Stores data values as a numeric value and displays the member’s data value as a percentage.</li> <li>● Smart list / enumeration–Stores data values as a numeric value and displays the member’s data value as a string.</li> <li>● Date–Stores and displays the member’s data value in the format <i>mm/dd/yyyy</i> or <i>dd/mm/yyyy</i></li> <li>● Text–Stores and displays the member’s data value as text.</li> <li>● Unspecified–Stores and displays the member’s data value as “unspecified.”</li> </ul> <p>The default value is taken from the parent of the member being loaded or is Currency if the member is being added to the root dimension.</p>
Exchange Rate Type	<p>Takes the exchange rate. This column is dependent on the value specified for the Data Type column. Valid values:</p> <ul style="list-style-type: none"> <li>● Average, Ending, and Historical when Data Type is equal to Currency</li> <li>● None when Data Type is equal to Non-currency or Percentage</li> </ul> <p>This value is passed as a string. The default value is taken from the parent of the member that is being loaded or, if the member is being added to the root dimension, is based on the account type and takes the following values:</p> <ul style="list-style-type: none"> <li>● Revenue–Average</li> <li>● Expense–Average</li> <li>● Asset–Ending</li> <li>● Liability–Ending</li> <li>● Equity–Ending</li> <li>● Saved Assumption–None</li> </ul>
Use 445	<p>Indicates the distribution selected in the Planning application. If the application has no distribution, this column is not displayed.</p> <p>Valid values are 0 and 1 (or any number other than 0); default value: 1.</p>
Variance Reporting	<p>Takes a value for account members with an account type of Saved Assumption or if the record is rejected. Valid values:</p> <ul style="list-style-type: none"> <li>● Expense–designates the saved assumption as an expense. The actual amount is subtracted from the budgeted amount to determine the variance.</li> <li>● Non-Expense–designates the saved assumption as revenue. The budgeted amount is subtracted from the actual amount to determine the variance.</li> </ul> <p>This value is passed as a string. The default value is taken from the parent of the member being loaded or, if the member is being added to the root dimension, is based on the value of the count type.</p> <p>For Account types, the value is set to the following:</p> <ul style="list-style-type: none"> <li>● Revenue–Non-Expense</li> <li>● Expense–Expense</li> <li>● Asset–Non-Expense</li> <li>● Liability–Non-Expense</li> <li>● Equity–Non-Expense</li> </ul>

Column	Description
Source Plan Type	<p>Takes a plan type name for the plan type assigned to the member being loaded. Valid values are any plan types specified in Planning application.</p> <p>This value is passed as a string. The default is taken from the parent of the member being loaded. If the source plan of the parent is not valid for the member, the specified plan type is not selected for the member in the application, and the first plan type that the member is used in is used. If the member is being loaded to the root dimension, the first plan type the member is used in is used.</p> <p>When you update or save the parent of a member, the system verifies if the Source Plan Type associated with the member being loaded is valid for the new parent. If the member's source plan type is not a valid plan type of its parent member, you receive the error message, "The source plan type is not in the subset of valid plan types."</p> <p>If the source plan type of a member is valid for the parent member but not for the member itself, the member is saved but its source plan type is set to the first valid plan type (in the order Plan 1, Plan 2, Plan 3, Wrkforce, Capex).</p> <p><b>Note:</b> If a Source Plan Type is specified in the adapter but is not valid for the parent, the record is rejected.</p>
Plan Type ( <i>Plan1</i> )	<p>Boolean value that indicates if the member being loaded is used in Plan1. Valid values are 0 for False and any other number for True. The default value is True. The name of the column varies depending on the name of the plan type in the Planning application.</p>
Aggregation ( <i>Plan1</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan1. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Plan Type ( <i>Plan2</i> )	<p>Boolean value that indicates if the member being loaded is used in Plan2. Valid values are 0 for False and any other number for True. The default value is True. The name of the column varies depending on the name of the plan type in the Planning application.</p>
Aggregation ( <i>Plan2</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan2. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> </ul>

Column	Description
	<ul style="list-style-type: none"> <li>● Never</li> </ul>
Plan Type ( <i>Plan3</i> )	<p>Boolean value that indicates if the member being loaded is used in Plan3. Valid values: 0 for False or any other number for True; default value: True. The name of the column varies depending on the name of the plan type in the Planning application.</p>
Aggregation ( <i>Plan3</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan3. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Plan Type ( <i>Wrkforce</i> )	<p>For Workforce Planning: The Plan Type (<i>Wrkforce</i>) column is a Boolean value that indicates if the member being loaded is used in Workforce Planning. Valid values are 0 for False and any other number for True. The default is True. The actual name of the column varies, depending on by the name of the plan type in the Planning application.</p>
Aggregation ( <i>Wrkforce</i> )	<p>For Workforce Planning: The Aggregation (<i>Wrkforce</i>) column takes the aggregation option for the member being loaded as related to Workforce Planning. This column is available only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Plan Type ( <i>Capex</i> )	<p>For Capital Expense Planning: The Plan Type (<i>Capex</i>) column is a Boolean value that indicates if the member being loaded is used in Capital Expense Planning. Valid values are 0 for False and any other number for True. The default is True. The actual name of the column varies, depending on by the name of the plan type in the Planning application.</p>
Aggregation ( <i>Capex</i> )	<p>For Capital Expense Planning: Takes the aggregation option for the member being loaded as related to Capital Expense Planning. This column is available only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> </ul>



Column	Description
	<ul style="list-style-type: none"> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Custom Attribute	<p>Takes the custom attribute member values. The name of the column is determined by the name of the custom attribute in the Planning application. The number of custom attribute columns varies depending on the number of attributes defined for the Account dimension. If you modify properties and do not specify a value, the custom attribute is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, then the custom attribute in the Planning application is deleted. This value is passed as a string.</p>
Member Formula	<p>Takes the member formula values defined for the dimension member. By default, there is no member formula associated with a dimension or dimension member. You cannot load member formulas for dimension members that are Shared or Label Only.</p>
UDA	<p>Specifies a list of user-defined attributes to be updated.</p> <p><b>Note:</b> You must define the UDA for the dimension members within Planning or by way of the UDA target.</p>
Smart Lists	<p>Takes the name of a user-defined Smart List defined in the Planning application. This value is passed as a string. The default for Smart Lists is &lt;None&gt;. Smart Lists are used in a metadata or dimension load (not a data load) allowing you to define the association of the Smart List name (not the values) with a given dimension member. You can have multiple Smart Lists associated with a dimension but only one Smart List associated with a dimension member.</p> <p>These predefined Smart Lists are available in a Workforce Planning application:</p> <ul style="list-style-type: none"> <li>● None</li> <li>● Status</li> <li>● FT_PT</li> <li>● HealthPlan</li> <li>● TaxRegion</li> <li>● Month</li> <li>● Performance</li> <li>● Position</li> <li>● EmployeeType</li> </ul>
Description	<p>Takes a description for the member that is being loaded. By default, the Description column is empty.</p> <p><b>Note:</b> If you do not enter a value for this column or do not connect the column, a new member is loaded without a description, and the description of an existing member is unchanged. If you enter &lt;NONE&gt; as the value for this column, any existing description for the member is deleted and is not loaded with the member.</p>
Operation	<p>Takes any of these values:</p> <ul style="list-style-type: none"> <li>● Update (default)–Adds, updates, or moves the member being loaded.</li> <li>● Delete Level 0–Deletes the member being loaded if it has no children.</li> <li>● Delete Idescendants–Deletes the member being loaded and all of its descendants.</li> </ul>

Column	Description
	<ul style="list-style-type: none"> <li>Delete Descendants–Deletes the descendants of the member being loaded, but does not delete the member itself.</li> </ul> <p><b>Note:</b> If you delete a member, that member, its data, and any associated planning units are permanently removed and cannot be restored.</p>

See “[Data Load Columns](#)” on page 41 for descriptions of additional columns that are displayed for loading Account dimension data if the application has been set up for data load in Planning.

## Employee

Column	Description
Employee	<p>Takes the name of the member you are loading. If this member exists, its properties are modified. If the member does not exist, then the record is added. This column is required.</p> <p>The value for this column must meet the following requirements for a successful load:</p> <p>The value for this field must meet these requirements:</p> <ul style="list-style-type: none"> <li>Unique</li> <li>Alphanumeric</li> <li>Not more than 80 characters</li> <li>Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string.</p>
Parent	<p>Takes the name of the parent of the member you are loading. It is used to create the hierarchy in the dimension.</p> <p>When you update a member of an application using the Load method and specify a parent member that is different than the parent member in the application, the member is updated with the new parent value specified in your flow diagram.</p> <p>For example, if Member 1 has a parent value of Member A in your Planning application and you load Member 1 with a parent value of Member B, the system updates your application and makes Member B the parent of Member 1. Member 1 and its descendants are moved from Member A to Member B. If the column is left blank, it is ignored during the load.</p> <p>The record is not loaded in either of these situations:</p> <ul style="list-style-type: none"> <li>The specified parent is a descendant of the member that you are loading.</li> <li>The specified parent does not exist in the Planning application.</li> </ul>
Default Alias	<p>Takes an alternate name for the member being loaded. If you are modifying properties and do not specify a value, the alias is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, the alias in the Planning application is deleted.</p> <p>The value for this column must meet the following requirements for a successful load:</p>

Column	Description
	<ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string; default value: a null string.</p>
Additional Alias	<p>Additional Alias columns can take alternate names for the member being loaded. There will be as many Alias columns as there are Alias tables defined in Planning. The value for multiple alias columns must conform to the same requirements as those listed for the default alias column.</p>
Data Storage	<p>Takes the storage attribute for the member being loaded.</p> <p>Valid values:</p> <ul style="list-style-type: none"> <li>● Store</li> <li>● Dynamic Calc</li> <li>● Dynamic Calc and Store</li> <li>● Shared</li> <li>● Never Share (default)</li> <li>● Label Only</li> </ul> <p>This value is passed as a string.</p>
Valid for Consolidation	<p>This column is ignored.</p>
Two Pass Calculation	<p>Boolean value to indicate if the member being loaded has the Two-Pass Calculation attribute associated in the Planning application. Valid values are 0 for False and any other number for True. The default value is False. Values are valid only when the Data Storage value is Dynamic Calc or Dynamic Calc and Store. Otherwise, the record is rejected.</p>
Data Type	<p>Takes the data storage value. Valid values:</p> <ul style="list-style-type: none"> <li>● Currency–Stores and displays the member’s data value in the default currency.</li> <li>● Non-currency–Stores and displays the member’s data value as a numeric value.</li> <li>● Percentage–Stores data values as a numeric value and displays the member’s data value as a percentage.</li> <li>● Smart list / enumeration–Stores data values as a numeric value and displays the member’s data value as a string.</li> <li>● Date–Stores and displays the member’s data value in the format <i>mm/dd/yyyy</i> or <i>dd/mm/yyyy</i></li> <li>● Text–Stores and displays the member’s data value as text.</li> <li>● Unspecified–Stores and displays the member’s data value as “unspecified.”</li> </ul> <p>The default value is taken from the parent of the member being loaded or is Currency if the member is being added to the root dimension.</p>

Column	Description
Custom Attribute	<p>Takes the custom attribute member values. The name of the column is determined by the name of the custom attribute in the Planning application. The number of custom attribute columns varies depending on the number of attributes defined for the Employee dimension. If you modify properties and do not specify a value, the custom attribute is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, then the custom attribute in the Planning application is deleted. This value is passed as a string.</p>
Aggregation ( <i>Plan1</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan1. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Plan2</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan2. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Plan3</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan3. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Wrkforce</i> )	<p>For Workforce Planning: The Aggregation (<i>Wrkforce</i>) column takes the aggregation option for the member being loaded as related to Workforce Planning. This column is available</p>

Column	Description
	<p>only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation (Capex)	<p>For Capital Expense Planning: Takes the aggregation option for the member being loaded as related to Capital Expense Planning. This column is available only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Member Formula	<p>Takes the member formula values defined for the dimension member. By default, there is no member formula associated with a dimension or dimension member. You cannot load member formulas for dimension members that are Shared or Label Only.</p>
UDA	<p>Specifies a list of user-defined attributes to be updated.</p> <p><b>Note:</b> You must define the UDA for the dimension members within Planning or by way of the UDA target.</p>
Smart Lists	<p>Takes the name of a user-defined Smart List defined in the Planning application. This value is passed as a string. The default for Smart Lists is &lt;None&gt;. Smart Lists are used in a metadata or dimension load (not a data load) allowing you to define the association of the Smart List name (not the values) with a given dimension member. You can have multiple Smart Lists associated with a dimension but only one Smart List associated with a dimension member.</p> <p>These predefined Smart Lists are available in a Workforce Planning application:</p> <ul style="list-style-type: none"> <li>● None</li> <li>● Status</li> <li>● FT_PT</li> <li>● HealthPlan</li> <li>● TaxRegion</li> <li>● Month</li> <li>● Performance</li> </ul>

Column	Description
	<ul style="list-style-type: none"> <li>● Position</li> <li>● EmployeeType</li> </ul>
Description	<p>Takes a description for the member that is being loaded; empty by default.</p> <p><b>Note:</b> If you do not enter a value for this column or do not connect the column, a new member is loaded without a description, and the description of an existing member is unchanged. If you enter &lt;NONE&gt; as the value for this column, any existing description for the member is deleted and is not loaded with the member.</p>
Operation	<p>Takes any of these values:</p> <ul style="list-style-type: none"> <li>● Update (default)–Adds, updates, or moves the member being loaded.</li> <li>● Delete Level 0–Deletes the member being loaded if it has no children.</li> <li>● Delete Idescendants–Deletes the member being loaded and all of its descendants.</li> <li>● Delete Descendants–Deletes the descendants of the member being loaded, but does not delete the member itself.</li> </ul> <p><b>Note:</b> If you delete a member, that member, its data, and any associated planning units are permanently removed and cannot be restored.</p>

See “[Data Load Columns](#)” on page 41 for descriptions of additional columns that are displayed for loading Employee dimension data if the application has been set up for data load in Planning.

## Entities

Column	Description
Entity	<p>Takes the name of the member you are loading. If this member exists, its properties are modified. If the member does not exist, then the record is added. This column is required.</p> <p>The value for this column must meet the following requirements for a successful load:</p> <p>The value for this field must meet these requirements:</p> <ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string.</p>
Parent	<p>Takes the name of the parent of the member you are loading. It is used to create the hierarchy in the dimension.</p>

Column	Description
	<p>When you update a member of an application using the Load method and specify a parent member that is different than the parent member in the application, the member is updated with the new parent value specified in your flow diagram.</p> <p>For example, if Member 1 has a parent value of Member A in your Planning application and you load Member 1 with a parent value of Member B, the system updates your application and makes Member B the parent of Member 1. Member 1 and its descendants are moved from Member A to Member B. If the column is left blank, it is ignored during the load.</p> <p>The record is not loaded if one of the following situations occurs:</p> <ul style="list-style-type: none"> <li>● The specified parent is a descendant of the member that you are loading.</li> <li>● The specified parent does not exist in the Planning application.</li> </ul>
Default Alias	<p>Takes an alternate name for the member being loaded. If you are modifying properties and do not specify a value, the alias is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, the alias in the Planning application is deleted.</p> <p>The value for this column must meet the following requirements for a successful load:</p> <ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string; default value: a null string.</p>
Additional Alias	<p>Additional Alias columns can take alternate names for the member being loaded. There are as many Alias columns as there are Alias tables defined in Planning. The value for multiple alias columns must conform to the same requirements as those listed for the default alias column.</p>
Data Storage	<p>Takes the storage attribute for the member being loaded.</p> <p>Valid values:</p> <ul style="list-style-type: none"> <li>● Store</li> <li>● Dynamic Calc</li> <li>● Dynamic Calc and Store</li> <li>● Shared</li> <li>● Never Share (default)</li> <li>● Label Only</li> </ul> <p>This value is passed as a string.</p>
Two Pass Calculation	<p>Boolean value to indicate if the member being loaded has the Two-Pass Calculation attribute associated in the Planning application. Valid values: 0 for False (default), or any other number for True. Values are valid only when the Data Storage value is Dynamic Calc or Dynamic Calc and Store; otherwise, the record is rejected.</p>
Data Type	<p>Takes the data storage value. Valid values:</p>

Column	Description
	<ul style="list-style-type: none"> <li>● Currency–Stores and displays the member’s data value in the default currency.</li> <li>● Non-currency–Stores and displays the member’s data value as a numeric value.</li> <li>● Percentage–Stores data values as a numeric value and displays the member’s data value as a percentage.</li> <li>● Smart list / enumeration–Stores data values as a numeric value and displays the member’s data value as a string.</li> <li>● Date–Stores and displays the member’s data value in the format <i>mm/dd/yyyy</i> or <i>dd/mm/yyyy</i></li> <li>● Text–Stores and displays the member’s data value as text.</li> <li>● Unspecified–Stores and displays the member’s data value as “unspecified.”</li> </ul> <p>The default value is taken from the parent of the member being loaded or is Currency if the member is being added to the root dimension.</p>
Base Currency	Takes the base currency for the entity being loaded. It takes the code of the currency as defined in your Planning application. The default value is USD. This column is displayed only when the application is defined to be multi-currency.
Plan Type ( <i>Plan1</i> )	Boolean value that indicates if the member being loaded is used in Plan1. Valid values: 0 for False or any other number for True (default). The name of the column varies depending on the name of the plan type in the Planning application.
Aggregation ( <i>Plan1</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan1. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Plan Type ( <i>Plan2</i> )	Boolean value that indicates if the member being loaded is used in Plan2. Valid values are 0 for False and any other number for True. The default value is True. The name of the column varies depending on the name of the plan type in the Planning application.
Aggregation ( <i>Plan2</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan2. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> </ul>



Column	Description
	<ul style="list-style-type: none"> <li>● Never</li> </ul>
Plan Type ( <i>Plan3</i> )	<p>Boolean value that indicates if the member being loaded is used in Plan3. Valid values: 0 for False or any other number for True; default value: True. The name of the column varies depending on the name of the plan type in the Planning application.</p>
Aggregation ( <i>Plan3</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan3. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Wrkforce</i> )	<p>For Workforce Planning: Takes the aggregation option for the member being loaded as related to Workforce Planning. This column is available only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Capex</i> )	<p>For Capital Expense Planning: Takes the aggregation option for the member being loaded as related to Capital Expense Planning. This column is available only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Custom Attribute	<p>Takes the custom attribute member values. The name of the column is determined by the name of the custom attribute in the Planning application. The number of custom attribute</p>

Column	Description
	columns varies depending on the number of attributes defined for the Entity dimension. If you modify properties and do not specify a value, the custom attribute is not changed in the Planning application. If you specify <NONE> or <none> as the value, then the custom attribute in the Planning application is deleted. This value is passed as a string.
Member Formula	Takes the member formula values defined for the dimension member. By default, there is no member formula associated with a dimension or dimension member. You cannot load member formulas for dimension members that are Shared or Label Only.
UDA	Specifies a list of user-defined attributes to be updated.  <b>Note:</b> You must define the UDA for the dimension members within Planning or by way of the UDA target.
Smart Lists	Takes the name of a user-defined Smart List defined in the Planning application. This value is passed as a string. The default for Smart Lists is <None>. Smart Lists are used in a metadata or dimension load (not a data load) allowing you to define the association of the Smart List name (not the values) with a given dimension member. You can have multiple Smart Lists associated with a dimension but only one Smart List associated with a dimension member.  These predefined Smart Lists are available in a Workforce Planning application: <ul style="list-style-type: none"> <li>● None</li> <li>● Status</li> <li>● FT_PT</li> <li>● HealthPlan</li> <li>● TaxRegion</li> <li>● Month</li> <li>● Performance</li> <li>● Position</li> <li>● EmployeeType</li> </ul>
Description	Takes a description for the member that is being loaded; empty by default.  <b>Note:</b> If you do not enter a value for this column or do not connect the column, a new member is loaded without a description, and the description of an existing member is unchanged. If you enter <NONE> as the value for this column, any existing description for the member is deleted and is not loaded with the member.
Operation	Takes any of these values: <ul style="list-style-type: none"> <li>● Update (default)–Adds, updates, or moves the member being loaded.</li> <li>● Delete Level 0–Deletes the member being loaded if it has no children.</li> <li>● Delete Idescendants–Deletes the member being loaded and all of its descendants.</li> <li>● Delete Descendants–Deletes the descendants of the member being loaded, but does not delete the member itself.</li> </ul> <b>Note:</b> If you delete a member, that member, its data, and any associated planning units are permanently removed and cannot be restored.

See [“Data Load Columns” on page 41](#) for descriptions of additional columns that are displayed for loading Entities data if the application has been set up for data load in Planning.

## User-Defined Dimensions

Column	Description
Entity	<p>Takes the name of the member you are loading. If this member exists, its properties are modified. If the member does not exist, then the record is added. This column is required.</p> <p>The value for this column must meet the following requirements for a successful load:</p> <p>The value for this field must meet these requirements:</p> <ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string.</p>
Parent	<p>Takes the name of the parent of the member you are loading. It is used to create the hierarchy in the dimension.</p> <p>When you update a member of an application using the Load method and specify a parent member that is different than the parent member in the application, the member is updated with the new parent value specified in your flow diagram.</p> <p>For example, if Member 1 has a parent value of Member A in your Planning application and you load Member 1 with a parent value of Member B, the system updates your application and makes Member B the parent of Member 1. Member 1 and its descendants are moved from Member A to Member B. If the column is left blank, it is ignored during the load.</p> <p>The record is not loaded if one of the following situations occurs:</p> <ul style="list-style-type: none"> <li>● The specified parent is a descendant of the member that you are loading.</li> <li>● The specified parent does not exist in the Planning application.</li> </ul>
Default Alias	<p>Takes an alternate name for the member being loaded. If you are modifying properties and do not specify a value, the alias is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, the alias in the Planning application is deleted.</p> <p>The value for this column must meet the following requirements for a successful load:</p> <ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE \$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul>

Column	Description
	This value is passed as a string; default value: a null string.
Additional Alias	Additional Alias columns can take alternate names for the member being loaded. There are as many Alias columns as there are Alias tables defined in Planning. The value for multiple alias columns must conform to the same requirements as those listed for the default alias column.
Data Storage	<p>Takes the storage attribute for the member being loaded.</p> <p>Valid values:</p> <ul style="list-style-type: none"> <li>● Store</li> <li>● Dynamic Calc</li> <li>● Dynamic Calc and Store</li> <li>● Shared</li> <li>● Never Share (default)</li> <li>● Label Only</li> </ul> <p>This value is passed as a string.</p>
Two Pass Calculation	Boolean value to indicate if the member being loaded has the Two-Pass Calculation attribute associated in the Planning application. Valid values: 0 for False (default) or any other number for True. Values are valid only when the Data Storage value is Dynamic Calc or Dynamic Calc and Store; otherwise, the record is rejected.
Data Type	<p>Takes the data storage value. Valid values:</p> <ul style="list-style-type: none"> <li>● Currency–Stores and displays the member’s data value in the default currency.</li> <li>● Non-currency–Stores and displays the member’s data value as a numeric value.</li> <li>● Percentage–Stores data values as a numeric value and displays the member’s data value as a percentage.</li> <li>● Smart list / enumeration–Stores data values as a numeric value and displays the member’s data value as a string.</li> <li>● Date–Stores and displays the member’s data value in the format <i>mm/dd/yyyy</i> or <i>dd/mm/yyyy</i></li> <li>● Text–Stores and displays the member’s data value as text.</li> <li>● Unspecified–Stores and displays the member’s data value as “unspecified.”</li> </ul> <p>The default value is taken from the parent of the member being loaded or is Currency if the member is being added to the root dimension.</p>
Aggregation ( <i>Plan1</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan1. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> </ul>

Column	Description
	<ul style="list-style-type: none"> <li>● Never</li> </ul>
Aggregation ( <i>Plan2</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan2. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Plan3</i> )	<p>Takes the aggregation option for the member being loaded as related to Plan3. This column is available only if the Planning application is valid for this plan type. The name of the column varies depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Wrkforce</i> )	<p>For Workforce Planning: Takes the aggregation option for the member being loaded as related to Workforce Planning. This column is available only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Aggregation ( <i>Capex</i> )	<p>For Capital Expense Planning: Takes the aggregation option for the member being loaded as related to Capital Expense Planning. This column is available only if the Planning application is valid for this plan type. The name of the column varies, depending on the name of the plan type in the Planning application.</p> <p>This value is passed as a string. Valid values:</p> <ul style="list-style-type: none"> <li>● + (default)</li> </ul>

Column	Description
	<ul style="list-style-type: none"> <li>● -</li> <li>● *</li> <li>● /</li> <li>● %</li> <li>● ~</li> <li>● Never</li> </ul>
Custom Attribute	<p>Takes the custom attribute member values. The name of the column is determined by the name of the custom attribute in the Planning application. The number of custom attribute columns varies depending on the number of attributes defined for the user-defined dimension. If you modify properties and do not specify a value, the custom attribute is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, then the custom attribute in the Planning application is deleted. This value is passed as a string.</p>
Member Formula	<p>Takes the member formula values defined for the dimension member. By default, there is no member formula associated with a dimension or dimension member. You cannot load member formulas for dimension members that are Shared or Label Only.</p>
UDA	<p>Specifies a list of user-defined attributes to be updated.</p> <p><b>Note:</b> You must define the UDA for the dimension members within <b>Planning</b> or by way of the UDA target.</p>
Smart Lists	<p>Takes the name of a user-defined Smart List defined in the Planning application. This value is passed as a string. The default for Smart Lists is &lt;None&gt;. Smart Lists are used in a metadata or dimension load (not a data load) allowing you to define the association of the Smart List name (not the values) with a given dimension member. You can have multiple Smart Lists associated with a dimension but only one Smart List associated with a dimension member.</p> <p>These predefined Smart Lists are available in a Workforce Planning application:</p> <ul style="list-style-type: none"> <li>● None</li> <li>● Status</li> <li>● FT_PT</li> <li>● HealthPlan</li> <li>● TaxRegion</li> <li>● Month</li> <li>● Performance</li> <li>● Position</li> <li>● EmployeeType</li> </ul>
Description	<p>Takes a description for the member that is being loaded; empty by default.</p> <p><b>Note:</b> If you do not enter a value for this column or do not connect the column, a new member is loaded without a description, and the description of an existing member is unchanged. If you enter &lt;NONE&gt; as the value for this column, any existing description for the member is deleted and is not loaded with the member.</p>
Operation	<p>Takes any of these values:</p> <ul style="list-style-type: none"> <li>● Update (default)-Adds, updates, or moves the member being loaded.</li> <li>● Delete Level 0-Deletes the member being loaded if it has no children.</li> </ul>

Column	Description
	<ul style="list-style-type: none"> <li>● Delete Idescendants–Deletes the member being loaded and all of its descendants.</li> <li>● Delete Descendants–Deletes the descendants of the member being loaded, but does not delete the member itself.</li> </ul> <p><b>Note:</b> If you delete a member, that member, its data, and any associated planning units are permanently removed and cannot be restored.</p>

See “Data Load Columns” on page 41 for descriptions of additional columns that are displayed for loading user-defined dimension data if the application has been set up for data load in Planning.

## Attribute Dimensions

Column	Description
Entity	<p>Takes the name of the member you are loading. If this member exists, its properties are modified. If the member does not exist, then the record is added. This column is required.</p> <p>The value for this column must meet the following requirements for a successful load:</p> <p>The value for this field must meet these requirements:</p> <ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE\$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string.</p>
Parent	<p>Takes the name of the parent of the member you are loading. It is used to create the hierarchy in the dimension.</p> <p>When you update a member of an application using the Load method and specify a parent member that is different than the parent member in the application, the member is updated with the new parent value specified in your flow diagram.</p> <p>For example, if Member 1 has a parent value of Member A in your Planning application and you load Member 1 with a parent value of Member B, the system updates your application and makes Member B the parent of Member 1. Member 1 and its descendants are moved from Member A to Member B. If the column is left blank, it is ignored during the load.</p> <p>The record is not loaded if one of the following situations occurs:</p> <ul style="list-style-type: none"> <li>● The specified parent is a descendant of the member that you are loading.</li> <li>● The specified parent does not exist in the Planning application.</li> </ul>
Default Alias	<p>Takes an alternate name for the member being loaded. If you are modifying properties and do not specify a value, the alias is not changed in the Planning application. If you specify &lt;NONE&gt; or &lt;none&gt; as the value, the alias in the Planning application is deleted.</p> <p>The value for this column must meet the following requirements for a successful load:</p>

Column	Description
	<ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> <li>● Member name cannot start with any of these characters: ‘ \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE\$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Essbase online help.</li> </ul> <p>This value is passed as a string; default value: a null string.</p>
Additional Alias	Additional Alias columns can take alternate names for the member being loaded. There are as many Alias columns as there are Alias tables defined in Planning. The value for multiple alias columns must conform to the same requirements as those listed for the default alias column.
Operation	<p>Takes any of these values:</p> <ul style="list-style-type: none"> <li>● Update (default)–Adds, updates, or moves the member being loaded.</li> <li>● Delete Level 0–Deletes the member being loaded if it has no children.</li> <li>● Delete Idescendants–Deletes the member being loaded and all of its descendants.</li> <li>● Delete Descendants–Deletes the descendants of the member being loaded, but does not delete the member itself.</li> </ul> <p><b>Note:</b> If you delete a member, that member, its data, and any associated planning units are permanently removed and cannot be restored.</p>

**Note:**

The Parent, Default Alias, and Additional Alias columns are available only in Planning 9.3.1 and later.

## UDA

Column	Description
Dimension	Takes the dimension name for the UDA. You can associate UDAs only with dimensions that exist in the Planning application. If the UDA exists, its properties are modified; otherwise, the record is added. This column is required.
UDA	Takes the values of the UDA that you are loading.
Dimension	<p>Takes the values of the UDA you are loading. The value for this column must meet the following requirements for a successful load:</p> <p>The value for this column must meet the following requirements for a successful load:</p> <ul style="list-style-type: none"> <li>● Unique</li> <li>● Alphanumeric</li> <li>● Not more than 80 characters</li> <li>● Member name cannot contain tabs, double quotation marks (“), or backslash (\) characters.</li> </ul>



Column	Description
	<ul style="list-style-type: none"> <li>● Member name cannot start with any of these characters: ' \ &lt;   , = @ _ + - { } ( ) .</li> <li>● Value must not be an Essbase reserved word such as Children, Parent, \$\$\$UNIVERSE\$\$\$, #MISSING, or #MI. For more information about reserved words in Essbase, see the <i>Hyperion Essbase – System 9 Database Administrator’s Guide</i> or Oracle’s Hyperion® Essbase® – System 9 online help.</li> </ul>
Operation	<p>Takes any of these values:</p> <ul style="list-style-type: none"> <li>● Update (default)–Adds, updates, or moves the member being loaded.</li> <li>● Delete Level 0–Deletes the member being loaded if it has no children.</li> <li>● Delete Idescendants–Deletes the member being loaded and all of its descendants.</li> <li>● Delete Descendants–Deletes the descendants of the member being loaded, but does not delete the member itself.</li> </ul> <p><b>Note:</b> If you delete a member, that member, its data, and any associated planning units are permanently removed and cannot be restored.</p>

## Data Load Columns

These columns for loading data into Account, Employee, Entities, and user-defined dimensions are displayed if the application has been set up for data load in Planning:

Columns	Description
Data Load Cube Name	<p>Takes the name of the plan type to which data is being loaded. The value is passed as a string. Valid values are any plan types specified in the Planning application. For example:</p> <ul style="list-style-type: none"> <li>● Plan1</li> <li>● Plan2</li> <li>● Plan3</li> <li>● Wkforce</li> <li>● Capex</li> </ul>
Driver Member	<p>Takes the name of the driver member that is selected when the Planning, Oracle's Hyperion® Workforce Planning, or Oracle's Hyperion® Capital Expense Planning application is set up for loading data. You can have one driver dimension per load. The Driver Dimension and Driver Dimension Members are defined in the Data Load Administration page in Planning. The driver members are the members into which the data is loaded. The number of driver member columns depends on the number of driver members you select in Oracle's Hyperion® Planning – System 9. The value is passed as a string representing a numeric value or, if a Smart List is bound to the member represented on this column, a Smart List value.</p> <p><b>Note:</b> The Smart List field on this load method does not affect this column.</p>
Point-of-View	<p>Takes the names of all the other dimensions that are required to determine the intersection to load the data. The value is passed as a string. The data load automatically performs cross-product record creations based on dimension parameters defined in the POV. For example, an employee’s Smart List attribute values that are constant over time such as full time status for all twelve months need only be supplied once in the data feed and the load file will create and load that data record for each relevant cell intersection.</p>

