

Oracle - Oracle Hyperion Planning 11.1.2: Create Manage Applications (11.1.2.4)

Code:	HY-PCM-APP
Length:	5 days
URL:	View Online

This Hyperion Planning 11.1.2.4 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 and deploy planning applications.
- Manage metadata by adding and importing dimensions and members.
- Load data.
- Set up security for users, groups, and members.
- Create and customize forms, menus, and task lists.
- Migrate application artifacts.
- Set up and test business rules.
- Set up and 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 the Simplified Interface.

Recommended New Student Tutorial

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

This course covers Planning 11.1.2.4.0

Skills Gained

- Create and deploy Planning applications
- 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

Prerequisites

- Basic knowledge of business modeling
- Knowledge of Essbase administration
- Basic knowledge of Microsoft Windows
- Basic knowledge of financial planning and budgeting concepts

Course Details

Introduction to Planning

- Oracle Hyperion Planning
- Planning Architecture
- Planning Business Process
- Planning Business Scenario

Navigating Planning

- Interface: Overview
- Launching the Simplified Interface

Introduction to Applications and Dimensions

- Planning Application: Overview
- Application Framework
- Planning Dimensions
- Aggregate Storage Databases
- Data Block Creation Process
- Aggregation, Storage, and Calculation Options

Creating Planning Applications

- Application Creation Process
- Managing Data Sources
- Creating Simple Applications
- Creating Advanced Applications
- Refreshing Essbase Databases

- Adding Plan Types

Managing Dimensions

- Building Dimension Hierarchies
- Performance Settings and Data Type Evaluation Order
- Accessing Dimensions Information
- Managing Dimensions in the Simplified Interface
- Managing Dimensions in EPM Workspace
- Managing Dimensions in Smart View

Setting Up Aliases, Currencies, Years, and Periods

- Creating Aliases
- Adding Currencies
- Customizing Time Periods

Setting Up Scenarios and Versions

- Scenarios and Versions
- Creating Scenarios
- Creating Versions

Loading Metadata

- Metadata Load Options
- Creating Metadata Load Files
- Exporting Metadata
- Importing Metadata
- DRM Metadata Load Process
- Application Management

Creating User-Defined Elements

- Creating Member Formulas
- User-Defined Dimensions
- Attribute Dimensions
- Adding User-Defined Attributes
- Smart Lists: Overview
- Enabling the Simplified Interface
- Customizing Interface Appearance

Setting Up Exchange Rates

- Currencies and Exchange Rates
- Creating Exchange Rate Tables
- Currency Conversion Calculation Scripts

Loading and Calculating Data

- Data Load Options
- Managing Planning Data
- Exporting Data
- Importing Data
- FDMEE Data Load Process
- Data Calculations

Setting Up Planning Security

- Planning Security: Overview
- User and Group Provisioning in Shared Services
- Specifying Advanced Settings
- Assigning Access Permissions

Creating Forms

- Forms: Overview
- Form Components
- Creating Simple Forms
- Creating Composite Forms
- Exporting and Importing Forms

Enhancing Forms

- Creating Complex Forms
- Specifying Application Settings
- Specifying User Variables
- Setting Individual Display Options
- Creating Menus
- Creating Formula Rows and Columns
- Building Validation Rules

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 and Rule Components
- Managing Views
- Creating Business Rules and Rule Sets
- Validating and Deploying Rules
- Assigning Business Rule Security
- Launching Business 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
- Copying Data Between Versions
- Copying Data

Creating Task Lists

- Task Lists: Overview
- Navigating Task Lists
- Task List Creation Process

Appendices

- A: Creating Applications in Performance Management Architect
- Case Study

Creating Task Lists

- Task Lists: Overview
- Navigating Task Lists
- Task List Creation Process

Appendices

- A: Creating Applications in Performance Management Architect
- Case Study

Schedule (as of 4)

Date	Location	
Nov 4, 2019 – Nov 8, 2019	Virtual	Enroll
Dec 2, 2019 – Dec 6, 2019	Reston	Enroll
Dec 16, 2019 – Dec 20, 2019	Atlanta	Enroll
Jan 13, 2020 – Jan 17, 2020	Virtual	Enroll
Mar 23, 2020 – Mar 27, 2020	Toronto	Enroll
Mar 30, 2020 – Apr 3, 2020	Virtual	Enroll
May 18, 2020 – May 22, 2020	Virtual	Enroll
