Oracle Hyperion Planning 11.1.2: Create & Manage Applications Ed 5

Introduction to Planning

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

Navigating Planning

- Interface: Overview
- Launching the Simplified Interface

Introduction to Applications and Dimensions

- Planning Application: Overview
- Application Framework
- Planning Dimensions
- Aggregate Storage Databases
- Data Block Creation Process
- Aggregation, Storage, and Calculation Options

Creating Planning Applications

- Application Creation Process
- Managing Data Sources
- Creating Simple Applications
- Creating Advanced Applications
- Refreshing Essbase Databases
- Adding Plan Types

Managing Dimensions

- Building Dimension Hierarchies
- Performance Settings and Data Type Evaluation Order
- Accessing Dimensions Information
- Managing Dimensions in the Simplified Interface
- Managing Dimensions in EPM Workspace
- Managing Dimensions in Smart View

Setting Up Aliases, Currencies, Years, and Periods

- Creating Aliases
- Adding Currencies

- Customizing Time Periods

Setting Up Scenarios and Versions

- Scenarios and Versions
- Creating Scenarios
- Creating Versions

Loading Metadata

- Metadata Load Options
- Creating Metadata Load Files
- Exporting Metadata
- Importing Metadata
- DRM Metadata Load Process
- Application Management

Creating User-Defined Elements

- Creating Member Formulas
- User-Defined Dimensions
- Attribute Dimensions
- Adding User-Defined Attributes
- Smart Lists: Overview
- Enabling the Simplified Interface
- Customizing Interface Appearance

Setting Up Exchange Rates

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

Loading and Calculating Data

- Data Load Options
- Managing Planning Data
- Exporting Data
- Importing Data
- FDMEE Data Load Process
- Data Calculations

Setting Up Planning Security

- Planning Security: Overview
- User and Group Provisioning in Shared Services
- Specifying Advanced Settings
- Assigning Access Permissions

Creating Forms

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

Enhancing Forms

- Creating Complex Forms
- Specifying Application Settings
- Specifying User Variables
- Setting Individual Display Options
- Creating Menus
- Creating Formula Rows and Columns
- Building Validation Rules

Entering Data in Planning

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

Annotating and Analyzing Data

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

Managing Business Rules

- Business Rules: Overview
- Determining Calculation Requirements
- Launching Calculation Manager and Rule Components
- Managing Views
- Creating Business Rules and Rule Sets
- Validating and Deploying Rules
- Assigning Business Rule Security
- Launching Business Rules

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

Creating Task Lists

- Task Lists: Overview
- Navigating Task Lists
- Task List Creation Process