



keyteach

Oracle Hyperion Planning: Administrator

This five day course covers the key concepts and fundamentals of Planning from an administrator's perspective, including best practice methods for application design and maintenance.

Learning Objectives:

Learn how to create and manage Hyperion Planning applications, develop planning and budgeting models, load and manipulate data, create reports and ad hoc queries within a spreadsheet environment.

Course Description:

This course is designed to meet the needs of system administrators from existing implementations as well as new rollouts. It is the essential starting point for creating or managing Planning applications. Key design considerations are explored and best practice is discussed for the build, maintenance and support of Planning applications.

This course investigates system design, development and administration and explores how data is submitted, adjusted, reviewed and signed off.

The activities throughout the week help to build an understanding of how the system responds, and the attributes of the dimensions that underpin the applications.

In addition to using EPMA to build metadata hierarchies and assign properties, you will see how to deploy and administer applications, build data forms, establish security, load data, create calculations and gain an understanding of the planning cycle. You will also get an introduction to Financial Reporting Studio and discover a variety of methods for using Smart View to report on Planning data. Topics related to Essbase are also covered where appropriate, with discussions regarding structure and how to optimise databases.



Also available
as a self-paced
"On Demand" course

Course Information:

Audience:	Financial and Technical System Administrators
Pre-requisites:	None
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	35 Credits - Specialized Knowledge and Applications
Programme Level:	Intermediate

Summary by Day:

- Day 1: Overview of Planning, Navigation, EPM Architect, Key Dimensions, Application Creation and Deployment.
- Day 2: Loading Exchange Rates through the Outline Load Utility, Dense and Sparse Settings, Calculating Database Size, Essbase Optimisations, Member Formulas, Loading Data, Task Automation.
- Day 3: Security, Substitution Variables, Creating Data Forms, Menus, Smart Lists, Text and Date Members, Composite Forms, Application Defaults, Data Entry Techniques.
- Day 4: Grid Diagnostics, Cell History, Calculation Scripts, Calculation Order, Controlling Calculation Scope, Allocations, Design Considerations, Functions, Ranges, Approval Management, Creating Task Lists
- Day 5: Lifecycle Management Extracts and Imports, Smart View Connections, Viewing Forms in Excel, Ad Hoc Analysis, Attribute Reporting, Smart Slices, Working Offline, Financial Reporting Studio, Creating Planning Reports, Creating Essbase Reports.

Detailed Agenda

Introduction

- Planning components and architecture
- Planning and Essbase – the Relationship
- Multidimensionality
- Terminology and metadata relationships

Navigation

- Accessing the Workspace
- Reviewing details in the Essbase Administration Services Console (EAS)

EPM Architect

- Navigation and key components
- Dimension building
- Member and dimension properties
- Loading metadata from ADS files
- Key planning dimensions
- Custom dimensions
- Consolidation operators
- Attributes & UDAs
- Smart lists
- Creating, validating and deploying applications

Application Administration

- Exchange rates
- Calculating database size
- Data storage and Essbase optimisation
- MaxL task automation
- Loading data
- Security

- Substitution variables
- Application defaults
- Grid diagnostics and cell history
- Member formula and business rules/
Calculation Script Creation
- Controlling calculation scope
- Allocations
- Approvals

Data Form Creation

- Simple and composite forms
- Validation rules
- Rolling forecasts
- Menus and task lists

Data Entry Techniques

- Ad Hoc data entry
- Supporting detail
- Comments & document attachments

Reporting

- Smart View panel
- Ad Hoc Analysis
- Attribute reporting
- Smart slices
- Working with forms in Smart View
- Working offline
- Financial Reporting



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