

Course: Applied Planning

Duration	Cost	Prerequisites
3 Days	£1,900	Knowledge of Excel

Course Description

For those of you who have already been trained on Essbase, we teach you how to create and manage Planning applications in this three-day Applied Planning course. This course description is for Version 11. 123OLAP can deliver the course on whatever version the client is using.

The class begins with a general overview of Planning and Planning terms, the architecture of all the Planning components, and how they are commonly used. We go over all the steps to create an application from scratch. This involves some prep work outside of Planning and leads to developing the application in Workspace. We modify existing dimensions and build out the hierarchies using the Planning web client.

The next section of the course focuses on options available for building dimensions with Classic Planning. We cover the mechanics and cover strategies for automating the build process using the OutlineLoad utility, ODI, and DIM. We finish up the section by reviewing data loads using Load Rules to load the Planning database.

The course then focuses on tasks that end-users must perform during the planning cycle. We walk you through creating and modifying forms, working with forms to enter data, adding annotations, and the rest of the form features such as running business rules and managing task lists. We cover how to use the forms in the Smart View client. We 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. The last section of this class is dedicated to an overview of managing applications using EPM Architect. We go over managing dimensions, automating builds through raw data files or interface tables, and deploying to applications.

Course Outcomes

- Create Hyperion Planning Applications
- Manage hierarchies in both Classic and EPMA
- Automate the building dimensions using Outline Load
- Automate dimension building in EPMA
- Load data through Essbase load rules
- Set-up an optimal strategy for security for planning
- Build data forms with best practice approaches
- Set-up business rules through Admin Console and Calculation Manager
- Set-up SmartLists, Text & Data type members
- Manage the workflow process
- Copy versions of the budget/forecast

Course Content

Overview of Planning

We un-bundle all the components within a Planning implementation and cover the architecture of the product suite. This section also familiarizes students with the terminology used in Planning and multidimensional design. In doing this overview of the concepts, we introduce you to the tools used in Planning development by walking students through an extensive demonstration. Students will understand how all components fit together: Classic Planning, Essbase, EPMA, Workspace, Smart View, Forms, HBR, Reports, and more.

Setting up an Application

We begin by walking through all these steps you must take after the product is installed from configuring data sources to creating and registering applications. We then work in the Planning Web Client to build out the databasedimensions and hierarchy. We go over fundamentals such as applying the refreshes from the webclient, what all the special properties are for members, applying formulas to members, and more. Mixed throughout this section are important “big picture” topics such as currency conversion options, advantages/disadvantages to multiple plan types, and other design concepts.

Dimension Building Option for Classic

There are lots of options for building out large dimensions using automation. We go over all the tools available to developers: the OutlineLoad utility for quick and easy batch update; DIM - the Informatica tool that has a Planning adaptor; Oracle Data Integrator – an ETL tool that also has Planning Knowledge Modules. We give you a basic introduction to building dimensions with all these tools and can emphasize/deemphasize any of them depending on our audience’s needs. We also review different data load strategies for loading data once the dimensions have been built out but focus mainly on Essbase load rules.

EPM Architect

EPM Architect is the new tool for building out dimensions and deploying them to Planning. We cover how to manually create dimensions in EPMA library and how to add them to applications. In addition, we show how this can be automated for larger dimensions through flat files and interface tables. Finally, we walk through the process of deploying these to Planning.

Building Forms & Planning Bells and Whistles

After the basics of design have been covered, we look at it from the end-user perspective, mainly forms. The focus is on designing forms based on different requirements. We cover form design alternatives, the mechanics of building forms, customizing forms, and best practices for deploying forms; as well as advanced topics such as building asymmetric forms and building dynamic forms that allow users to add rows on the fly. After building forms, we focus on other bells and whistles of planning including task lists, menu options, types of Accounts, and SmartLists.

Business Rules/Calculation Manager

We cover the basics of how to take a calculation script from Hyperion Business Rules and take advantage of run-time prompts that will help users consolidate subsections of the database. For implementations where EPMA will be used, we cover the same topics through the Calculation Manager tool introduced in version 11. This section can be expanded to cover all the calculation capabilities by combining sections of the Applied Essbase class.

Smart View Client

If a client is using Smart View, we walk through all the steps for accessing forms through the Excel Smart View client. We go through taking forms off line, submitting data, and all of the equivalent functionality that the Forms interface provides.

Course Content Continued

Workflow Management

This section covers how users submit a budget for review. We go through typical ways we see companies take advantage of this feature in Planning to manage the budgeting cycle. We also cover Task lists and how they can be used to help manage the planning process.

Security and Administration

We go over important strategies for assigning roles through shared services and how to best set up access across dimensions. We go over precedence issues and how they are resolved. In addition, we focus on other Administration topics such as automation and backup strategies and Lifecycle Management.

Our training

All of our courses are taught by our certified Oracle Consultants, and have been developed by the leading Oracle Hyperion training providers, 123OLAP. We share real-life examples of implementations and all training manuals have been developed for later use as comprehensive reference manuals.

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