

Oracle Hyperion Planning 11.1.2: Create & Manage Applications (11.1.2.2)

Duration: 5 Days

What you will learn

This Hyperion Planning 11.1.2: Create & Manage Applications training will teach you how to create and administer Planning applications. You'll learn how to manage metadata and add dimensions and members.

Learn To:

Create planning applications.

Manage metadata and add dimensions and members and import members.

Load data.

Set up security.

Create forms, set up task lists and set up business rules.

Manage the approval process.

Benefits to You

Optimize your organization's resources by linking strategic, financial, and operational business plans. Align your organization using your new skills to efficiently plan, budget and forecast with Oracle Hyperion Planning.

Design and Manage the Approval Process

Enrolling in this course will also help you develop the knowledge and skills to design and manage the approval process. This includes building planning unit hierarchies and assigning responsibilities and promotional paths for planning units. Exercises, along with a case study, give you hands-on practice to solidify your understanding. By investing in this training, you'll learn how to create a planning application using Planning Administration (this is formerly referred to as "Classic Planning").

Recommended New Student Tutorial

For students new to Oracle Hyperion Planning, consider viewing the Planning Overview Tutorial before attending class.

This course covers Planning 11.1.2.2.300.

Audience

Administrator

Developer

Related Training

Required Prerequisites

Basic knowledge of Microsoft Windows

Basic knowledge of business modeling

Basic knowledge of financial planning and budgeting concepts

Suggested Prerequisites

Working knowledge of Essbase

Course Objectives

Manage metadata and data

Set up security for users, groups, and members

Create and customize forms, menus, and task lists

Migrate application artifacts

Verify application setup

Set up and test business rules

Set up and manage the approval process

Create and deploy Planning applications

Course Topics

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

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 SmartLists

Setting Up Exchange Rates

Currencies and Exchange Rates

Creating Exchange Rate Tables

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