

Oracle Hyperion Planning Administration

Course Description

Course Name:	Oracle Hyperion Planning Administration
Course Number:	O-PLN-A
Duration:	5 Days
Release:	11.1.2.4.x

The Administrator Training for Oracle Hyperion Planning is designed to guide students through the typical steps to build and administer on premises Planning applications. Students develop and deploy Planning as an interactive case study over five days.

After a general overview of Planning and Essbase, the course focuses on creating applications and currencies, followed by sections on data forms and task lists. Smart View is covered extensively including using data forms and creating ad hoc reports. Maintaining Security, managing the approval process, and lifecycle management are then discussed.

Students learn about financial reporting, creating basic reports and building batches and books. The course format consists of lecture plus a great deal of interaction doing exercises and workshops to build a real-world Planning application.

Who Should Attend

- System Administrators
- Application Developers
- Project Managers
- IT Support

Course Information

Advance Preparation: None
Program Level: Intermediate
Delivery Method: Group – Live
CPE Credit: 42 credits in Specialized Knowledge and Applications

Prerequisites

- Basic Microsoft Windows skills
- Knowledge of spreadsheets
- Working knowledge of accounting, specifically Planning and Budgeting

Course Registration: 203-941-0714 or online at <http://www.compintelligence.com>

Policies: For information regarding cancellations, refunds, or other questions, contact us at 203-941-0714 or education@compintelligence.com



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Oracle Hyperion Planning Administration

Course Outline

1 Planning Overview

- Oracle Enterprise Performance Management System
- Planning Features
- Planning Applications
- Planning and Essbase

2 Essbase Overview

- Properties of Dimensions
- Navigate Workspace
- Workspace Overview
- Launch Workspace
- Open Planning Applications
- Navigate in Planning

3 Create Applications – EPMA vs. Classic

- Create Metadata for EPMA Applications
- Create Metadata for Classic Applications
- Options for Creating the Classic Application
- Using the Outline Utility

4 Set Up Currencies

- Manage Exchange Rates
- Create Exchange Rate Tables
- Edit Exchange Rate Tables
- Delete Exchange Rate Tables
- Manage Currency Conversion
- Work with Currency Conversion Calc Scripts

5 Create and Use Forms

- Forms and Folders Overview
- Create Simple Forms
- Create Composite Forms
- Form Access
- Create Menus
- Create Formula Rows and Columns
- Build Validation Rules
- Set Up Custom Messaging
- Set Up Form Properties

Course Outline

- Data Entry Tasks
 - Use Smart Lists
 - Spread Data
- Calculate Data in Forms
- Add Annotations to Plan Data
- Perform Ad Hoc Actions in Forms

6 Create and Use Task Lists

- Task Lists Overview
- Navigate Task Lists in Basic Mode
- Navigate Task Lists in Advanced Mode
- Create Task Lists
- Print Task List Reports

7 Smart View

- Smart View Overview
 - Smart View Overview, Options, Data Sources, and Tasks Lists
- Set Smart View Options
 - Excel Formatting Option
- Connect to Data Sources
- Manage Task Lists in Excel and Outlook
- Work with Forms in Smart View
 - Spread Data by Using Grid Spread
 - Spread Data by Using Mass Allocate
 - Enter Supporting Detail in Smart View
 - Add Annotations and Comments
- Data Calculation in Smart View
 - Business Rules
 - Calculation Scripts
 - Calc Manager Rules
- Work Offline
- Create Ad Hoc Reports
 - Set Rows and Columns
 - Add Dimensions and Pivoting
 - Update the Point of View
 - Create Cascading Reports
 - Use Query Designer for Reporting
- Smart View Functions
 - Function Validation
- Planning Admin Extension
 - Import Planning Dimensions into SmartView
 - Make Property Changes to a Member

Oracle Hyperion Planning Administration

Course Outline

- Move a Member**

- Add a Member**

 - Shared Members

 - Refresh/Create Database

- Cell History (Planning Ad Hoc connection only)**

- Master Composite Form**

 - Attachment of Multiple Comments to Data Cells**

- Smart Slices**

 - Smart Slices and Ad Hoc Analysis**

 - Create Smart Slices**

 - Set Smart Slice Data Boundaries**

 - Set Smart Slice Preferences**

 - Smart Query (Planning/Essbase)**

 - Define Sets

 - Define Set Filters

 - Build the Smart Query

 - Complete the Smart Query

 - Open a Smart Query

8 Security

- Security Overview**

- Shared Services**

 - Network vs. Native Users**

 - Create Groups**

 - Planning Roles**

 - Set Product Security**

- Application Security**

 - Securable Planning Objects**

 - Form, Business Rule and Task List Security**

 - Dimension Security**

 - Inherit Access Permissions

 - Options for Inheriting Access Permissions

 - How Access Permissions Are Evaluated

 - Dimension Security, and Creating Security Filters Application Security

 - Import Security Overview**

 - Verify Security Rights through Reports**

9 Manage the Approval Process

- Approval Process Overview**

- Planning Unit Hierarchies**

- Planning Unit Process States**

- Reviewer Actions**

Oracle Hyperion Planning Administration

Course Outline

Impact of Entity Hierarchy on the Review Process

Manage the Review Cycle

Start the Budget Review Process

Post-Planning Activities

Copy Data between Versions

Clear Cell Details

10 Lifecycle Management (LCM)

Lifecycle Management Overview

Move Artifacts from Application to Application

Move Artifacts from Application to File

Back Up Application Objects Using LCM

11 Financial Reporting

Financial Reporting Functionality and Architecture

Financial Reporting Data Sources

SAP BW Data Source

SSAS Data Source

Set Preferences

Preview Reports

Print Reports and Snapshots

Working with Financial Reporting Studio

Create Basic Reports

Report Creation Overview

Report Objects Overview

Report Object Toolbar Buttons

Create Text Boxes

Add Images

Save Report Objects

Insert Saved Report Objects

Linked Object Properties

Use Linked Objects

Design Headers and Footers

Create Reports

Create Grids

Dimension Layout Dialog Box Items

Select Members for Rows and Columns

Alias Tables

Set the Point of View