

## Hyperion Planning Power User

Duration – 2 days

### What you will learn

The two-day Planning Power-User course is designed to take students through all the fundamentals of working in a Hyperion Planning system. Although this course description describes the typical flow of the course, elements of the Applied Planning Developer course can also be added to fit the needs of the class. We begin with the fundamentals of Essbase, the underlying engine of Hyperion Planning. We then show students all the features and tricks for extending the power of Excel into Essbase and Planning reporting using the Essbase Add-In and Smart View. Then we cover the fundamentals of Planning including terminology and architecture, forms business rules and workflow management. Here is the course description in detail:

### Topics Covered

#### Overview of Planning

We un-bundle all the components within a Planning implementation and cover the architecture of the product suite. This section also familiarises students with the terminology used in Planning and multidimensional design. In doing this review of the concepts we introduce you to all the tools used in Planning development by walking students through an extensive demonstration. Students will understand how all components fit together: Planning, Essbase, EPMA, Classic Planning, Forms, HBR, Calc Manager, Workspace, and Financial Reports.

#### Basics of Modelling Database Dimensions

Students learn about modelling outline design and mechanics. We go over concepts such as time series, shared member alternate rollups, attribute alternatives, storage properties, formulas and many other fundamental design considerations.

#### Smart View for Ad Hoc Analysis

We start building ad-hoc reports and show you the drilling behaviours and the member selection options. All the essential mechanics of connecting, retrieving, drilling, and pivoting reports are covered. We then cover advanced reporting options and the Query Designer.

#### Building Forms

After the basics of design have been covered, we look at the end-user perspective - forms. The focus is on designing forms based on different requirements. We cover form design alternatives, the mechanics of building out forms, customising forms and best practices for deploying forms; and advanced topics such as building asymmetric forms and building dynamic forms that allow users to add rows on the fly.

#### Smart View Client

We walk through all the steps for accessing forms through the Essbase Smart View client. We go through taking forms off line, submitting data, and all the equivalent functionality that the Forms interface provides.

## **Business Rules**

We show you how to add business rules to a form and manage the options for how they will interact with Planners. We then cover the basics of calculations including understanding calculation order, the effects of calculating across dense and sparse dimensions, and the most important settings. Students leave with a basic understanding of calculation capabilities within Essbase.

## **Workflow Management & Other Bells and Whistles**

This section covers how to move a plan through the review and approval process. We go through typical ways we see companies take advantage of this feature in Planning to manage the budgeting cycle and how to use task lists to help in the process. In addition, we look at some of the other features of planning including task lists, menu options, and more.

## **Who should attend?**

- Hyperion Planning users/super users & administrators, Business Analysts

## **Prerequisites**

- Basic knowledge of building business models in Excel or similar.
- Basic Microsoft Office skills

## **Follow on Training**

- Applied Planning and Essbase Essentials – 5 days