

## Course: Hyperion Planning Bootcamp

Duration	Cost	Prerequisites
5 Days	£2,900	None

### Course Description

Our five-day Planning Bootcamp course is designed for those using either On-Premises Oracle Hyperion Planning or Oracle Planning & Budgeting Cloud Service (PBCS) - we often have a mix of both in our classes! PBCS and Hyperion Planning on-premises have the same basic tools and functionality with a few key differences, which we outline throughout the class. You are hands-on all week with the on-premises version and we have a discussion and a section in the manual outlining the differences and bridging the gap between the two. In the end, both types of students leave with the skills they need.

This course takes students through the step-by-step process of developing and implementing a 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 two days of the course are centered on building a foundation of knowledge on Essbase, the underlying technology of Planning. We go through multi-dimensional modeling, using load rules to load data, architecture of Block Storage cubes, calculation fundamentals for consolidations, and using Smart View ad hoc to build reports.

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 how to build out dimensions using Classic Planning and by using EPMA. We cover the mechanics and 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 and give an overview of FDMEE.

Next, the course focuses on tasks end-users must perform during the planning cycle. You will create and modify forms, enter data, learn the options for spreading data, use supporting detail and add cell notes. We build out task lists and business rules using Calculation Manager. 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. We then cover Security and other administration topics such as automation and deployment using LifeCycle Management. We also summarise the differences between PBCS and On-Premises Planning applications.

### 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
- Analyse planning results.
- Manage the workflow process

## Hyperion Planning Bootcamp - Daily Agenda

### Day One - Essbase Modeling

#### Overview of Essbase and Planning

- Multidimensional Concepts
- OLAP vs. OLTP
- Essbase Vocabulary

#### 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
  - Expense Reporting
  - Introduction to Formulas
- Best Practices in Design

#### Smart View

- Basic Mechanics of Creating Reports
  - Connecting/Refreshing Retries, Zooms, Pivots, Keep/Remove
- Advanced Spreadsheet Topics
  - Options
  - Member Selections
  - Cascade
  - Attribute Dimension Reporting

### Day Two - Load Rules, Architecture, Calc Fundamentals

#### Dimension Building

- Loading Data without Load Rules
- Overview of FDME
- Tips and tricks for SQL Interface
- Best practices in design

#### Architecture of BSO

- Dense/Sparse and impact on design
- Choosing optimal configuration
- Restructuring and compression
- BSO calculation overview

#### Calculation Fundamentals

### Day Three - Classic Planning

- Creating a Classic Planning application
- Setting up an application
- Modeling the default dimensions – Time, Years, Scenario, Version, Accounts
- Special properties of members
- Applying formulas to members
- Refreshing to Essbase
- Currency conversion options
- Working with multiple plan types
- Creating custom dimensions
- Building attribute dimensions

### 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

## Agenda Continued...

### 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: Bells and Whistles of 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

## 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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