

Hyperion Planning 11.1.2.4- Training Curriculum

Course Objectives:

- Create and deploy Planning applications
- Manage metadata and data
- Set up security for users, groups, and members
- Create and customize forms, menus, and task lists
- Migrate application artifacts
- Verify application setup
- Set up and test business rules
- Set up and manage the approval process

Course Topics:

Introduction to Planning

- Oracle Hyperion Planning
- Planning Architecture
- Oracle Exalytics: Overview
- Planning Business Process
- Planning Business Scenario

Navigating EPM Workspace

- EPM Workspace: Overview
- Launching EPM Workspace
- Opening Applications
- Navigating in Planning

Introduction to Applications and Dimensions

- Planning Application: Overview
- Application Framework
- Planning Dimensions

- Data Block Creation Process
- Aggregation, Storage, and Calculation Options

Creating Applications in Planning Administration

- Planning Administration Overview
- Application Creation Process
- Creating Applications with Planning Application Administration
- Managing Applications and Data Sources
- Managing Data Sources
- Managing Essbase Databases
- Refreshing Essbase Databases
- Managing Plan Types

Managing Dimensions

- Building Dimension Hierarchies
- Performance Settings and Data Type Evaluation Order
- Setting Up Dimension Hierarchies
- Managing Member Hierarchies

Setting Up Aliases, Currencies, Years, and Periods

- Creating Aliases
- Adding Currencies
- Customizing Time Periods

Setting Up Scenarios and Versions

- Scenarios and Versions
- Creating Scenarios
- Creating Versions

Setting Up the Entity and Account Dimensions

- Entities: Overview
- Adding Entities
- Deleting Entities
- Accounts: Overview
- Account Types
- Time Balance Properties
- Saved Assumptions

- Data Types and Exchange Rate Types

Loading Metadata

- Metadata Load Options
- Loading Metadata with Planning Outline Load
- Loading Metadata with the Outline Load Utility
- FDMEE Metadata Load Process
- Lifecycle Management

Creating User-Defined Elements

- Creating Member Formulas
- User-Defined Dimensions
- Attribute Dimensions
- Adding User-Defined Attributes
- Smart Lists: Overview

Setting Up Exchange Rates

- Currencies and Exchange Rates
- Creating Exchange Rate Tables
- Generating Currency Conversion Calculation Scripts

Loading and Calculating Data

- Data Load Options
- Loading Data Values with Administration Services
- Managing Data with Outline Load Utility
- FDMEE Integrator Data Load Process
- Oracle Data Integrator: Data Loads with ETL Tools
- Data Calculations

Setting Up Planning Security

- Planning Security: Overview
- User and Group Provisioning in Shared Services
- Assigning Access Permissions
- Exporting and Importing Access Permissions
- Creating Security Filters

Creating Forms

- Forms: Overview
- Form Components
- Creating Simple Forms
- Creating Composite Forms
- Exporting and Importing Forms

Enhancing Forms

- Creating Rolling Forecasts
- Creating Menus
- Creating Formula Rows and Columns
- Building Validation Rules
- Specifying Advanced Settings
- Setting Application Defaults
- Setting Up User Preferences
- Setting Individual Display Options

Entering Data in Planning

- Navigating Forms
- Submitting Data in Forms
- Filtering Data
- Sorting Data
- Spreading Data
- Adjusting Plan Data

Annotating and Analyzing Data

- Adding Annotations to Plan Data
- Clearing Cell Details
- Working with Ad Hoc Grids

Managing Business Rules

- Business Rules: Overview
- Determining Calculation Requirements
- Launching Calculation Manager
- Rule Components
- Templates: Overview

- Creating Business Rules with Templates
- Creating Business Rules and Rule Sets
- Validating and Deploying Rules

Setting Up the Approval Process

- Approvals: Overview
- Creating Planning Unit Hierarchies
- Assigning Scenario and Version Combinations
- Synchronizing Planning Unit Hierarchies
- Exporting and Importing Planning Unit Hierarchies
- Updating the Promotional Path with Validation Rules

Managing the Approval Process

- Approvals Dashboard
- Planning Unit Approval States
- Reviewer Actions
- Impact of Entity Hierarchy on the Review Process
- Managing the Review Cycle
- Viewing and Resolving Validation Errors
- Copying Data Between Versions
- Copying Data

Creating Task Lists

- Task Lists: Overview
- Navigating Task Lists
- Task List Creation Process
- Printing Task List Reports

Additional topics

- Overview on new features in Hyperion Planning 11.1.2.3.500 & beyond
- Classic & EPMA based Planning applications
- Planning with ASO plan type
- Planning with Smartview
- Planning with DRM / DRMG
- Working with Temporary Variables & Substitution Variables
- Administering Planning components
- Overview on Hyperion Financial Reports

****All the above listed courses are expected to be delivered with a case study or hands-on exercise (preferable), wherever applicable.**

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