

Oracle Hyperion Public Sector Planning and Budgeting Administration

Course Description

Course Name: Oracle Hyperion Public Sector Planning and Budgeting Administration
Course Number: O-PSPB-A
Duration: 5 Days

The Oracle Hyperion Public Sector Planning and Budgeting (PSPB) course is designed to guide students through the typical steps required to build and administer Public Sector Planning and Budgeting applications. Students build, administer and budget as an interactive case study over five days.

After a general overview of Hyperion Planning and Essbase, the class focuses on data forms, task lists and building validation rules followed by the creation of the PSPB application. We'll review and discuss the pre-packaged, delivered components of PSPB and examine the metadata management needed to maintain an application. The class will then discuss security and PSPB administrative data setup followed by a review of the PSPB budgeting process, how to complete the budget, and how to set up and execute the approval processes. Other topics will be covered such as the use of decision packages, optimum architecture, pushing data to line item cubes and ASO cubes as well as reporting in a PSPB environment.

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 public sector 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 Public Sector Planning and Budgeting Administration

Course Outline

1 Planning Overview

Understanding Planning

Oracle's Enterprise Performance Management System

Planning Features

Planning Applications

Planning and Essbase

Planning Technical Architecture

Summary

2 Essbase Overview

Understanding Essbase

Properties of Dimensions

PSPB Dimension Structure

Workspace Overview

Navigate Workspace

Open Planning Applications

Navigate in Planning

Planning PSPB Plan Types

Summary

3 Introduction to Public Sector Planning and Budget (PSPB)

PSPB

Overview of PSPB

Compare Design Differences in Financial Planning Cubes and PSPB Planning Cubes

PSPB is Position Budgeting

Integration Between Position Budgeting, P&L Budgeting, and Reporting

Metadata and Data Sources for Your Planning Application

Plan Types Available in PSPB

PSPB Delivered Process Flows

Summary

4 Create Applications

Create Applications

Create Metadata for Classic Applications

Options for Creating the Classic Application

Use the Outline Utility

PSPB Application

Summary

5 PSPB Applications

Build a PSPB Application

HCP Cube – Unique Features

PSPB Application Types

Create Data Source Name

Create PSPB Application Shell

Delivered Components of the PSPB Application

Summary

Course Outline

6 Metadata Management

Manage Metadata

- Create and Maintain Common Dimensions
- Create Hierarchies in Dimensions
- Add Custom User-Defined Dimensions
- Other Common Dimensions
- Other User-Defined Dimensions
- Member Formulas and Other Properties
- Alias Tables
- HCP Delivered Dimension Updates
- Smart Lists
- UDAs
- Load Dimension Metadata
- Verify the Data Load
- Review the Loaded Application

Summary

7 Create/Use Forms

Forms

- Forms and Folders Overview
- Create Simple Forms
- Create Composite Forms
- PSPB Composite Forms
- Form Access
- Create Menus
- Create Formula Rows and Columns
- Build Validation Rules
- Custom Messaging
- Set Up Form Properties
- Data Entry Tasks
- Use Smart Lists
- PSPB Delivered Smart Lists
- Spread Data
- Calculate Data in Forms
- Add Annotations to Plan Data
- Perform Ad Hoc Actions in Forms

Summary

8 Create/Use Task Lists

Task Lists

- Task Lists Overview
- PSPB Usage of Tasks Lists
- Create Task Lists
- Print Task List Reports

Summary

9 Compensation PSPB Defaults

Manage Compensation Budgets

- Update Salary Grades
- Update Other Compensation
- Process Loaded Human Resources Data
- Calculate Compensation Budgets
- Allocate Compensation Budgets to GL Accounts

Oracle Hyperion Public Sector Planning and Budgeting Administration

Course Outline

- Review the Loaded Application
- Verify the Data Load
- Review Position and Employee Data

Summary

10 Departmental Compensation Defaults

Maintain Departmental Compensation Defaults

- Overview
- Position Defaults
- Salary Grade Defaults
- Other Compensation Defaults
- Natural Accounts
- Salary Allocation Details
- Set up Working Days and Pay Days

Summary

11 Position and Employees

About Positions and Employees

- Positions
- Position Types
- Single Incumbent Positions
- Pooled Positions
- Position FTEs
- Copy Positions to Budget
- Edit Position Details
- Approve Positions
- Approve Period Level FTEs
- Approve Employees

Employees

- Modify Employee Information
- View Employee Compensation Budget by Period
- Terminate Employees
- Employee Status
- Add To Be Hired Employees
- Transfer Employees
- Edit Employee Details

Summary

12 Data Push from HCP to P&L Budgets

Push Data from HCP to P&L Budgets

- Overview
- Integration Setup
- Dimensions
- Allocate Position Compensation to GL Accounts
- Mapping Process
- Pushing the Data to P&L Budget
- Review Completed Pushed Data in P&L Budget

Summary

13 Decision Packages

Decision Packages

- Overview
- Baseline Decision Packages
- Shared Decision Packages

Oracle Hyperion Public Sector Planning and Budgeting Administration

Course Outline

- Access & Approval Requirements
- Budget Requests
- Decision Package & Budget Request Highlights
- Configuring the DP_ASO Reporting Plan Type
- Mapping Process
- Push the Data to P&L Budget
- Provided Decision Package Types
- Creating Decision Package Types

14 Approval Process

- Approve Budget Data
- Approval Process Overview
- PSPB Position Approval Process
- Validation Rules for Approval Process
- Post-Planning Activities

- Summary

15 Security

- Manage Security
- Security Overview
- Shared Services
 - Network vs. Native Users
 - Create Groups
 - Planning Roles
 - Set Product Security
 - Inheriting Access Permissions
- Application Security
 - Securable Planning Objects
 - Form, Business Rule and Task List Security
 - Dimension Security
- Summary