



Functional Course

Oracle Hyperion Planning for the Business User

Business users are team members that have limited data entry and reporting responsibilities. In this course, Business Users learn to carry out the typical tasks they need to perform budgeting and forecasting by working with a real-world case study. After a general review of Planning, users learn about navigation in Planning and how to manage data form using Smart View. Ad Hoc reporting using Smart View is reviewed and users are introduced to Financial Reporting for more standardized reporting.

Prerequisites:

- Basic Microsoft Windows Skills
- Knowledge of Spreadsheets

Planning Overview

- Planning Features
- Planning Applications

User Interface (UI)

- Simplified User Interface Overview
- Launch PBCS
- Open PBCS Application
- Navigate in PBCS

Data Forms

- Data Forms and Folders Overview
- Simple vs Composite Forms
- Data Entry Tasks
- Calculate Data
- Add Annotations to Plan Data
- Ad Hoc Actions

Submit Data

- Process Management Overview
- Planning Unit Annotations
- Monitor Planning Units

Smart View

- Smart View Overview
- Manage Task List in Excel
- Work with Data Forms in Smart View
- Spread Data by Using Grid Spread
- Enter Supporting Detail in Smart View
- Data Calculations in Smart View
- Manage Planning Process
- Copy Process
- Monitor Job Statuses
- Manage Planning Offline in Smart View
- Create Ad Hoc Report
- Set Rows and Columns
- Add Dimensions and Pivoting
- Update the Point-of-View
- Zoom-In and Zoom-out
- Create Cascading Reports
- Smart View Functions

Financial Reporting

- Financial Reporting Overview
- Financial Reporting Data Sources
- Preferences
- Preview Reports
- Print Reports and Snapshots