Oracle Hyperion Planning 11.1.2.2 Hyperion Planning Forms "Building Validation Rule"

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 Oracle Hyperion Planning Administration. The document focuses on performing validation in Hyperion Planning Data Form. Join our professional training program and learn from experts.



Contents

Hyperion Planning Data Form Validation:	3
Building Validation Rules	3
Steps to create the validation Rules:	4
A Graphical view for Data Validation Form	5
Define Data Form Location(scope)	6
Define the Source Type	6
Validation Description	8
Custom Defined Message	8
Save Validation Rule and provide name	10
Example: Validation Rule fail to meet the criteria.	10

Hyperion Planning Data Form Validation:

There are many instances where users require to validate the input data based on some predefine business rules. These rules decide the data will save into Essbase using Hyperion Planning DataForm. With Planning version 11.1.2 and newer, Oracle has introduced a powerful set of tools for data validation within the Planning Data Form Designer itself. Let's walk through a scenario of how this works. Hyperion Planning now comes with set of functions which allow you to write custom data input validation rules associated with each data form, column and rows.

Building Validation Rules

Once can create data validation rules for data forms at the grid, column, row, or cell level to meet the data input guidelines imposed by your organization. For example your company requires data of account dimension should be certain member and non-missing data. You can create a data validation rule for the standard Expense data form to flag the criteria in red. The rule also triggers notifications to junior and senior management to alter them about the violation of rule.

You can create multiple data validation rules for a data form in order to implement a complex set of processes for tracking and processing plan data. When you do, the rules are prioritized accounting to the condition priority, rule location, and rule position in the rule list.

			\langle	Use to add a new without leaving t	/ ru he	le		apply i	it to	a nother cell on		se to view rul evaluation or	les and der fo	l set r		
C	Da	ta Validatio		e Builder: Fin_Pla		- Windows Interne	et	France (
	,	Add Rule	Delete	: Duplicate \	/iew	Rule										4
	Loca	ation:	Row 1	ample Rule						1						
	Des	cription:	01010	ample Rule					~							
																=
									~							
			🗹 En	able validation rule												
			L Cu	stom grouping												
	22	28 🎍 🎍	17 2				_									
	_	Conditio	n	Source Type		Source Value		Operator		Target Type		Target Value	Proce	:55	Actions	4
		IF	×	Member Name	×	Account 🖪	~	Equals	~	Value 🛛	F	360 📢 🚛	AND	~	As 45	
			¥	Current Cell Value	~			Not Equals	~	Value 🗳	*	#Missing 🧷	AND	Y	A 40	
			×	Current Cell Value	~			<	~	Value 🖂) 🦯		×	🕹 🔥	
		THEN	Y	Process Cell	~										📌 🍄 🎭	
		ELSE IF	V	Member Name	~	Account 🖪	~	Equals	~	Value 🖂	⊡ F	-360 🖣 🖓	AND	V	P P	
			v	Current Cell Value	~			Not Equals	~	Value 💌	*	#Missing 🦯	AND	¥	🐣 😓	
			V	Current Cell Value	7			>	~	Value 💌	1	. 🦯		~	A 4	-

Steps to create the validation Rules:

- 1. Select Administration, then Manage, and then Data Forms.
- 2. From Data Form Management, create or open a data form and select the Layout Tab.
- 3. On the Layout tab, right-click the grid, row, column, or cell for which you want to create the validation rule.
- 4. Select Add/Edit validation Rules.

Data Validation Rule Builder is displayed.

5. Click Add Rule.

6. Optional: If you want to change the rule location, from the Location drop-down list, select the location in teh data form for the rule.

7. In the Name box, enter the name of the validation rule. This description is displayed in the process management promotional hierarchies.

- 8. Optional: In the Description box, enter a description of the rule.
- 9. Optional: Clear the Enable Validation Rule option until you create and validate the rule without error.
- 10. Optional: Select the Customer grouping option to customize the grouping conditions for the rule definition.
- 11. Build the rule as follows.

a. Under Condition, click down arrow, and form the drop-down list, select the beginining condition for the statement. The first part of teh statement must include an IF Statement.

b. Under Source Type, click down arrow, and form the drop-down list, select an option. The options that display in the drop-down list are dependent on the beginning condition.

c. Under Source Value, select a rule evaluation option. The values available for selection are driven by the selected Source Type

d. Under Operator, click drow-down, and from the drop-down list, select a conditional operator.

e. Under Target Type, click drop-down, and from the drop-down list, select the targeted member or value type.

f. Under Target Value, enter the targeted value or member.

g. Optional: Under Process, click drop-down, and from the drop-down menu, select a process operator.

- h. Under Actions, click Filter to add additional lines to the statement.
- i. Optional: On the Data Validation Rule toolbar, click to group conditions within the rule.
- 12. Optional: Under Actions, set cell-processing instructions.
- 13. Click Validate
- 14. Select Enable Validation Rule to make the rule available on the data form.
- 15. Click Ok.
- 16. Save

Below examples to demonstrate how to implement Hyperion Planning Data Form Input rules.

Open a DataForm Administration → Manage-→ Forms & AdHoc Grids, Select Data Form from the list of forms. Select the form and Edit

Rule#1: As per requirement 1st, the account dimension member should be with "Net Rate". Also, the value shouldn't be #Missing.

A Graphical view for Data Validation Form

Add Rule Delete Duplicate View Rule Location: Row 1 Name: New Rule Description:		
Add Rule Delete Duplicate View Rule Location: Row 1 Name: New Rule Description:		
Location: Row 1 Name: New Rule Description:		
Name: New Rule Description:		
Description:		
V		
Enable Validation rule		
25.25日处场也,按该1		
Condition Source Type Source Value Operator Target Type	Target Value	Process Actions
E IF V Member V Account V In V Value V	I Net Rate, Third 🖣	AND 🖂 📌 🍄
Current Cell Value	l #Missing 🧷	AND 🗵 📌 🍄
Cross-Dim Member 👽 360001 🦯 Equals 🗵 Value	l #Missing 🏑 🦯	💌 🍫 🥵
THEN 🗵 Process Cell 🗵		V 🕹 🕹
	Va	alidate OK Cancel

					randanioni mina		to missing the							ي الغ
					i The rule has	no	errors. Click OK to	close the dialog box. 🗵						
	Add Rule	Delete	Duplicate	View	Rule									1
Loc	ation:	Row 1	~											1
Nar	ne:	Non Mi	ssing# Validation											
Des	scription:						1	6						
		En En	able validation rule											
		Cu	stom grouping											
2	: 🥵 🐝	70 70	Va Va											
	Condi	tion	Source Type		Source Value		Operator	Target Type	Target Valu	e	Proce	ss	Actions	
Ξ	IF	v	Member	¥	Account I	~	In 💌	Value 0	Net Rate, Third	. 🖗 🖵	AND	Y	🐣 😓	
		Y	Current Cell Value	Y			Not Equals 🗵	Value E	∠ #Missing	/	AND	Y	A 4	
		V	Cross-Dim Member	V	360001 🌙	/	Equals 🗵	Value E	☑ #Missing	./		Y	🐣 😓	
	THEN	¥	Process Cell	V									📌 🍄 🎭	
	ELSE IF	¥	Member	V	Account I	~	In 💌	Value E	Net Rate, Third	¥1,	AND	Y	P P	
		¥	Current Cell Value	V			Equals 💌	Value E	✓ #Missing	/	AND	Y	P P	
		Y	Cross-Dim Member	Y	360001 🌙	/	Not Equals 🗵	Value E	✓ #Missing	./		Y	P P	
	THEN	¥	Process Cell	¥									📌 🍄 🎭	
He	elp									Va	lidate	0	K Cancel	

Define Data Form Location(scope)

~				-								
C Date	a Validati	on Rule	e Builder: New Rul	e - W	indows Interne	The scope	of the	validation is				<u>عاله</u>
Ad	dd Rule	Delete	Duplicate	View		for entire	grid.					
Locat	ion:	Grid	✓									
Name		Retaine	ed Income validation									
Descr	ription:					1	~					
						1	1					
		🗹 En	able validation rule									
		🗌 Cu	stom grouping									
25 2	8 🦗 🖁	ð 72	F F									
	Conditio	n	Source Type		Source Value	Operator		Target Type	Target Value	Process	Actions	
Ξ 1	ſF	¥	Current Cell Value	¥		- 💌	Value	V	./	¥	A 4	
Help)								Va	lidate C	Cancel	
												~

Define the Source Type

Data Valida	tion Rul	e Builder: New Rule - W	indows Internet Exp	lorer				
Add Rule	Delete	Duplicate View	Rule					
Location:	Grid	~						
Name:	Retain	ed Income validation						_
Description:	The re 999999 appear 999999	tained income should be betwe 9999999.90. If value is entere [•] stating "retained income shou 9999999.90"	en -9999999999999.90 ar d outside the range, valid Ild be between -99999999	nd Allation will 99999.90 and V	Select examp	Source Type, in n ble it is Account N Bate	ny Iember	
	🗹 En	able validation rule				Nate.	_	
	🗌 Cu	stom grouping						
🖧 🐻 🦄	12 12	<u>Fa</u> Fa						
Condi	tion	Source Type	arce Value	Operator	Target Type	Target Value	Process	Actions
Help	V	Current Cell Value		= v	Value 🔽	1	alidate C	🥐 🍄 К Cancel
		Version Type Var Reporting Type UDA Attribute						



In the process cell option specifies the criteria. In the below example. The retained income should be in between -99999999.90 to +99999999.90. However, if criteria fail, the cell format will be changed along with custom message.

Validation Description

Add Rule	Delete	e Duplicate	View	Rule								
Location:	Grid	*										
Name:	Retain	ed Income validation										
Description:	The rel outside betwee	tained income should be a the range, validation (en -999999999999999,90 (e betwo will app and 999	een -9999 and 9999. I ear stating "Yetained b 99999999999.90"	if va balai	lue is entered nce should be	~	De	escription of th	ie val	idatio	n
		istom grouping										
7 1 1 1 1 1 1 1 1	5) (1)											
Condit	ion	Source Type		Source Value	_	Operator		Target Type	Target Value	1	Process	Actions
IF	v	Member	V	Account	¥	In E	a Value		Retained Balan	A.	ND 💌	∿• ∿
	Y	Current Cell Value	¥			Not Equals 🛛 🖻	I Value	V	#Missing	<u>/</u> A	ND 💌	📌 🍄
	V	Current Cell Value	¥			< 5	a Value	v	-9999	/	V	₽ ₽
THEN	V	Process Cell	¥								>	🎤 🍄 🇞
ELSE IF	V	Member	¥	Account	¥	In 🖪	Value	×	Retained Balan	A	ND 💌	A 4
	V	Current Cell Value	¥			Not Equals 🛛	I Value	V	#Missing	, / A	ND 💌	A 🔥
	¥	Current Cell Value	¥				Yalue			./	*	P 🕈
Help						= != <				Valida	te C	K Cance
stom De mat Cell	efine	ed Message										
ell Background Color:		11					_					
lidation Message:	Retaine	d Balace should be between	-9999999	999999.90 and 999999999	1999.	90	_		Custom D Message.	efine	e Valid	ation
	Sho	w in Data Validation Message	s pane									
provals			P									
None 💛 Update P	romotional	Path 🤍 Do Not Promote										
Help												

However, in the below example, there is an additional Else Criteria. The account member name should be "Retained Balance", should not be #MISSING and greater then >9999.

Ć	Da	ta Validati	on Rule	Builder: Retained In	come validation - Win	dows Internet	Explorer			
۲) Int	ternet Explore	r is curre	ently running with add-ons d	isabled. Click here to mana	ge, disable, or rem	ove your add-ons.			×
		Add Duly	Delete	Durkerke	u Dula					
	1.44		Delete		W Rule					
	LOC	acion:	Botoin				Г			
	Des	cription:	The rel	ained income should be bet	upon -9999 and 9999. If up	lue is optored				
			outside	the range, validation will a	opear stating "retained bala	nce should be				
			Derwei	31 - 33 33 33 33 33 33 33 30 dilu 3	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	~				
			🗹 En	able validation rule						
			🗌 Cu	stom grouping						
	8	18 👆	272	A A A						
		Conditio	n	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
	Ξ	IF	v	Member E	Account 💌	In 💌	Value 💌	Retained Balan ۷ 🌉	AND 💌	A 4
			Y	Current Cell Value	2	Not Equals 🗵	Value 💌	#Missing 🦯	AND 💌	№ №
			¥	Current Cell Value	2	< 💌	Value 💌	-9999 🏑	V	№
		THEN	¥	Process Cell	2					A 4 20
		ELSE IF	¥	Member E	Account	In 💌	Value 💌	Retained Balan ۷ 🌉	AND 💌	№ №
			¥	Current Cell Value	a cifu the	Not Equals 🗵	Value 💌	#Missing 🦯	AND 💌	A 40
			Y		becity the	> 💌	Value 💌	9999 🎺	×	📌 🐢
		THEN	*	EI	se criteria.	/				
			_							A. A. 40
	He	IF Else IF						Va	lidate O	K Cancel
		ELSE THEN								
L		RANGE								

	ata vanuati	on Kat	Bunder. Ketamed	mee	me vanuation - i		dows intern	let i	cxpiorer						
					i The rule ha	s no	errors. Click O)K to	close the dialog box. 💌						4
	Add Rule	Delete	Duplicate	View F	Rule										
Lo	cation:	Grid													
Na	ame:	Retain	ed Income validation]						
De	escription:	The re outside betwee	ained income should be b the range, validation wil n -9999999999999,90 an	oetwe II appe d 999	en -9999 and 9999. I ear stating "retained 1999999999.90"	if va balar	lue is entered nce should be	~							
		🗹 En	able validation rule												
		🗌 Cu	stom grouping												
8	S 🔏 🧏 🕻	ja 72	唐 居												
	Conditi	on	Source Type		Source Value		Operator		Target Type	Target Value		Proce	ss	Actions	
E	IF	v	Member	v	Account	¥	In	~	Value 💌	Retained Balan	¥:	AND	Y	🐣 😓	
		Y	Current Cell Value	V			Not Equals	¥	Value 💌	#Missing	./	AND	¥	A 40	
		¥	Current Cell Value	¥			<	¥	Value 💌	-9999	./		¥	🕈 🖗	
	THEN	V	Process Cell	×										📌 ზ 🦓	
	ELSE IF	¥	Member	V	Account	¥	In	¥	Value 💌	Retained Balan	¥:,	AND	¥	A. A.	
		Y	Current Cell Value	V			Not Equals	¥	Value 💌	#Missing	./	AND	¥	A 4	
		Y	Current Cell Value	V			>	¥	Value 💌	9999	./		¥	A 4	
	THEN	¥	Process Cell	V										P P 🖏	
ŀ	Help										Va	lidate	0	K Add Conditio	n
															1

Save Validation Rule and provide name

perties	Layout	Other Options	1	Business Rules					
				Point of View ⁄ 💷				20	Grid Properties
FY13		Ý1.,	For	ecast 🖓 🚛	- V	/orking	¥.	Ro	ws
Local		¥1.							Suppress missing blocks
				6					Suppress missing data
E01 101 1	100 501 101 1	120 501		Page 📶 🗸					Default row beight Medium
	100,201_101_1	120,201 🦷						Col	umns
									Suppress missing data
			~		Colu	imns			Default column width Medium
				A		В			Der dale colamit Walth
	Rows		Ī	IDescendants(Q1),IDescendants	ý.	Expense %		F	Row Properties: 1
1 II	escendants(507	000),IDescend	No.		- Uy	#			Apply to all rows
-									Hide
									Read-only
									Show separator
					-	<			Suppress hierarchy
									Suppress missing data
				/ Validatio	on				Default
				(Rule Na	ne				Row height Derault
					ne.				alidation Rules: Grid
					_			R	etained Income validation
									Validate only for users with access to

Example: Validation Rule fail to meet the criteria.

Validation Rule Message and Cell formatting when validation rule failed to meet the creterial.

		I	The data has be	en saved. 🗵		Data Validation Messages	
🛗 Year: FY13 (~)	Scenario	: Forecast (~)		Version: Working (~)	Q fs Cur	Retained Balance should be between -9999 and 9999".)ata
age NY (+) 🔽 Go					1	[2]: <u>1</u> , <u>2</u>	/ allo
	Jan (+)	Feb (+)	Mar (+)	□Q1 (+) Apr (+)	(+)		ation
Other Employee Costs (+)	120	120					- Me
Recruitment (+)	120	140		Custom	1		Dess
Relocation (+)	120	10	/				saf
Employee Development (+)	30	50]	Message when			
Employee HR (+)	390	320		validation ruled			
Net Rate (+)	100			failed			
Third Party Transfer Pricing Spread (+) 100		<u> </u>				
Strategy Market Rate Spread (+)	100						
Strategy Market Rate-Spread (+)	100			100			
Retained Balance (+)	11111			11111			
New Add Balance (+)							
-360000 (+)	11511			11511			
		$ \setminus $	Ш				
		Cus for vali	stom defir matting, v idation rul	ned cell vhen le failed			