# Hyperion Training Course Content

**Overview of Hyperion Planning**
· Describe the main features of Hyperion Planning
· Describe the product architecture of Hyperion Planning
· Access Planning through Workspace

**Creating a Planning Application**
· Set up data source
· Describe and use the Calendar
· Described and use Plan Types

**Modeling in Planning**
· Describe dimensions
· Describe members and member properties
· Create scenario dimensions
· Create version dimensions
· Set up entity dimensions
· Set up account dimensions
· Describe dense and sparse dimensions
· Set up currencies and exchange rates
· Set up user defined dimensions and attribute dimensions.
· Data Loading
· Describe different dimension build alternatives
· Describe different data load alternatives
· Share Planning data within an application and outside an application

**EPMA**
· Describe EPM Architect
· Create dimension members in EPMA

**Forms Designer**
· Create and edit data forms and folders
· Manage user variables
· Create Custom Menus

· Create Smart Lists

## Planning End User Functions
· Perform Planning End User features over the web
· Use End User features in Smart View
· Use work flow process management to copy data between application versions

## Calculations, Business Rules, & Calculation Manager
· Describe Business Rules and capabilities
· Create and manage business rules
· Describe and use member formulas and calc scripts
· Use Calculation Manager

## Planning Security and Administration
· Describe security in Planning
· Describe user provisioning in Shared Services
· Provision users and groups for Planning
· Generate provisioning reports
· Assign access rights in Dimension Editor
· Import access rights
· Create security filters
· Perform general application administration tasks

## Other
· Describe financial reporting basics
· Described and use Workforce Planning
· Describe and use Capital Expense Planning

## Oracle Hyperion Essbase training in Chennai

## Overview of Oracle Essbase
· Describe multidimensional analysis
· Describe Oracle Essbase

## Smart View
· Describe Smart View
· Retrieve Data using Smart View

## Essbase Application Creation Fundamentals
· Perform manual outline creation

· Build dimensions from sources
· Perform initial data loads
· Use calculations and aggregations
· Assign security

## Aggregate Storage Databases
· Describe when to deploy aggregate storage, block storage, or a combined solution
· Convert block storage to aggregate storage
· Create, load, and pre-aggregate aggregate storage databases
· Employ database partitioning in combined block/aggregate storage solutions
· Write member formulas using MDX
· Perform management tasks for aggregate storage databases
· Partition block and aggregate storage databases
· Describe and implement aggregate storage design best practices
· Describe multiple hierarchies and the use of Shared Members

## Block Storage Databases
· Describe block storage calculations
· Describe the default database calculation order
· Describe data blocks
Describe how data blocks are indexed
· Interpret database statistics
· Describe when data blocks are created
· Describe the block storage database calculation process
· Tune and optimize block storage databases
· Describe and implement block storage design best practices
· Describe BSO load techniques working with Calculation Scripts
· Identify correct and incorrect calculation script syntax
Describe calculation script behavior for various ASO data structures
· Describe calculation script behavior for various BSO data structures
· Design calculation scripts to meet specified requirements

## Essbase Administration
· Describe the file Essbase.cfg and its settings.
· Describe the file Essbase.sec and its settings.
· Identify and interpret Essbase log files
· Manage Essbase security via Administration Services
· Manage Essbase security via Shared Services
· Back up and recover Block Storage Databases
· Automate database processes with MaxL

· Describe and use substitution variables and location aliases

## Essbase Studio
· Describe functionality of Essbase studio
· Add and delete joins between tables
· Create drill through reports

## Oracle Hyperion Financial Management training in Chennai

## Overview of Hyperion Financial Management
· Explain financial reporting concepts
· Describe HFM structure and design concepts a high level

## Creating Applications -- Profile and Metadata -- Classic
· Create an application profile and application
· Create the application profile
· Manage, Load and Extract metadata
· Build a Chart of Accounts
· Describe and specify values for commonly used properties
· Describe and specify values for commonly used application settings
· Describe and implement dimensionality

## EPM Architect
· Explain advantages and disadvantages of using EPMA versus "classic" HFM
· Describe EPMA components
· Define and maintain dimensions using EPMA
· Create and maintain application using EPMA
· Deploy applications
· Use data synchronization to move data between EPMA-based applications   Data Loading and Analysis
· Load data into an application with native format files
· Load data into an application using alternative approaches
· Copy and clear data from HFM application

## HFM Rules & Calculation Manager
· Create and maintain calculations in HFM
· Define and invoke subroutines
· Define and use variables
· Define and invoke functions

**Creating and Building Lists**
· Create member lists.
· Use member lists.
· Load and Extract member lists.

**Shared Services**
· Explain Security and Lifecycle Management
· Describe security structure (i.e. users/groups, roles, and classes) in HFM
· Provision users and groups
· Create and assign classes
· Manage users, groups and classes in a classic HFM application via extract/load
· Use Lifecycle Management Services to move artifacts from one application to another

**HFM Administration**
· Copy classic HFM applications
· Perform application management tasks using the HFM Administration menu
· Implement process control
· Perform HFM tuning and optimization

**HFM End User Basics**
· Use task lists
· Use data grids
· Use data entry forms
· Use Journals.

**HFM End User Advance Functions**
· Implement intercompany reporting in HFM

**Financial Reporting Studio**
· Explain and use the basic features of Financial Reporting Studio
· Explain and use relationship functions in report creation
· Use end user report functionality and features

**Supporting Tools of FM**
· Financial Data Quality Management
· Other - Extended Analytics

**Planning Overview**
· Describe the main features of Hyperion System 9 Planning

· Describe the product architecture of Hyperion System 9 Planning
· Describe the relationship between Hyperion System 9 Planning and Hyperion System 9 BI+ Analytic Services

## Navigating Workspace
· Describe the user interface components
· Access Planning through Workspace
· Navigate the Planning Web client

## Creating Dimensions Overview
· Identify required dimensions
· Identify user-defined dimensions
· Describe dense and sparse dimensions
· Describe data block creation
· Set up aggregation, data storage, and calculation options

## Managing Dimensions with BPM Architect
· Describe BPM Architect
· Navigate BPM Architect
· Manage Dimensions
· Create Dimension Members
· Edit Member Properties
· [Data Types (Dates, Text)]
· Create Property Associations
· Add and modify currencies

## Setting Up the Period, Scenario, and Version Dimensions
· Describe Planning time periods
· Customize time periods
· Create scenarios
· Create versions

## Setting up the Entity Dimension
· Add entity members to the Entity dimension
· Modify entity members in the Entity dimension
· Delete entity members in the Entity dimension
· Setting up the Account Dimension
· Describe account types and consolidation order
· Create account hierarchies

## Creating User-Defined Elements

· Create Alias Tables
· Create user-defined dimensions
· Create attributes and assign attribute values
· Describe member formulas
· Add member formulas in Analytic Administration Services
· Create Smart Lists

## Loading Metadata from a File

· Format metadata load files
· Map dimensions and dimension properties
· Create Profiles
· Load and extract Metadata

## Creating Application Views

· Create Application Views
· Add dimensions to Application Views
· Configure application properties
· Remove members

## Deploying Applications

· Validate application views
· Compare application views
· Deploy applications
· Activate and register Planning using the Configuration Utility
· Review Planning application in Analytic Administration Services (???)
· Test Application Deployments
· Redeploy Applications

## Setting up Exchange Rates

· Create exchange rate tables
· Enter exchange rate values
· Generate currency conversion calculation scripts

## Loading and Calculating Data Overview

· Describe the requirements for data load files
· Describe data load rules
· Describe how data is calculated within dimensions

**Loading Data**
· Load data using the staging area
· Create load rules for data files for Analytic Services
· Load data using Analytic Administration Services
· Modify performance settings

**Provisioning Users and Groups**
· Describe security in Planning
· Describe user provisioning in Shared Services
· Provision users and groups for Planning
· Generate provisioning reports

**Setting Up Access Rights to Planning Applications**
· Assign access rights in Dimension Editor
· Import access rights
· Create security filters

**Creating Data Forms and Folders**
· Create data forms and folders
· Print data form definition reports
· Assign access rights to data forms
· Associate Custom Menus to Data Forms
· Export and import data forms

**Customizing Data Forms**
· Create Custom Menus
· Specify application default settings
· Manage user variables
· Set up user preferences

**Entering Data**
· Enter and submit data in data forms
· Adjust and annotate plan data
· Calculate data in data forms
· Enter data by using Smart Lists
· Navigate data forms by using Custom Menus

**Entering Data in Smart View**
· Describe Smart View
· Enter, adjust, calculate, and analyze data with Smart View

· Modify planning data offline

**Creating Business Rules**
· Describe Business Rules and capabilities
· Navigate Administration Console to design business rules
· Create business rules
· Launch business rules from Planning
· Print business rules

**Building Run-Time Prompts for Business Rules**
· Describe Runtime Prompts
· Create Runtime Prompts

**Adding Formulas to Business Rules**
· Identify the four formulas included with Business Rules
· Build formulas for business rules
· Manage Business Rules

**Planning Process Management**
· Explain the planning process
· Describe planning units
· Manage the review cycle for planning units
· Copy data between versions
· Copy data
· Delete textual information

**Creating Task Lists**
· Define task list capabilities
· Navigate task lists in Basic and Advanced modes
· Create task lists
· Assign Access to task lists
· Validate task lists

**Financial Reporting Overview**
· Describe Financial Reporting
· Describe Data Sources
· Navigate Financial Reporting Studio
· Log on to Financial Reporting Studio
· Identify portions of the Financial Reporting Studio workspace
· Open, Preview, and print reports

· Identify report components
· Change the user POV

**Navigating Reports in Workspace**
· Identify interface elements in Workspace
· Set preferences
· Set the user POV
· Limit user POV user selections
· Integrate reports into Microsoft Office applications

**Financial Reporting Overview**
· Describe the components and general architecture of System 9
· Describe Financial Reporting functionality and architecture
· Identify data source dimensions and members
· Start the Analytic Services server

**Navigating Reports in Workspace**
· Identify interface elements in Workspace
· Set preferences
· Preview and print reports
· Set the user Point of View (POV)
· Limit the user POV member selections
· Integrate reports into Microsoft Office applications

**Navigating Reports in Financial Reporting Studio**
· Log on to Financial Reporting Studio
· Identify portions of the Financial Reporting Studio workspace
· Open, preview, and print reports
· Identify report components
· Change the user POV

**Creating Basic Reports**
· Create reports and grids
· Select members for rows and columns
· Set the POV
· Modify reports by adding rows and columns
· Save reports

**Applying Advanced Member Selections**
· Select members by using lists

· Select members by using functions
· Select multiple members by using expressions
· Select members for the page axis
· Set data query optimization options

**Customizing Grids**
· Select multiple database connections in a grid
· Attach documents to reports
· Display planning supporting detail
· Create reports with expansions
· Create reports with related content

**Formatting Cells and Grids**
· Format cells within a grid
· Format grids
· Sort a range of rows or columns
· Suppress data in a grid
· Apply conditional formatting in a grid
· Specify the page setup

**Creating Report Objects**
· Create text boxes in a report
· Add images to a re port
· Save and link objects
· Insert saved objects into a report
· Add headers and footers to a report
· Create row and column templates

**Creating Charts**
· Create bar, line, pie, and combo charts
· Format charts

**Adding Text Functions**
· Describe the purpose of text functions
· Add text functions to reports
· Describe common text functions

**Adding Auto Calculations and Mathematical Functions**
· Describe the purpose of auto calculations and mathematical functions
· Add auto calculations to data rows and columns

· Apply mathematical functions and properties to perform calculations
· Describe common mathematical functions

## Creating Books
· Preview books in PDF and HTML modes
· Change the book POV
· Create books containing multiple reports
· Set member selections for reports in a book

## Creating Batches
· Create and schedule batches to automatically generate reports
· Schedule batch bursting options
· Retrieve exported batch output from the Scheduler Server

## Managing Items in the Repository
· Create e-mail links
· Create folders
· Rename, move, and delete items in the repository
· Import and export items
· Manage database connections
· Set permissions for repository items

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