



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.**

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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.

Use to add a new rule without leaving the

Use to copy a rule and apply it to another cell on

se to view rules and set evaluation order for

The screenshot shows the 'Data Validation Rule Builder' window. At the top, there are buttons: 'Add Rule', 'Delete', 'Duplicate', and 'View Rule'. Below these, the 'Location' is set to 'Row 1', 'Name' is 'BISP Sample Rule', and 'Description' is empty. There are checkboxes for 'Enable validation rule' (checked) and 'Custom grouping' (unchecked). Below the form fields is a toolbar with icons for adding, deleting, duplicating, and viewing rules. The main area is a table with columns: Condition, Source Type, Source Value, Operator, Target Type, Target Value, Process, and Actions.

	Condition	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
IF	Member Name	Account	Equals	Value	F360	AND		
	Current Cell Value		Not Equals	Value	#Missing	AND		
	Current Cell Value		<	Value	0			
THEN	Process Cell							
ELSE IF	Member Name	Account	Equals	Value	F360	AND		
	Current Cell Value		Not Equals	Value	#Missing	AND		
	Current Cell Value		>	Value	1			

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 the 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 from the drop-down list, select the beginning condition for the statement. The first part of the statement must include an IF Statement.
 - b. Under Source Type, click down arrow, and from the drop-down list, select an option. The options that display in the drop-down list are dependant 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 down arrow, 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

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

A Graphical view for Data Validation Form

Data Validation Rule builder - Non Missing# Validation - Windows Internet Explorer

The rule has no errors. Click OK to close the dialog box.

Location:

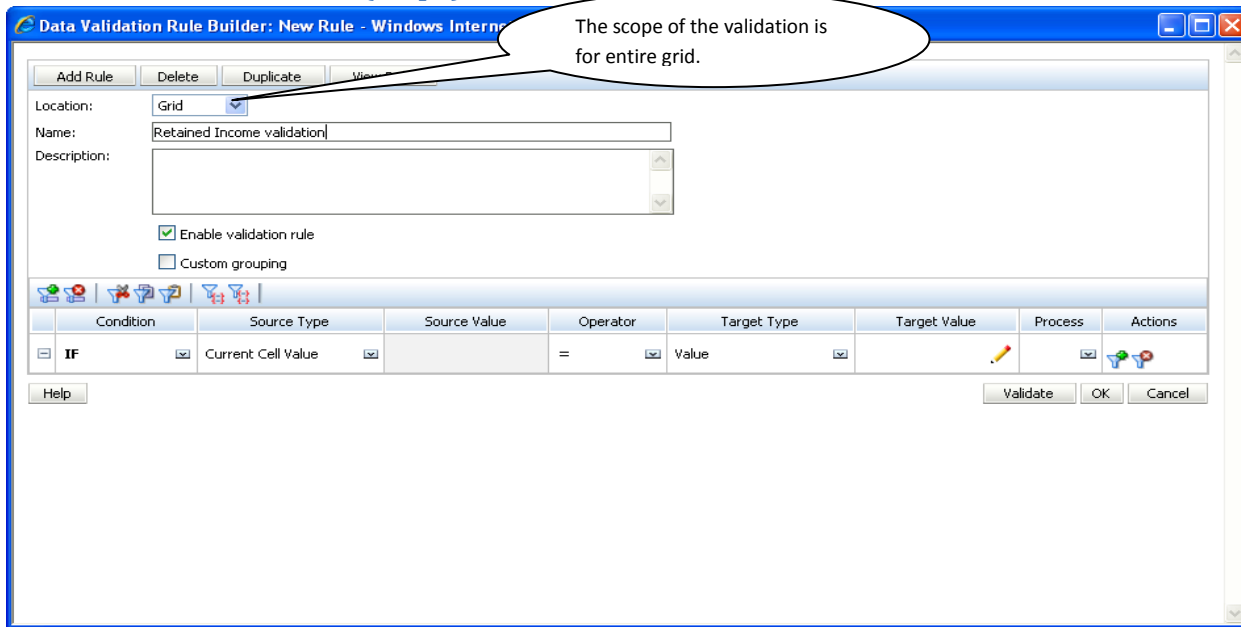
Name:

Description:

☒ Enable validation rule
☐ Custom grouping

	Condition	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
	<input checked="" type="checkbox"/> IF	<input checked="" type="checkbox"/> Member	<input checked="" type="checkbox"/> Account	<input checked="" type="checkbox"/> In	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> Net Rate, Third...	<input checked="" type="checkbox"/> AND	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Current Cell Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Not Equals	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> #Missing	<input checked="" type="checkbox"/> AND	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Cross-Dim Member	<input checked="" type="checkbox"/> 360001	<input checked="" type="checkbox"/> Equals	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> #Missing	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/> THEN	<input checked="" type="checkbox"/> Process Cell	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/> ELSE IF	<input checked="" type="checkbox"/> Member	<input checked="" type="checkbox"/> Account	<input checked="" type="checkbox"/> In	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> Net Rate, Third...	<input checked="" type="checkbox"/> AND	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Current Cell Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Equals	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> #Missing	<input checked="" type="checkbox"/> AND	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Cross-Dim Member	<input checked="" type="checkbox"/> 360001	<input checked="" type="checkbox"/> Not Equals	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> #Missing	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/> THEN	<input checked="" type="checkbox"/> Process Cell	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Define Data Form Location(scope)



Data Validation Rule Builder: New Rule - Windows Internet Explorer

Buttons: Add Rule, Delete, Duplicate, View Rule

Location: **Grid**

Name: Retained Income validation

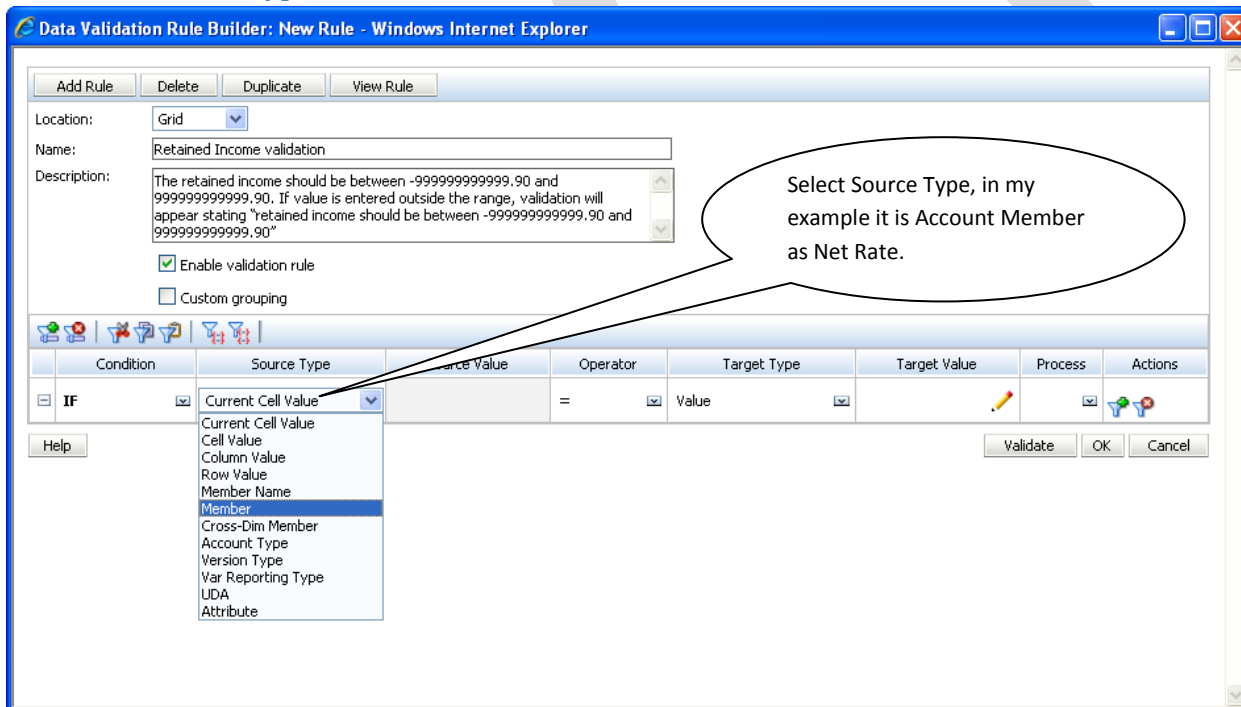
Description:

☒ Enable validation rule
☐ Custom grouping

	Condition	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
<input checked="" type="checkbox"/>	IF	<input checked="" type="checkbox"/>	Current Cell Value	=	<input checked="" type="checkbox"/>	Value	<input checked="" type="checkbox"/>	

Buttons: Help, Validate, OK, Cancel

Define the Source Type



Data Validation Rule Builder: New Rule - Windows Internet Explorer

Buttons: Add Rule, Delete, Duplicate, View Rule

Location: **Grid**

Name: Retained Income validation

Description: The retained income should be between -99999999999.90 and 99999999999.90. If value is entered outside the range, validation will appear stating "retained income should be between -99999999999.90 and 99999999999.90"

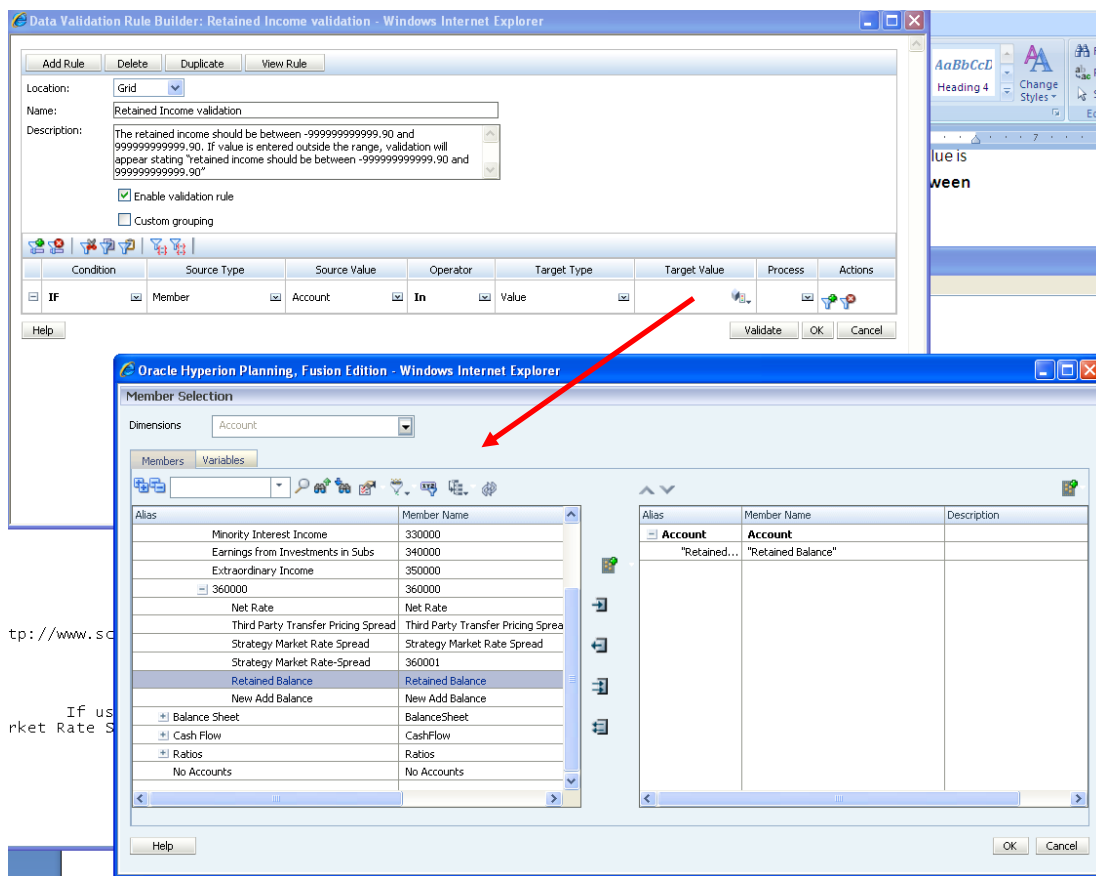
☒ Enable validation rule
☐ Custom grouping

	Condition	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
<input checked="" type="checkbox"/>	IF	<input checked="" type="checkbox"/>	Current Cell Value	=	<input checked="" type="checkbox"/>	Value	<input checked="" type="checkbox"/>	

Buttons: Help, Validate, OK, Cancel

Source Type dropdown options:

- Current Cell Value
- Cell Value
- Column Value
- Row Value
- Member Name
- Member**
- Cross-Dim Member
- Account Type
- 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

Location:

Name:

Description:

☒ Enable validation rule

☐ Custom grouping

	Condition	Source Type	Source Value	Operator	Target Type	Target Value	Process	Actions
IF	<input checked="" type="checkbox"/> Member	<input checked="" type="checkbox"/> Account	<input checked="" type="checkbox"/> In	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> Retained Balan...	<input checked="" type="checkbox"/> AND	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Current Cell Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Not Equals	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> #Missing	<input checked="" type="checkbox"/> AND	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Current Cell Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> -9999	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
THEN	<input checked="" type="checkbox"/> Process Cell	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
ELSE IF	<input checked="" type="checkbox"/> Member	<input checked="" type="checkbox"/> Account	<input checked="" type="checkbox"/> In	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> Retained Balan...	<input checked="" type="checkbox"/> AND	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Current Cell Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Not Equals	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/> #Missing	<input checked="" type="checkbox"/> AND	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Current Cell Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> =	<input checked="" type="checkbox"/> Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help Validate OK Cancel

Custom Defined Message

Format Cell

Cell Background Color:

Validation Message:

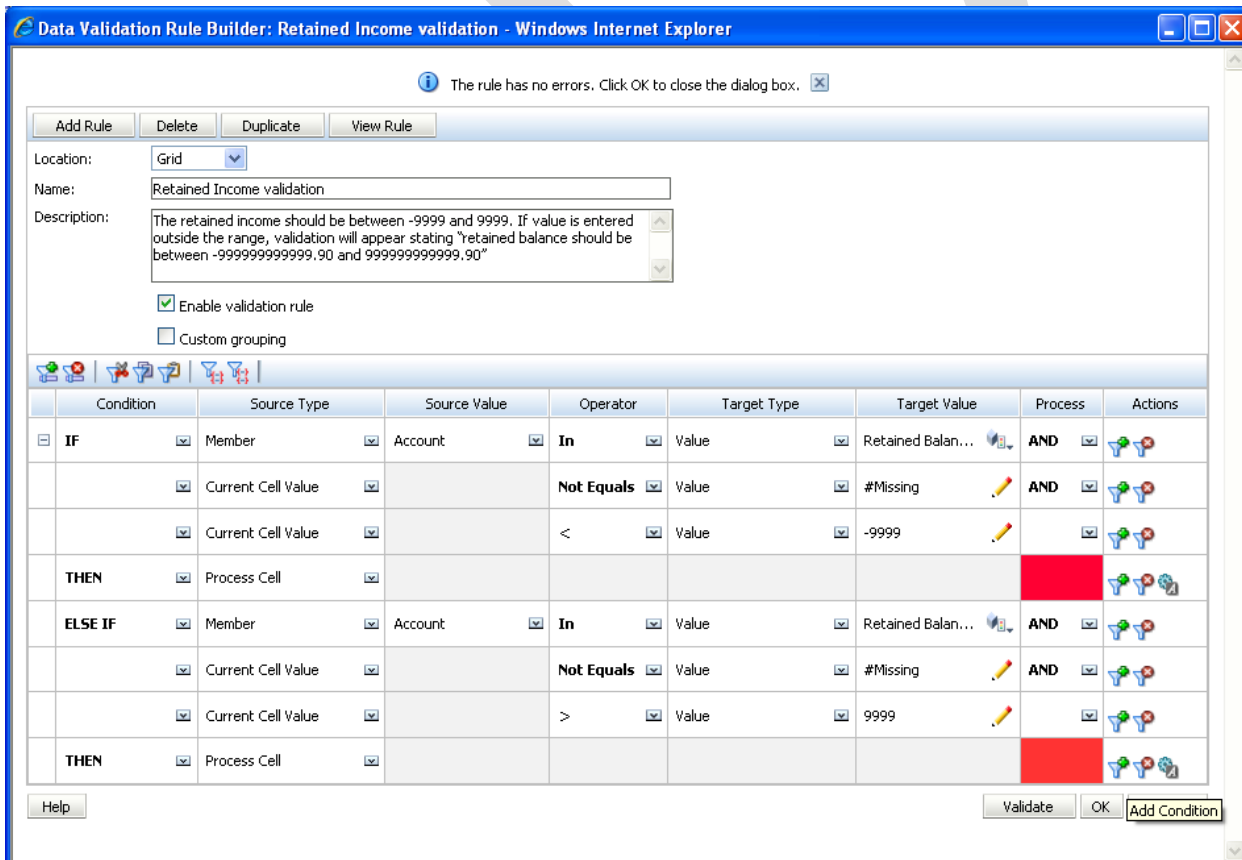
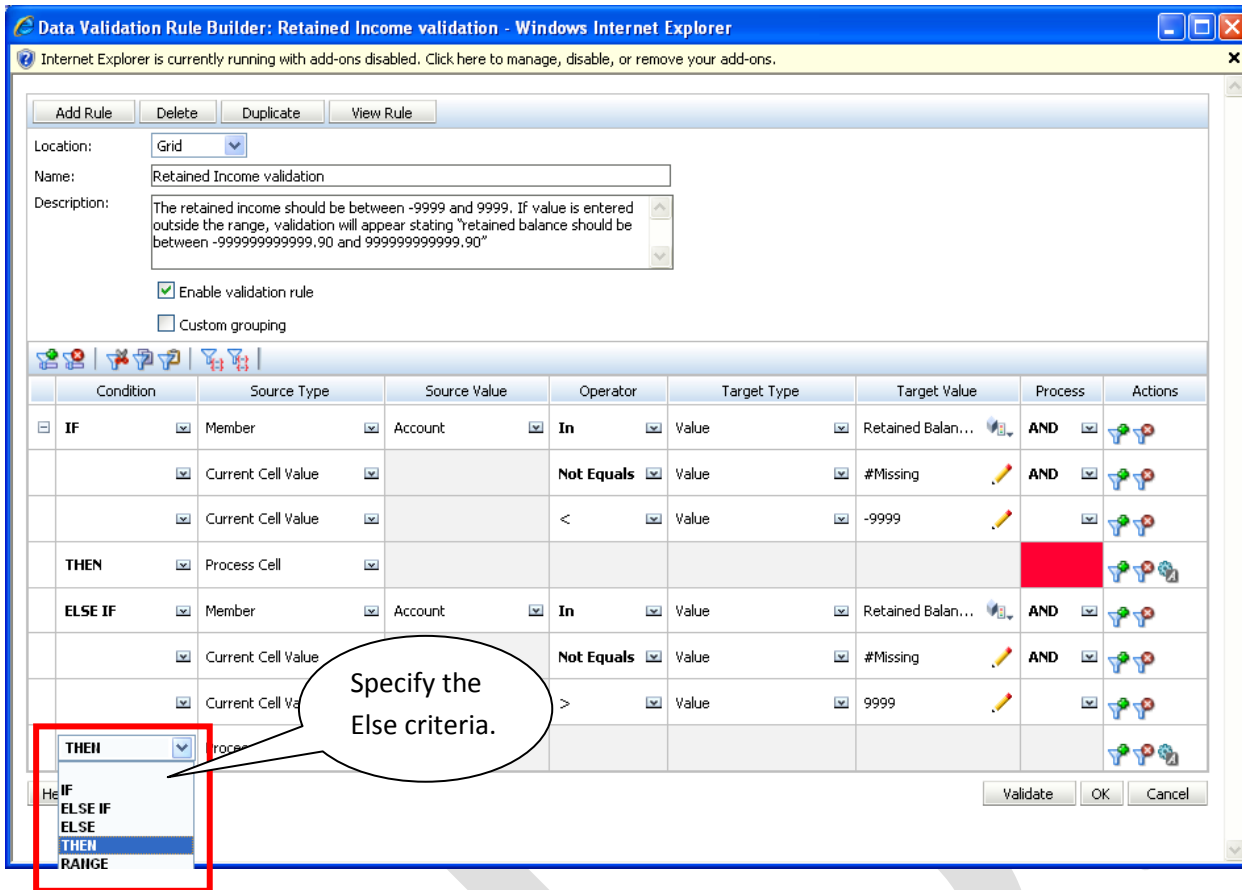
☒ Show in Data Validation Messages pane

Approvals

☒ None ☐ Update Promotional Path ☐ Do Not Promote

Help OK

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.



Save Validation Rule and provide name

The screenshot shows the 'Simple Form: Validation Examples' application with the 'Layout' tab selected. The main grid displays a table with columns A and B. Row 1 contains the formula 'IDescendants(507000),IDDescend...' in column A and '#' in column B. The 'Grid Properties' pane on the right shows the 'Validation Rules: Grid' section with a list containing 'Retained Income validation'. A callout bubble points to this list with the text 'Validation Rule Name.'

Example: Validation Rule fail to meet the criteria.

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

The screenshot shows the application interface with a data table. The table has columns for 'Year: FY13 (~)', 'Scenario: Forecast (~)', and 'Version: Working (~)'. The 'Retained Balance (+)' row is highlighted in red and contains the value '11111'. A callout bubble points to this row with the text 'Custom defined cell formatting, when validation rule failed'. Another callout bubble points to the 'Data Validation Messages' pane, which displays the message: 'Retained Balance should be between -9999 and 9999. [2]: 1, 2'. A third callout bubble points to the 'Data Validation Messages' pane with the text 'Custom Message when validation ruled failed.'