

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

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<b>Code:</b>	HY-PCM-APP
<b>Length:</b>	5 days
<b>URL:</b>	<a href="#">View Online</a>

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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

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