Oracle Hyperion EPM 11.1.2 Installation & Configuration Ed 1

Hyperion & Essbase

DURATION	MODULES	COURSE CODE
4 Days	**21 Lectures**	**—**

Course Overview

This course REPLACES Oracle Hyperion Planning 11.1.2 Installation & Configuration and Oracle Hyperion Financial Mgmt 11.1.2 Installation & Configuration.

What You Will Learn

Introduction to Planning

- Objectives
- Oracle Hyperion Planning
- Planning Components
- Additional Planning Modules
- Additional Planning-Based Products
- Product Integration
- Planning Architecture
- Client Tier
- Middle Tier
- Data Tier
- External Services
- Oracle Exalytics: Overview
- Planning on Oracle Exalytics: Benefits
- Planning on Oracle Exalytics: Optimized Engine
- Planning Business Process
- Step 1: Entering Data
- Step 2: Adjusting Data
- Step 3: Calculating Data
- Step 4: Annotating Data
- Step 5: Reviewing and Approving Data
- Step 6: Running and Publishing Financial Reports
- Summary

- Quiz

Introduction to Financial Management

- Objectives
- About Financial Management
- Additional Financial Management Components
- Management of the Extended Close Process
- Product Integration
- Financial Management Architecture
- Client Tier
- Middle Tier
- Data Tier
- External Services
- Financial Management Business Process
- Step 1: Entering Data
- Step 2: Calculating Data
- Step 3: Adjusting Data
- Step 4: Translating and Consolidating Data
- Step 5: Reviewing and Approving Data
- Step 6: Running and Publishing Financial Reports
- Summary
- Quiz

Preparing the Installation Environment

- Objectives
- Installation: Overview
- Installation Checklist
- Preparing Third-Party Software
- Preparing the Work Area
- Planning the Deployment Architecture
- Sample Deployment Scenarios
- Deployment for 100 to 500 Users
- Deployment for 1000 Users
- Virtual Deployments
- Preparing Server Disk Space and RAM
- Preparing Client Disk Space and RAM
- Preparing the Security Infrastructure
- Configuring SSL
- Full SSL Deployment
- SSL Terminating at the Web Server
- SSL Deployment with an Off-Loader
- Two-Way SSL Deployment
- Preparing Web Application Servers
- Preparing Web Servers
- Preparing Web Browsers

- Default Ports
- ABC Corporation: Overview
- Summary
- Quiz
- Practice 3: Overview

Preparing the Software Requirements

- Objectives
- Selecting a Supported Platform
- Selecting a Supported Database
- Classroom Database Definition
- Accessing Oracle Software and Documentation
- Preparing the Required Software
- Release Compatibility
- EPM System Software Dependencies
- Preparing Third-Party Software
- Summary
- Quiz
- Practice 4: Overview

Installing Product Components

- Objectives
- EPM System Installer: Overview
- Installing EPM System Products
- Reviewing System Prerequisites
- Specifying the Middleware Home Directory
- Selecting an Installation Type
- Selecting the Products to Install
- Confirming Your Selections
- Reviewing the Summary Report
- Performing Silent Installations
- Installing Foundation Services
- Installing Essbase
- Installing Planning and Offline Planning
- Installing Planning Modules
- Installing Financial Management
- Installing Financial Close Management, Tax Management, Disclosure Management, and Strategic Finance
- Installing FDMEE
- Installing Reporting and Analysis Framework
- Installing Reporting and Analysis
- Reporting and Analysis Architecture
- Installing Smart View
- Summary
- Quiz
- Practice 5: Overview

Understanding Configurations

- Objectives
- Launching EPM System Configurator
- Configuration Tasks
- Configuration Sequence
- Configuring Products in a Clustered Environment
- Performing Silent Configurations
- Summary
- Quiz

Configuring Shared Services

- Objectives
- Running EPM System Configurator for Shared Services
- Configuring the EPM Oracle Instance
- Configuring the Shared Services and Registry Database Connection
- Configuration Selection
- Configuring EPM System Common Settings
- Deploying to the Application Server
- Setting the Shared Services Admin User Password
- Launching the Shared Services Console
- Configuring Single Sign-On
- Configuring User Directories
- Configuring MSAD or LDAP User Directories
- Configuring Users
- Configuring Groups
- Provisioning Users and Groups
- Generating Provisioning Reports
- Creating Application Groups
- Summary
- Quiz
- Practice 7: Overview

Configuring Performance Management Architect and Calculation Manager

- Objectives
- Configuring Performance Management Architect
- Configuring the EPM Oracle Instance
- Configuration Selection
- Configuring the Performance Management Architect Database
- Deploying Performance Management Architect to the Application Server
- Creating an Interface Data Source
- Configuring Calculation Manager
- Configuring the EPM Oracle Instance
- Configuration Selection
- Configuring the Calculation Manager Database

- Deploying Calculation Manager to the Application Server
- Summary
- Quiz
- Practice 8: Overview

Configuring Essbase

- Objectives
- Configuring Essbase Components
- Configuring the EPM Oracle Instance
- Configuration Selection
- Configuring the Essbase Studio and Administration Services Database
- Deploying Administration Services and Provider Services to the Application Server
- Specifying the Essbase Studio Data File Location
- Configuring the Essbase Server
- Essbase Authentication
- Adding Essbase Servers
- Summary
- Quiz
- Practice 9: Overview

Configuring Planning

- Objectives
- About Planning Configuration
- Configuring Planning Modules
- Configuring the EPM Oracle Instance
- Configuration Selection
- Configuring the Planning System Database
- Deploying Planning to the Application Server
- Configuring the RMI Server
- Installing and Configuring Offline Planning
- Installing Reporting and Analysis
- Installing Smart View
- Summary
- Quiz
- Practice 10: Overview

Configuring Financial Management

- Objectives
- Configuring Financial Management
- Configuring the EPM Oracle Instance
- Configuration Selection
- Configuring the Financial Management Database
- Deploying Planning to the Application Server
- Configuring the Financial Management Application Server

- Configuring Financial Management Servers and Clusters
- Registering Financial Management Servers and Clusters
- Summary
- Quiz

Configuring Financial Reporting and Workspace

- Objectives
- Configuring Financial Reporting and Framework Services
- Configuring the EPM Oracle Instance
- Configuration Selection
- Configuring the Reporting and Analysis Database
- Configuring Reporting and Analysis Framework Services
- Deploying Reporting and Analysis to the Application Server
- Configuring Reporting and Analysis Framework Agent Ports
- Configuring RMI Ports
- Configuring the Workspace Web Server
- Configuration Selection
- Configuring Web Server Type and Port
- Installing Financial Reporting Studio Through Workspace
- Installing Financial Reporting Studio by Using FinancialReportingStudio.exe
- Integrating Products with Workspace
- Summary
- Quiz

Troubleshooting the EPM System Installation

- Objectives
- Troubleshooting Basics
- Reviewing Documentation
- Checking Release Compatibility
- Identifying Port Conflicts
- Starting and Stopping EPM Services
- Validating the Installation and Configuration
- Viewing and Analyzing Log Files
- Troubleshooting Product-Specific Issues
- Accessing Technical Support Resources
- Summary
- Quiz

Accessing Planning

- Objectives
- Verifying the Installation
- Starting Services
- Logging On to Workspace
- Creating and Deploying Applications

- Managing Data Sources
- Creating Applications in Performance Management Architect
- Creating Applications in Classic Application Administration
- Creating Applications in Simplified Interface
- Creating Essbase Databases
- Refreshing Essbase Databases in Simplified Interface
- Provisioning Users and Groups
- Installing and Configuring Smart View
- Accessing Planning Applications
- Accessing Planning Applications in Workspace
- Accessing Planning Applications in Smart View
- Taking Forms Offline
- Accessing Planning Outlines in Administration Services
- Testing Financial Reporting Connectivity
- Managing Financial Reporting Database Connections
- Summary
- Quiz

Switching Application Modes

- Objectives
- Application Upgrade Wizard
- Transforming Classic Applications to Performance Management Architect Applications
- Step 1: Reviewing the Welcome Page
- Step 2: Reviewing the Application Summary
- Step 3: Selecting Applications
- Step 4: Reviewing the Transformation Summary
- Step 5: Viewing Job Console
- Step 6: Viewing Application Library
- Step 7: Accessing the Application
- Switching Performance Management Architect Applications to Classic Applications
- Summary
- Quiz

Verifying the Financial Management Installation

- Objectives
- Testing Process
- Starting Required Services
- Logging On to Workspace
- Creating Import Profiles
- Importing Dimensions
- Creating Applications
- Selecting Dimensions
- Configuring the Application Settings
- Deploying Applications to Application Servers
- Validating Applications

- Deploying Applications
- Viewing Job Status
- Loading Data
- Summary
- Quiz

Reporting Tools

- Objectives
- Installing Reporting Studio
- Creating a Financial Reporting Report
- Testing Related Content
- Summary
- Quiz

Moving Classic Applications to Performance Management Architect

- Objectives
- Application Transformation: Overview
- Accessing Application Upgrade Wizard in Workspace
- Step 1: Reviewing the Welcome Page
- Step 2: Reviewing the Application Summary
- Step 3: Selecting Applications
- Step 4: Reviewing the Transformation Summary
- Step 5: Viewing Job Console
- Step 6: Viewing Application Library
- Step 7: Accessing the Application
- Summary
- Quiz

Performing System Maintenance

- Objectives
- Backup and Restore: Overview
- Backing Up Databases and File Systems
- Backing Up Windows Registry Settings
- Backing Up and Restoring EPM System Products
- Managing EPM System Log Files
- Summary
- Quiz

Upgrading EPM System Products

- Objectives
- Upgrade: Overview
- Supported Upgrade Paths
- Upgrade Checklist
- Performing Upgrade Installation Prerequisites

- Preparing Data for Upgrade
- Uninstalling Earlier Releases of EPM System Products
- Installing EPM System Products for an Upgrade
- Configuring EPM System Products for an Upgrade
- Performing Additional Product-Specific Upgrade Tasks
- Upgrading from Multiple Releases
- Summary
- Quiz

Performing Migrations with Lifecycle Management

- Objectives
- Lifecycle Management: Overview
- Migrating on Connected and Disconnected Environments
- Lifecycle Management Requirements
- Lifecycle Management Security
- Artifacts: Overview
- Planning Artifacts
- Financial Management Artifacts
- Performance Management Architect Artifacts
- Essbase Artifacts
- Calculation Manager Artifacts
- Foundation Services Artifacts
- Reporting and Analysis Artifacts
- Viewing and Searching for Artifacts
- Application and Artifact Migration Process
- Migration Scenario
- Migration Guidelines
- Migrating Application Artifacts to a File System
- Migrating Applications from the File System to a Destination Application
- Exporting and Importing Individual Artifacts for Editing
- Automating Migration Tasks
- Running the Lifecycle Management Utility
- Viewing Migration Status Reports
- Viewing Audit Reports
- Summary
- Quiz