

## Oracle Hyperion PSPB 11.1.2: Create & Manage Applications (11.1.2.3)

**Duration:** 4 Days

### What you will learn

This Oracle Hyperion PSPB 11.1.2: Create & Manage Applications training teaches you how to create and administer Public Sector Planning and Budgeting applications within Planning. Expert Oracle University instructors will teach you how to design and manage the budgeting process, which includes building planning unit hierarchies and assigning responsibilities and promotional paths for planning units.

### Learn To:

- Create Public Sector Planning and Budgeting applications.
- Maintain Public Sector Planning and Budgeting position and employee data.
- Load metadata and data into applications and set up security.
- Create and fill positions.
- Manage employee assignments to positions.
- Set up and maintain compensation budget defaults and maintain compensation data.
- Link compensation and line item budgets.
- Create and review funding requests.
- Set up and manage the approval process.
- Review budget books.
- Manage revision requests.
- Set up funding requests.

### Benefits to You

By enrolling in this course, you'll develop the knowledge and skills to create applications, add dimensions and members, import members and set up security. Through participating in hands-on exercises, you'll reinforce this learning that you can apply directly to your daily job.

Please note: this course is designed for customers using Oracle Hyperion Public Sector Planning and Budgeting 11.1.2.3. This course is not suitable for customers using Oracle Hyperion Planning Sector Planning and Budgeting 11.1.2.1 or earlier.

Oracle Hyperion Planning 11.1.2: Create & Manage Applications is a prerequisite so students begin this course already knowing how to build and modify a form.

A Live Virtual Class (LVC) is exclusively for registered students; unregistered individuals may not view an LVC at any time. Registered students must view the class from the country listed in the registration form. Unauthorized recording, copying, or transmission of LVC content may not be made.

### Audience

Administrator

## Related Training

### *Required Prerequisites*

Working knowledge of Planning administrator functions as well as familiarity with client-server concepts and basic knowledge of planning and budgeting

Oracle Hyperion Planning 11.1.2: Create & Manage Applications (11.1.2.4)

## Course Objectives

Create Public Sector Planning and Budgeting applications

Load metadata and data into applications

Set up security for users

groups

and members

Set up and maintain compensation budget defaults

Maintain position and employee data

Link compensation and line item budgets

Create and review funding requests

Set up and manage the approval process

Review budget books

Manage revision requests

## Course Topics

### **Introduction to Public Sector Planning and Budgeting**

- Planning Components and Architecture
- Integration with Other Systems
- Business Process Followed in Class
- Business Process for Applications with Decision Packages
- Business Scenario

### **Navigating EPM Workspace**

- Launching EPM Workspace
- Opening Applications
- Navigating Planning

### **Dimensions: Overview**

- Methods for Creating Applications
- Plan Types
- HCP Configuration Options
- Dimensions

### **Creating Planning Applications**

- Application Creation Process and Criteria
- Relational Databases for Planning and Configuring Data Sources
- Creating Applications in Planning Administration
- Essbase Databases
- Predefined Components and Setting Up User Variables
- Customizing Forms, Menus, and Task Lists
- Reporting Applications
- Setting Planning Properties

### **Managing Dimensions**

- Building Dimension Hierarchies
- Managing Alias Tables
- Adding Member Formulas

### **Setting Up Public Sector Planning and Budgeting Dimensions**

- Time Periods Overview
- Setting Up Scenarios and Versions
- Position, Employee and Job Code Dimension Overview
- Element and Budget Item Dimension Overview
- Setting Up the Request Dimension

### **Setting Up Other Dimensions**

- Setting Up the Entity Dimension
- Setting Up the Account Dimension
- Setting Up User-Defined Dimensions
- Setting Up Smart Lists

Setting Up UDAs

### **Loading Metadata and Data**

Metadata Load Options

Data Load Options

Loading Metadata into Applications

Loading Data into Applications

FDMEE Process Overview

Lifecycle Management and Migrating Applications and Artifacts

### **Setting Up Security**

Planning Security Overview

Provisioning Users and Groups

Assigning Access Permissions

Importing Access Permissions

Reporting and Access Permissions

### **Setting Up Compensation Budgets**

Compensation Budget Setup

Verifying the Public Sector Planning and Budgeting Application Setup

Data Load Verification

Setting Up Compensation Budget Defaults

Synchronizing Salary, and Other Compensation Properties

Calculating Compensation Budgets

Compensation Analysis Dashboards

### **Maintaining Compensation Defaults**

Compensation Defaults Overview

Maintaining Position Defaults

Maintaining Salary Grade Defaults

Maintaining Other Compensation Defaults

Maintaining Default Natural Accounts and Allocation Defaults

Setting Up Work Days and Pay Days

Mass Adjustments of Salaries and Other Compensation Data

Increments Overview

### **Maintaining Positions**

Managing Positions

Assigning Employees to Positions

Reviewing and Approving Positions

Approving Period-Level FTEs

### **Maintaining Employees**

Changing Employee Details

Viewing Employee Compensation Information

Changing Employee Status

Terminating Employees

Replacing To-Be-Hired Employees with Existing Employees

Transferring Employees

Maintaining Employee Compensation Details

### **Linking Compensation and Line Item Budgets**

- Budget Integration Process
- Allocating Compensation Expenses to GL Accounts
- Mapping Applications for Reporting
- Pushing Data to Reporting Applications
- Pushing Data with the PushData Utility

### **Setting Up the Approval Process**

- Creating Planning Unit Hierarchies
- Assigning Scenarios and Versions to Planning Units
- Reviewing the Promotional Path
- Synchronizing Planning Unit Hierarchies
- Exporting and Importing Planning Unit Hierarchies
- Updating the Promotional Path with Validation Rules

### **Reviewing Decision Packages and Budget Requests**

- Decision Packages and Budget Requests Overview
- Recurring and Nonrecurring Budget Requests
- Navigating Decision Packages
- Reviewing Decision Packages
- Reviewing Budget Requests

### **Setting Up Decision Packages and Budget Requests**

- Creating Decision Package Types
- Modifying Decision Package Types
- Copying Decision Package Types
- Integration Considerations with FDMEE
- Metadata Requirements for Decision Packages
- Requirements for Pushing Data to Reporting Applications

### **Managing Decision Packages and Budget Requests**

- Creating Decision Packages
- Creating Budget Requests for Decision Packages
- Attaching Supporting Documentation to Budget Requests
- Creating Budget Requests for Shared Decision Packages
- Modifying Budget Requests
- Adding Annotations to Line Item Budgets
- Copying Decision Packages Between Versions
- Deleting Decision Packages and Budget Requests

### **Managing the Approval Process**

- Approvals Considerations
- Approving and Rejecting Decision Packages
- Planning Unit Process States
- Managing the Review Cycle
- Viewing and Resolving Validation Errors

### **Reviewing Budget Books**

- Financial Reporting Overview
- Setting Financial Reporting General Preferences
- Previewing Reports
- Budget Books Process Flow and Book Editor
- Previewing Budget Books

## **Managing Revision Requests**

Revision Request Overview

Copying Data for the Baseline Budget

Creating and Populating Revisions

Editing Compensation Budget Revisions

Calculating Revisions

Revision Approvals