Applied Planning with Essbase Essentials

Duration – 5 days

What you will learn

The 5-day Applied Planning with Essbase Essentials course is designed to take students through the step-by-step process of developing and implementing a Hyperion Planning application. We start with a general overview of Essbase and Planning terms and the architecture of all the Planning components, and how they are commonly used. The first half of the course is centred in building a foundation of knowledge on Essbase, the underlying technology of Planning. We go through multi-dimensional modelling, using load rules to load data, architecture of Block Storage cubes, and calculation fundamentals for consolidations.

Once the foundation in Essbase has been established, we walk through all the steps to create a planning application, how to modify existing dimensions and build out the hierarchies using the Planning web client. We then show developers how to build out dimensions using Classic Planning and by using EPMa. We cover the mechanics and cover strategies for automating the build process such as interface tables. We finish up by reviewing data loads using Load Rules to load the Planning database.

Next, the course focuses on tasks end-users must perform during the planning cycle. Students create and modify forms, enter data, add annotations. Running business rules and managing task lists is also covered. We review how to use the forms in the Smart View client and finish up the end-user perspective by going through Workflow Management and the process of submitting a plan for review. The final section of the course covers Security and other administration topics such as automation and deployment.

Upon completion of this course, students will be able to create Planning applications, build out dimensions, load data, set up and maintain security, create data forms, business rules and calculations, manage the workflow process and analyse planning results.

Topics Covered

- Overview of Essbase & Planning
- Application Design Overview
- Smart View for Essbase
- Load Rules for Loading Data
- Essbase Administration Services (EAS)
- Architecture
- Calculation Fundamentals

- Overview of Planning
- Setting Up an Application
- EPMa - Enterprise Performance Management Architect
- Building Forms and Business Rules
- Smart View for Planning
- Work Flow Management
- Security and Administration

Who should attend?

- Hyperion Planning administrators, Hyperion Planning project team members, Hyperion Planning super users

Prerequisites

- A basic understanding of Hyperion Planning and Excel is preferred

M-Power Solutions Pty Ltd
ABN 70 104 312 209

Perth Office
Tel: 08 9481 0013

Melbourne Office
Tel: 03 8610 6349

Brisbane Office
Tel: 07 3103 1369

info@mpowersolutions.com.au
www.mpowersolutions.com.au