

# **Hyperion Planning Curriculum**

## **1. Introduction to Planning**

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

## **2. Navigating EPM Workspace**

- EPM Workspace: Overview
- Launching EPM Workspace
- Opening Applications
- Navigating in Planning

## **3. Introduction to Applications and Dimensions**

- Planning Application: Overview
- Application Framework
- Planning Dimensions
- Aggregation, Storage, and Calculation Options

## **4. Creating Applications in Planning Administration**

- Planning Administration Overview
- Application Creation Process
- Creating Applications with Planning Application Administration
- Managing Applications and Data Sources
- Managing Data Sources
- Managing Essbase Databases
- Refreshing Essbase Databases
- Managing Plan Types



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## **5. Managing Dimensions**

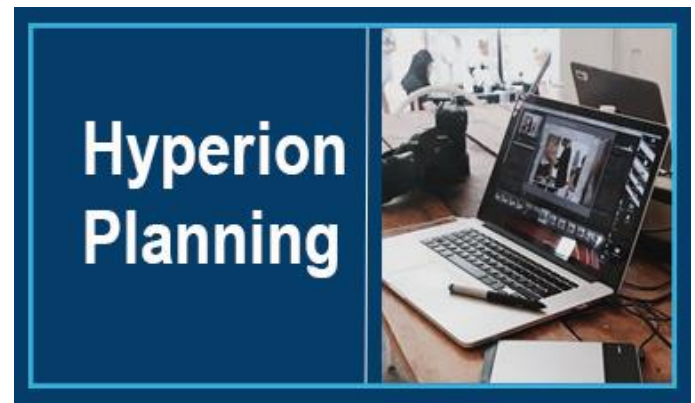
- Building Dimension Hierarchies
- Performance Settings and Data Type Evaluation Order
- Setting Up Dimension Hierarchies
- Managing Member Hierarchies

## **6. Entities: Overview**

- Adding Entities
- Deleting Entities

## **7. Accounts: Overview**

- Account Types
- Time Balance Properties
- Saved Assumptions
- Data Types and Exchange Rate Types



## **8. Setting Up Scenarios and Versions**

- Scenarios and Versions
- Creating Scenarios
- Creating Versions

## **9. Creating Forms**

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

## **10. Entering Data in Planning**

- Navigating Forms
- Submitting Data in Forms
- Filtering Data
- Sorting Data
- Spreading Data

## **11. Setting Up Exchange Rates**

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

## **12. Creating Smart List**

- Smart List: Overview
- Navigating Smart List
- Smart List Creation Process
- Adding smart list to Webforms

## **13. Setting Up Application settings, View statistics, Manage Properties, reporting, Alias Tables**

- Creating Aliases
- Customizing Time Periods

## **14. Setting Up the Entity and Account Dimensions**

## **15. Setting Up Planning Security**

- Planning Security: Overview
- User and Group Provisioning in Shared Services
- Assigning Access Permissions
- Exporting and Importing Access permission
- Creating security Filters

## **16. Annotating and Analyzing Data**

- Adding Annotations to Plan Data
- Clearing Cell Details
- Working with Ad Hoc Grids



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## **17. Creating Task Lists / Menus**

- Task Lists / Menus: Overview
- Navigating Task Lists / Menus
- Task Lists / Menus Creation Process
- Printing Task List Reports

## **18. Setting Up the workflow / Approval Process**

- Approvals: 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

## **19. 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



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## 20. Managing Business Rules and User variables

- Business Rules: Overview
- Determining Calculation Requirements
- Launching Calculation Manager
- Rule Components
- Templates: Overview
- Creating Business Rules with Templates
- Creating Business Rules and Rule Sets
- Validating and Deploying Rules

## 21. Initialize Workforce, Capex Planning App

### KEY FEATURES



**Instructor-led Sessions**



**Learn from Experts**



**Assignments**



**24 x 7 Support**



**Real-time Case Studies**



**Get Certified**

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