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BISP

A Hands-On Guide for

Creating Hyperion Planning 11.1.2.2 Data Forms Part I

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Guide for Hyperion Planning Developers. The document focuses on how to Create Hyperion Planning Data forms. Join our professional training program and learn from experts.

History:

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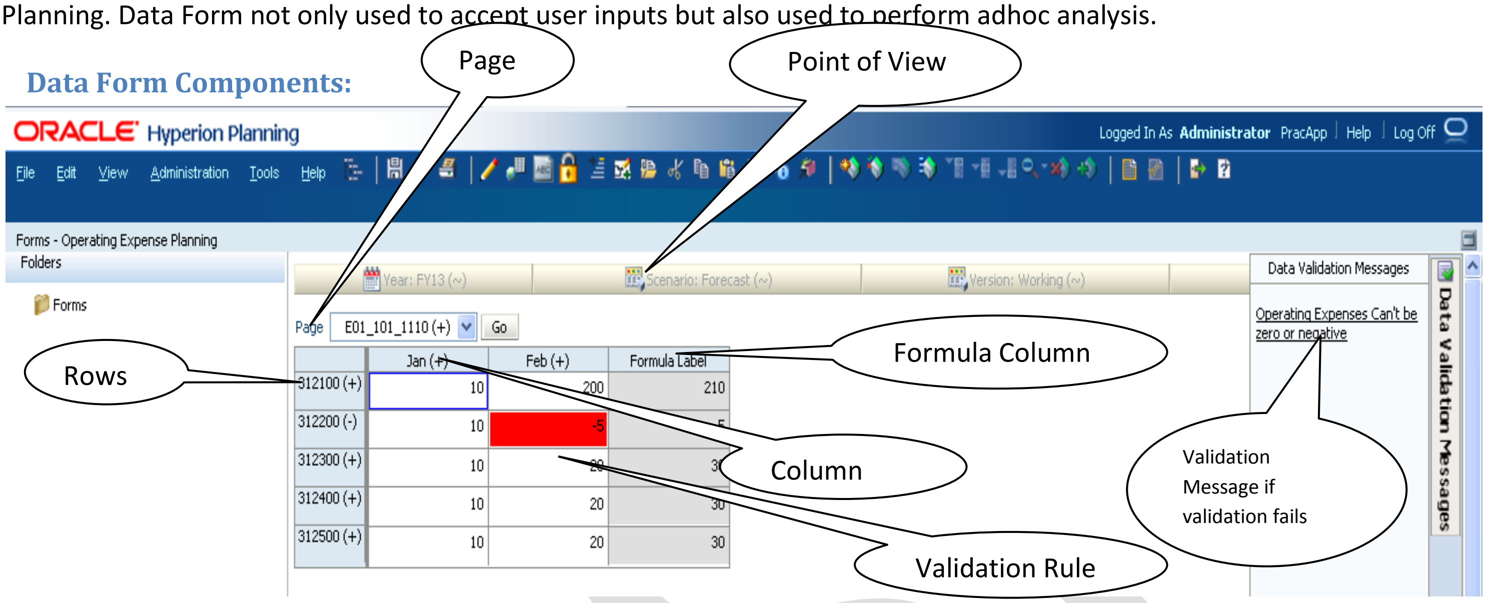
BISP

Why We Need Hyperion Planning Data Form?

Planners and Budget Preparer need some interface to enter data and define planning and budgeting activities. Prior to Hyperion Planning, the most favorite tools used to be excel speed sheets Hyperion Planning Data Forms are the main input mechanism to gather end user budgets and forecasts, and oftentimes, are the only component an end user interacts with in Planning. Data Form not only used to accept user inputs but also used to perform adhoc analysis.

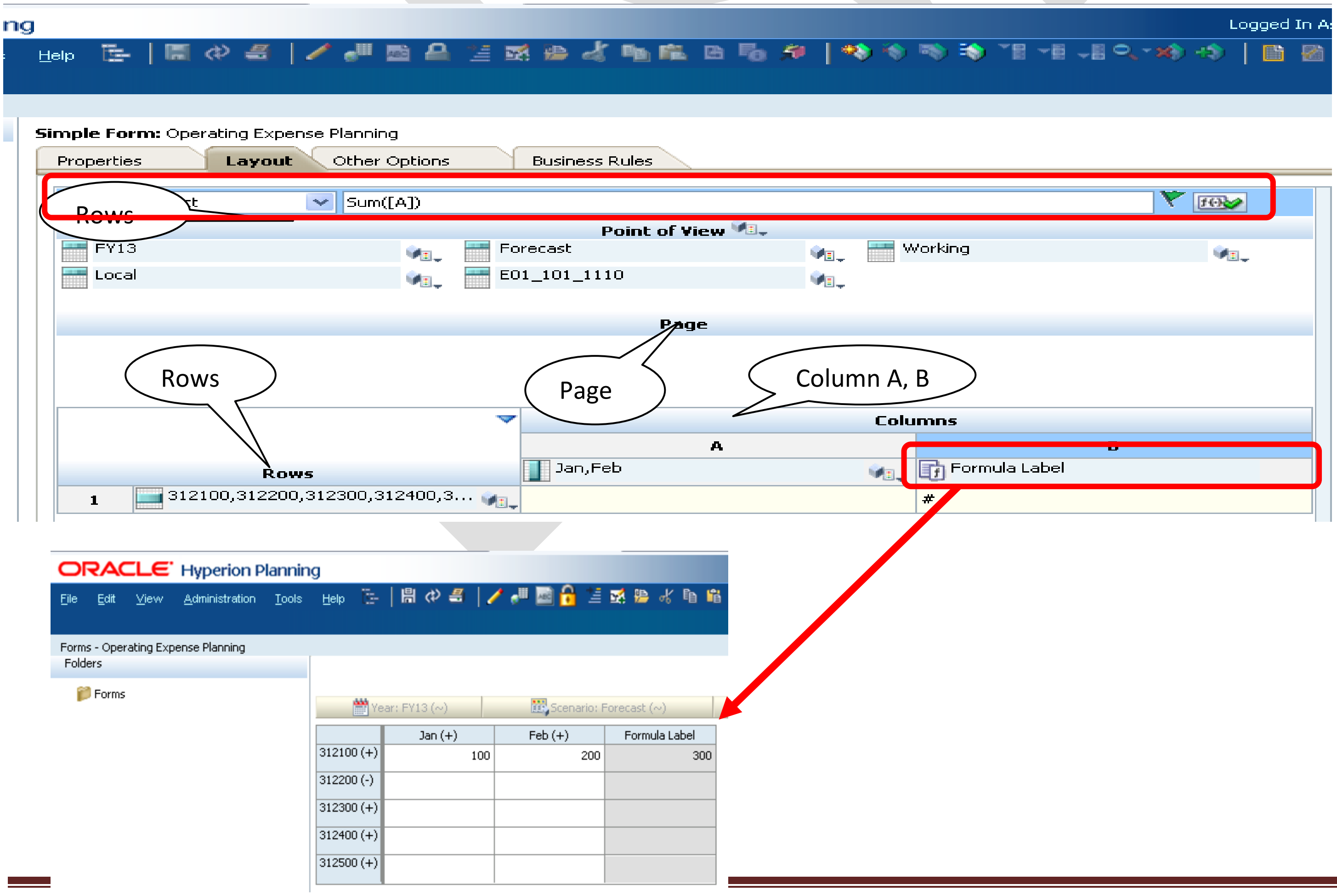
Data Form Components:


Page
Point of View
ORACLE Hyperion Planning
Logged In As Administrator PracApp Help Log Off
File Edit View Administration Tools Help
Forms - Operating Expense Planning
Folders
Forms
Year: FY13 (~)
Scenario: Forecast (~)
Version: Working (~)
Page E01_101_1110 (+) Go
Data Validation Messages
Data Validation Messages
Rows
Formula Column
Column
Validation Message if validation fails
Validation Rule

Operating Expenses Can't be zero or negative

	Jan (+)	Feb (+)	Formula Label
312100 (+)	10	200	210
312200 (-)	10	-5	5
312300 (+)	10	20	30
312400 (+)	10	20	30
312500 (+)	10	20	30

Data Form Components (Design Mode):


ng
Logged In A
Help
Simple Form: Operating Expense Planning
Properties
Layout
Other Options
Business Rules
Rows
Sum([A])
Point of View
Page
Rows
Page
Column A, B
Columns
A
B
Rows
ORACLE Hyperion Planning
File Edit View Administration Tools Help
Forms - Operating Expense Planning
Folders
Forms
Year: FY13 (~)
Scenario: Forecast (~)

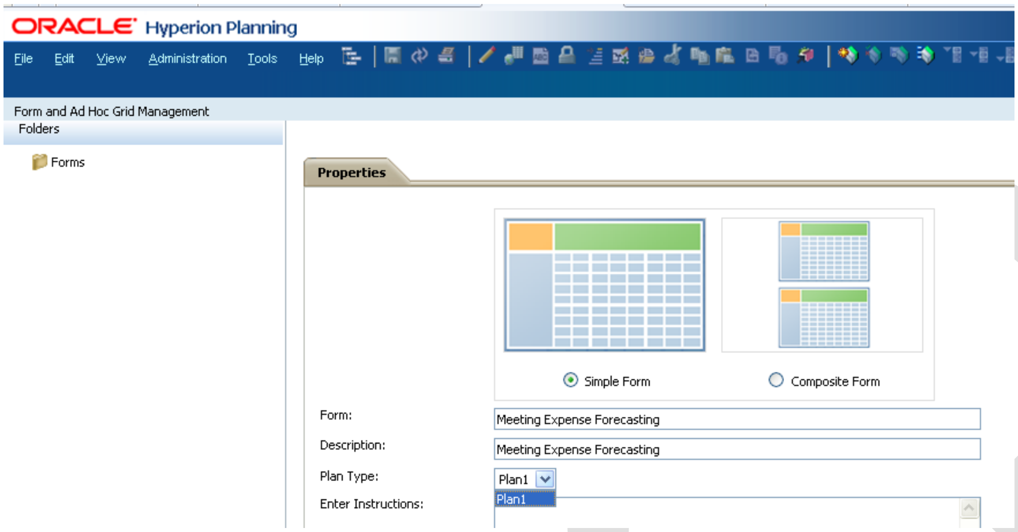
Point of View: FY13, Forecast, Working, Local, E01_101_1110

	A	B
	Jan,Feb	Formula Label
1 312100,312200,312300,312400,3...		#

	Jan (+)	Feb (+)	Formula Label
312100 (+)	100	200	300
312200 (-)			
312300 (+)			
312400 (+)			
312500 (+)			

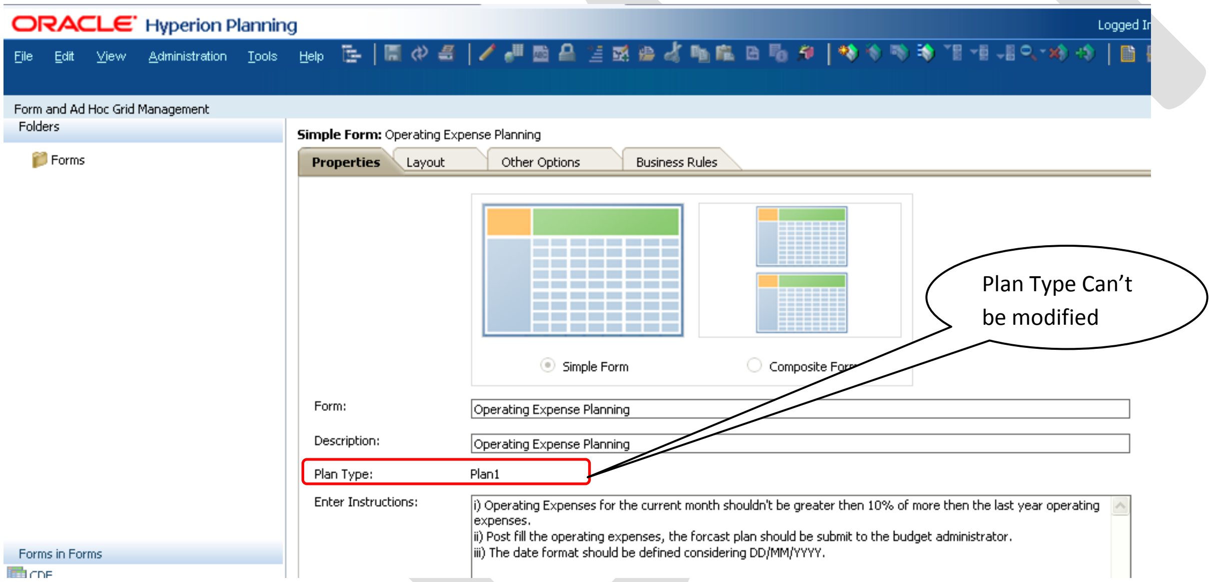
Consideration While Creating Data Form

-Data Form must be associated with Plan Type.


ORACLE Hyperion Planning
File Edit View Administration Tools Help
Form and Ad Hoc Grid Management
Folders
Forms
Properties
● Simple Form
○ Composite Form

Form: Meeting Expense Forecasting
Description: Meeting Expense Forecasting
Plan Type: Plan1
Enter Instructions:

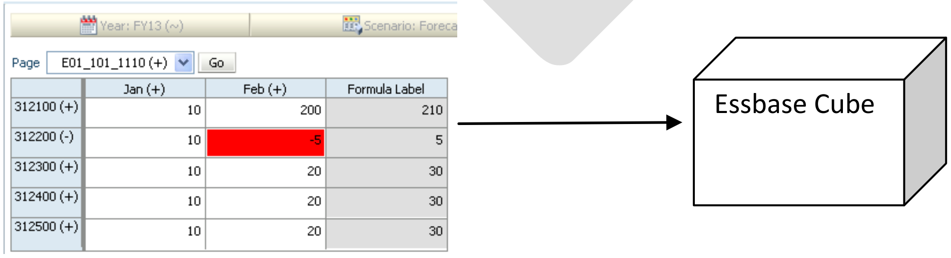
-Once Data form has been created, its Plan Type cannot be changed.


ORACLE Hyperion Planning
Logged I
File Edit View Administration Tools Help
Form and Ad Hoc Grid Management
Folders
Forms
Forms in Forms
CDF
Simple Form: Operating Expense Planning
Properties
Layout
Other Options
Business Rules
○ Simple Form
○ Composite For

Plan Type Can't be modified

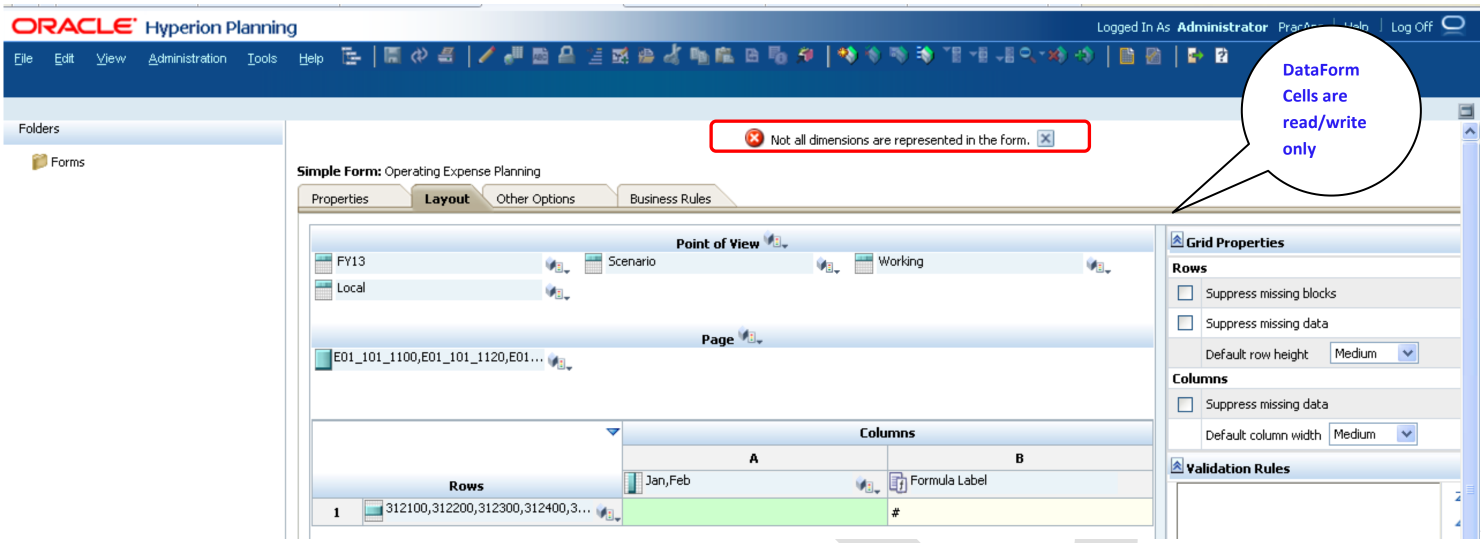
Form: Operating Expense Planning
Description: Operating Expense Planning
Plan Type: Plan1
Enter Instructions: i) Operating Expenses for the current month shouldn't be greater then 10% of more then the last year operating expenses.
ii) Post fill the operating expenses, the forcast plan should be submit to the budget administrator.
iii) The date format should be defined considering DD/MM/YYYY.

-The data entered in the data forms, finally saves to the respective plan type it is associated with.


Year: FY13 (~)
Scenario: Foreca
Page E01_101_1110 (+) Go
Essbase Cube

	Jan (+)	Feb (+)	Formula Label
312100 (+)	10	200	210
312200 (-)	10	-5	5
312300 (+)	10	20	30
312400 (+)	10	20	30
312500 (+)	10	20	30

-There should be atleast one member for each Dimension. In the below example, I haven't added entity dimension in any one of the axis. Therefore a error message "Not all dimensions are represented in the form"



Not all dimensions are represented in the form.

Simple Form: Operating Expense Planning

ORACLE Hyperion Planning
File Edit View Administration Tools Help
Logged In As Administrator
Log Off
Folders
Forms
Properties
Layout
Other Options
Business Rules

Point of View: FY13, Scenario, Working, Local

Page: E01_101_1100,E01_101_1120,E01…

Rows	A	B
	Jan,Feb	Formula Label
1 312100,312200,312300,312400,3…		#

Grid Properties

Rows
- ☐ Suppress missing blocks
- ☐ Suppress missing data
- Default row height: Medium

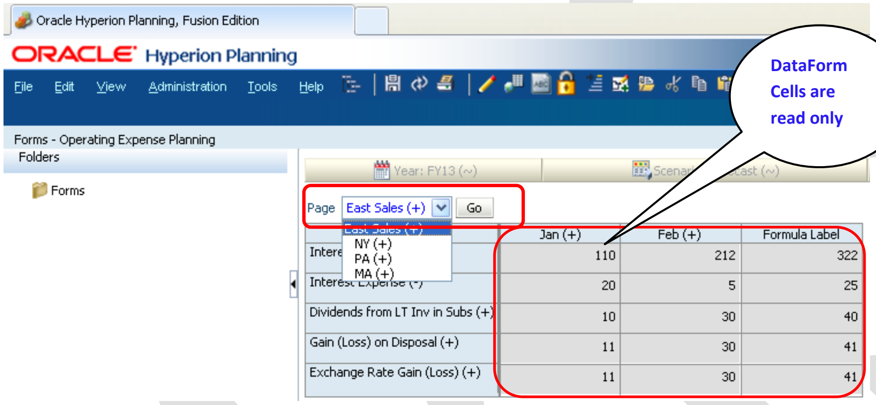
Columns
- ☐ Suppress missing data
- Default column width: Medium

Validation Rules

DataForm Cells are read/write only

-All Dimension member in PoV, Rows, Column and Page should be level 0 members (except the target version)

Else the data form become read only. As in the below example, East Sales is parent therefore the dataform become read only. However, on selection of level 0 member, the dataform become read/write.



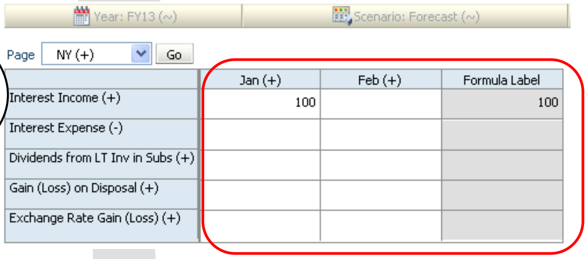
Oracle Hyperion Planning, Fusion Edition
ORACLE Hyperion Planning
File Edit View Administration Tools Help
Forms - Operating Expense Planning
Folders
Forms
Year: FY13 (~)
Scenario: Forecast (~)

Page: East Sales (+) Go

East Sales (+)
NY (+)
PA (+)
MA (+)

	Jan (+)	Feb (+)	Formula Label
Interest Income (+)	110	212	322
Interest Expense (-)	20	5	25
Dividends from LT Inv in Subs (+)	10	30	40
Gain (Loss) on Disposal (+)	11	30	41
Exchange Rate Gain (Loss) (+)	11	30	41

DataForm Cells are read only



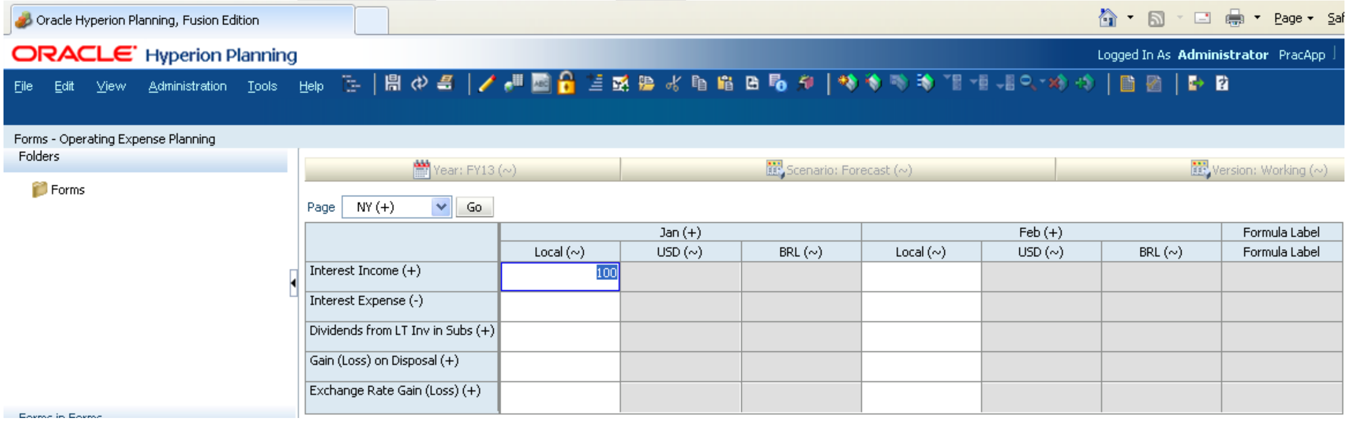
Year: FY13 (~)
Scenario: Forecast (~)

Page: NY (+) Go

	Jan (+)	Feb (+)	Formula Label
Interest Income (+)	100		100
Interest Expense (-)			
Dividends from LT Inv in Subs (+)			
Gain (Loss) on Disposal (+)			
Exchange Rate Gain (Loss) (+)			

-The currency dimension must be set to Local member for multicurrency applications.

As in the below screen shot, user can make entry to Local Currency but in USD and BRL it is marked as Read Only.



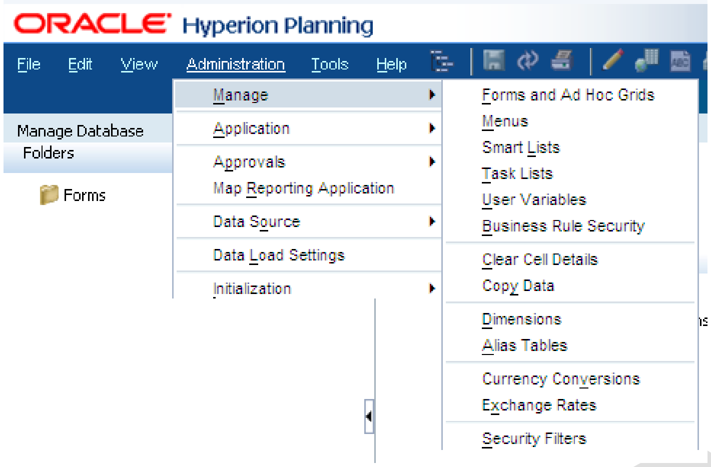
Oracle Hyperion Planning, Fusion Edition
Page
ORACLE Hyperion Planning
Logged In As Administrator PracApp
File Edit View Administration Tools Help
Forms - Operating Expense Planning
Folders
Forms
Year: FY13 (~)
Scenario: Forecast (~)
Version: Working (~)

Page: NY (+) Go

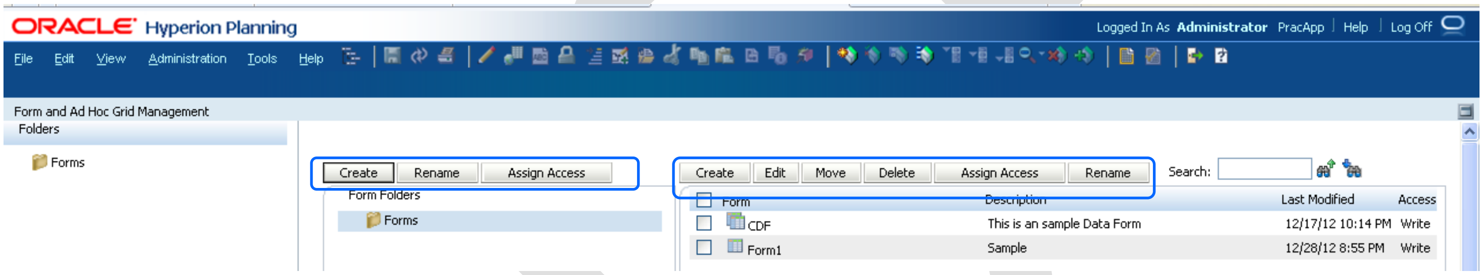
	Jan (+)			Feb (+)			Formula Label
	Local (~)	USD (~)	BRL (~)	Local (~)	USD (~)	BRL (~)	Formula Label
Interest Income (+)	100						
Interest Expense (-)							
Dividends from LT Inv in Subs (+)							
Gain (Loss) on Disposal (+)							
Exchange Rate Gain (Loss) (+)							

Steps to create Hyperion Data Form :

Step#1 : Go to Administration→Manager→Forms and Ad Hoc Grids


ORACLE Hyperion Planning
File
Edit
View
Administration
Tools
Help
Manage Database
Folders
Forms
Manage
Application
Approvals
Map Reporting Application
Data Source
Data Load Settings
Initialization
Forms and Ad Hoc Grids
Menus
Smart Lists
Task Lists
User Variables
Business Rule Security
Clear Cell Details
Copy Data
Dimensions
Alias Tables
Currency Conversions
Exchange Rates
Security Filters

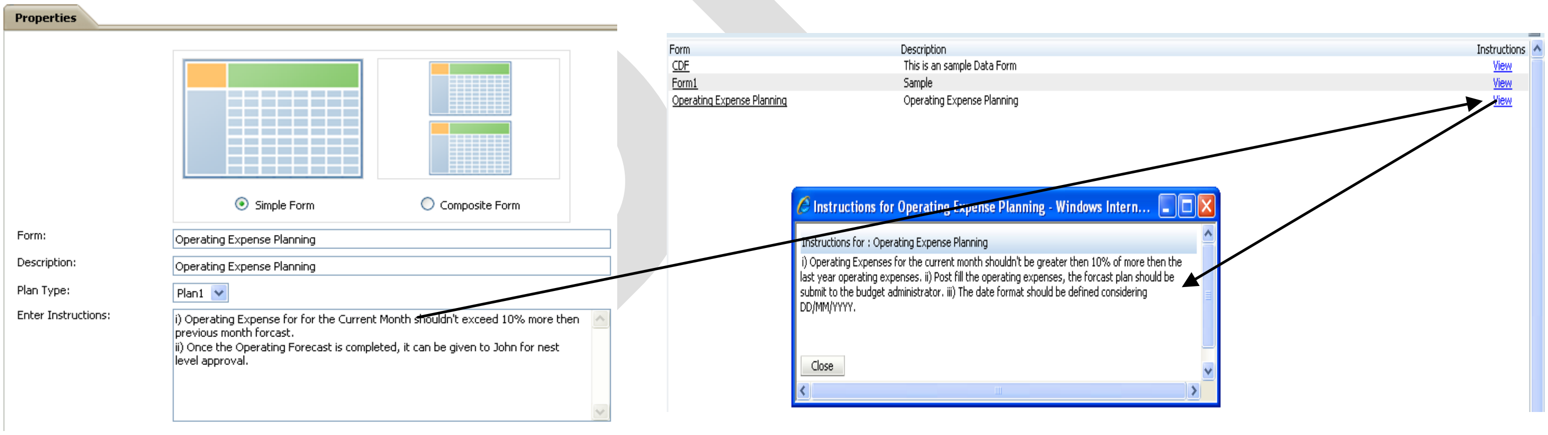
Step#2: Create Folder(optional) and Click on Create Data form


ORACLE Hyperion Planning
Logged In As Administrator PracApp Help Log Off
File
Edit
View
Administration
Tools
Help
Form and Ad Hoc Grid Management
Folders
Forms
Create
Rename
Assign Access
Form Folders
Forms
Create
Edit
Move
Delete
Assign Access
Rename
Search:

	Form	Description	Last Modified	Access
☐	CDF	This is an sample Data Form	12/17/12 10:14 PM	Write
☐	Form1	Sample	12/28/12 8:55 PM	Write

Step#3: Specify the Data Form Name, Description(optional) and instruction.

Specify the Data Form Name, Description(optional) and instruction which planners can follow while filling the data form. The instructions can be accessed.


Properties
● Simple Form
○ Composite Form
Close

Form: Operating Expense Planning

Description: Operating Expense Planning

Plan Type: Plan1

Enter Instructions: i) Operating Expense for for the Current Month shouldn't exceed 10% more then previous month forcast.
ii) Once the Operating Forecast is completed, it can be given to John for nest level approval.

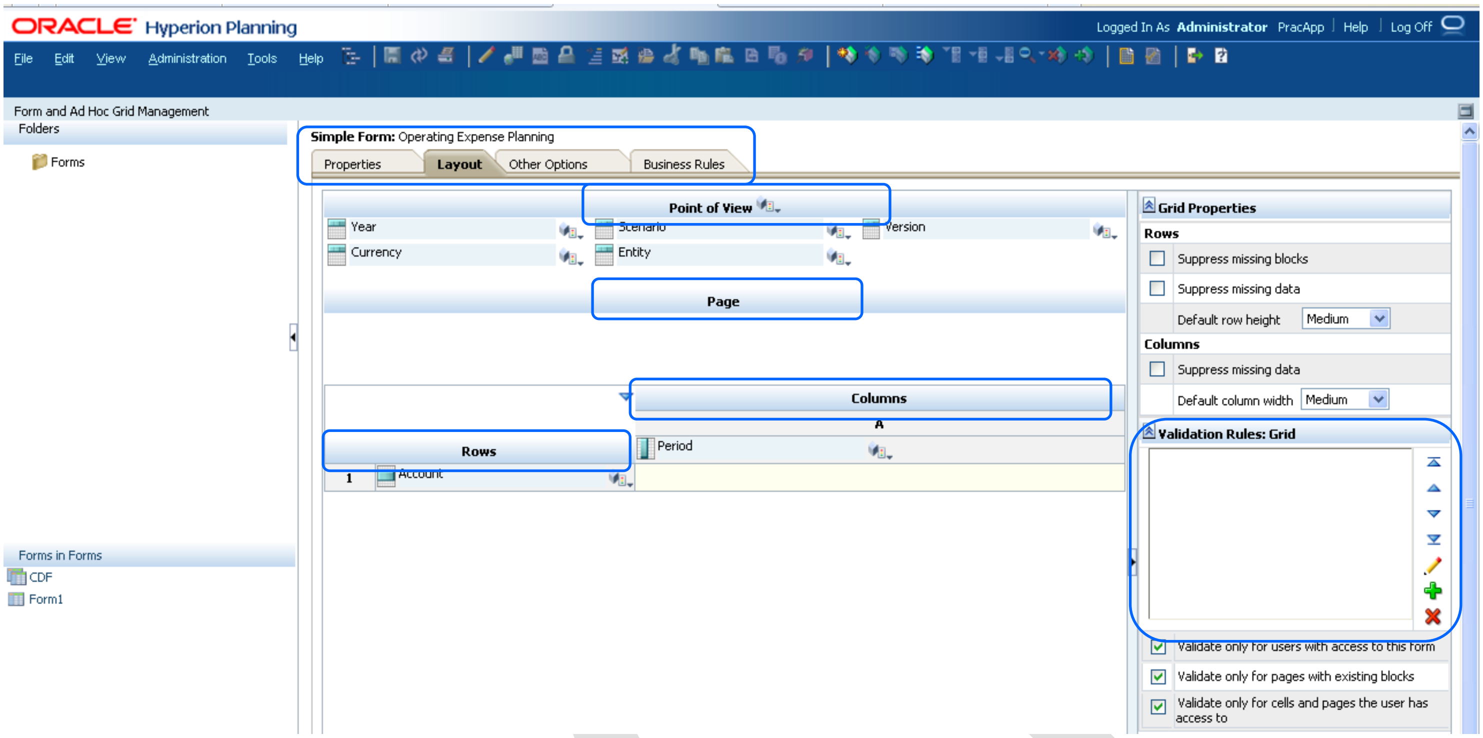
Form	Description	Instructions
CDF	This is an sample Data Form	View
Form1	Sample	View
Operating Expense Planning	Operating Expense Planning	View

Instructions for Operating Expense Planning - Windows Intern...

Instructions for : Operating Expense Planning

i) Operating Expenses for the current month shouldn't be greater then 10% of more then the last year operating expenses. ii) Post fill the operating expenses, the forcast plan should be submit to the budget administrator. iii) The date format should be defined considering DD/MM/YYYY.

Step#4: Define Layout Rows, Column, Page, PoV, Formula Column, Validation Rules and Properties.


ORACLE Hyperion Planning
Logged In As Administrator PracApp | Help | Log Off
File Edit View Administration Tools Help
Form and Ad Hoc Grid Management
Folders
Forms
Forms in Forms
CDF
Form1
Properties
Layout
Other Options
Business Rules
Point of View
Page
Columns
Rows
Grid Properties
Validation Rules: Grid

Simple Form: Operating Expense Planning

Point of View: Year, Scenario, Version, Currency, Entity

Columns: Period

Rows: 1 Account

Grid Properties

Rows

☐ Suppress missing blocks

☐ Suppress missing data

Default row height: Medium

Columns

☐ Suppress missing data

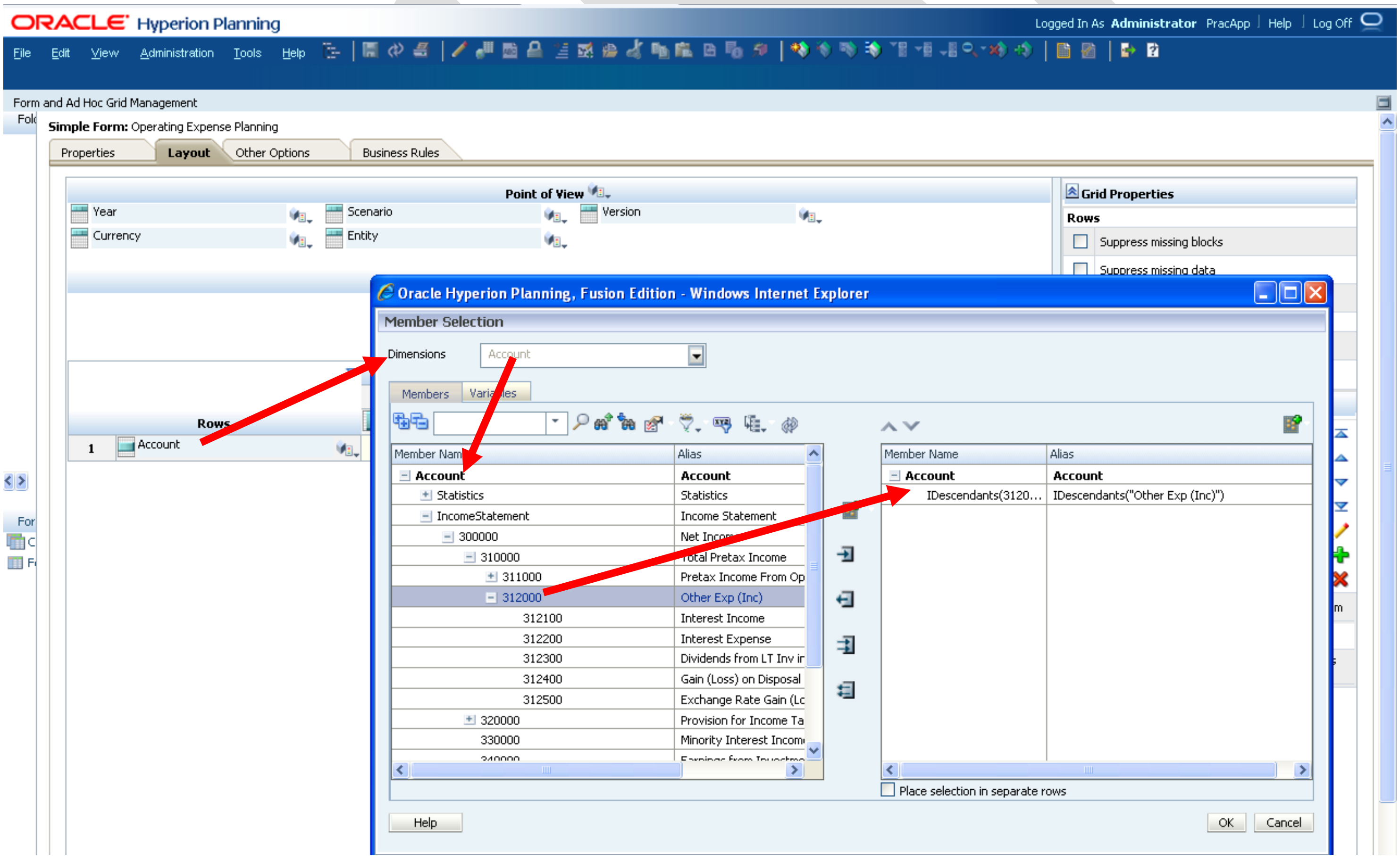
Default column width: Medium

☑ Validate only for users with access to this form

☑ Validate only for pages with existing blocks

☑ Validate only for cells and pages the user has access to

Step#5: Select Dimension Members in each layout Rows, Columns, Page, PoV.


ORACLE Hyperion Planning
Logged In As Administrator PracApp | Help | Log Off
File Edit View Administration Tools Help
Form and Ad Hoc Grid Management
Properties
Layout
Other Options
Business Rules
Point of View
Grid Properties
Rows
Oracle Hyperion Planning, Fusion Edition - Windows Internet Explorer
Member Selection
Members
Variables
Help
OK
Cancel

Simple Form: Operating Expense Planning

Point of View: Year, Scenario, Version, Currency, Entity

Rows: 1 Account

☐ Suppress missing blocks

☐ Suppress missing data

Dimensions: Account

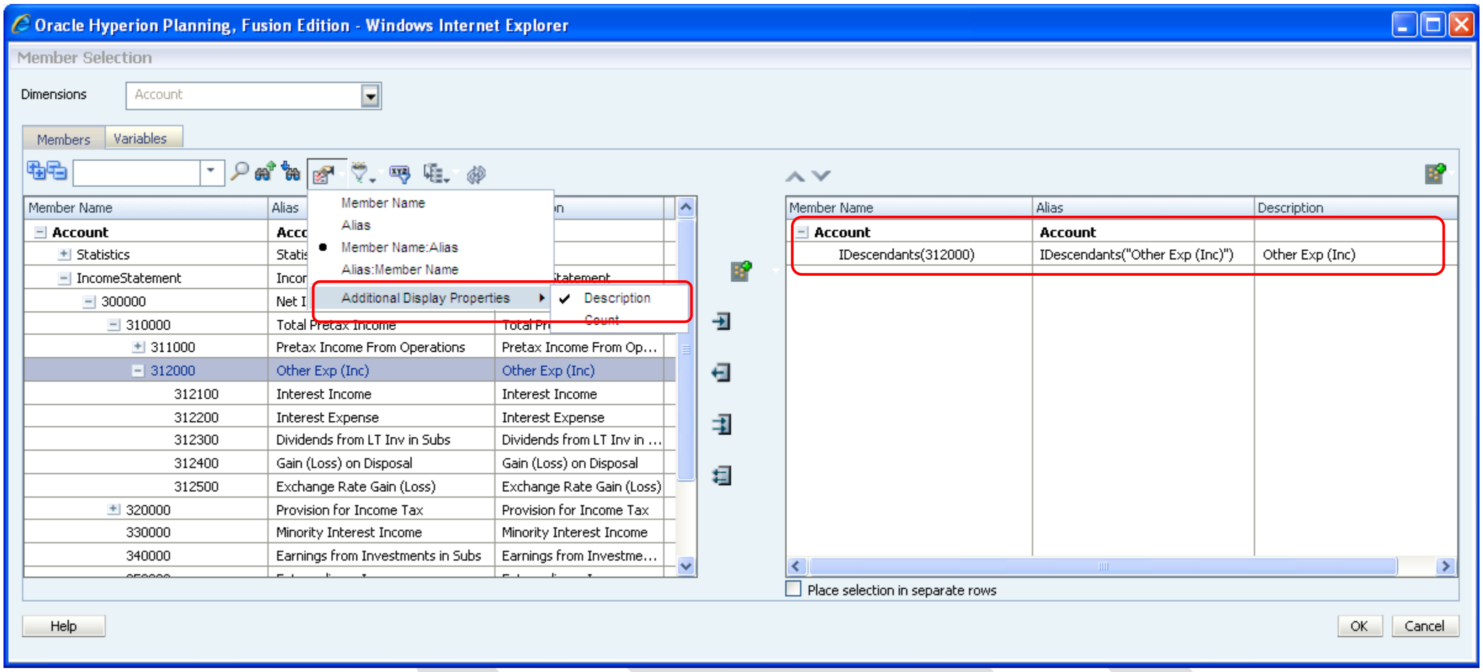
Member Name	Alias
Account	Account
Statistics	Statistics
IncomeStatement	Income Statement
300000	Net Income
310000	Total Pretax Income
311000	Pretax Income From Op
312000	Other Exp (Inc)
312100	Interest Income
312200	Interest Expense
312300	Dividends from LT Inv ir
312400	Gain (Loss) on Disposal
312500	Exchange Rate Gain (Lc
320000	Provision for Income Ta
330000	Minority Interest Incom

Member Name	Alias
Account	Account
IDescendants(3120…	IDescendants("Other Exp (Inc)")

☐ Place selection in separate rows

Step#6: Dimension member can be selected with member relation.

Dimension member can be selected with member relation functions as given below. In addition to this, we can also specify the alias name to make it east selection.


Oracle Hyperion Planning, Fusion Edition - Windows Internet Explorer
Member Selection
Dimensions
Account
Members
Variables
Member Name
Alias
Member Name:Alias
Alias:Member Name
Additional Display Properties
Description
Count
Place selection in separate rows
Help
OK
Cancel

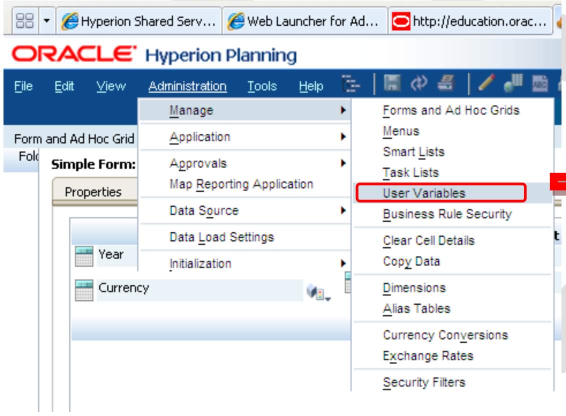
Member Name	Alias	Description
Account	Account	
IDescendants(312000)	IDescendants("Other Exp (Inc)")	Other Exp (Inc)

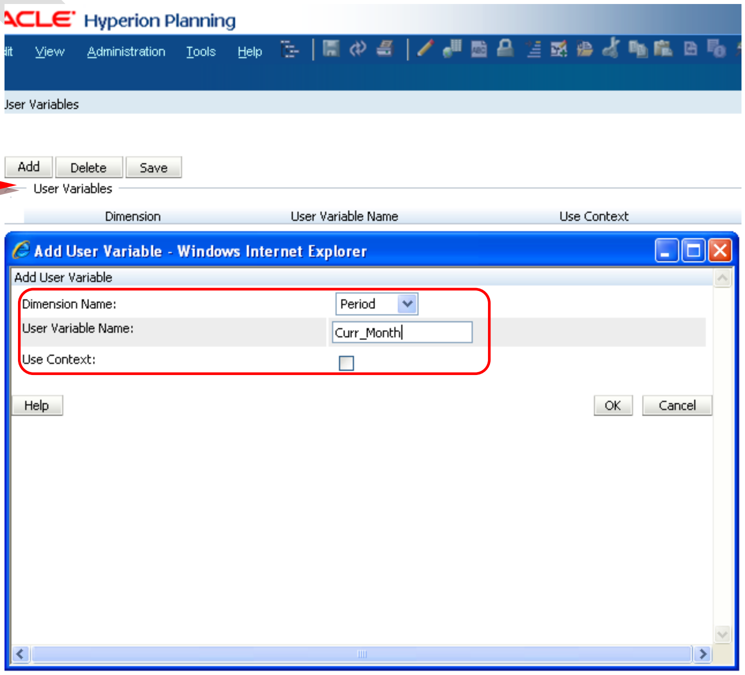
Member Name	Alias	
Account	Acc	
Statistics	Statis	
IncomeStatement	Incon	Statement
300000	Net I	
310000	Total Pretax Income	Total Pr
311000	Pretax Income From Operations	Pretax Income From Op…
312000	Other Exp (Inc)	Other Exp (Inc)
312100	Interest Income	Interest Income
312200	Interest Expense	Interest Expense
312300	Dividends from LT Inv in Subs	Dividends from LT Inv in …
312400	Gain (Loss) on Disposal	Gain (Loss) on Disposal
312500	Exchange Rate Gain (Loss)	Exchange Rate Gain (Loss)
320000	Provision for Income Tax	Provision for Income Tax
330000	Minority Interest Income	Minority Interest Income
340000	Earnings from Investments in Subs	Earnings from Investme…

Step#7 Designing Data Form With User Variables.

The Data Form can be designed with variables to make it flexible and single point of administration. Some components are variable by nature i.e current month, current year etc. We can create user defined variables to turn it to dynamic rather than constant. Below are the steps one can use to

Creating User variables.

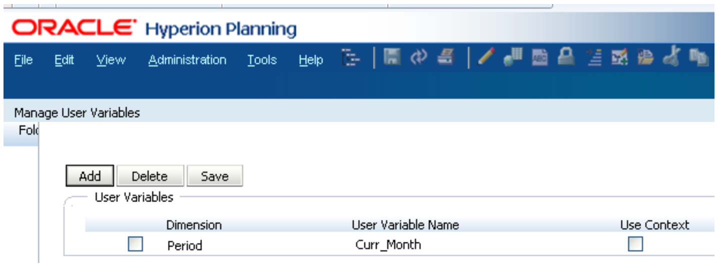

Hyperion Shared Serv…
Web Launcher for Ad…
http://education.orac…
ORACLE Hyperion Planning
File
Edit
View
Administration
Tools
Help
Form and Ad Hoc Grid
Simple Form:
Properties
Year
Currency
Manage
Application
Approvals
Map Reporting Application
Data Source
Data Load Settings
Initialization
Forms and Ad Hoc Grids
Menus
Smart Lists
Task Lists
User Variables
Business Rule Security
Clear Cell Details
Copy Data
Dimensions
Alias Tables
Currency Conversions
Exchange Rates
Security Filters


ACLE Hyperion Planning
View
Administration
Tools
Help
User Variables
Add
Delete
Save
User Variables
Dimension
User Variable Name
Use Context
Add User Variable - Windows Internet Explorer
Add User Variable
Help
OK
Cancel

Dimension Name: Period

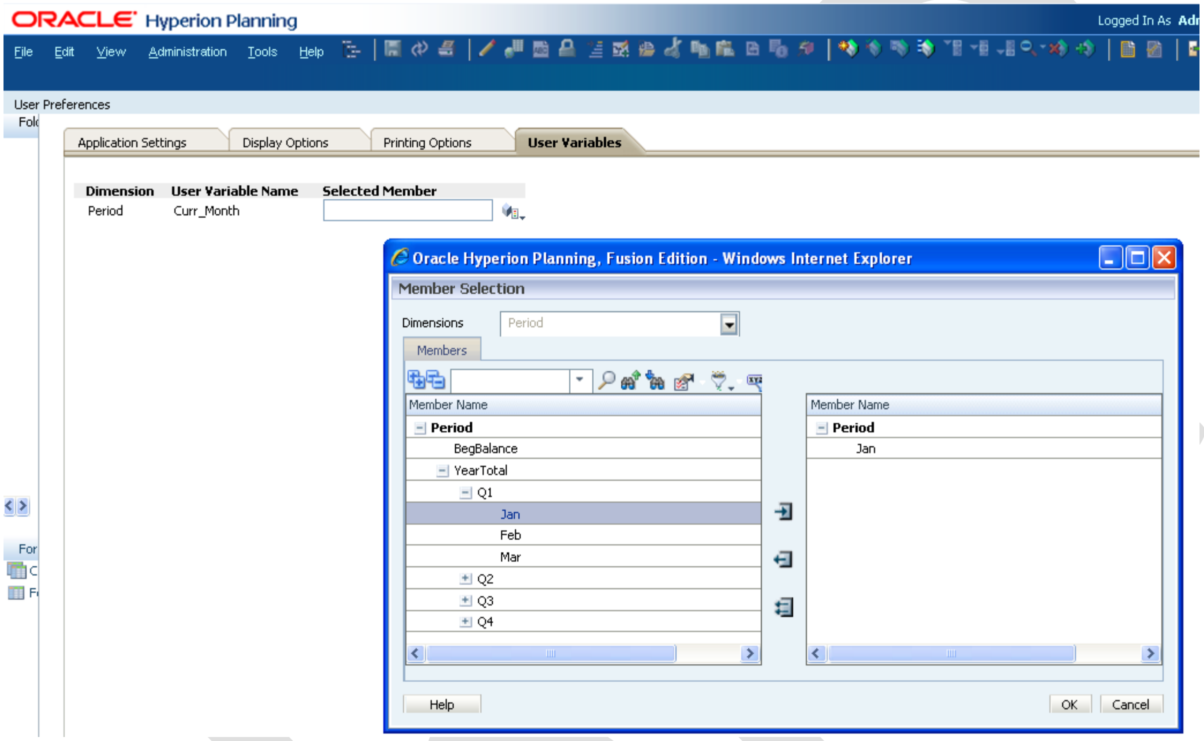
User Variable Name: Curr_Month

Use Context: ☐


ORACLE Hyperion Planning
File Edit View Administration Tools Help
Manage User Variables
Add
Delete
Save
User Variables

☐	Dimension	User Variable Name	Use Context
☐	Period	Curr_Month	☐

Once the variable has been created, you can initial it. In order to initialize the variable select File→Preferences. The below screen shows initialization of variable. The Curr_Month variable has been initialized with Jan Month.

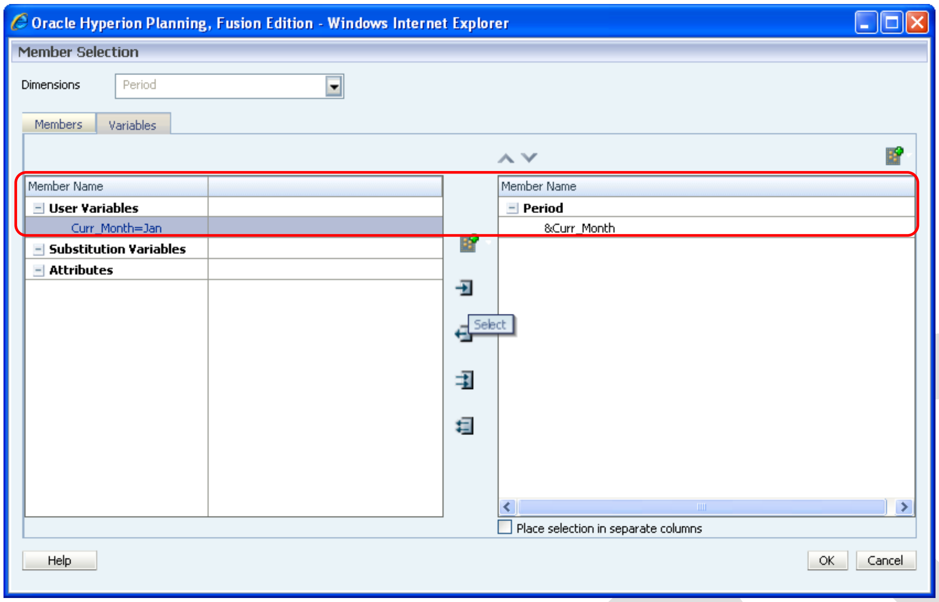

ORACLE Hyperion Planning
Logged In As Adr
File Edit View Administration Tools Help
User Preferences
Application Settings
Display Options
Printing Options
User Variables
Oracle Hyperion Planning, Fusion Edition - Windows Internet Explorer
Member Selection
Members
Member Name
Period
BegBalance
YearTotal
Q1
Jan
Feb
Mar
Q2
Q3
Q4
Help
OK
Cancel

Dimension	User Variable Name	Selected Member
Period	Curr_Month	

Dimensions: Period

Member Name
Period
Jan

The same User Variable has been used here instead of constants.


Oracle Hyperion Planning, Fusion Edition - Windows Internet Explorer
Member Selection
Members
Variables
Select
Help
OK
Cancel

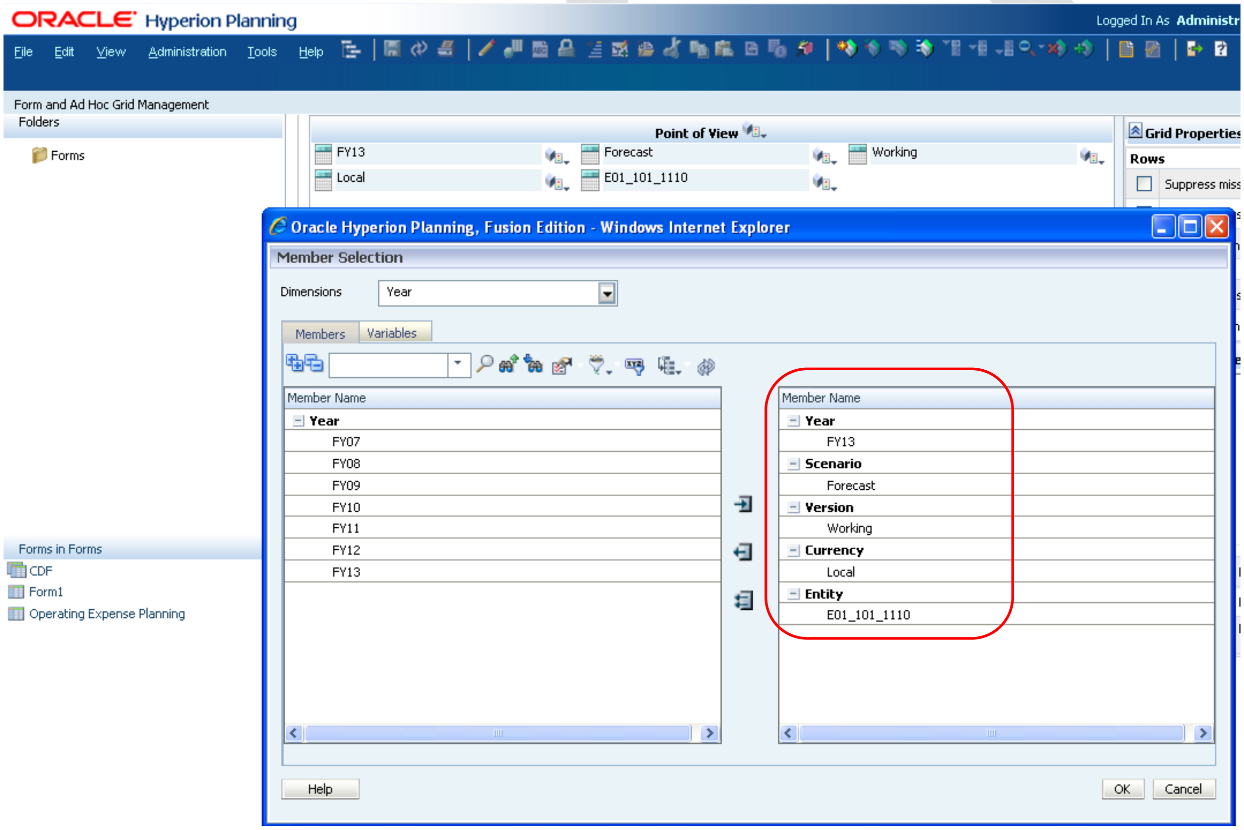
Dimensions: Period

Member Name	
User Variables	
Curr_Month=Jan	
Substitution Variables	
Attributes	

Member Name
Period
&Curr_Month

☐ Place selection in separate columns

Similarly set the values for all Dimension members in PoV, Column and Rows


ORACLE Hyperion Planning
Logged In As Administr
File
Edit
View
Administration
Tools
Help
Form and Ad Hoc Grid Management
Folders
Forms
Grid Properties
Rows
Suppress miss
Forms in Forms
CDF
Form1
Operating Expense Planning
Oracle Hyperion Planning, Fusion Edition - Windows Internet Explorer
Member Selection
Members
Variables
Help
OK
Cancel

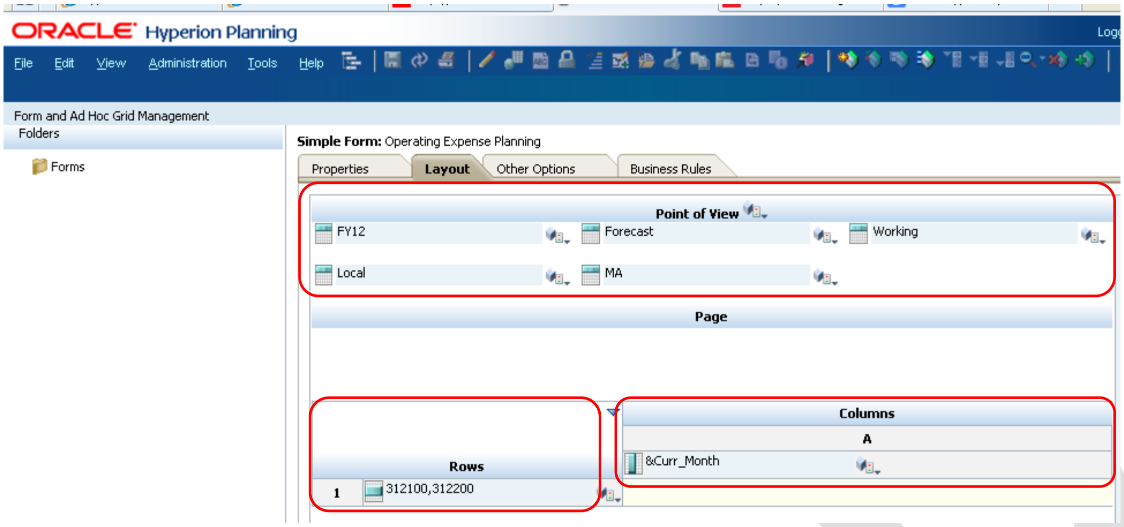
Point of View: FY13, Forecast, Working, Local, E01_101_1110

Dimensions: Year

Member Name
Year
FY07
FY08
FY09
FY10
FY11
FY12
FY13

Member Name
Year
FY13
Scenario
Forecast
Version
Working
Currency
Local
Entity
E01_101_1110

The Final layout looks like this way.


ORACLE Hyperion Planning
File Edit View Administration Tools Help
Form and Ad Hoc Grid Management
Folders
Forms
Properties
Layout
Other Options
Business Rules
Point of View
Page
Rows
Columns
A

Simple Form: Operating Expense Planning

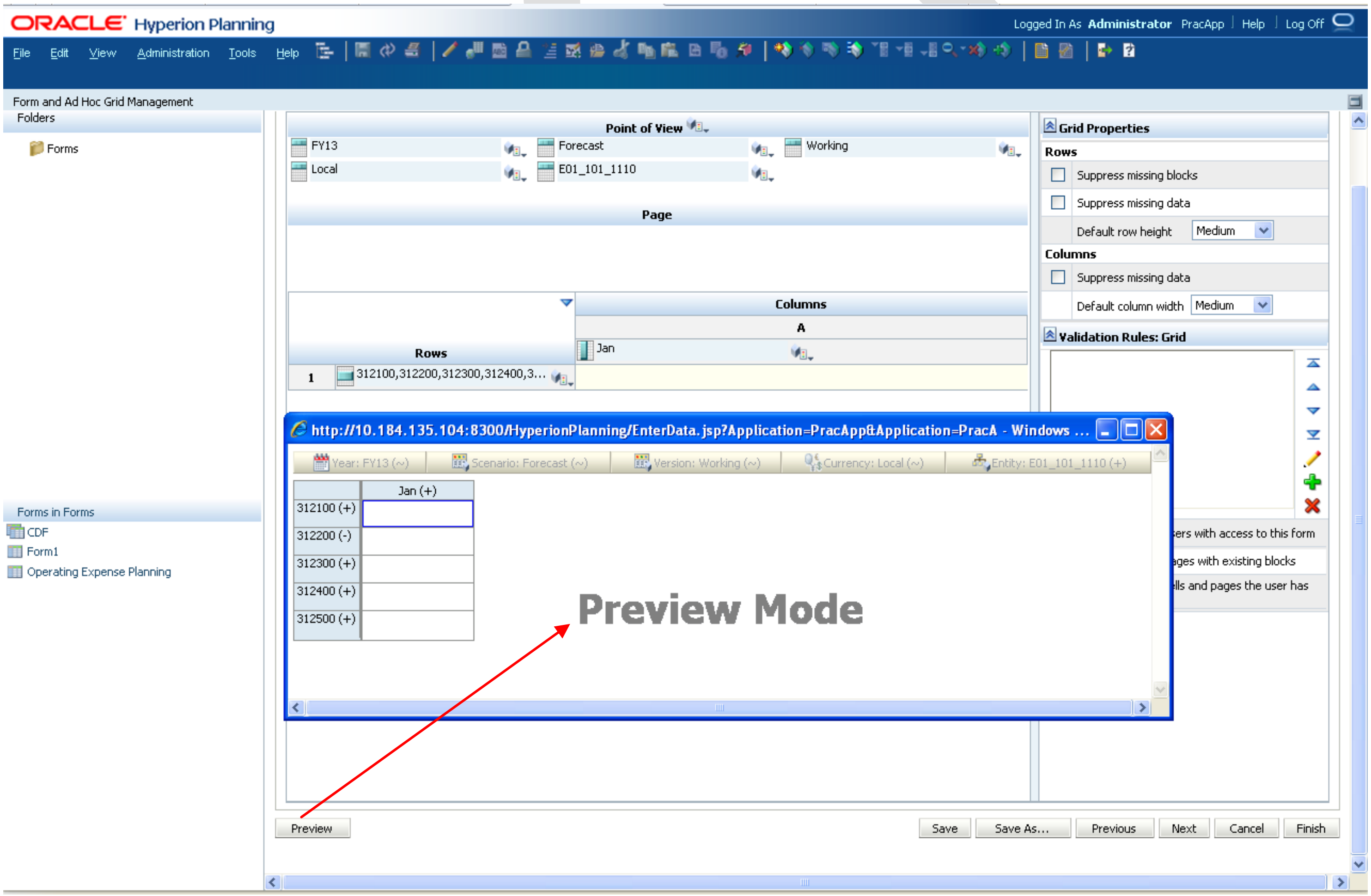
Point of View: FY12, Forecast, Working, Local, MA

Rows: 1 312100,312200

Columns: A &Curr_Month

Step#8 : Preview the Data Form.

Once all members in layout have been defined, one can click on previous to have the actual view of the data form before you save it finally.


ORACLE Hyperion Planning
Logged In As Administrator PracApp | Help | Log Off
File Edit View Administration Tools Help
Form and Ad Hoc Grid Management
Folders
Forms
Forms in Forms
CDF
Form1
Operating Expense Planning
Point of View
Page
Columns
A
Rows
Grid Properties
Validation Rules: Grid
ers with access to this form
ges with existing blocks
lls and pages the user has
Preview
Save
Save As...
Previous
Next
Cancel
Finish
Preview Mode

Point of View: FY13, Forecast, Working, Local, E01_101_1110

Rows: 1 312100,312200,312300,312400,3...

Columns: A Jan

Grid Properties

Rows

☐ Suppress missing blocks

☐ Suppress missing data

Default row height: Medium

Columns

☐ Suppress missing data

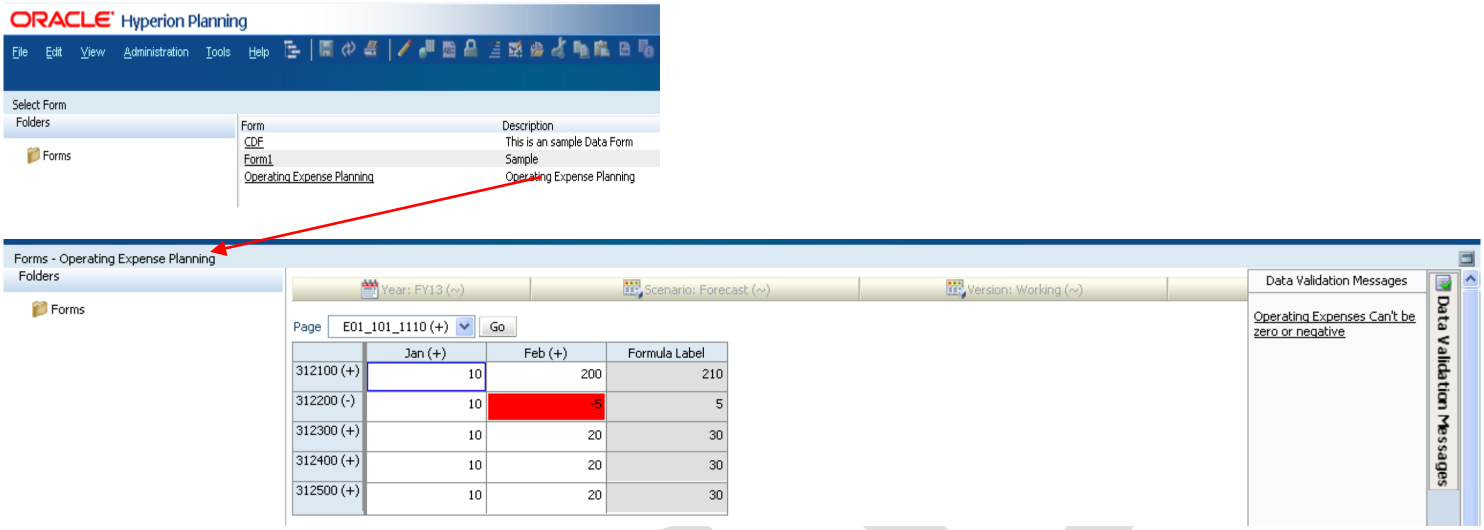
Default column width: Medium

http://10.184.135.104:8300/HyperionPlanning/EnterData.jsp?Application=PracApp&Application=PracA - Windows ...

Year: FY13 (~) | Scenario: Forecast (~) | Version: Working (~) | Currency: Local (~) | Entity: E01_101_1110 (+)

	Jan (+)
312100 (+)	
312200 (-)	
312300 (+)	
312400 (+)	
312500 (+)	

Step#9 Save Data Form and final look.


ORACLE Hyperion Planning
File Edit View Administration Tools Help
Select Form
Folders
Forms
Forms - Operating Expense Planning
Folders
Forms
Year: FY13 (~)
Scenario: Forecast (~)
Version: Working (~)
Page
E01_101_1110 (+)
Go
Data Validation Messages

Form	Description
CDF	This is an sample Data Form
Form1	Sample
Operating Expense Planning	Operating Expense Planning

	Jan (+)	Feb (+)	Formula Label
312100 (+)	10	200	210
312200 (-)	10	-5	5
312300 (+)	10	20	30
312400 (+)	10	20	30
312500 (+)	10	20	30

Data Validation Messages

Operating Expenses Can't be zero or negative