

Hyperion Planning 9.3.1 for Interactive Users

What you will learn

This course is designed to teach you how to use Planning. The course includes an overview of Planning features, capabilities, and its relationship with Analytic Services. You create data forms and task lists, enter and adjust data, set up calculations, and move a plan through the budget review-and-approval process. You learn how to create management-quality reports with Financial Reporting or Web Analysis*. Exercises provide hands-on practice.

Learn to:

- Navigate Workspace to access Planning, Financial Reporting or Web Analysis
- Create and test data forms
- Enter and adjust data in Planning and Smart View
- Set up and test business rules
- Move plans through a budget review cycle
- Discuss Planning capabilities

Audience

Business Analysts

Prerequisites

Basic knowledge of Excel or Lotus 1-2-3
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Basic knowledge of planning and budgeting
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Familiarity with concepts of client-server applications
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Basic knowledge of Microsoft Windows
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Course Objectives

Discuss Planning capabilities and its relationship with Essbase
Discuss Planning dimension requirements
Navigate Workspace to access Planning and Financial Reporting or Web Analysis
Create and test data forms
Enter and adjust data in Planning and Smart View
Work with Offline Planning

Set up and test business rules
Move plans through a budget review cycle
Set up and implement task lists
Create reports and documents to analyze planning results

Course Topics

Planning Overview

Enterprise Performance Management
Product Components
User Roles
Planning
Planning and Essbase

Navigating Workspace

Launching Workspace
Workspace User Interface
Opening Applications
Navigating in Planning

Planning Dimensions and Data Storage Overview

Planning Required and User-Defined Dimensions
Dense and Sparse Dimensions
Factors that Impact Calculations

Creating Data Forms and Folders

Data Forms and Folders Overview
Data Form Elements
Creating Folder Structures for Data Forms
Data Form Requirements
Composite Data Forms
Printing Data Form Definition Reports
Assigning Access Rights to Data Forms

Customizing Data Forms

Adding Menus to Data Forms
Managing User Variables
Setting Up User Preferences

Entering Data

Submitting Data in Data Forms
Spreading Data
Adjusting and Annotating Data
Calculating Data in Data Forms

Entering Data with Smart Lists
Navigating Data Forms with Menus

Entering Data Using Smart View

Smart View Overview
Planning and Smart View
Offline Planning Overview
Taking Data Forms Offline

Creating Business Rules

Business Rules Overview
Navigating Business Rules
Business Rules Creation Process
Launching Business Rules
Printing Business Rules

Building Runtime Prompts for Business Rules

Runtime Prompts Overview
Adding Runtime Prompts

Adding Formulas to Business Rules

Business Rules Formula Overview
Building Formulas for Business Rules
Specifying Data Conditions
Managing Business Rules

Managing the Approval Process

Process Management Overview
Planning Units
Managing the Review Cycle for Planning Units
Copying Data Between Versions

Creating Task Lists

Task Lists Overview
Navigating Task Lists
Task Lists Creation Process
Working with Task List Folders
Building Task Lists
Assigning Access to Task Lists
Validating Task Lists
Reporting on Task Lists

Financial Reporting Overview

Financial Reporting Features
Data Sources for Financial Reporting

Financial Reporting Studio
Working with Financial Reporting Studio

Navigating Reports in Workspace

- Workspace Overview
- Setting Preferences
- Browsing the Repository
- Searching for Items
- Previewing Reports
- Changing Page Members
- Printing Reports and Snapshots
- Integrating Reports into Microsoft Office Applications

Creating Basic Reports

- Report Creation Overview
- Creating Reports
- Creating Grids
- Selecting Members
- Setting Up the Point of View
- Adding Rows and Columns
- Saving Reports

Formatting Cells and Grids

- Formatting Cells
- Formatting Grids
- Suppressing Data
- Applying Conditional Formatting
- Setting Up Pages

Creating Report Objects

- Report Objects Overview
- Creating Text Boxes
- Adding Images
- Saving Report Objects
- Inserting Saved Report Objects
- Linked Object Properties
- Designing Headers and Footers

Adding Text Functions

- Text Functions Overview
- Inserting Text Functions in Text Boxes
- Inserting Text Functions in Headings and Text Cells
- Creating Dynamic Values with the Current Keyword
- Displaying the Row and Column IDs
- Displaying Text Functions Errors

Common Text Functions

Adding Auto Calculations and Mathematical Functions

Auto Calculations Overview

Mathematical Functions

Mathematical Operators in Expressions

Formulas Overview

Common Mathematical Functions

Setting Up Books

Books Overview

Previewing and Printing Books

Changing the Book Point of View

Creating Books

Changing the Appearance of Books

Reviewing Planning Data with Web Analysis

Web Analysis Architecture

Key Benefits of Web Analysis

Key Concepts

Navigating Between Open Items

Navigating Web Analysis Studio

Accessing Help

Workspace and Web Analysis Studio Tasks

Creating Web Analysis Documents

Creating Documents in Web Analysis Studio

Setting Format Options

Creating Chart Views

Creating Documents in Workspace