

BusinessObjects Planning XI: System and Budgeting Fundamentals

PL440

Course Description

This two-day instructor-led course is designed to give you the skills necessary to manage your planning process using your BusinessObjects Planning system. In this course, you will learn how to administer the system, work with templates to build your plan workbooks, create and modify Standard Planning Methodologies (SPMs) to meet your calculation needs, use utilities to assist in administering the plan process, and manage workflow using Process Control.

The business benefit of this course is that you will be able to effectively administer your Planning system according to your organization's business requirements and plan process. Additionally, you will be able to take advantage of the flexible and robust capabilities available to manage and execute that plan process enabling a better experience for all involved.

Course Audience

The target audience for this course is users who will function as the Master System User of the application.

Course Topics

Lesson #1 – System setup and Configuration

- What is Planning?
- Define data structures
- Work with Dimensions

Lesson #3 – Getting started with Plan Budgeting

- Examine the end-user experience
- Explore the plan workbook environment
- Work with plan workbooks

Lesson #2 – Utilities

- Run a data import
- Use database and system utilities
- Manage security

Lesson #4 – Working with Templates

- Describe the Template structure
- Create and modify a Template
- Compare Planning-sheets to non-Planning sheets
- Examine the Settings sheet

Lesson #5 – Understanding the Interface Process

- Discuss when to perform Interfaces
- Execute an Interface from within a workbook
- Execute the Sequential Interface Utility
- Define Interface, Dimension, and Template settings

Lesson #7 – Using Global Assumptions and Custom Tables

- Differentiate between Global Assumptions and Custom Tables
- Explore the Global Assumptions workbook
- Reference Global Assumptions
- Reference Custom Tables

Lesson #9 – Managing workflow with Process Control

- Define Process Control stages
- Describe Process Control from an end-user perspective
- Work with Process Control utilities
- Discuss implementation considerations

Lesson #6 – Working with SPMs

- What are SPMs?
- Use SPMs in plan workbooks
- Create and edit master SPMs
- Assign SPMs for interface
- Construct multi-line SPMs

Lesson #8 – Reviewing Plan Administration Tools

- Discuss Plan Administration settings
- Run the Recalculate utility
- Use the Override Checkout Status utility
- Define Versioning
- Distribute and collect workbooks
- Execute a Workbook Modification utility

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Visit the Business Objects Learning Network:

<http://www.businessobjects.com/services/training/elm/default.asp>

Prerequisite Education

Not applicable for this offering.

Prerequisite Knowledge/Experience

While not required for this course, experience with these products or technologies will be helpful:

- Working knowledge of Excel

Additional Education

Additional education offerings that we recommend include:

- BusinessObjects Planning XI: Plan Reporting Fundamentals



Delivery & Duration

This instructor-led offering is a two-day course.

Applicable Certification

This course is not applicable to any Business Objects Certified Professional programs.

More Information

Visit <http://www.businessobjects.com/services/training/default.asp>.

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