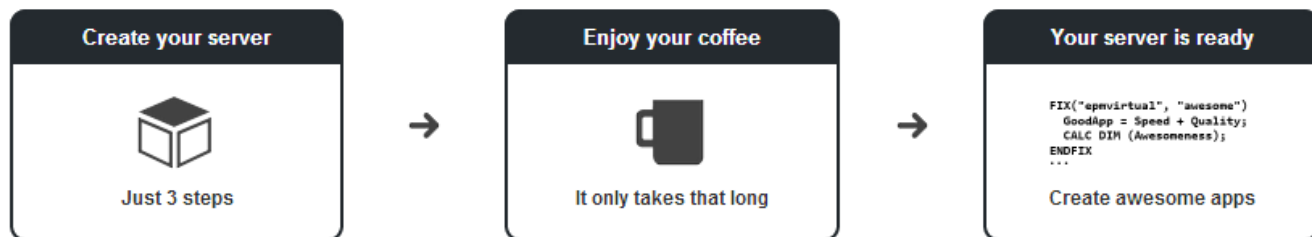


Creating Hyperion Planning Applications with EPMA

Cloud servers for EPM professionals

Create your EPM cloud server in just 15 minutes.



Creating Hyperion Planning Applications with EPMA

This tutorial will take you through the steps on creating Hyperion Planning applications using Enterprise Performance Management Architect (EPMA).

Hyperion Planning application can be created in two ways,

1. Classic
2. EPMA

So what is the difference between classic and EPMA applications? A classic application is the standalone application and the maintenance of structure, dimensions and data synchronization is not integrated with the other EPM application whereas the EPMA application will be integrated with the other EPM applications and the dimension structure can be maintained in the common repository. Of course, the whole environment maintenance becomes simpler using the latter method.

Application Creation:

The first step in creating the planning application is creating the dimension and its members, that is metadata. For an EPMA application, the metadata can be created manually and load using the import profiles.

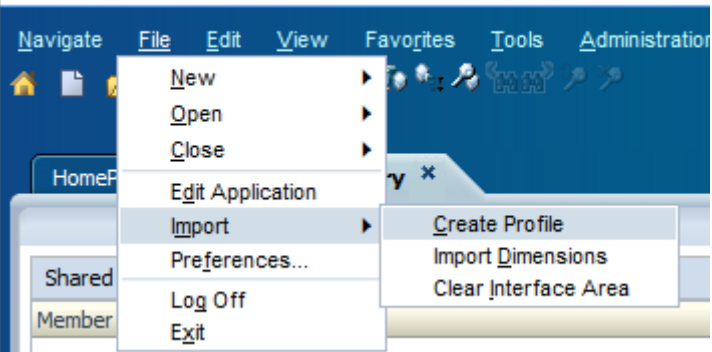
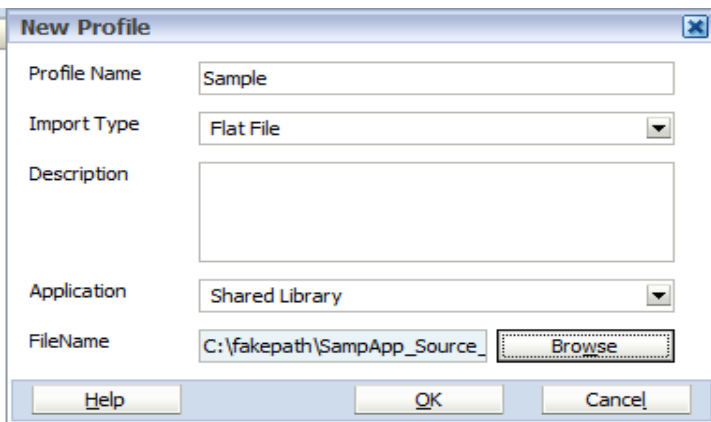
Import Profile:

For creating the application, the primary task is to load the dimensions in the EPMA shared library and import the dimensions in the application library of the planning application.

The concept of having the dimensions imported in the dimension library is to have set of dimensions in the common repository and use it across the EPM applications like HFM, Hyperion Planning when required.

Creating Import profile to import dimensions:

1. Log on to the workspace
2. Open Dimension Library Module
3. Navigate to File->Import->Create Profile

4. Provide the information for the required fields,

Profile Name: Recommended to give relevant name

Import Type: Import type can be interface tables or Flat File.
In our case, it should be flat file

Description: This is an optional field. Provide relevant description if required

Application: By default it is set to Shared Library, which means the dimensions are imported into the shared Library.
Dimensions can be imported directly in to the Planning application, but in our case we are importing into the shared library as the application is not created yet

FileName: In this field, click browse and upload the .ads file and select OK.

5. File Properties: Provide the details of the file properties in the window,

- **Column delimiter:** The delimiter section depends on the delimiter used in the .ads file. Select pipe as shown in our case
- **Remove Double Quotes:** Deselect this option as we have member formulas in the file
- **Remove White Space:** Deselect this option
- Click on Next

6. Map Dimensions: In this section, the dimensions in the flat file should be mapped to the dimensions in the shared library of the dimension library.

File Properties

Column Delimiter

Remove Double Quotes on Strings

☐

Remove White Space

☐

Suppress Transaction Logs

☒

Map Dimensions

To import dimensions, select a dimension from the Shared Library column for each source dimension.

Note: Only eligible Shared Library dimensions display next to source dimensions.

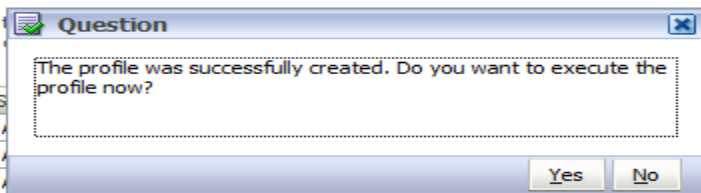
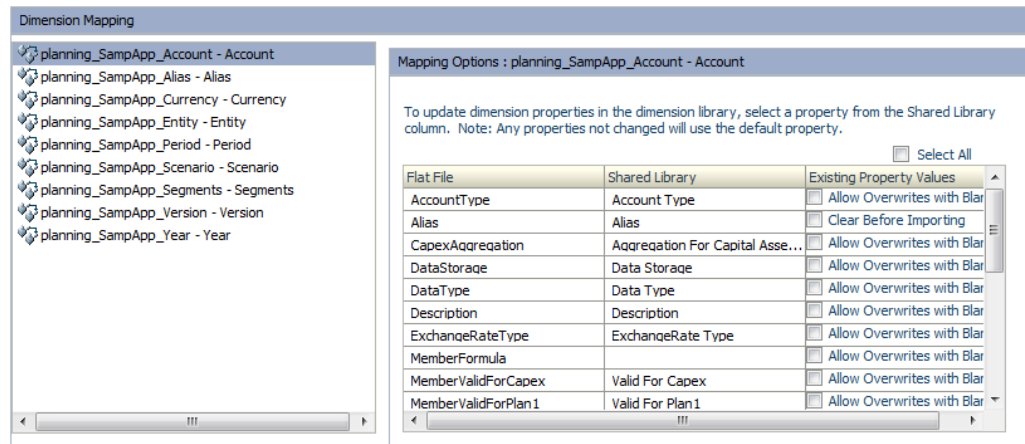
☐ Create dimensions for the non-mapped dimensions with the source dimension name.

Flat File	Shared Library	Process Type	Reorder Type	Reorder Existing Memb...
planning SampApp Account	Account	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Alias	Alias	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Currency	Currency	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Entity	Entity	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Period	Period	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Scenario	Scenario	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Segments	Segments	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Version	Version	Merge As Primary	Merge To Bottom	<input type="checkbox"/>
planning SampApp Year	Year	Merge As Primary	Merge To Bottom	<input type="checkbox"/>

Flat File: In this, the dimensions in the flat file are displayed as shown in the above image.

Shared Library: In shared library, as there is no dimensions available click on the drop down and create dimension for the dimensions in the flat file and map it.

Leave the default values for Process Type and Reorder Type and Click on Next.



Validate the dimension mapping in the window and click on Next. The Popup will be displayed as on the left and click on yes to execute the profile.

As the profile execution happens, one more pop up will be displayed for the job task and the execution can be monitored using the job console.

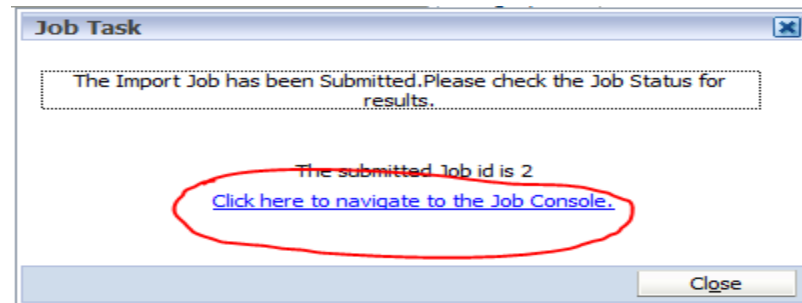
Select “Click here to navigate to the job console” link to Monitor the job console and the status of this activity.

Job Console will give the description of importing the Profile sample into the library and the status of the

Activity. The log file can be viewed in the attachments

Section by clicking import results.

The Summary section will provide the information of user, time and details of this activity.



Job Console						
Job Filter Options						
ID	Description	Last Updated Time	Status	Type	Create	
2	Import 'Sample' into Application 'Master'	Wednesday, April 30, 2014 9:27:47 AM	Completed	Dimension Import	admin	

Summary

Started Time : Wednesday, April 30, 2014 9:27:40 AM

Submitted Time : Wednesday, April 30, 2014 9:27:40 AM

Last Updated Time : Wednesday, April 30, 2014 9:27:47 AM

User Name : admin

Process Name : EPMA_ServerEngine

Thread : 94

Server : EPMVIRTUAL

Attachments

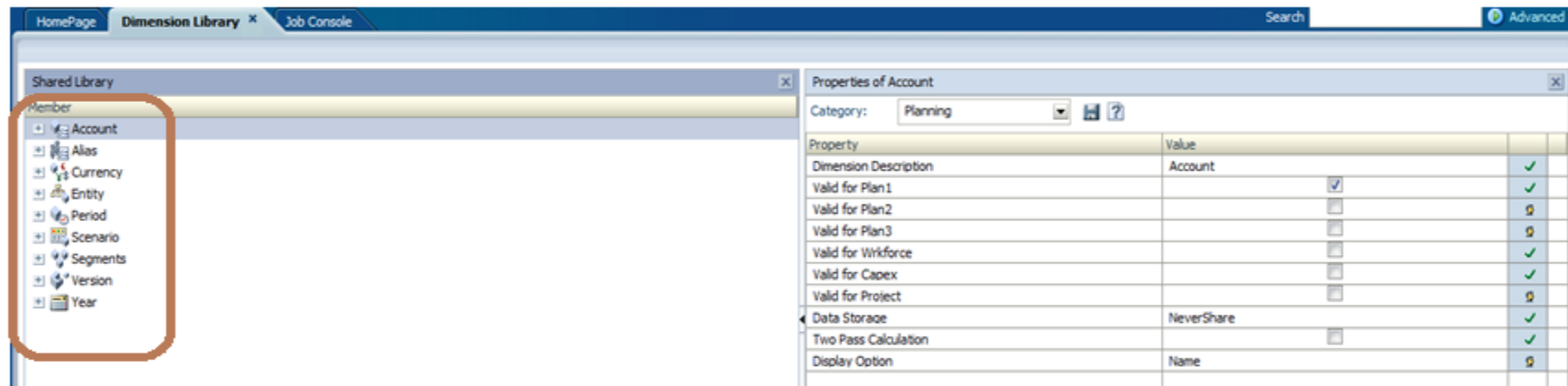
[Import Results](#)

Status

Status : Completed

Progress : 100%

Now, go back to the dimension library and look at the newly imported dimensions in the shared library.



The screenshot shows the EPM Virtual Dimension Library interface. The 'Shared Library' pane on the left displays a tree view of dimensions. The 'Account' dimension is selected and highlighted by an orange box. The 'Properties of Account' pane on the right displays a table of properties for the 'Account' dimension.

Property	Value		
Dimension Description	Account		✓
Valid for Plan1	<input checked="" type="checkbox"/>		✓
Valid for Plan2	<input type="checkbox"/>		?
Valid for Plan3	<input type="checkbox"/>		?
Valid for Workforce	<input type="checkbox"/>		✓
Valid for Capex	<input type="checkbox"/>		✓
Valid for Project	<input type="checkbox"/>		?
Data Storage	NeverShare		✓
Two Pass Calculation	<input type="checkbox"/>		✓
Display Option	Name		?

The dimensions are now successfully imported in to the shared library and we are ready to the planning application and make use this dimensions.

1. Open Application library in the workspace
2. Navigate to File->New->Application
3. Provide Application information details for creating the application,

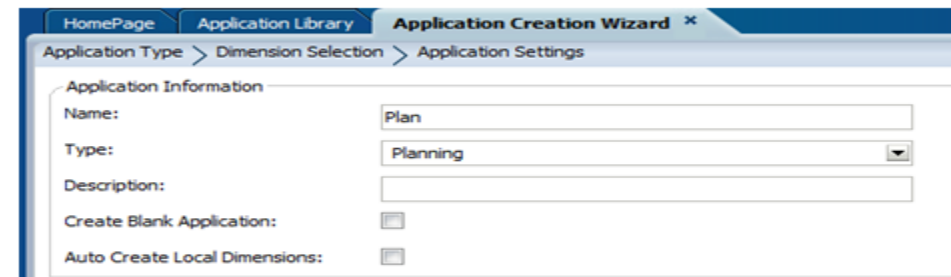
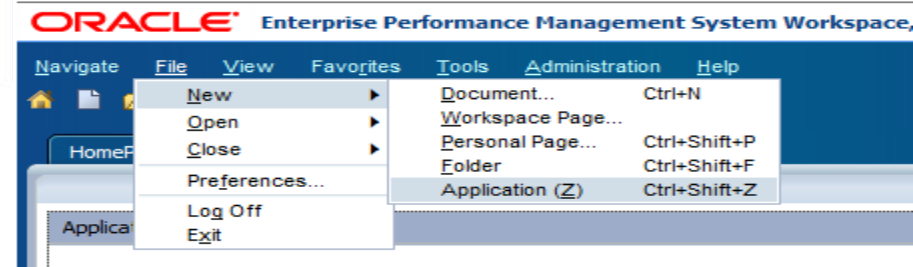
Name: Name of the Planning application.

Underscores and special characters are not allowed in the application name.

Type: Select the Application Type

Description : Provide suitable description

As already the dimensions are imported in the dimension library, deselect the option create blank application.



4. Provide the planning application details,

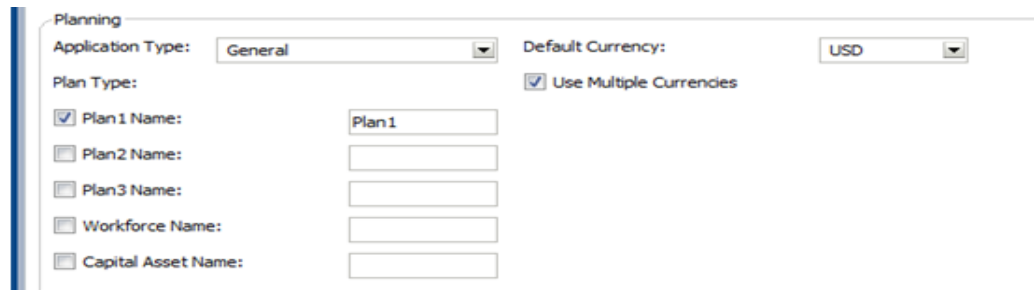
Application Type: select General

Plan Type: Plan type is nothing but an planning model. Each plan type creates an Essbase cube. In our case, select plan1.

5. Select “use Multiple currencies” for an Multi-currency application.

6. Select the default currency for an application. In our case, it is USD.

7. Select the calendar settings for an application as shown below,



Planning

Application Type: General

Plan Type: Plan1

Default Currency: USD

☒ Use Multiple Currencies

☒ Plan1 Name: Plan1

☐ Plan2 Name:

☐ Plan3 Name:

☐ Workforce Name:

☐ Capital Asset Name:

As the dimensions are already created and imported, deselect the options “Create New Local Period Dimension” and “Create New Local Year Dimension”



Calendar

Base Time Period: 12 Months

Fiscal Year First Month: Jan

Fiscal Year Start Date: Same Calendar Year

Weekly Distribution: Even

Create New Local Period Dimension: ☐

Create New Local Year Dimension: ☐

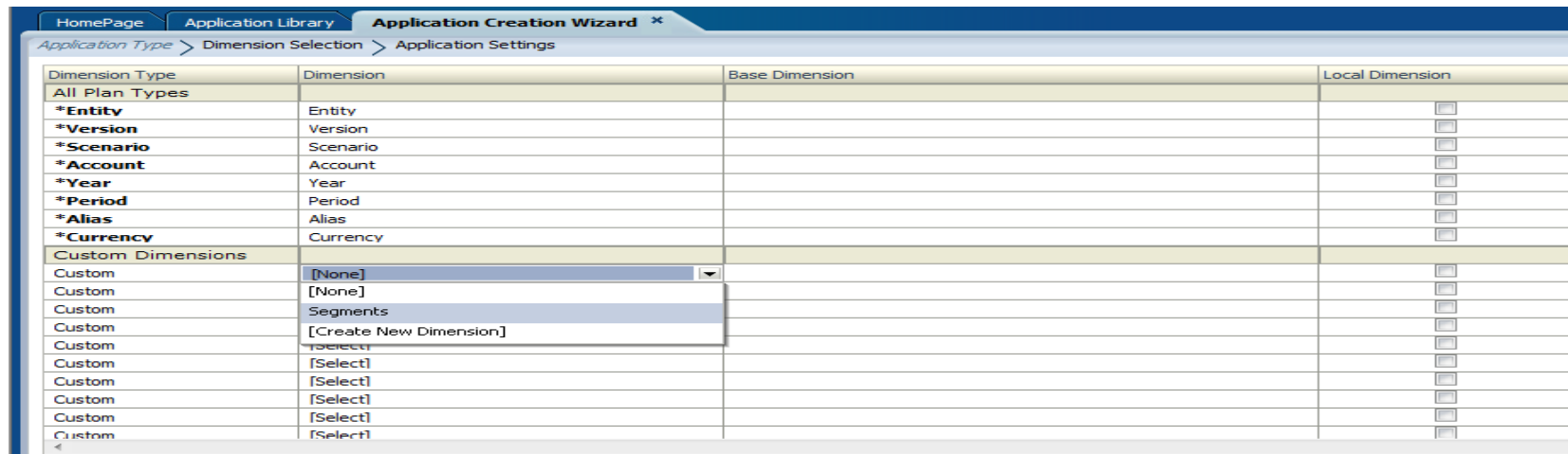
8. Click Next to proceed with the next selection

Dimension Selection:

In this section, the dimensions required for the planning application will added. Planning application need to have standard dimensions like Entity, Account, Scenario, version, Year and Period and currency dimension if it is multi-currency application.

1. As shown below the standard dimensions are already mapped against the dimension types from the dimension library. Apart from standard dimensions, only the custom dimension “Segments” has to be mapped against the Custom dimension type.

2. Click on Next



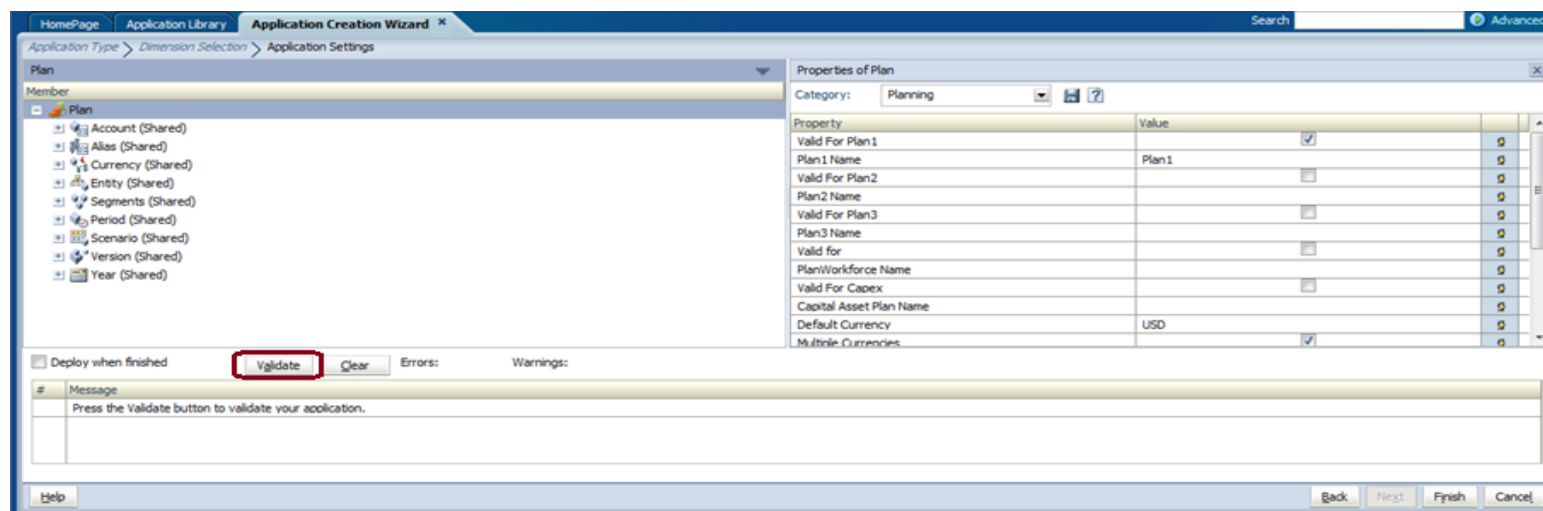
Dimension Type	Dimension	Base Dimension	Local Dimension
All Plan Types			
*Entity	Entity		<input type="checkbox"/>
*Version	Version		<input type="checkbox"/>
*Scenario	Scenario		<input type="checkbox"/>
*Account	Account		<input type="checkbox"/>
*Year	Year		<input type="checkbox"/>
*Period	Period		<input type="checkbox"/>
*Alias	Alias		<input type="checkbox"/>
*Currency	Currency		<input type="checkbox"/>
Custom Dimensions			
Custom	[None]		<input type="checkbox"/>
Custom	[None]		<input type="checkbox"/>
Custom	Segments		<input type="checkbox"/>
Custom	[Create New Dimension]		<input type="checkbox"/>
Custom	[Select]		<input type="checkbox"/>
Custom	[Select]		<input type="checkbox"/>
Custom	[Select]		<input type="checkbox"/>
Custom	[Select]		<input type="checkbox"/>
Custom	[Select]		<input type="checkbox"/>
Custom	[Select]		<input type="checkbox"/>

Note: If there are multiple dimensions of the same type present in the shared library, user has to manually map the dimensions.

Application settings:

In this section, the application settings can be set and validated. The dimensions can be expanded and the properties can be edited in the left-hand side property window.

The property window provides the information on application properties. Click the validate button as shown to validate the application and see if any error occurs.



The screenshot shows the 'Application Creation Wizard' window, specifically the 'Application Settings' tab. The window is divided into several sections:

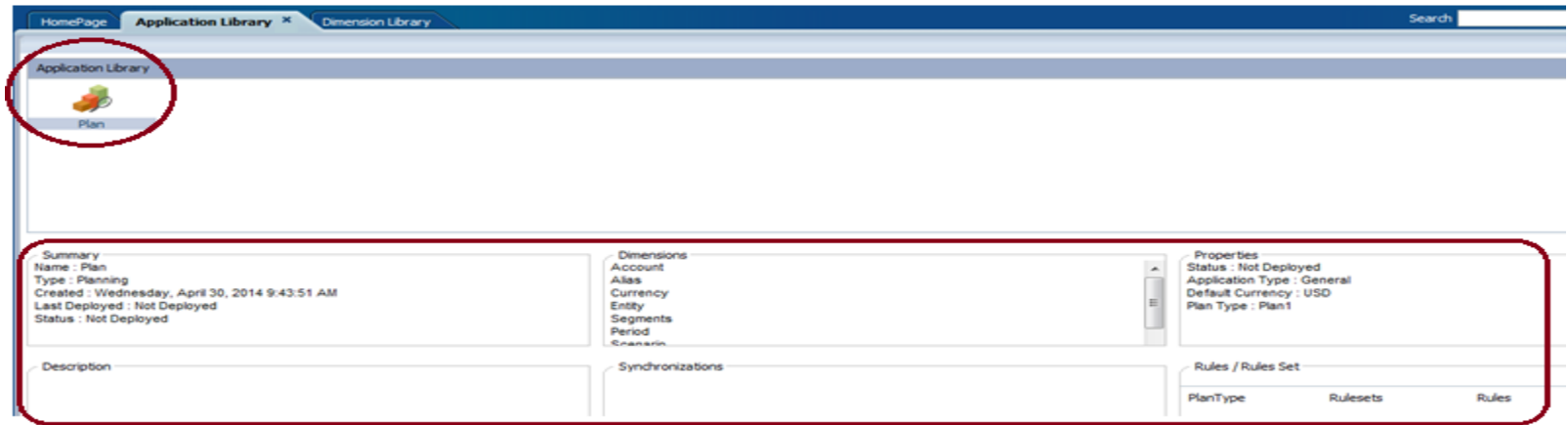
- Left Panel:** A tree view showing dimensions under the 'Plan' member. The dimensions listed are: Account (Shared), Alias (Shared), Currency (Shared), Entity (Shared), Segments (Shared), Period (Shared), Scenario (Shared), Version (Shared), and Year (Shared).
- Right Panel:** A table titled 'Properties of Plan' with a 'Category' dropdown set to 'Planning'. The table has columns for 'Property' and 'Value'. The properties listed are:

Property	Value
Valid For Plan1	<input checked="" type="checkbox"/>
Plan1 Name	Plan1
Valid For Plan2	<input type="checkbox"/>
Plan2 Name	
Valid For Plan3	<input type="checkbox"/>
Plan3 Name	
Valid for	<input type="checkbox"/>
PlanWorkforce Name	
Valid For Capex	<input type="checkbox"/>
Capital Asset Plan Name	
Default Currency	USD
Multiple Currencies	<input checked="" type="checkbox"/>
- Bottom Section:** A message box with the text 'Press the Validate button to validate your application.' and a 'Validate' button highlighted with a red box. Other buttons include 'Deploy when finished', 'Clear', 'Errors:', 'Warnings:', 'Back', 'Next', 'Finish', and 'Cancel'.

Click on Finish to complete the application creation.

Deployment:

- As the application has been created successfully, the application can be seen in the application library as shown below.
- The application library will display the summary, dimensions and properties of this application. The deployment status of the application will be displayed in the summary and status is displayed as “Not Deployed” as shown below.

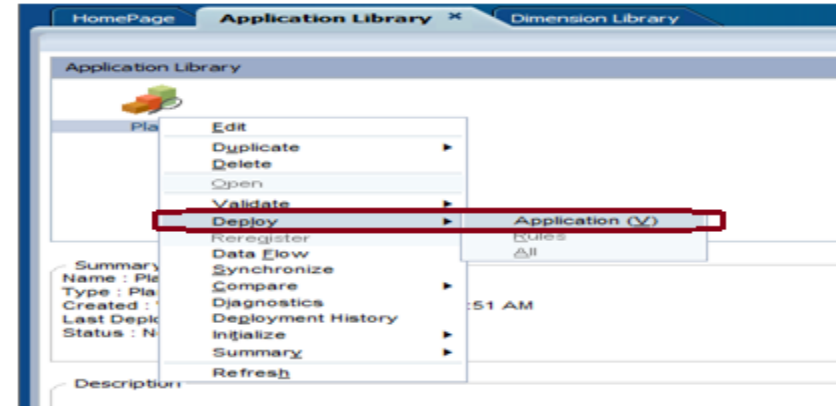


- The Actual application creation takes place only when the EPMA application is deployed as a Planning application.

- In EPMA application, we actually defined the metadata structure for creating the Planning application.
- As a part deployment process, EPMA uses this metadata to create the Planning application on the Hyperion Planning instance.

To deploy the application,

1. Go to Application Library and right-click the application “PLAN”
2. Select the option Deploy and click on the application



This leads to the next screen and following information has to be provided,

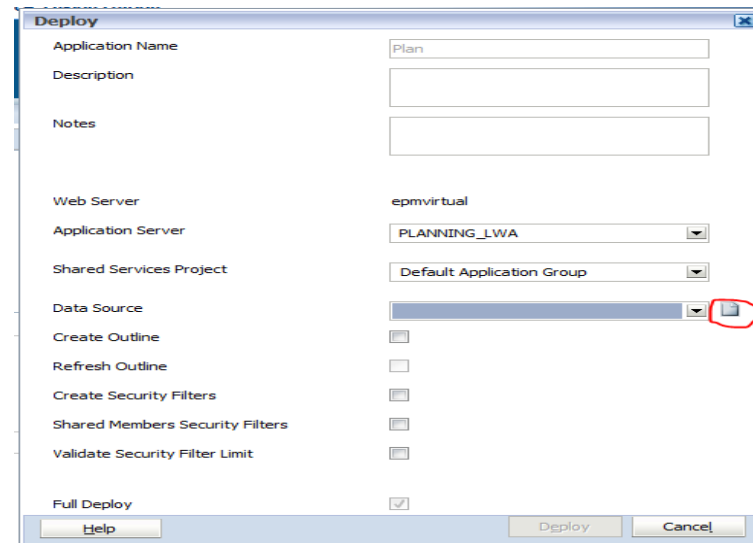
Application Name : Already provided

Description: Provide suitable description

Application Server: Select the application server where it has to be deployed

Shared services project: Select the shared services project

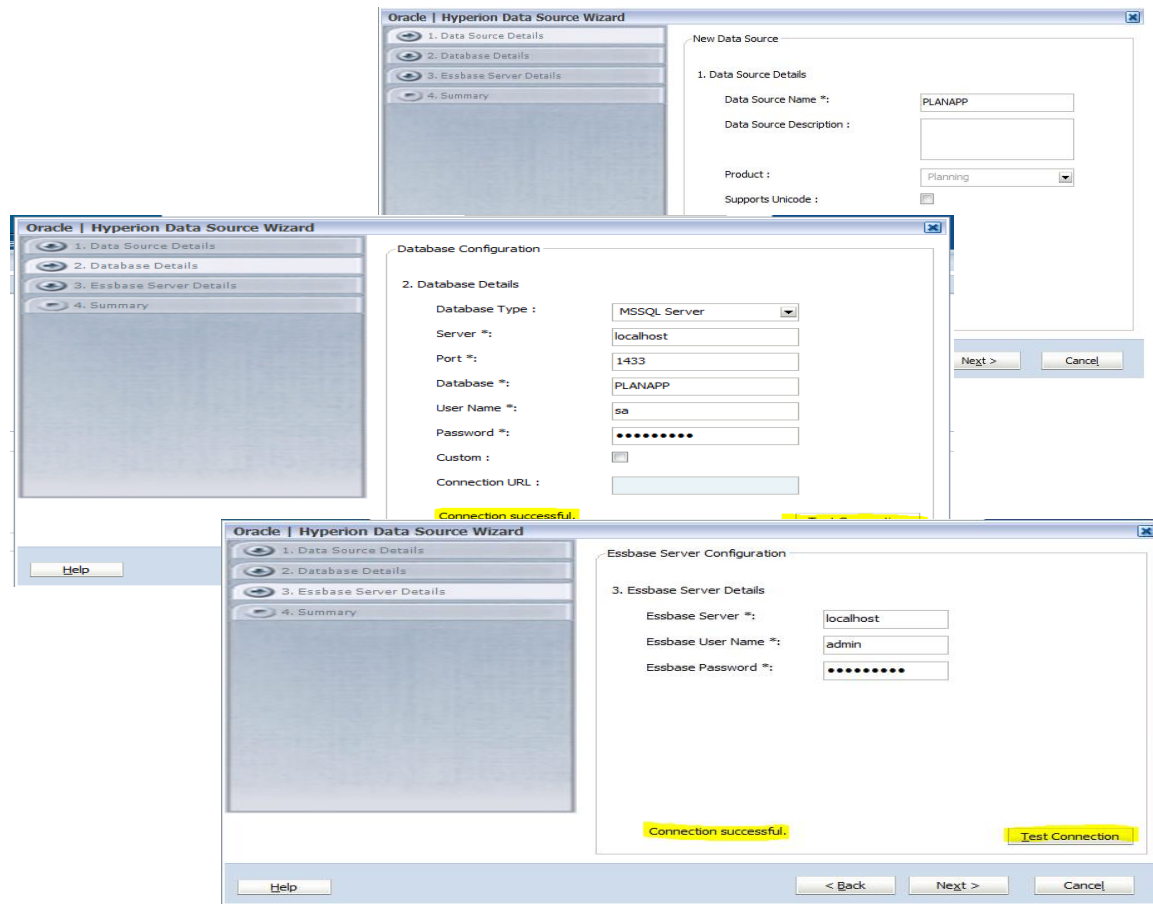
Data Source: In this field, the information of Relational data source and Essbase has to be Provided.



As the data source has not been created yet, click on the highlighted part shown in the image to create the data source for the application.

This takes you to data source creation screen where the details of relational data base and Essbase has to be provided.

- Provide the Data Source Name on the below screen and Click on Next
- Provide the details of the relational database on the next screen and hit the Test connection button to see if the connection is successful and Click Next.
- Provide the Essbase Server details in the next screen and hit the Test Connection button to have the connection succeeded and Click Next.
- Click Finish in the next screen to complete the data source creation



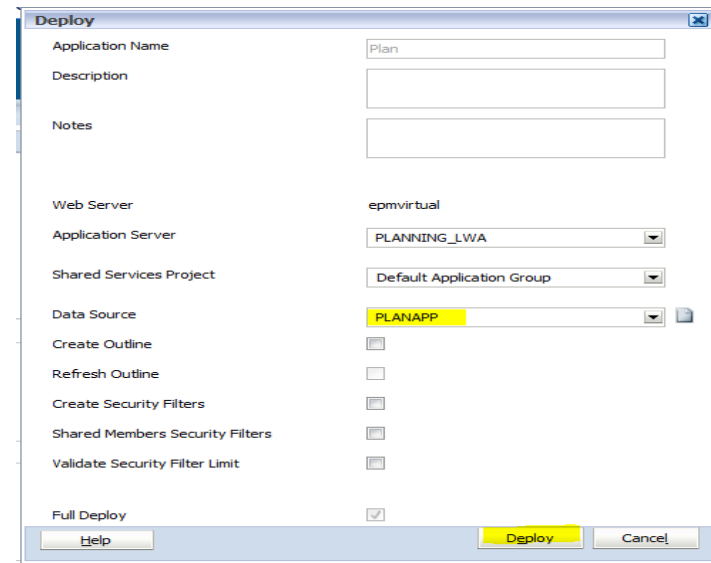
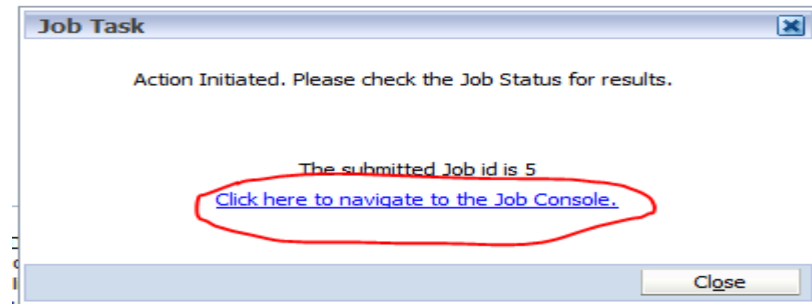
The image displays three sequential screenshots of the Oracle Hyperion Data Source Wizard, illustrating the steps to create a new data source.

Screenshot 1: New Data Source
 This screen shows the initial setup. The left pane lists the steps: 1. Data Source Details, 2. Database Details, 3. Essbase Server Details, and 4. Summary. The main area is titled "New Data Source" and contains the following fields:
 - Data Source Name *: PLANAPP
 - Data Source Description :
 - Product : Planning
 - Supports Unicode : ☐

Screenshot 2: Database Configuration
 This screen shows the "2. Database Details" step. The left pane is the same. The main area is titled "Database Configuration" and contains the following fields:
 - Database Type : MSSQL Server
 - Server *: localhost
 - Port *: 1433
 - Database *: PLANAPP
 - User Name *: sa
 - Password *:
 - Custom : ☐
 - Connection URL :
 A yellow status bar at the bottom indicates "Connection successful."

Screenshot 3: Essbase Server Configuration
 This screen shows the "3. Essbase Server Details" step. The left pane is the same. The main area is titled "Essbase Server Configuration" and contains the following fields:
 - Essbase Server *: localhost
 - Essbase User Name *: admin
 - Essbase Password *:
 A yellow status bar at the bottom indicates "Connection successful."

- Once the data source has been created, the data source will list in the dropdown and select the data source connect for the application as shown below and click on Deploy to deploy the application
- The job console pop-up window will appear and click on the “Click here to navigate to the Job Console” to monitor the status of this activity.
- The Application deployment status can be monitored on the job console window for successful deployment/any errors.



- The Job console window shows the status and progress of the application deployment as shown below and it is evident that the application has been deployed successfully.

Job Console

[Job Filter Options](#)

ID	Description	Last Updated Time	Status	Type	Created By
5	deploy : Plan	Wednesday, April 30, 2014 10:03:40 ...	Completed	Planning Application Deploy...	admin

Summary

Started Time : Wednesday, April 30, 2014 10:03:11 AM
Submitted Time : Wednesday, April 30, 2014 10:03:11 AM
Last Updated Time : Wednesday, April 30, 2014 10:03:40 AM
User Name : admin
Process Name :
Thread : 0
Server :
Detail : Initiating Product Action...

Attachments

[Messages](#)


Status

Status : Completed
Progress : 100%

- Navigate to the application library to see that the application status is “In Sync with the Deployment”
- Now, we have successfully created the planning application.

[HomePage](#)
[Application Library](#)
[Dimension Library](#)
[Job Console](#)

Application Library



Plan

Summary

Name : Plan
Type : Planning
Created : Wednesday, April 30, 2014 9:43:51 AM
Last Deployed : Wednesday, April 30, 2014 10:03:40 AM
Status : In sync with deployment

thank you

www.epmvirtual.com