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

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

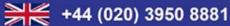- Scenarios and Versions
- Creating Scenarios
- Creating Versions

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
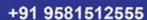- Filtering Data
- Sorting Data
- Spreading Data

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

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

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

For More Info:

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