



# Functional Course

## Oracle Hyperion Planning Administration

The Oracle Hyperion Planning Administrator training is designed to guide students through the typical steps to build and administer on-premise Planning applications. Students develop and deploy Planning as an interactive case study over the duration of the course. After a general overview of Planning and Essbase, the course focuses on creating applications and currencies, followed by sections on Forms and Task Lists. Smart View is covered extensively, followed by maintaining security, the approval process and lifecycle management. Students learn about Financial reporting, creating basic reports, books and batches.

## Prerequisites:

- Basic Microsoft Windows Skills
- Knowledge of Spreadsheets

## Planning Overview

- Oracle EPM Systems
- Planning Features and Applications
- Planning and Essbase

## Essbase Overview

- Workspace Overview
- Open Planning Applications

## Currencies

- Manage Exchange Rates
- Create Exchange Rate Tables
- Edit and Delete Exchange Rate Tables
- Manage Currency Conversion
- Currency Conversion Calc Scripts

## Task Lists

- Task List Overview
- Manage Task Lists
- Create Task Lists

## Data Forms

- Forms and Folders Overview
- Create Simple and Composite Forms
- Forms Access
- Create Menus
- Create Formulas Rows and Columns
- Validation Rules
- Form Properties
- Data Entry Tasks
- Calculate Data in Forms

## Security

- Security Overview
- Shared Services
- Application Security
- Import Security Overview
- Verify Security through Reports

## Manage the Approval Process

- Approval Process Overview
- Planning Unit Hierarchies
- Planning Unit Process States
- Manage the Review Cycle

## Smart View

- Smart View Overview
- Smart View Options
- Connect to Data Sources
- Manage Task List and Excel
- Work with Forms in Smart View
- Data Calculation in Smart View
- Work Offline
- Create Ad Hoc Reports
- Planning Admin Extension
- Smart Slices
- Cell History
- Master Composite Form

## Lifecycle Management (LCM)

- Lifecycle Management Overview
- Move Artifacts between Applications
- Move Artifacts to File
- Back Up Application Artifacts Using LCM

## Financial Reporting

- Financial Reporting Overview
- Financial Reporting Data Sources
- Set Preferences
- Preview Reports
- Print Reports and Snapshots
- Working with Reporting Web Studio
- Report Creation Overview
- Create Reports
- Create Grids

## Financial Reporting (Cont'd)

- Report Objects
- Text Functions
- Auto Calculations
- Apply Mathematical Functions
- Select Members for Row and Columns
- Alias Tables
- Setting the Point of View
- Books Overview
- Create Books
- Batches Overview
- Create Batches