

Hyperion Planning Tasks to Offload

A robust tool like Hyperion Planning has many tasks you can outsource to a support services provider. Below is a sampling of tasks and actions performed by our dedicated team for clients.

Scheduled Tasks

Your Hyperion applications require periodic maintenance and updating — recurring activities that need to be completed on a scheduled basis, whether daily, weekly, or monthly. Your Hyperion support services team can work with you to schedule the frequency and dates of completion for these tasks and perform them for you.

Seed and Maintain Annual Forecast Scenarios

- ✓ “Pre-seed” forecast periods with budget
- ✓ Update forms for forecast periods after budget is rolled in each year
- ✓ Load actual for forecast scenarios monthly

Quarterly Environment Assessment

- ✓ Review logs for errors and evaluate
- ✓ Archive logs
- ✓ Review and install relevant patches
- ✓ Performance recommendations

Execute Metadata and Data Load Support

- ✓ Manual metadata updates using ODI packages to move data to/from Planning
- ✓ Use EPMA data synchronization

Other Hyperion Planning Tasks

- ✓ Update forecast SubVar for forms, calc scripts, and business rules
- ✓ Refresh data to see forecast
- ✓ Update filters in ETL changes (calculating EBITDA)

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Unscheduled Tasks

After getting set up with a support services ticket portal, you will open tickets as issues arise. Need to make some account and hierarchy changes? Troubleshoot new users issues? Or are you needing assistance in preparing for budget season? These are examples of needs that might sneak up on you — and you'll need an experienced Hyperion support services team to assist.

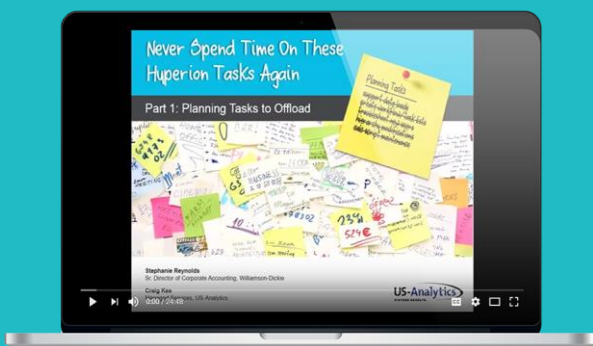
Having a support services team in place is an insurance policy providing piece of mind that no matter how complex your issue appears to be, they will jump in and get you back on track.

Preparing for Next Budget Season

- ✓ Updating substitution variables and planning forms, adding new SubVars
- ✓ Updating business rules
- ✓ Verifying security group assignment on all Planning forms
- ✓ Updating EPMA data synchronization jobs to integrate Planning loads
- ✓ Process one-time data calculation to seed budget forms

Account and Hierarchy Changes

- ✓ Adding new accounts and subtotal in EPMA's Dimension Library
- ✓ Verifying no impact to existing hierarchy (checking for historical data intersections)
- ✓ Assigning appropriate attributes in Planning
- ✓ Updating Planning forms for new accounts



For more details, watch the [webinar replay!](#)