

Oracle Hyperion Financial Planning for the Power User

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Course Description

Course Name: Oracle Hyperion Planning for the Power User
Course Number: O-PLN-P
Duration: 2 Days

Power Users are staff that use Planning nearly every day to enter, manipulate and/or analyze data, and to create and modify reports. The Power User Training is designed to guide users through the typical tasks they need to use Planning for budgeting and forecasting. Users learn by interacting with a real-world application over two days.

After a general overview of Planning functions and processes, Power Users learn about creating data forms and task lists, and using Smart View to enter and calculate data. Topics such as process management and financial reporting are also taught.

Then, users learn about Reporting, including how to navigate reports in Workspace and Reporting Studio. Finally, users learn to create basic reports and to work with report objects.

Who Should Attend

- Power Users
- Report Developers

Course Information

Advance Preparation: None

Program Level: Intermediate

Delivery Method: Group – Live

CPE Credit: 25 credits in Specialized Knowledge and Applications

Prerequisites

- Basic Microsoft Windows skills
- Knowledge of spreadsheets
- Working knowledge of accounting

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 for the Power User

Course Outline

1 Planning Overview

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

2 Essbase Overview

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

3 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

4 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
- Data Entry Tasks
 - Smart Lists
 - Spread Data
- Calculate Data in Forms
- Add Annotations to Plan Data
- Perform Ad Hoc Actions in Forms

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Course Outline

5 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

6 Smart View

- Smart View Overview
 - Smart View Installation Components
 - Typical Business Process for Smart View
 - Smart View Interface
 - Ribbon
 - Smart View
 - Planning Ad Hoc
 - Essbase Ad Hoc
 - Smart View Panel
 - Connections
 - Shared Connections and Private Connections
 - Connect to Data Sources
 - Disconnect from Data Sources
 - Create Private Connections
 - Analyze Data with Ad Hoc Analysis Tools
 - About Ad Hoc Analysis
 - Start Ad Hoc Analysis
 - Excel Formulas in Ad Hoc Grids
 - Format Ad Hoc Grids
 - Use Smart View Formatting
 - Use Excel Formatting
 - Zoom In
 - Zoom Out
 - Set a Default Zoom Level
 - Enable Double-Click Zooming
 - Pivot
 - Remove Selected Members from the Grid
 - Insert Rows and Columns
 - Set Dimensions and Members
 - Select Members from the Member Selector
 - Select Members from the POV Toolbar
 - Copy and Paste a POV
 - Delete a POV
 - Cell Comments
 - View and Add Cell Comments
 - Edit and Delete Cell Comments

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Course Outline

Smart View Options

- Global Options and Sheet Level Options

- Member Options

- Data Options

- Advanced Options

- Formatting Options

- Cell Styles

Smart Slices

- About Smart Slices

- Smart Slices and Ad Hoc Analysis

- Create Smart Slices

- Set Smart Slice Data Boundaries

- Set Smart Slice Preferences

Smart Query

- Define Sets

- Define Set Filters

- Build the Smart Query

- Complete the Smart Query

- Open a Smart Query

Functions

- Create Functions with Function Builder

- Create Functions Manually

- Function Descriptions

 - HsSetValue

 - HsGetValue

- Common Function Error Codes

Planning Admin Extension

- Make Property Changes to a Member

- Move a Member

- Add a Member

 - Shared Members

 - Refresh/Create Database

Import Reporting Documents into Microsoft Office

- Import Financial Reporting Documents

- Edit and Refresh Documents

Copy Data Between Excel, Word, and PowerPoint

7 Manage the Approval Process

- Approval Process Overview

- Planning Unit Hierarchies

- Planning Unit Process States

- Reviewer Actions

- Impact of Entity Hierarchy on the Review Process

- Manage the Review Cycle

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Course Outline

- Start the Budget Review Process
- Post-Planning Activities

- Copy Data between Versions**

- Clear Cell Details**

8 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**

- Set the Point of View**

- Add Rows or Columns

- Row and Column Types

- Save Reports

- Design Row and Column Templates

- Create Charts from an Existing Grid**

- Bar Charts

- Line Charts

- Combo Charts

- Pie Charts

- Supporting Details and Grids**

- Set Up Details in Reports**

- Create Related Content in Reports and Books**

- Format Cells and Grids**

- Suppress Data in Grids**

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Course Outline

- Behavior of Conditional Suppression
- Use the Basic Option in Conditional Suppression
- Use the Advanced Option in Conditional Suppression

Apply Conditional Formatting in Grids

Change Page Settings

Add Functions

Text Functions Overview

Insert Text Functions

Display Text Function Errors

Financial Functions Overview

Insert Financial Functions

- Get Cell Function
- Mathematical Operators in Expressions

Build Batches and Books

Books

- Add Reports to Books
- Set the Book Point of View
- Set Book Options
- Run Books

Batches

- Add Reports and Books to a Batch
- Bursting Options
- E-mail and Messages Options
- Schedule and Monitor a Batch