Oracle Hyperion Financial Mgmt 11.1.2: Create Rules Using Calc Mgr(11.1.2.3)

Duration: 4 Days

What you will learn

This course is based on Oracle Hyperion Financial Management 11.1.2.3. The class specifically covers creating rules and calculations in Hyperion Financial Management (rather than Hyperion Planning), and is designed to teach you how to create rules for advanced business calculations. The course is based on creating these rules and calculations within Calculation Manager. Expert Oracle University instructors will demonstrate how you can design, maintain, and execute complex rules by using Calculation Manager. Choose this course if you will use Calculation Manager.

Learn How To:

Create formulas, rules, rule sets and rules templates with Calculation Manager.
Reduce database size and calculation time by properly using the custom and value dimensions in rules.
Calculate percentages and ratios for dynamic accounts.
Create loops by using member lists and data ranges.
Create rules with proper data-handling techniques.
Create allocation, currency translation, consolidation and elimination rules.

Benefits to You

By investing in this course, you'll develop the knowledge and skills necessary to increase your organization's database performance, write rules for dynamic accounts and create translation and consolidation rules. You'll also walk away from this course with a new ability to effectively troubleshoot rules using log files.

Note: The Calculation Manager class is specifically for Calculation Manager with Hyperion Financial Management, not Calculation Manager for Hyperion Planning.

Audience

Administrator
Application Developers

Related Training

Required Prerequisites

Oracle Hyperion Financial Mgmt 11.1.2: Create & Manage Applications (11.1.2.3)

Course Objectives

Calculate percentages and ratios for dynamic accounts

Create loops by using member lists and data ranges

Create rules with proper data-handling techniques

Create allocation, currency translation, consolidation, and elimination rules

Create formulas, rules, rule sets, and rules templates with Calculation Manager

Reduce database size and calculation time by proper use of the custom and Value dimensions in rules

Course Topics

Introduction to Calculation Manager
Financial Management Rules
Calculation Manager Overview
Viewing Rules
Viewing Flow Charts
Printing Rules

Creating Rules and Formulas
Creating Rules
Creating Formula Components
Member Expressions in Calculation Statements
Operators, Keywords, and Functions
Validating Rules

Managing Rules
Creating and Validating Rule Sets
Deploying Rules
Importing and Exporting Calculation Manager Objects
Creating Rules as VB Script Components
Converting Script Components to Graphical Rules
Importing Rules From RLE Files

Managing Templates
Templates Overview
System Templates
Adding Templates to Rules
Creating Custom-Defined Templates
Saving Rules and System Templates as Custom-Defined Templates

Reducing Maintenance with Variables
Execution and Replacement Variables
Creating Variables
Assigning Values to Variables in Grids
Passing Values to Variables
Standard Variables for the Point of View
Standard Variables for Custom and ICP Dimensions

Managing Rule Scope with Conditions

Adding Condition Rows to Grids
Adding Condition Components to Rules
Trigger Functions for Conditions
Managing Rule Execution for the Value Dimension

Managing the Custom and ICP Dimensions
Subcubes and Performance
Page Dimensions and Rules
Specifying Source Dimensions
Specifying Destination Dimensions

Troubleshooting with Log Files
Log Files Overview
Configuring Timer Logs
Setting Up Debug Logs
Creating Log Information Variables

Creating Rules Using Member Ranges
Member Ranges and Loops
List Functions and Member Range Components
Adding Member Range Components to Rules
Member Attributes in Loops

Improving Performance Using Data Units and Fixed Loops
Data Units Overview
Creating Variables for Data Range Components
Adding Data Range Components to Rules
Creating Data Range Replacement Variables
Creating Rules with Fixed Loop Components

Managing Financial Management Data
Retrieving and Writing Data
Testing for No Data
Setting Accounts to No Input
Enabling Accounts for Intercompany Transactions
Rounding with the Financial Round Template
Rounding and Scaling with the Round Function

Managing Dimension Hierarchies
Managing the Calendar
Managing Calculation Status
Managing Movement Accounts and Data Views
Avoiding Circular Calculations in Hierarchies

Creating Rules for Dynamic Accounts and Equity Pickup
Dynamic Accounts Overview
Creating Rules with the Dynamic Function
Applying Period Functions to Dynamic Rules
Creating Equity Pickup Rules
Running Equity Pickup Rules

Creating Allocations

Allocations Overview
Creating Rules with the Alloc Function
Creating Rules with the AllocationByEntity System Template
Setting Parent Entities to Input

Creating Currency Translation Rules
Currency Translation Overview
Default Translation Process
Translating Data with Trans and Transperiodic
Calculating Exchange Differences
Working with Currency Overrides

Creating Consolidation and Elimination Rules
Default Consolidation and Elimination Calculation
Consolidation Functions
The Standard Consolidation Template
Creating Consolidation and Elimination Rules