

SCD Accounting Datamart

Creating an Open Catalog Extension (OCE) in Hyperion Version 8.X

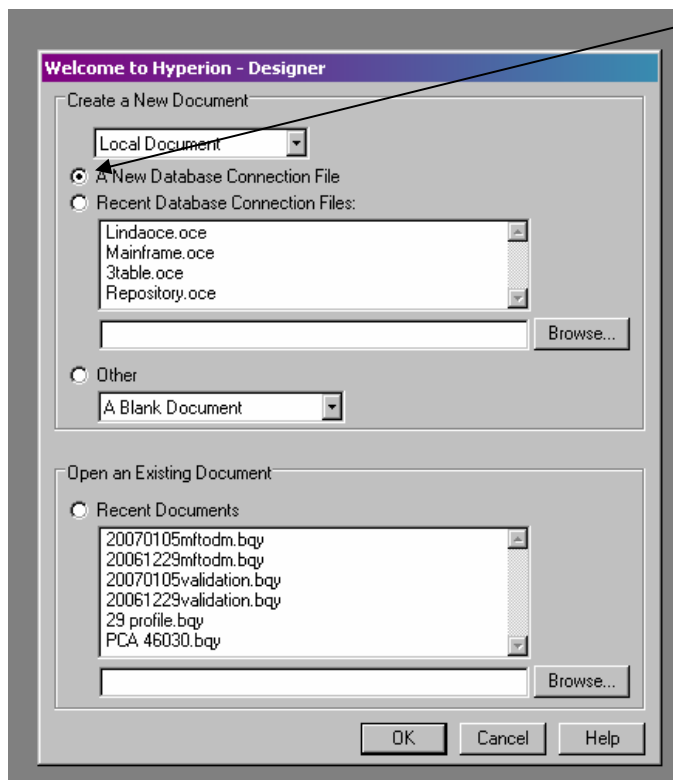
These are the detail instructions to be used to set up your Hyperion OCE. The OCE is simply a definition of the connection required to view a particular database. In these instructions, you will be connected to the SCD Accounting Datamart only. An OCE already set up according to these instructions is also available.

Step 1: Open Hyperion

You should see a "Welcome to Hyperion" dialog box.

Select: **"A New Database Connection File"**

Click: **"OK"**



Step 2: This takes you to the "Database Connection Wizard".

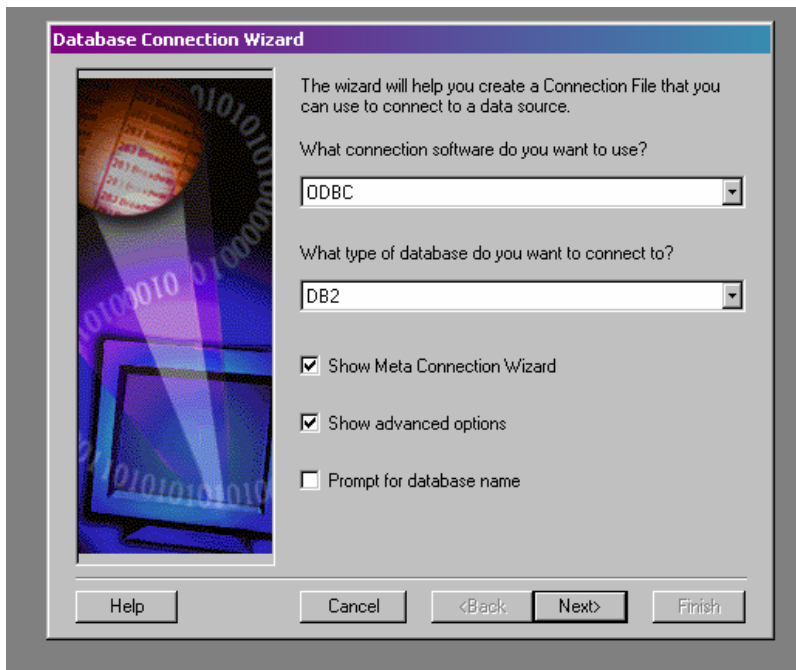
Select: "ODBC" from the-What connection software do you want to use?

Select: "DB2" from the-What type of database do you want to connect to?

Check the following two boxes:

1. Show Meta Connection Wizard
2. Show advanced options

Click: "Next"



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Step 3: In the box labeled "User Name" type your **Datamart ID** (looks like your **RACF ID**)

In the box labeled "Password" type your **Datamart Password**, not your SFMA password.

From the dropdown list select: **"SFMSP"**

Click: **"Next"**

Database Connection Wizard

Connect to the data source.
Enter your user name, password, and select your IP address or database host.

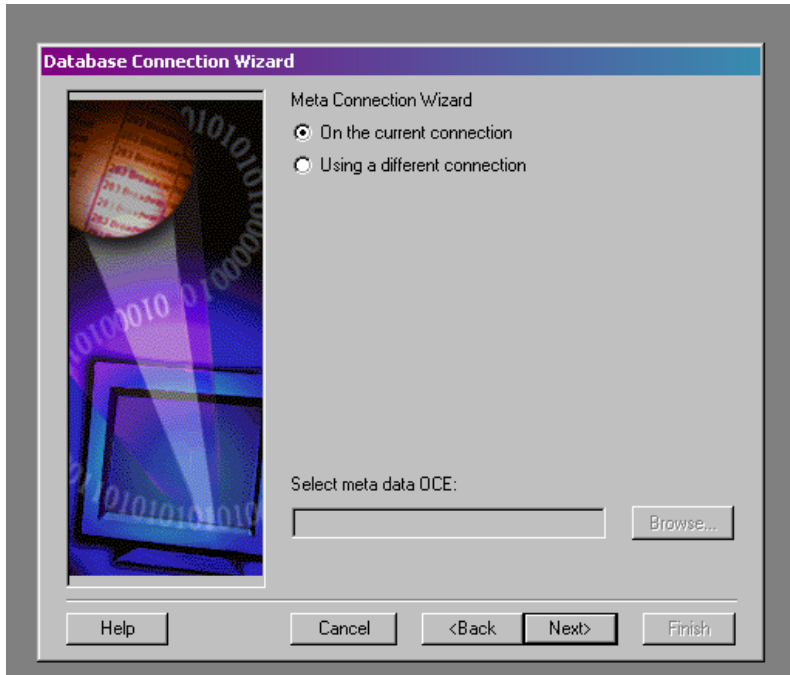
User Name:

Password:

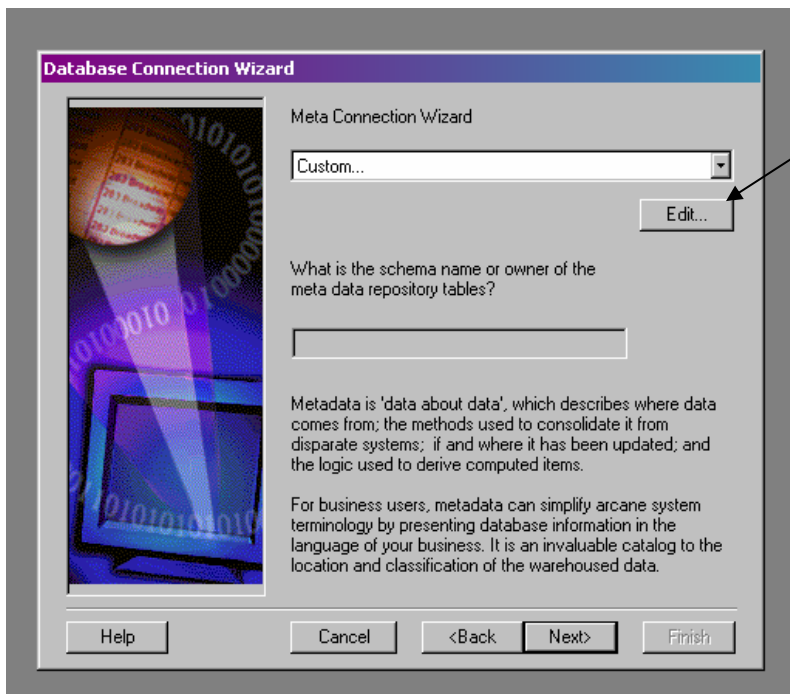
Host:

Help Cancel <Back Next> Finish

Step 4: Leave this screen just as it is shown with "On the current connection" marked.



Step 5: On this "Meta Connection Wizard" screen select: "Edit"



Step 6: This next screen is the "Meta Data Table Definition"
Select the following tab from the top: **Joins**

The screenshot shows the "Metadata Definition" dialog box with the "Joins" tab selected. The "Use Database Defaults" radio button is selected. The "Meta Data Table Definition" section contains the following fields: "Select" with "CREATOR" and "Table Alias" with "TABLE" (both grayed out); "Owner Name" with "*Physical Table Name" and "NAME" (both white); "Table Type" with "TYPE" (grayed out); "From" with ".DBNAME:DBSEPSYSIBM.SYSTABLES"; and "Where" with a complex SQL condition: "CREATOR <> 'SYS' AND CREATOR <> 'SYSTEM' AND CREATOR <> 'SYSIBM' AND CREATOR <> 'SYSCAT' AND CREATOR <> 'SYSSTAT'". Buttons for "OK", "Cancel", "Reset", and "Help" are on the right.

Step 7: Click: "**Custom**"
The grayed out fields now become white for data entry.

The screenshot shows the "Metadata Definition" dialog box with the "Joins" tab selected and the "Custom" radio button selected. The "Meta Data Join Definition" section contains the following fields: "Select" with "Primary Database Name" and "Primary Owner" (both white); "*Primary Table" and "*Primary Column" (both grayed out); "Foreign Database Name" and "Foreign Owner" (both white); "*Foreign Table" and "*Foreign Column" (both grayed out); "From" (white); and "Where" (grayed out). Buttons for "OK", "Cancel", "Clear", and "Help" are on the right.

Step 8: Fill in the fields accordingly:

- Primary Owner **PKEY_OWNER**
- Primary Table **PKEY_TABLE_NAME**
- Primary Column **PKEY_COLUMN_NAME**
- Foreign Owner **FKEY_OWNER**
- Foreign Table **FKEY_TABLE_NAME**
- Foreign column **FKEY_COLUMN_NAME**
- From **SFMSPU.SFMS_WHSE_JOINS**
- Where **PKEY_OWNER=:OWNER**

Click: "OK", then click "Next" to continue

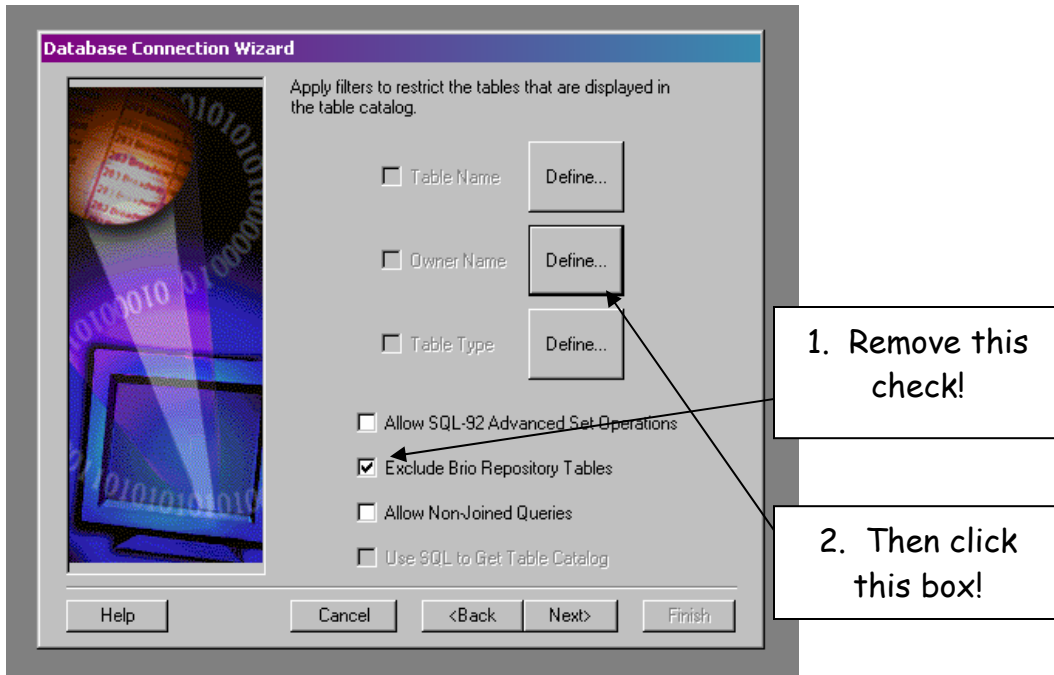
The screenshot shows the 'Metadata Definition' dialog box with the 'Joins' tab selected. The 'Meta Data Join Definition' section contains the following fields and values:

Primary Database Name	Primary Owner
[Empty]	PKEY_OWNER
*Primary Table	*Primary Column
PKEY_TABLE_NAME	PKEY_COLUMN_NAME
Foreign Database Name	Foreign Owner
[Empty]	FKEY_OWNER
*Foreign Table	*Foreign Column
FKEY_TABLE_NAME	FKEY_COLUMN_NAME
From	SFMSPU.SFMS_WHSE_JOINS
Where	PKEY_OWNER=:OWNER

Buttons on the right side of the dialog include OK, Cancel, Clear, and Help.

Step 9: Remove the check next to "Exclude Brio Repository Tables"

Click on the middle "Define" button next to Owner Name



Step 10: This takes you to a screen where you can choose the tables you want in your OCE.

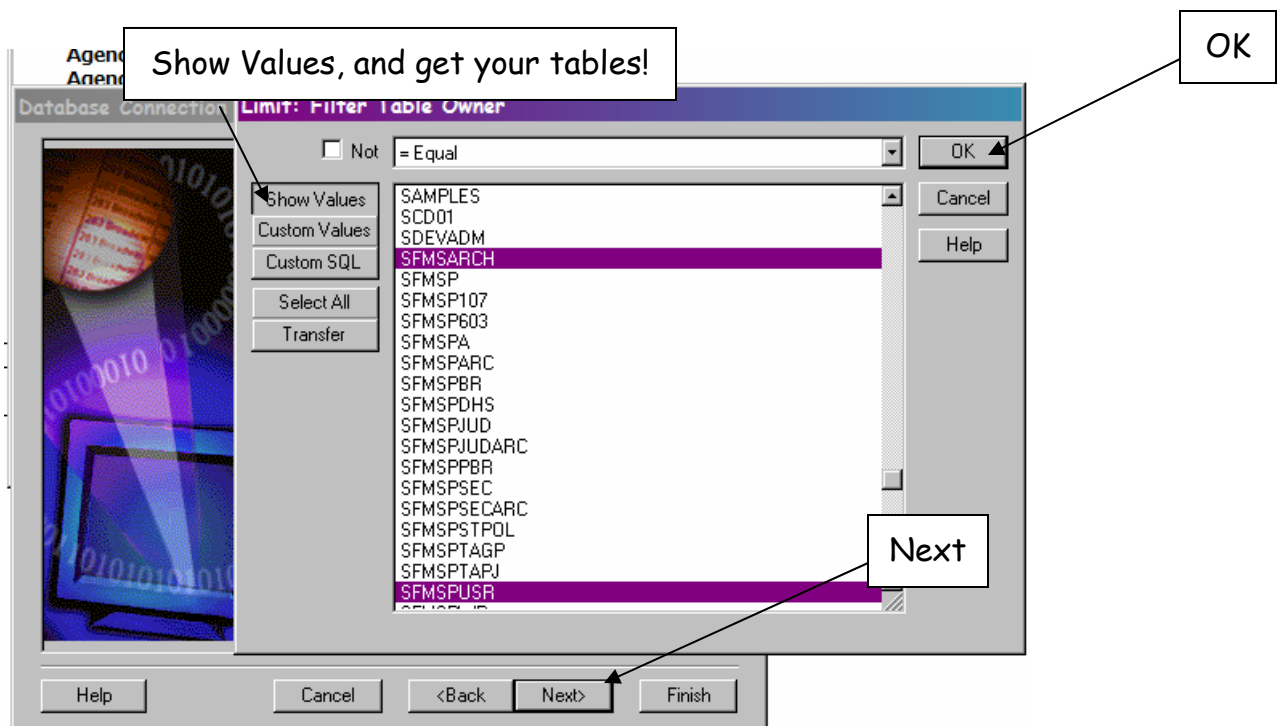
Select: **"Show Values"**

Then, you can select the table names you want. You can select more than one by using "CTRL+Click".

Select the following tables:

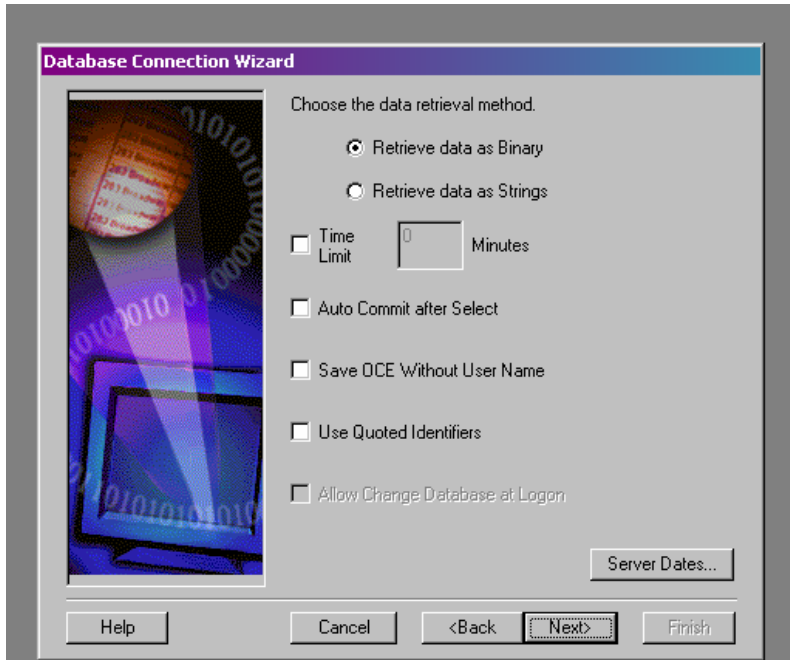
- **"SFMSPUSR"**-SFMA Accounting Tables (no archived data)
- **"SFMSARCH"**-SFMS Archive Tables
- **"YEAREND"**-Year-End Repository

Click: **"OK"**, then click **"Next"** to continue

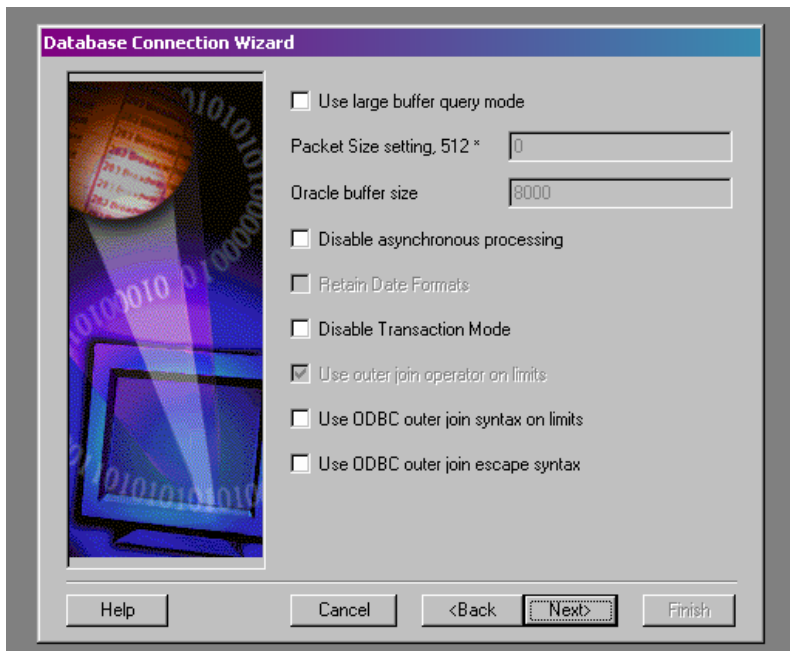


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Step 10: Leave the next two screens just as they appear below. Do not make any changes. Click: **"Next"** to continue on both screens.

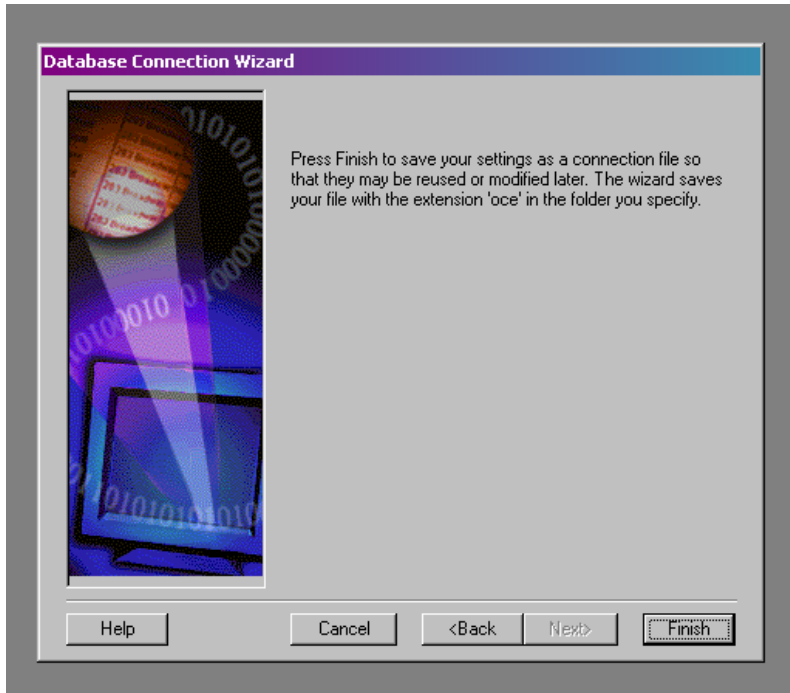


The screenshot shows the 'Database Connection Wizard' dialog box. The title bar is purple with the text 'Database Connection Wizard'. The main area has a grey background with a blue border. On the left, there is a vertical image strip showing a computer monitor and a document with binary code. The text 'Choose the data retrieval method.' is at the top. Below it are two radio buttons: 'Retrieve data as Binary' (selected) and 'Retrieve data as Strings'. There are several checkboxes: 'Time Limit' (unchecked) with a text box containing '0' and the word 'Minutes' to its right; 'Auto Commit after Select' (unchecked); 'Save OCE Without User Name' (unchecked); 'Use Quoted Identifiers' (unchecked); and 'Allow Change Database at Logon' (unchecked). A 'Server Dates...' button is located at the bottom right of the main area. At the bottom of the dialog are five buttons: 'Help', 'Cancel', '<Back', 'Next>' (highlighted with a dotted border), and 'Finish'.

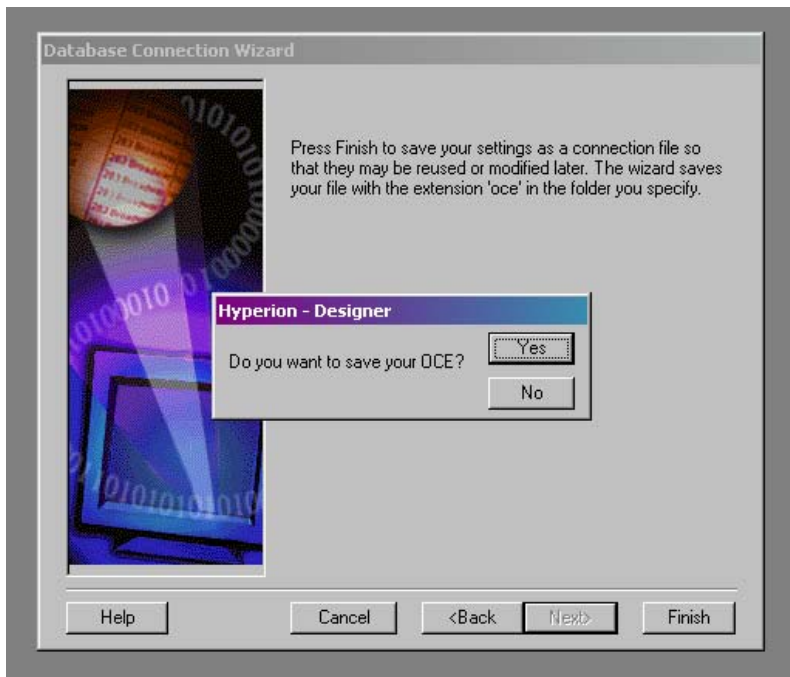


The screenshot shows the second screen of the 'Database Connection Wizard' dialog box. The title bar is purple with the text 'Database Connection Wizard'. The main area has a grey background with a blue border. On the left, there is a vertical image strip showing a computer monitor and a document with binary code. The text 'Use large buffer query mode' is at the top with an unchecked checkbox. Below it are two text boxes: 'Packet Size setting, 512 *' with a value of '0' and 'Oracle buffer size' with a value of '8000'. There are several checkboxes: 'Disable asynchronous processing' (unchecked); 'Retain Date Formats' (unchecked); 'Disable Transaction Mode' (unchecked); 'Use outer join operator on limits' (checked); 'Use ODBC outer join syntax on limits' (unchecked); and 'Use ODBC outer join escape syntax' (unchecked). At the bottom of the dialog are five buttons: 'Help', 'Cancel', '<Back', 'Next>' (highlighted with a dotted border), and 'Finish'.

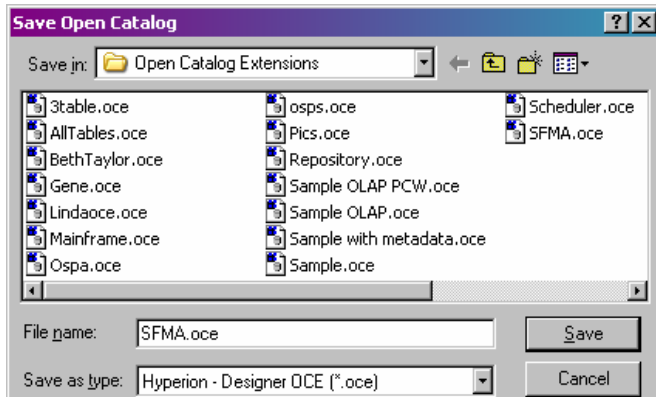
Step 11: Select: **"Finish"** starting the completion of this process.



Step 12: Select: **"Yes"** to save your OCE.



Step 13: Give your OCE a name in "File Name" field. Click: "OK" to save your OCE.



Have fun working in Hyperion! You are now ready to create queries and run reports.

If you have any questions, please call Linda Tullis at 503-373-7277 Ext 281 or email at linda.tullis@state.or.us