

What you should know While working in Hyperion Planning

Prepared By

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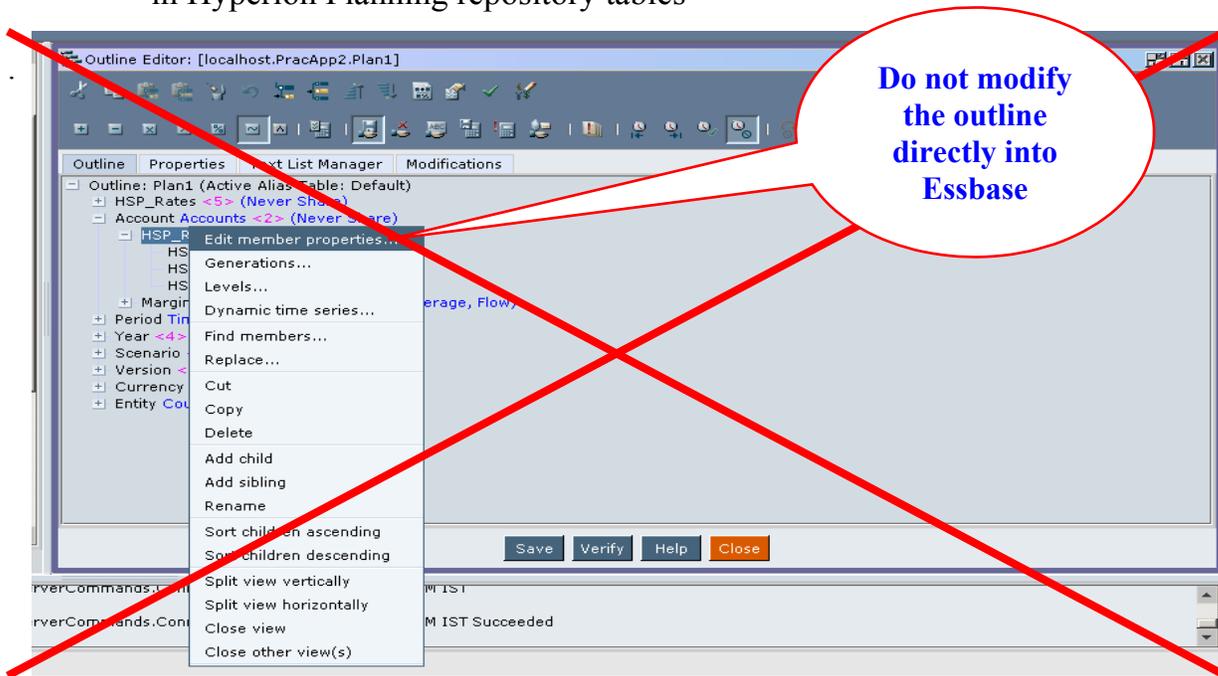
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There are some important points one should remember while working on Hyperion Planning. This is in fact more important when are experienced in Hyperion Essbase and moving your career to Hyperion Planning.

- 1) As a Essbase developer we are so used to changing Dimension, Dimension Member or properties directly in Essbase outline, however if you work with Hyperion Planning do not modify the outline directly by going in Essbase Admin Services. Hyperion Planning maintains all the dimension, dimension members, member properties; dimension hierarchy is maintained in Hyperion Planning repository tables



Modification in Essbase outline is done through Planning. Every time any modification is done in Hyperion planning first it saves in Hyperion Planning underlying RDBMS tables and then pushed to Essbase. Making any changes in Essbase outline put Essbase outline and Planning underlying tables in out of sync as a result Planning system is get corrupted. At this time it's time to visit your recovery procedures. BTW: make sure your backups for Essbase and the relational Planning tables are taken at the same time.

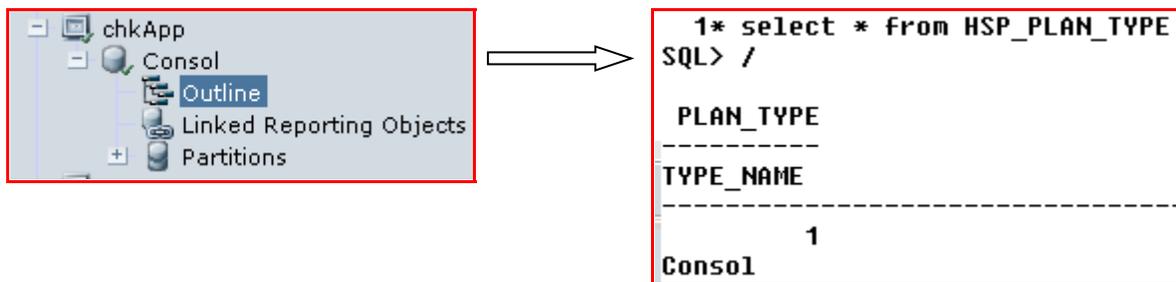
List of Tables Hyperion Planning 11.1.1.3 uses. Total 83 Tables

HSP_ACTIVITY_LEASE	HSP_CALC_MGR_USER_VAR_PPT	HSP_PM_STATES	HSP_ATTRIBUTE_DIM	HSP_FX_RATES
HSP_USER_VARIABLE_VALUE	HSP_CALC_MGR_VARIABLES	HSP_ACTION	HSP_ALIAS	HSP_FX_TABLE
HSP_USER_VARIABLE	HSP_CALC_MGR_RULESETS	HSP_ANNOTATION	HSP_MEMBER	HSP_ENTITY
HSP_FORM_ATTRIBUTES	HSP_CALC_MGR_RULES	HSP_PLANNING_UNIT_LOG	HSP_ENUMERATION	
HSP_WF_PREFS	HSP_JOB_STATUS	HSP_PLANNING_UNIT	HSP_SYSTEMCFG	
HSP_CHECKOUTS	HSP_TEXT_CELL_VALUE	HSP_FORM_CALCS	HSP_CURRENCY	
HSP_USER_TASK	HSP_COMPOSITE_BLOCK	HSP_FORMOBJ_DEF_MBR	HSP_ACCOUNT	
HSP_TASK	HSP_COMPOSITE_FORM	HSP_FORMOBJ_DEF	HSP_LOCK	
HSP_CELL_NOTE_ITEM	HSP_SPREAD_PATTERN	HSP_FORM_LAYOUT	HSP_USER_PREFS	

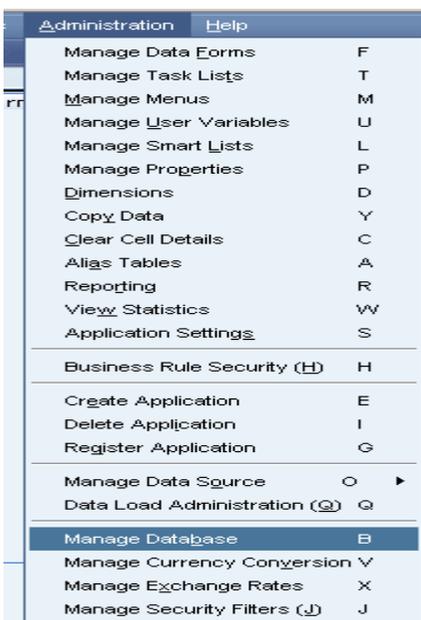
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HSP_CELL_NOTE	HSP_FX_VALUES	HSP_FORM	HSP_ACCESS_CONTROL	
HSP_AUDIT_OPTIONS	HSP_DRIVER_MEMBER	HSP_STRINGS	HSP_USERSINGROUP	
HSP_AUDIT_RECORDS	HSP_MEMBER_FORMULA	HSP_ACCOUNT_DESC	HSP_GROUP	
HSP_PRINT_OPTS	HSP_MEMBER_TO_UDA	HSP_DIMENSION	HSP_USERS	
HSP_MRU_MEMBERS	HSP_UDA	HSP_PENDING_DELS	HSP_CALENDAR	
HSP_COLUMN_DETAIL_ITEM	HSP_FORM_VARIABLES	HSP_PENDING_XACTS	HSP_TIME_PERIOD	
HSP_COLUMN_DETAIL	HSP_FORM_MENUS	HSP_PLAN_TYPE	HSP_MEMBER_TO_ATTRIBUTE	
HSP_LINKS	HSP_MENU_ITEM	HSP_OBJECT_TYPE	HSP_CUBES	
HSP_PM_RULES	HSP_ENUM_EVALUATION	HSP_UNIQUE_NAMES	HSP_VERSION	
HSP_PM_EFFECTS	HSP_ENUMERATION_ENTRY	HSP_OBJECT	HSP_SCENARIO	
HSP_PM_ACTIONS	HSP_WF_SET_SCREEN	HSP_ATTRIBUTE_MEMBER	HSP_FX_RATE_VALUES	

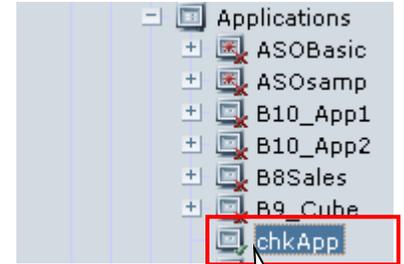
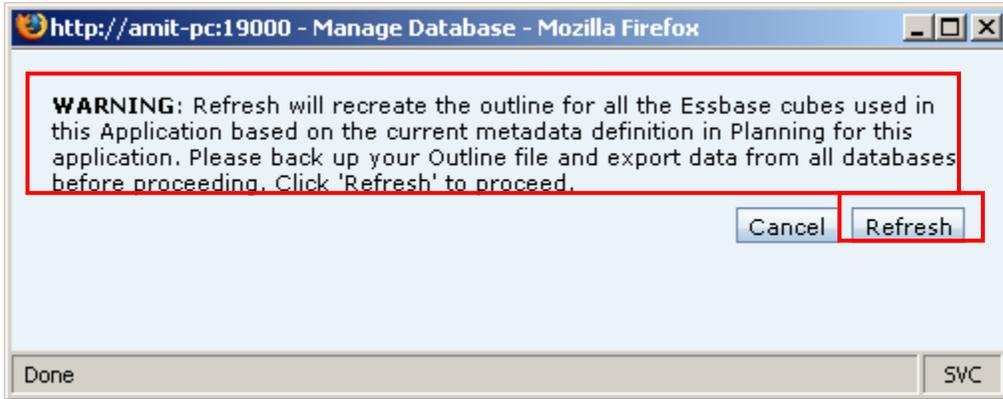
The below diagram shows that the Essbase has one Database corresponding to one plan selected in Hyperion Planning while creating Hyperion Planning Application. The underlying Planning database table **HSP_Plan_Type** contains only one entry for one plan type in Essbase Database. This shows the direct relationship with how Planning underlying table stores the Essbase outline data.



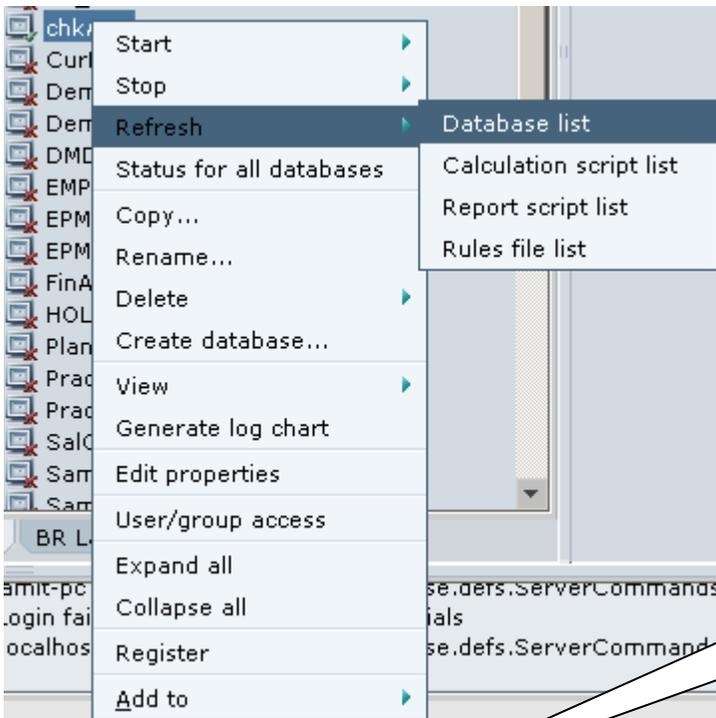
Take backup of all the underlying Hyperion Planning database tables and artifacts after making some changes in Essbase outline by Planning web interface.



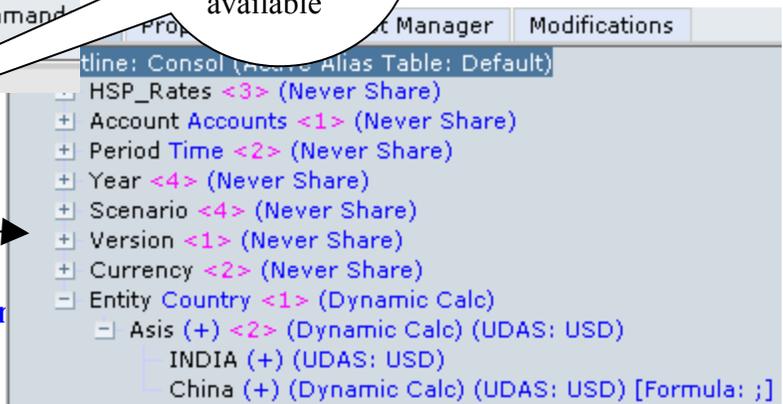
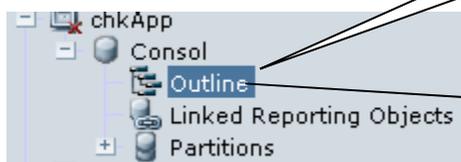
After creating an application you find the newly created application listed in the an application list, however the databases according to the plans you selected while creating application is not visible. We need to refresh the database to get the plan database to be listed in Application. Here one thing is utmost import : Make sure you take the backup of all tables before select Create/Refresh button in Manage Database.



Before refresh no database available



After refresh the database is available



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In the second instance I added a two new members to the outline in Entity dimension, before refreshing the outline, the newly added members are available in Planning relational databases as given below. On refreshing the application the metadata is read and refresh the Essbase outline.



SQL> desc hsp_entity

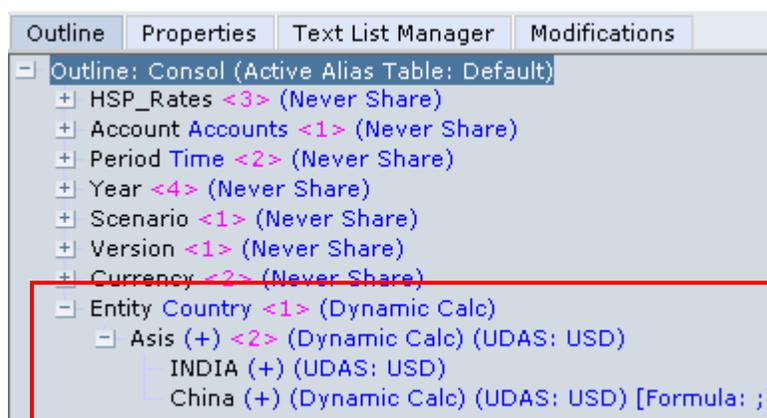
Name	Null?	Type
ENTITY_ID	NOT NULL	NUMBER(38)
DEFAULT_CURRENCY	NOT NULL	NUMBER(38)
USED_IN		NUMBER(38)
EMPLOYEE_ID		VARCHAR2(255)
REQUISITION_NO		VARCHAR2(255)
ENTITY_TYPE		NUMBER(38)

SQL> select table_name from user_tables.

2 .

SQL> select ENTITY_ID,DEFAULT_CURRENCY,ENTITY_TYPE,REQUISITION_NO from hsp_entity;

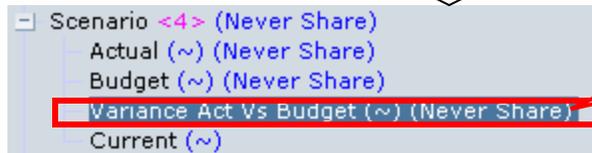
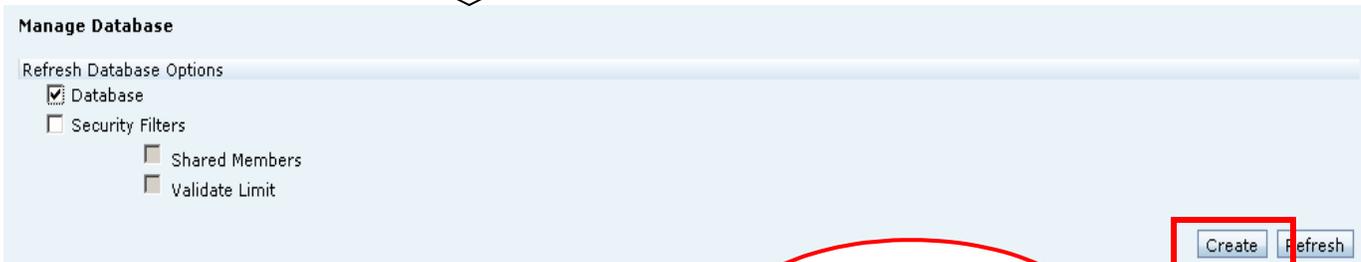
ENTITY_ID	DEFAULT_CURRENCY	ENTITY_TYPE
50033	1000	0
50034	1000	0
50035	1000	0



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-During the refresh process, never, ever select "Create" from the refresh window (unless your developers has instructed you to do this). I was at a client where their directions were to select "Create" for their refresh process. They would then have to create their YTD members by hand in the outline directly. This took place every refresh instance. If they had instead chosen "Refresh" instead of create, these outline changes would not get lost. Also, in the older versions of Hyperion Planning, the software did not allow you to create complex member formulas in the web then push them to Essbase. This meant that you had to directly enter formulas in Essbase. By selecting the "Create" button, all of your custom Essbase changes get lost. Planning takes all the metadata and creates the database from scratch based on the metadata stored in the relational tables.

To demonstrate this I have manually added the member formula directly in Essbase(Just to demonstrate concept however this is not recommended approach) outline and later I select Create button in Manage Database rather then using Refresh, as a result I lost



-In the Hyperion Planning web interface, never ever add a dimension by mistake. This is easier said than done. When you are in the Planning web trying to add a new member, it's very easy to accidentally add a dimension by mistake.

-In Hyperion Planning do not enter all your member formulas manually in either the web interface or directly into Essbase. I have seen too many instances where all the formulas were entered via the web then a rebuild of the entire application was mandated. With Hyperion Planning, assumptions are made at the creation of the app that will possibly not be true as the project progresses. We have to keep in mind during the build phase, that everything possible should be scripted. Instead of manually

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entering the formulas, place them into a file for bulk loading into Planning via either a tool like ODI, DIM, or even directly to Essbase via load rules.

I have many instances where Planner finds very difficult to adapt the new environment, they still love to use the Excel based budgeting and macros based solution I've seen systems where a business analyst is supposed to run 5 different rules by hand after submitting 6 different web forms. A system such as this represents a poor design. In this case, each of the 5 rules were consolidated into 1 business rule. This 1 rule was then attached to each of the 5 web forms to run on save. This not only streamlines the workflow for the analyst, it also reduces the number of business rules from 5 to 1. Maintenance will also benefit.

. I always use multiple instances for Planning in VMWare, this allows me to play around without worrying about the application/software get corrupted. Do not run Hyperion Planning without a development environment A development environment will cost you less than 5k these days. That's less than the cost of an onsite consultant for a week. This will allow you to test different strategies without trashing your production environment.