

Hyperion Planning Course Content

Introduction to Planning

- Planning Overview
- Planning Architecture
- Planning Business Process
- Course Roadmap
- Planning Business Scenario

Navigating EPM Workspace

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

Introduction to Application 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 Essbase Databases

Managing Dimensions

- Building Dimension Hierarchies
- Setting Up Dimension Hierarchies
- Managing Member Hierarchies
- Sorting Members

Setting Up the Alias, Currency, Year, and Period Dimensions

- Creating Aliases

- Adding Currencies
- Customizing Time Periods

Setting Up Scenarios and Versions

- Scenarios and Versions
- Creating Scenarios
- Creating Versions

Loading Metadata

- Metadata Load Options
- Loading Metadata with the Outline Load utility
- ERP Integrator Load Process
- Lifecycle Management
- Migrating Applications and Artifacts

Setting Up the Entity and Account Dimensions

- Entities: Overview
- Adding and Deleting Entities
- Accounts Overview
- Account Types
- Saved Assumptions
- Data Types and Exchange Rate Types
- Adding Accounts
- Aggregating Accounts
- Creating User-Defined Elements
- Creating Member Formulas
- User-Defined Dimensions
- Attribute Dimensions
- Adding User-Defined Attributes
- About Smart Lists

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 the Outline Load Utility
- ERP 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
- Creating Simple Forms
- Creating Composite Forms
- Exporting and Importing Forms

Enhancing Forms

- Creating Rolling Forecasts
- Modifying Rolling Forecast Variables
- Creating Menus
- Creating Formula Rows and Columns
- Building Validation Rules
- Specifying Advanced Settings and Setting Application Defaults
- Setting Up User Preferences
- Performing Grid Diagnostics

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
- Creating Business Rules from Templates
- Creating Business Rules and Rule Sets
- Validating, and Deploying Business Rules and Rulesets
- Assigning Business Rule Security and Launching Business Rules

Setting Up the Approval Process

- Approval Process: 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
- Working with Copy Data Options

Creating Task Lists

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