

Course: Applied Planning with Essbase Essentials

Duration	Cost	Prerequisites
5 Days	£2,900	None

Course Description

Our five-day Applied Planning with Essbase Essentials course is designed to take you through the step-by-step process of developing and implementing an Oracle Hyperion Planning application. We start with a general overview of Essbase and Planning terms and the architecture of all the Planning components, and how they are commonly used.

The first half of the course is centred in building a foundation of knowledge on Essbase, the underlying technology of Planning. We go through multi-dimensional modelling, using load rules to load data, architecture of Block Storage cubes, and calculation fundamentals for consolidations. Once the foundation in Essbase has been established, we walk through all the steps to create a planning application, how to modify existing dimensions and build out the hierarchies using the Planning web client. We then show developers how to build out dimensions using Classic Planning and by using EPMA. We cover the mechanics and cover strategies for automating the build process such as interface tables. We finish up by reviewing data loads using Load Rules to load the Planning database.

Next, the course focuses on tasks end-users must perform during the planning cycle. You'll create and modify forms, enter data, add annotations. Running business rules and managing task lists is also covered. We review how to use the forms in the Smart View client and finish up the end-user perspective by going through Workflow Management and the process of submitting a plan for review. The final section of the course covers Security and other administration topics such as automation and deployment.

Course Outcomes

- Create Hyperion Planning Applications
- Build out dimensions
- Load data
- Set-Up and maintain security
- Create data forms
- Set-up business rules and calculations
- Analyze planning results.
- Manage the workflow process

Course Content

- Overview of Essbase & Planning
- Application Design Overview
- Smart View for Essbase
- Load Rules for Loading Data
- Essbase Administration Services (EAS)
- Architecture
- Calculation Fundamentals
- Overview of Planning
- Setting up an Application
- EPMA – Enterprise Performance Management Architect
- Building Forms and Business Rules
- Smart View for Planning
- Workflow Management
- Security and Administration

Applied Planning – Daily Agenda

Day One – Essbase Basics

Overview of Essbase and Planning

- Multidimensional Concepts
- OLAP vs. OLTP
- Multidimensional Vocabulary
- Planning architecture – Essbase, AAS Console, EPMA, Workspace, Shared Services

Application Design Overview

- Creating Applications and Databases
- Member Properties
 - Storage Properties
 - Aliases and Alias Tables
 - Shared Members
 - User Defined Attributes
 - Attribute Dimensions
- Special Accounts and Time Functionality
 - Time Series and other YTD solutions
 - Time Balance
 - Expense Reporting
 - Introduction to Formulas
- Modelling Exercises
 - Mechanics of Building a dimension using the Outline Editor
 - Typical design structure for common applications

Smart View Ad hoc

- Basic Mechanics of Creating Reports
 - Retrieves, Zooms, Pivots, Keep and Remove Only
 - Rules for Reporting
- Advanced Spreadsheet Topics
 - Options
 - Member Selections
 - Cascade
 - Attribute Dimension Reporting
 - Query Designer

Day Two – Loading Data, Block Storage Architecture, Calc Fundamentals

Loading Data

- Loading Data without Load Rules
- Rules for Data Loads with Rules
- Data Load Cheat Sheet
- Loading Multiple & Single Column Data files
- Controlling Data Load Properties

SQL Interface

- Creating Applications and Databases
- Field Manipulations:
 - Ignores, Replace, White space
 - Joins, Splits, Create Text
 - Select/Reject Criteria
 - Controlling Dimension Build Settings

BSO Architecture and Calc Fundamentals

Architecture

Dense/Sparse and Essbase Architecture

- Choosing the Optimal Configuration
- Understanding Statistics and Performance implications
- Essbase Data File Types – Piecing it all Together
- Restructuring
- Compression
- Database Fragmentation
- Advanced Spreadsheet Topics

Calculation Fundamentals (5 hrs)

- Understanding Calculation Order
 - Calc Ordering Within and Across Dimensions
- The Calc Script Editor
- Calc All – Understanding a Full Consolidation
 - Effects of Calculations on Dense and Sparse

Agenda Continued...

Day Four – EPMA, Forms, Planning End-user EPMA

- Exploration of dimension building options for Classic Planning – ODI & DIM
- Migrating from Classic to EPMA
- Modifying dimensionality in EPMA and deploying the application
- Working with SmartLists
- Loading dimensions with raw data files into EPMA
- Working with Interface tables
- Loading data into the application

Building Forms

- Building a basic form
- Building an asymmetric form
- Composite forms
- Best practices in Form design

End-user perspective

- Entering data in forms
- Spreading data with grid spread & mass allocation
- Downloading forms with the SmartView client
- Taking forms offline in SmartView

Day Five: Planning, Business Rules, Security and Administration

More Bells and Whistles of Planning

- Task lists
- Menu options
- SmartLists
- Workflow Management
- Data management – copying versions and scenarios

Business Rules

- Business rules vs. Calc scripts
- Writing a business rule
- Attaching a business rule to a form
- Run-time prompts

Security and Administration

- Assigning roles in shared services
- Assigning access to forms and tasks in planning
- Assigning data access in Planning
- Refreshing security
- Lifecycle management

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