

Hyperion Planning

What you will learn

This course is designed to teach you how to create and administer applications using the Planning software. You learn how to create applications, add dimensions and members, import members, load data, set up security, create data forms, set up task lists, set up calculations, and move a plan through the planning cycle. You also access data offline and analyze plan data. Exercises and a case study provide hands-on practice.

Prerequisites

Required Prerequisites

- Basic Microsoft Windows skills
- Basic Microsoft Excel or Lotus 1-2-3 skills
- Basic knowledge of planning and budgeting
- Working knowledge of Essbase recommended

Course Objectives

- Create Planning applications
- Load data into Planning applications
- Set up security for users, groups, and members
- Create data forms and enter data
- Review budget data by using process management
- Analyze planning results in Financial Reporting

Course Topics

Planning Overview

- Oracle's Enterprise Performance Management
- Planning Architecture
- Planning and Essbase

Navigating Workspace

- Launching Workspace
- Workspace Navigate Menu
- Opening Applications
- Navigating in Planning

Creating Dimensions Overview

- Planning Dimensions
- Required and User-Defined Dimensions
- Dense and Sparse Dimensions
- Data Block Creation
- Selecting Aggregation, Data Storage, and Calculation Options

Managing Dimensions with EPM Architect

- About Dimension Management
- Adding Dimensions to Master View
- Organizing Dimensions
- Creating Members
- Managing Members
- Creating Aliases
- Adding Currencies
- Creating Associations Between Dimensions

Setting Up the Period, Scenario, and Version Dimension

- Time Periods Overview
- Period and Year Dimensions
- Setting up Dynamic Time Series
- Choosing How Data is Stored
- Scenario Dimension and Creating Scenarios
- Version Dimension and Creating Versions

Setting Up the Entity Dimension

- Entity Members and Plan Types
- Identifying the Currency Value for Entities
- Adding and Modifying Entities
- Saving Dimensions
- Deleting Entities

Setting up the Account Dimension

- Account Types
- Creating Account Hierarchies

Creating User-Defined Elements

- User-Defined Dimensions
- Creating Attributes
- Assigning Attribute Values
- Member Formula Overview
- Smart Lists Overview
- Creating Smart Lists

Loading Metadata from a File

- Metadata Load Files
- Loading Metadata Process
- Loading Metadata from Interface Tables

Working with Application Views

- Creating Application Views
- Configuring Application Settings
- Removing Dimensions
- Setting Up Dimension Associations

Deploying Applications

- Deploying Applications Overview
- Deployment Process
- Validating Application Views
- Comparing Application Views
- Choosing Performance Settings
- Dimension Order
- Deploying Application Views
- Creating Essbase Databases

Setting Up Exchange Rates

- Currencies and Exchange Rates
- Exchange Rates Table Overview
- Creating Exchange Rate Tables
- Exchange Rates and the HSP_rates Dimension
- Generating Currency Conversion Calculation Scripts

Loading Data and Calculating Data Overview

- Loading Data
- Data Calculation Overview

Provisioning Users and Groups

- Planning Security Overview
- User and Group Provisioning Overview
- Provisioning Users and Groups
- User Roles
- Generating Provisioning Reports

Setting Up Access Rights to Planning Applications

- Assigning Access Rights
- Importing Security Overview

Creating Data Forms and Folders

- Data Forms and Folders Overview
- Data Form Elements
- Creating Folder Structures for Data Forms
- Data Form Requirements
- Composite Data Forms
- Printing Data Form Definition Reports
- Assigning Access Rights to Data Forms

Customizing Data Forms

- Exporting and Importing Data Forms
- Advanced Settings
- Managing User Variables
- Setting Up User Preferences

Entering Data

- Submitting Data in Data Forms
- Spreading Data
- Adjusting and Annotating Data
- Calculating Data in Data Forms
- Entering Data with Smart Lists
- Navigating Data Forms with Menus
- Planning and Smart View
- Taking Data Forms Offline

Creating Business Rules

- Navigating Business Rules
- Business Rules Creation Process
- Launching Business Rules
- Printing Business Rules
- Adding Runtime Prompts
- Building Formulas for Business Rules
- Specifying Data Conditions
- Managing Business Rules

Managing the Approval Process and Creating Task Lists

- Managing the Review Cycle for Planning Units
- Copying Data Between Versions
- Copying Data
- Navigating Task Lists
- Task List Creation Process
- Building Task Lists and Assigning Access to Task Lists

Financial Reporting Overview

Financial Reporting Features

Data Sources for Financial Reporting

Financial Reporting Studio

Working with Financial Reporting Studio

Navigating Reports in Workspace

Workspace Overview

Setting Preferences

Browsing the Repository

Searching for Items

Previewing Reports

Changing Page Members

Printing Reports and Snapshots

Integrating Reports into Microsoft Office Applications