



Hyperion Planning Course Content:35-40hours

Course Outline

Planning Overview

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

Navigating Workspace

- Launching Workspace
- Workspace User Interface
- 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 Secfile.txt File
- Importing Access Rights
- Creating Security Filters

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
- Validating Task Lists
- Reporting on 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