Planning Content

DAY1	
ESSBASE CONCEPTS	Multidimensional Analysis
	Difference between OLTP and OLAP
	Star schema Model
	Types of Dimenions in Essbase
	Order of the outline
	Dense & Sparse Concepts
	Potential number of blocks and block size
	Consolidation Properties
	Data Storage Properties
	Different Data Types
	Enabling Dynamic Time Series
	Different Account Types
EPBCS Overview	Introducing EPBCS Frameworks
	Financials
	Workforce
	Capital
	Launching EPBCS
	Opening Applications
	Navigating in Planning

DAY 2	
Configuring the Financials	Financials Features
	Revenue/Gross Margin
	Expense
	Income Statement
	Balance Sheet
	Cash Flow
	Rolling Forecast
	Weekly Planning
	Financials Dimensions
	Configuring Financials
	Post Configuration Tasks
	Importing Metadata and Data
	Financials Rules
	Using the Financials Framework
	Practical Assignment for Enabling Financials
Workforce Framework	Workforce Features
	Granularity
	Workforce Dimensions
	Configuring Workforce
	Post Configuration Tasks
	Importing Metadata and Data
	Managing Existing Employees
	Assumptions and Defaults
	Practical Assignment for Enabling Workforce

Configuring Capex Module	Configuring Capex Module
	Post Configuration Tasks
	Importing Metadata and Data
	Pratical Assignment for Enabling Capex
Setting Up Alias, Period, Year, Scenario, Version, and Currency Dimensions	Creating Aliases
	Customizing Time Periods
	Creating Scenarios
	Associating start year and end year to scenario dimension
	Defining Versions
	Top down/bottom up version types
	Adding Currencies
	Practical Assignment to add Version, Scenario members

DAY 3	
Setting Up Entity and Account Dimensions	Entities Overview
	Assocating Currency code to the entity dimension
	Adding and Modifying Entities
	Accounts Overview
	Account Types
	Saved Assumptions
	Data Types and Exchange Rates
	Creating Account Hierarchies
	Consolidation Order
Creating User-Defined Elements	User-Defined Dimensions
	Adding Attributes
	Difference between UDA &Attribute
	Creating Member Formulas
	Adding User-Defined Attributes
	Working with Smart Lists

Importing & Exporting Metadata	Import & Export Metadata
	Metadata management using Smart view
	Applying performance settings
Practical Assignment on the topics that are covered on Day3	

DAY4	
Loading and Calculating Data	· Data Load Options
	· Introduction to Data Management
Preparing Data Management Integrations	· Setting Up Source Systems
	· Registering Target Applications
Setting Up Import Formats for File Systems	· Import Formats Overview
	· Creating Import Formats
	· Defining Import Format Mappings
	· Skipping Lines in Import Files
	· Adding Import Expressions
Completing the Integration Setup	· Locations Overview
	· Adding Locations
	· Setting Location Details and Integration Options
	· Periods and Categories Overview
	· Defining Period Mappings
	· Defining Category Mappings
	· Point of View Overview

Setting Up Data Load Mappings	' Data Load Mappings Overview
	' Defining Data Load Mappings
	' Explicit Mappings
	' Mapping Rules
	' Importing Mappings
Defining and Executing Data Load Rules	' Data Load Rules Overview
	' Defining Data Load Rules for File-Based Data Loads
	' Running Data Rules and Checking Rule Status
	' Viewing Imported Data
	' Scheduling Data Load Rules
Processing Data in Data Load Workbench	' Processing Data Overview
	' Importing Source Data
	' Validating Dimension Mappings
	' Managing Data
	' Loading Data to Target Applications
Practical Assignment on the topics that are covered on Day4	

DAY 5	
SmartView	Introduction to Smartview-Excel addins
	Connect to planning through smart view
	Planning using smart view
	Adhoc analysis using smart view
	Drilldown & drill through using smart view features
	Practical Assignment on the topics that are covered on Day5
EPM Automate	Introduction to EPM Automate.
	Checking the jobs
	Scheduling the jobs.
Practical Assignment on the topics that are covered on Day5	

DAY 6	
Creating Data Forms	· Data Forms Overview
	· Creating Simple Data Forms
Customizing Data Forms	· Data Form Customization
	· Exporting and Importing Data Forms
	· Creating Menus
	· Creating Formula Rows and COlumns
	· Building Validation Rules
	· etting Up User Preferences

Entering Data in Planning	· Navigating Data Forms
	· Submitting Data in Data Forms
	· Spreading Data
	· Adjusting Plan Data
	· Adding Annotations to Plan Data
	· Performing Ad Hoc Actions on Data Forms
	· Calculating Data in Data Forms
Working with Dashboards	• Create Dashboards
	• Building a dashboard
Practical Assignment on the topics that are covered on Day6	

DAY 7	
Working With Valid Intersections	Valid Intersections
	Smart Push
Creating and Managing Business Rules	· Business Rules Overview
	· Assigning Business Rule Security
	· Launching Calculation Manager

DAY 8	
Business Rules	· Setting Up Business Rules
	Business rule to convert currencies
	Commanly used house keeping commands
	Understanding the RTP
	Understanding block creation issues and how to resolve them
	· Validating and Deploying Business Rules
	· Launching Business Rules
	· Creating, Validating, and Deploying Rulesets
	· Creating Business Rule Variables and Formulas
Practical Assignment on the topics that are covered on Day8	

DAY 9	
Setting Up the Approval Process	· Approval Process Overview
	· Creating Planning Unit Hierarchies
	· Setting the Potential Promotional Path
	· Assigning Scenario and Version Combinations
	Synchronizing Planning Unit Hierarchies
	· Exporting and Importing Planning Unit Hierarchies
	· Viewing and Resolving Validation Errors
Creating Task Lists	· Task Lists Overview
	· Navigating Task Lists in Basic Mode
	· Navigating Task Lists in Advanced Mode
	· Task List Creation Process
	· Printing Task List Reports
Practical Assignment on the topics that are covered on Day9	

DAY 10		
Provisioning Users and Groups for Planning	' Planning Security Overview	
	' User and Group Provisioning Overview	
	' Provisioning Users and Groups	
	' Generating Provisioning Reports	
Setting Up Access Permissions to Planning Applications	' Assigning Access Permissions	
	' Importing Access Permissions	
	' Creating Security Filters	
Practical Assignment on the topics that are covered on Day10		