

Hyperion Planning 9.3.1: Create and Manage Applications

O que é que gostaria de aprender

This course is designed to teach you how to create and administer applications using the Planning software. You learn how to create applications, add dimensions and members, import members, load data, set up security, create data forms, set up task lists, set up calculations, and move a plan through the planning cycle. You also access data offline and analyze plan data. Exercises and a case study provide hands-on practice.

Learn To:

- Create Planning applications
- Set up Security for users, groups, and members
- Create data forms
- Set up business rules
- Manage the planning process
- Analyze planning results in Financial Reporting

Pré-requisitos

Basic Microsoft Windows skills

Basic Microsoft Excel or Lotus 1-2-3 skills

Basic knowledge of planning and budgeting

Working knowledge of Essbase recommended

Objetivos do Curso

Create Planning applications

Load data into Planning applications

Set up security for users, groups, and members

Create data forms and enter data

Set up and test business rules

Review budget data by using process management

Analyze planning results in Financial Reporting

Tópicos do Curso

Planning Overview

Oracle's Enterprise Performance Management

Planning Architecture
Planning and Essbase

Navigating Workspace

Launching Workspace
Workspace User Interface
Workspace Navigate Menu
Opening Applications
Navigating in Planning

Creating Dimensions Overview

Planning Dimensions
Required and User-Defined Dimensions
Dense and Sparse Dimensions
Data Block Creation
Selecting Aggregation, Data Storage, and Calculation Options

Managing Dimensions with EPM Architect

About Dimension Management
Adding Dimensions to Master View
Organizing Dimensions
Creating Members
Managing Members
Creating Aliases
Adding Currencies
Creating Associations Between Dimensions

Setting Up the Period, Scenario, and Version Dimension

Time Periods Overview
Period and Year Dimensions
Setting up Dynamic Time Series
Choosing How Data is Stored
Scenario Dimension and Creating Scenarios
Version Dimension and Creating Versions

Setting Up the Entity Dimension

Entity Members and Plan Types
Identifying the Currency Value for Entities
Adding and Modifying Entities
Saving Dimensions
Deleting Entities

Setting up the Account Dimension

Account Types
Creating Account Hierarchies

Creating User-Defined Elements

- User-Defined Dimensions
- Creating Attributes
- Assigning Attribute Values
- Member Formula Overview
- Smart Lists Overview
- Creating Smart Lists

Loading Metadata from a File

- Metadata Load Files
- Loading Metadata Process
- Loading Metadata from Interface Tables

Working with Application Views

- Creating Application Views
- Configuring Application Settings
- Removing Dimensions
- Setting Up Dimension Associations

Deploying Applications

- Deploying Applications Overview
- Deployment Process
- Validating Application Views
- Comparing Application Views
- Choosing Performance Settings
- Dimension Order
- Deploying Application Views
- Creating Essbase Databases

Setting Up Exchange Rates

- Currencies and Exchange Rates
- Exchange Rates Table Overview
- Creating Exchange Rate Tables
- Exchange Rates and the HSP_rates Dimension
- Generating Currency Conversion Calculation Scripts

Loading Data and Calculating Data Overview

- Loading Data
- Data Calculation Overview

Provisioning Users and Groups

- Planning Security Overview
- User and Group Provisioning Overview
- Provisioning Users and Groups

User Roles
Generating Provisioning Reports

Setting Up Access Rights to Planning Applications

Assigning Access Rights
Importing Security Overview
Creating Secfile.txt File
Importing Access Rights
Creating Security Filters

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

Exporting and Importing Data Forms
Advanced Settings
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
Planning and Smart View
Taking Data Forms Offline

Creating Business Rules

Navigating Business Rules
Business Rules Creation Process
Launching Business Rules
Printing Business Rules
Adding Runtime Prompts
Building Formulas for Business Rules
Specifying Data Conditions
Managing Business Rules

Managing the Approval Process and Creating Task Lists

Managing the Review Cycle for Planning Units

Copying Data Between Versions

Copying Data

Navigating Task Lists

Task List Creation Process

Building Task Lists and 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