

How to Use Hyperion Training to Effectively Handle Change Management



MINDSTREAM[®]
ANALYTICS

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Presenters



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AGENDA



- About MindStream Analytics
- Objectives of the Session
- Client Project Initiatives
- Change Management
- Training Objectives
- Training Strategy / Methods
- Training Curriculum
- UPK
- Results of Training
- Lessons Learned
- Q&A





MindStream Analytics



MindStream Analytics helps companies identify, implement and manage technology that allows them to effectively analyze and predict key metrics. MindStream Analytics is a consulting and managed services provider that specializes in the implementation and management of financial and analytic applications. For more information, please visit <http://www.mindstreamanalytics.com>.





You weren't born trained



Or Ready for Change






Objectives



- Implementing Change Management at clients through Training
- Share Best Practices for Training end users in a Global Hyperion Planning deployment
- Role that Oracle User Productivity Kit has on Training strategy
- Lessons learned from a Global Training implementation



Hyperion Planning Project Objectives

- Develop single Global Process for Financial Planning and Forecasting
 - Rules of engagement, clarity of roles, accountabilities
 - Develop globally consistent data governance in the underlying Oracle systems
 - E.g., Country identification, conflicting hierarchies, etc.
 - Implement Hyperion Planning as the single FP&A tool to eliminate current inefficiencies and enhance capabilities
 - Eliminate multiple, disparate reporting systems
 - Remove heavy reliance on Excel
 - Allow 'constant currency' analysis
 - Ensure a single, transparent versions of the truth
 - Track Capital Projects
- 



What is Change Management


Definition:

Change management is the [application of] the set of tools, processes, skills and principles for managing the people side of change to achieve the required outcomes of a change project or initiative

Change management incorporates the organizational tools that can be utilized to help individuals make successful personal transitions resulting in the adoption and realization of change



Overview of Training Objectives

- Successfully access and use the Hyperion Planning system from a (Power) User or End User perspective
 - Educate users to understand and fulfill their role(s) in the revised financial planning processes
 - Understand the potential changes in roles/responsibilities
 - The focus will be on delivering training to multiple delivery channels at multiple times and at multiple locations
 - Training will consist of a “Train the Trainer” Approach to key Financial Business Partners, IT, and Financial Planning stakeholders who will pass this down to 800+ Cost Center Managers
 - Ensure the training is sustainable over time to support changes to staff, changes to the system and changes within the organization
- 



Training Strategy



- **Customized, Role-Based Training** - Only training that is appropriate to the individual/position will be provided; training will focus strictly on the skills employees need to successfully perform in their jobs
- **Blended Learning** - Training will be offered in many formats (e.g., instructor-led training, virtual classroom, self-service (UPK), etc.)
- **Train-the-Trainer Approach** – The Key Finance, IT and FBP Stakeholders will be classroom trained from Leading Hyperion Consulting SMEs on Process, Action, and Method, who will then train the Regional Users. This will most efficiency promote direct knowledge transfer throughout the organization
- **Multi-Phased Learning** - There will be multiple opportunities for employees to attend training, with sessions being offered at different venues and times
- **Just-in-Time Tools** - Tools, such as job aids and quick reference guides, will provide the flexibility to deliver the appropriate information to the right people at the point of need
- **Continuous Improvement** – Ongoing reviews and assessment of training will be used to improve the overall effectiveness in developing knowledge and skills employees need





Training Critical Success Factors

Leadership and Management Commitment/Alignment

- Commitment to and active support of the training effort
- Management and execution of critical communication plan leading up to training
- Enforcement of employee participation in scheduled training activities

Subject Matter Expert (SME) Documentation Support

- Current and well-written documentation (e.g., processes, design documentation, etc.)
- Detailed understanding of User Acceptance Testing process and scripts
- Availability of the SME resources to provide feedback during design and development phases
- Active participation of representative business SMEs in the training development and review process
- Adherence to review timelines essential to timely delivery of documentation

Adequate Resources

- Appropriate management and execution of Training Strategy from Internal Project Lead
- Appropriate internal and external resources allocated to executing training-related activities
- Availability of trainers to deliver training and ensure maximum knowledge transfer, acceptance and ownership of the new systems and business processes

Stable Scope

- Adherence to a clearly defined and tightly controlled project scope and plan
- Adequate time for materials development (e.g., guides, presentations, quick reference guides)
- Adequate time for content revisions following UAT activities
- Clear identification of process role definitions to determine who participates in what training





Training Methods



Delivery Method	Description	Application Process	Instructional Value	Scalability
Instructor Led Training (ILT)	Traditional interactive classroom training setting with trainer, class agenda, training environment and exercises. Access to SMEs for questions or background on how learners can directly apply knowledge to current role is best practice.	<ul style="list-style-type: none">▪ All course curriculum/modules▪ Format for most critical WBT▪ Competency development	High	Low
Web Based Training (UPK)	Online training through interactive recorded modules (User Productivity Kit) supported by soft copy of course curriculum and process layout typically used to walk end-users through a new process, components of a policy or technology navigation.	<ul style="list-style-type: none">▪ Interactive familiarization with Hyperion application▪ Future state process training (PowerPoint addendum with Links to UPK)▪ Hands-on practice of simulated or scripted forecast activities within the training environment▪ Application of tech training with other learning	High	High





Training Methods



Delivery Method	Description	Application Process	Instructional Value	Scalability
Job Aids	Reference guides / cards designed to allow the user to quickly locate needed information. May be a simple one-page reference document or may be more comprehensive to include step-by-step procedures for executing complex tasks.	<ul style="list-style-type: none">▪ Planning calendars of key dates▪ Key features for use of forms▪ Detailed process descriptions for common tasks	Medium	Very High
Lunch & Learn Sessions	Informal, moderate sized group sessions organized to present and/or discuss a specific training topic over lunch and allow participants to engage in a question and answer dialog with a subject matter specialist	<ul style="list-style-type: none">▪ Informal training to cover special topics of interest▪ Training coverage of more advance features▪ Modular sessions with very specific focus	High	Low





Training Methods



Delivery Method	Description	Application Process	Instructional Value	Scalability
Exercises	Team-based scenarios that require group interaction, planning and working to solve a challenge or work together to create a specific output	<ul style="list-style-type: none">▪ Collaboration in review of forecast▪ Competency development (e.g. team work)▪ Problem solving for complex tasks	High	Medium
Video or Web Casts	Recorded sessions of training in 'bite-sized' modules or screen cams with narratives to provide the audience with pseudo-live demonstrations of how to use the Hyperion application to perform common job tasks.	<ul style="list-style-type: none">▪ Demonstration of use of Hyperion to execute common job tasks▪ Announcements or communications▪ Introduction overview to Global User base	High	Very High

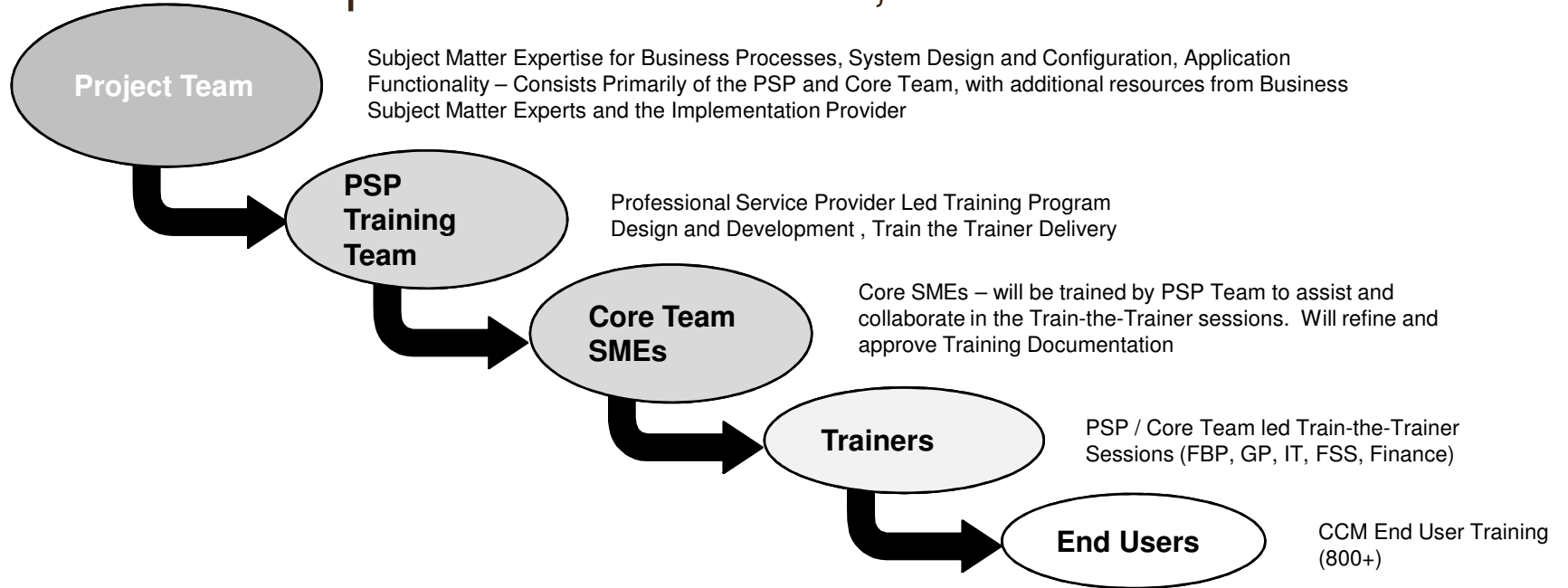




Train the Trainer Approach



- This requires a collaborative, cohesive effort





Training Needs Analysis



- A Training Needs Analysis was performed for:
 - Planning training curriculum development
 - Delivery of course content
 - Target audience groups that should participate for learning and skill development
- The Training Needs Analysis consists of:
 - Course Name/Number
 - Content of learning module and/or learning objectives for each module
 - Delivery method (whether UPK or Webinar is used along with Instructor Led Training)
 - Roles or audience groups that the course is applicable to
 - Effect on the current Process



Audience groups have been identified to receive targeted training based on their learning needs

- Each audience will require an individualized curriculum that supports the unique aspects of the business processes in which they work and the associated Hyperion-enabled activities. We will identify the appropriate curriculum for each employee based on their role in the new process/system design.

Audience Group	Description	Group Members	Estimated Number
FBPs	<ul style="list-style-type: none"> • Finance members who will participate in the planning, budgeting, forecasting, or management reporting processes using Hyperion. 	<ul style="list-style-type: none"> • Financial analysts, business leaders, senior business leaders 	<ul style="list-style-type: none"> • 15
CCMs	<ul style="list-style-type: none"> • Cost Center Managers who will use the Hyperion system to participate in the planning and forecasting processes. 	<ul style="list-style-type: none"> • CCMs 	<ul style="list-style-type: none"> • 800
Capex Users	<ul style="list-style-type: none"> • Employees who will use Hyperion to perform fixed asset forecasting and/or forecasting of depreciation & amortization expense using Hyperion 	<ul style="list-style-type: none"> • Financial analysts, business leaders, senior business leaders • CCMs (mostly IT) 	<ul style="list-style-type: none"> • 10
Super Users	<ul style="list-style-type: none"> • Individuals who have been identified as participants in “Train-the-Trainer” and/or to assist members of their finance team in day-to-day use of the Hyperion application. 	<ul style="list-style-type: none"> • Project Team Members • Senior Financial Analysis, Business Leaders 	<ul style="list-style-type: none"> • 10-12 (<i>approximately 1-2 per each Hub, Global Function, Central Planning</i>)
Admins	<ul style="list-style-type: none"> • Application administrators or users who maintain or change application configuration 	<ul style="list-style-type: none"> • IT • FSS 	<ul style="list-style-type: none"> • 5-7



Learning Paths for Audience Groups

	All Planners	FBPs	CCMs	Capex Users	Other Users
Description	Training is focused on developing Hyperion skills so Planners can support all operating expense planning and forecasting processes.	Training will be tailored to FBPs use of Hyperion to support all operating expense planning and forecasting processes.	This learning path will be geared CCMs with responsibility for participating in Global Planning and Forecasting processes.	Identified users require a specialized learning path focused on fixed asset and D&A forecasting using Hyperion.	Finance Staff, such as controllership, that require reporting access.
Course 101: Overview of New Global Standard Planning & Forecasting Process	Required	Required	Required	Required	Required
Course 102: Introduction to Hyperion	Required	Required	Required	Required	Required
Course 201: Using Hyperion for OpEx and Salary Planning & Forecasting	Required	Required	Required	Required	N/A
Course 301: CapEx Planning for Fixed Assets	Optional	Optional	Optional	Required	N/A
Course 401: Hyperion Financial Reporting	Required (Including Central Finance)	Required	Required	Required	Required
Course 501: Smart View and Ad-Hoc Reporting & Analysis	Required	Required	N/A	N/A	Optional





Training Plan



- The training initiative will commence in late June to validate Requirements, Strategy, and Project Plan
- Training content development will commence in July, pilot draft the week of August 19th, and update for September Train-the-Trainer sessions
- An Introductory Process and System overview (via webinar – 2 sessions) will be given by the Core and PSP teams on July 27
- The Core-Team Training Pilot will run the week of August 22 (pending confirmed UAT schedule)
- Concurrent Train-the-Trainer Sessions will commence the weeks of September 12th and 19th in Foster City, CA (both weeks, Singapore, and Miami, FL (pending confirmed UAT schedule)
- Other self-service training methods (via UPK) will be made available so that end users can develop learning and skills or reinforce instructor lead training based on their own available time

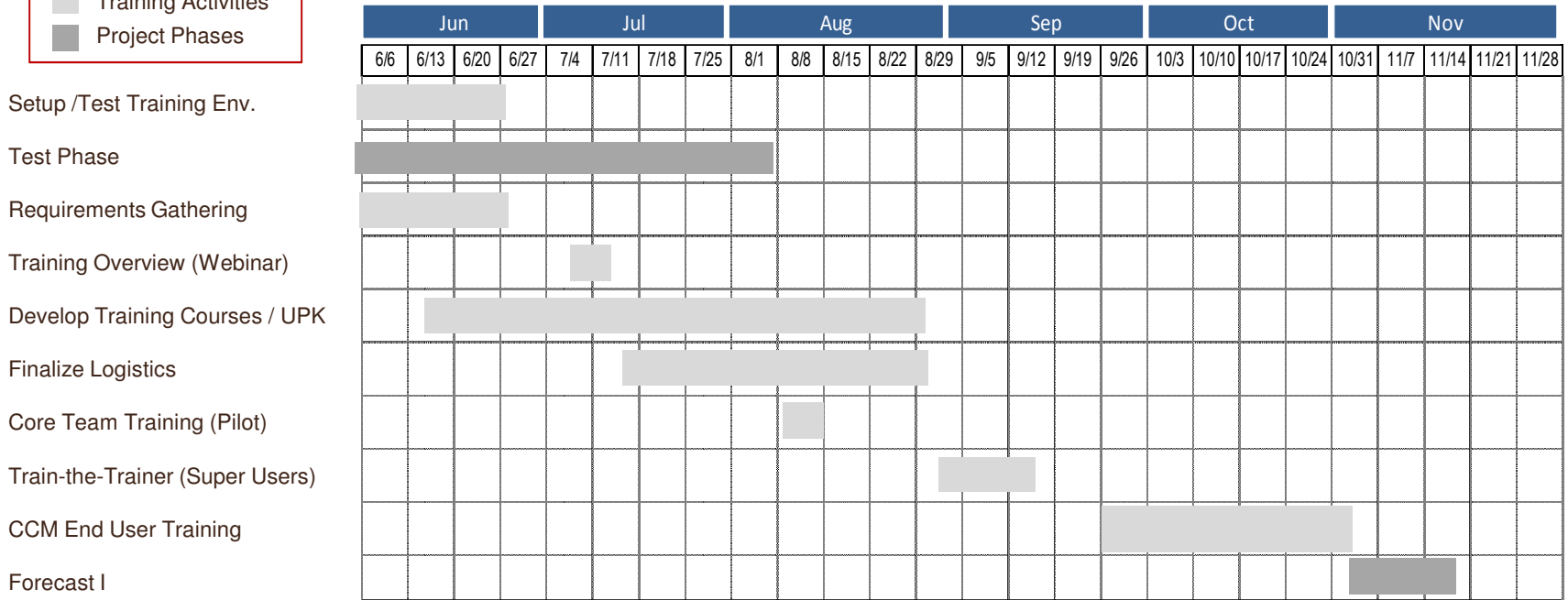




Training Project Plan



■	Training Activities
■	Project Phases





Training Curriculum



Course	Key Topics	Target Audience	Change in Process?	Comments / Learnings
Overview of New Global Standard Planning & Forecasting Process	Financial Planning Cycle, Cadence & Calendar	ALL	Yes	Includes roles and responsibilities
Course 101 Required for All Users	Quarterly Forecast Process	ALL	No	How Hyperion will be used
	Annual Operating Plan (Budget) Process	ALL	No	How Hyperion will be used
	A-B-C Monthly Forecast Process	ALL	Yes	Changes and Hyperion effect
	Currency – nominal vs constant	ALL	Yes	New Process in Hyperion
ALL = CCM, FBP, All Planners, IT, Capex Planners	Headcount and Salary Planning	ALL	Yes	Changes and Hyperion effect
	IT Planning Overview	IT	Yes	Effect on Capex
	Foreign Exchange in Planning & Forecasting (CCM – what is an exchange rate to start, then what is the new)	ALL	Yes	Changes and Hyperion effect
	Data Governance & Data Refreshes	ALL	Yes	Will limit refreshes per month
Webinar series will be presented to Global Team for this content	Adding New Activity Codes	ALL	Yes	Emphasis for IT Audience
	Reports – who goes to what reports (Finance vs. CCMs)	ALL	Yes	New Reporting format
	Super User Report writers / users	ALL	Yes	Who to ask for reports
	Finance – when to request an FR vs. Smartview / Adhoc	FBP	Yes	HFR vs. Smartview
	Support Model – structured in regions (Vhelp)	ALL	Yes	How to get support on new Process





Training Curriculum



Course	Key Topics	Target Audience	Change in Process?	Comments / Learnings
Introduction to Hyperion	Overview of Hyperion Systems	ALL	Yes	Architecture, System Flow, Various Products, Data Flow
	Application specifications (Americas vs Other)	ALL	Yes	Who will use which application for Planning / Reporting
	1st Digit Rule	ALL	No	Consistency for Dimension Members
	Planning Dimensions, Data, and Security	ALL	Yes	Overview of Dimensional Setup, Security
	Navigating Workspace	ALL	Yes	Login Procedures (single sign-on), access to all Hyperion components
	Overview of Forms (Webforms) / Templates	ALL	Yes	How data is entered into Hyperion / Differences
	Overview of Smartview	ALL	Yes	Microsoft Office add-in for Reporting / Ad-hoc / Data entry
	Overview of Reporting	ALL	Yes	Overview of Hyperion Financial Reporting tool for Planning and ASO Reporting

Course 102
Required for All Users

ALL = CCM, FBP,
All Planners, IT,
Capex Planners

Webinar series will
be presented to
Global Team for
this content





Training Curriculum



Course	Key Topics	Target Audience	Change in Process?	Comments / Learnings
CapEx Planning for Fixed Assets	Fixed Asset D&A Forecast Process	CAPEX Planners	Yes	Depreciation and Amortization process – Data Sources / Timing / Roles
	Fixed Assets Analysis	CAPEX Planners	Yes	Review of data query and reports from OFA / Tagging of assets (Impaired / Transfers)
	Adding new assets	CAPEX Planners	Yes	Using Form / Calculations – importance of CAR #
	Modifying Existing / Removing	CAPEX Planners	Yes	Using Form / Calculations
	Asset Reconciliation	CAPEX Planners	Yes	Prior Fixed Assets to new Forecast
	Development of D&A Forecast	CAPEX Planners	Yes	Using Hyperion
	Review Unmodified Existing Assets	CAPEX Planners	Yes	View Only

Course 301
Pre-Requisite:
Course 101, 102, 201

UPK Content
Videos will be
produced for
this module





Training Curriculum



Course	Key Topics	Target Audience	Change in Process?	Comments / Learnings
Hyperion Financial Reporting	Reports Navigation / Database Connections	ALL + Controllership	New	Using Workspace / Explore / Setup a Links to Reports
	Essbase vs. Planning (ASO vs. BSO) (Different for CCM (PDF only) vs Finance)	ALL + Controllership	New	Same user interface / different sources
	Setting Preferences	ALL + Controllership	New	Default Preview (HTML vs. PDF) / Point of View Grid
	Previewing Reports	ALL + Controllership	New	Selection of Point of View
	Printing Reports and Snapshots	ALL + Controllership	New	Printing Options and Process
	HTML vs. PDF	ALL + Controllership	New	Dynamic Web vs. Adobe static view
	Books	ALL + Controllership	New	Group of Reports / setting dynamic points of view
	Integrating Reports into Microsoft Office	ALL + Controllership	New	Exporting Reports
	Applications	ALL + Controllership	New	Planning applications vs. Essbase applications

Course 401
Pre-Requisite:
Course 101, 102

ALL = CCM, FBP,
All Planners, IT,
Capex Planners

UPK Content
Videos will be
produced for this
module






Training Curriculum



Course	Key Topics	Target Audience	Change in Process?	Comments / Learnings	
Smart View and Ad-Hoc Reporting & Analysis	Smart View Overview	All Planners	New	Use of Microsoft Office in Hyperion Environment and Forecast Process	
	Connecting to the Database	All Planners	New	Setting Up connections in Excel to application	
	Course 501 Pre-Requisite: Course 101, 102	Navigating spreadsheet reports	All Planners	New	Point of View
	Forms	All Planners	New	Opening / Updating / Submitting / Viewing	
	Manipulating Multidimensional Data	All Planners	New	Point of View / Dimensionality	
	UPK Content Videos will be produced for this module	Smart View Options	All Planners	New	Formatting
	Retrieving Data using Smart View	All Planners	New	Formulas – Function Builder statements	
	Reusing Smart View Queries	All Planners	New	Opening / Saving / refreshing	
	Ad-hoc	All Planners	New	Pivot Tables	



What is UPK

- UPK is Oracle's User Productivity Kit
 - Self Paced Learning
 - Available via the Web – anytime / anywhere
 - Securable by user
 - Screen by screen video instruction with captions
 - Can use it against Live production application
 - Instructor manual
 - Job Aids
 - Exercises - Repetition
 - Print
- 



UPK Developer Console / Outline

The screenshot displays the 'Content - UPK Developer' application window. The interface includes a menu bar (File, Edit, View, Link, Document, Tools, Help) and a toolbar with various icons. A 'Player view' dropdown is visible. The main area is divided into two panes:

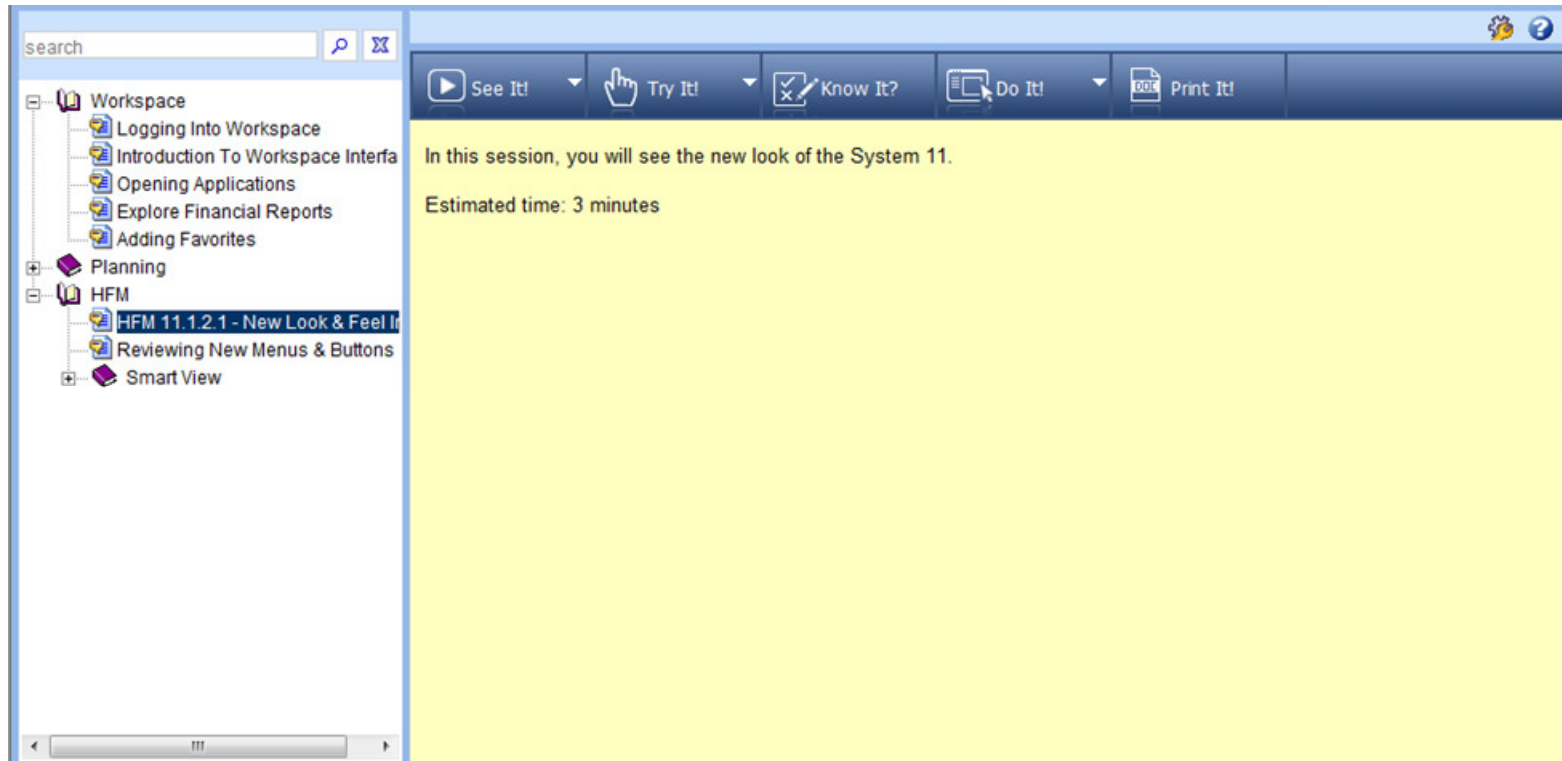
- Left Pane (Tree View):** Shows a hierarchical outline of content. The root is 'Hyperion 11.1.2.1', which branches into 'Workspace', 'Planning', 'Admins', 'Non-Admins', 'Smart View', and 'Smart View New Features'. The 'Admins' folder is expanded, showing 'Creating Single Forms', 'Creating Composite Forms', and 'Creating Validation Rules'. 'Creating Single Forms' is selected.
- Right Pane (Content View):** Displays the content for 'Creating Single Forms'. It has a 'Concept/Introduction for:' header. Below it, there is a 'Concept' section with a toolbar and a large empty text area. Below that is an 'Introduction' section with a yellow background, containing the text: 'In this session, you will learn how to create single forms and assign access to the data form. Estimated time: 8 minutes'.

At the bottom right of the window, there is an 'Online' icon.



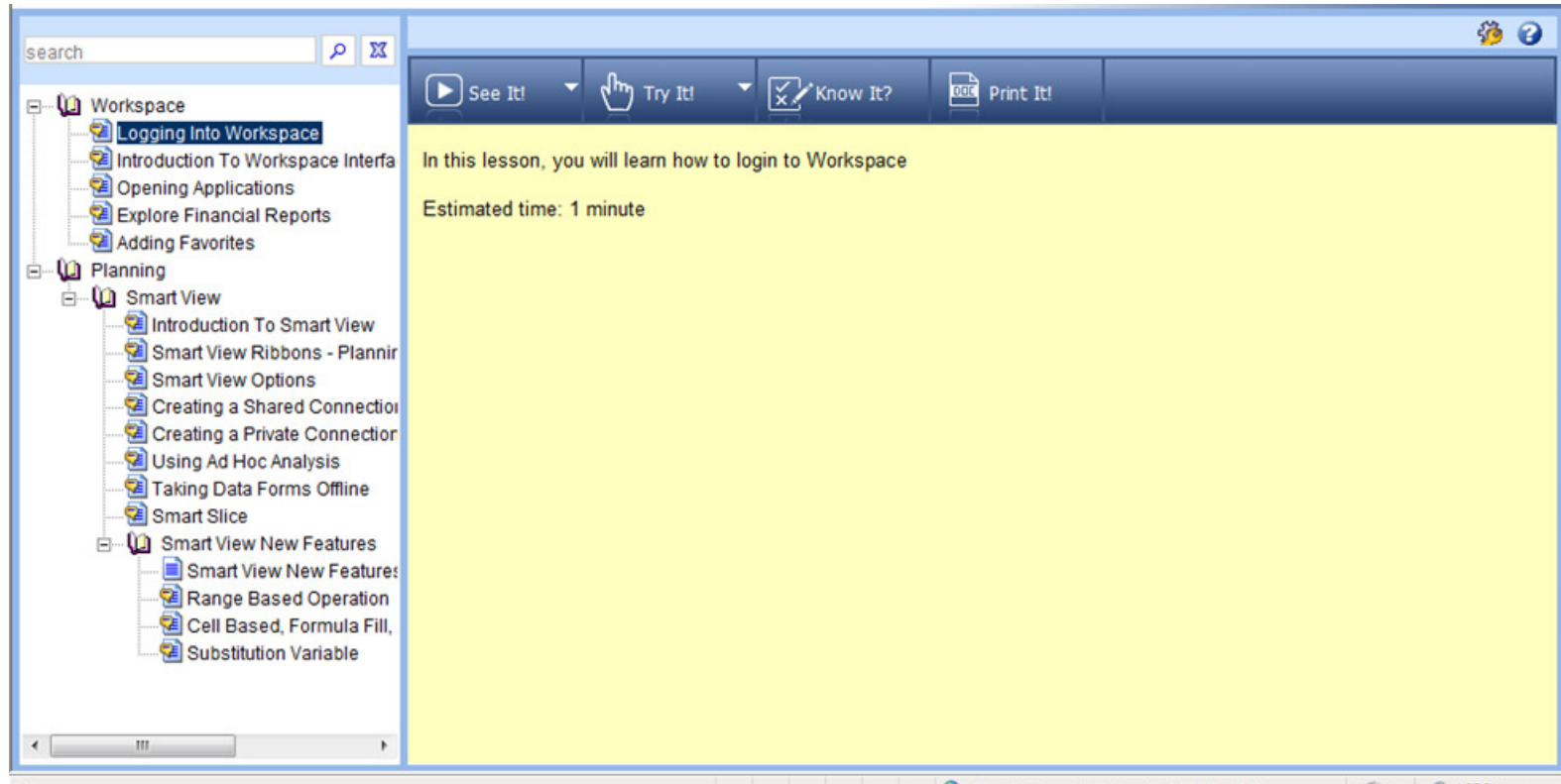


UPK User Interface



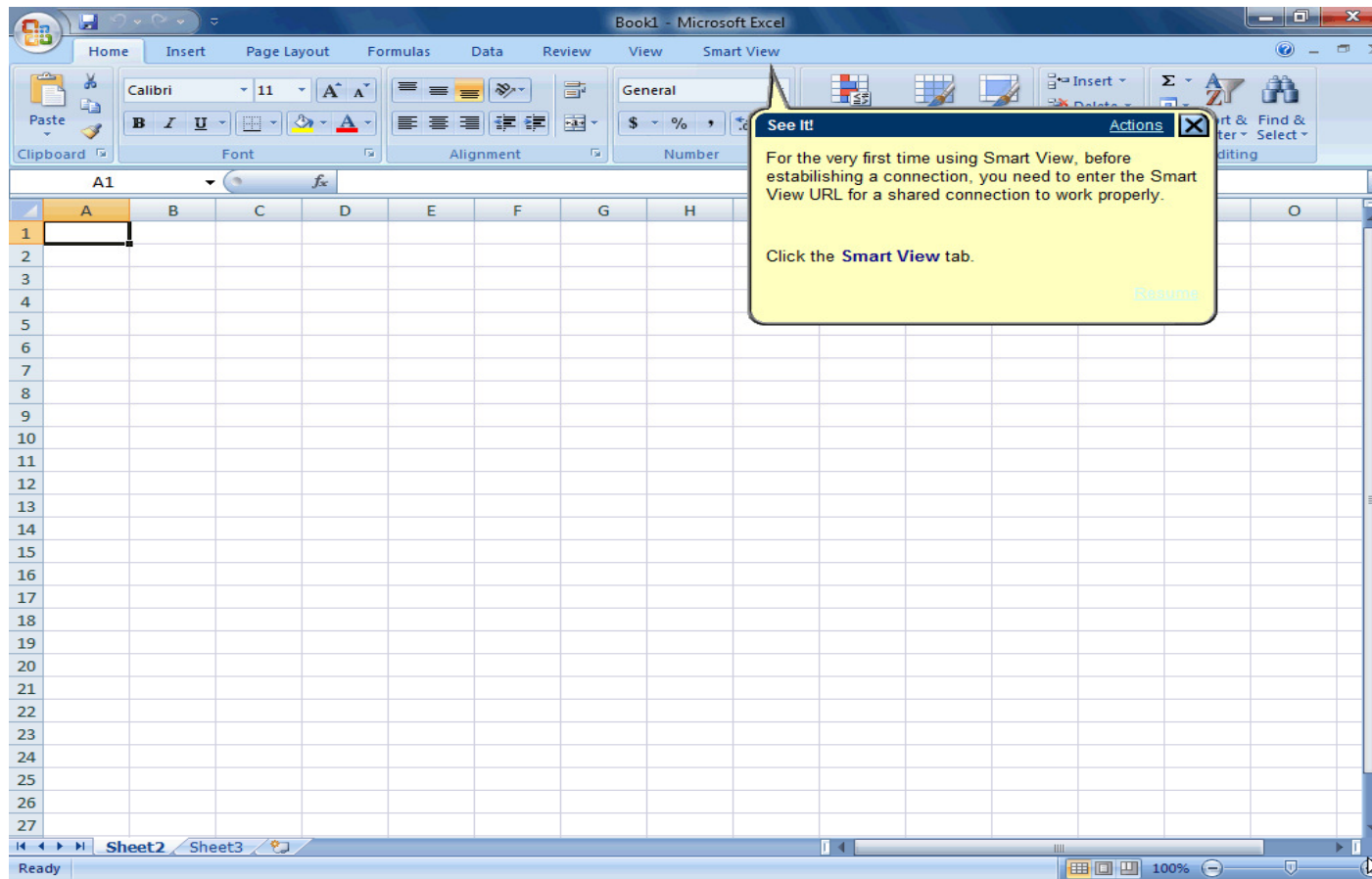


UPK User Interface





UPK “See It!” Captions / Smartview





UPK “See It!” Captions / Smartview

The screenshot shows the Microsoft Excel interface with the Smart View ribbon active. The ribbon includes tabs for Home, Insert, Page Layout, Formulas, Data, Review, View, Smart View, and Essbase. The Smart View ribbon contains various tools such as Zoom In, Keep Only, Member Selection, Preserve Format, Smart Slice, Refresh, POV, View Comments, Drill-through, Calculate, Linked Objects, Submit Data, Zoom Out, Remove Only, Query, Change Alias, Cascade, Visualize, Adjust, and Pivot. The main grid shows columns A through P and rows 2 through 28. Cell A2 contains 'Period' and cell B2 contains '#Missing'. A 'POV Sheet1' dropdown menu is open, showing 'Year' selected. A yellow tooltip titled 'See It!' is displayed, providing instructions on how to use the POV box and a note about case sensitivity. The tooltip text reads: 'Now you can see the difference between the POV toggled on or off. The POV box is displayed now. To hide the POV box, click the POV button again. Note: You are able to type the member name directly in the POV box. Please note that this is case sensitive and spelling has to be exact. Click in the Member Cell field. Resume'.





UPK “See It!” Captions / Smartview

The screenshot shows the Microsoft Excel interface with the 'Smart View' ribbon selected. A 'Take Offline Wizard' dialog box is open, displaying 'Step 1 of 3: Please select forms/folders that you want to take offline. All forms from selected folders will be taken offline.' The 'Available forms/folders' list includes 'Forms', 'Active Entities', 'Regional Inputs', 'Admin', 'NA Regional Office', and 'Capital'. A red box highlights the '+' icon next to the 'Regional Inputs' folder. A yellow tooltip titled 'See It!' is overlaid on the dialog, providing instructions: 'You need to select which data forms you want to take offline. Please note that only data forms that are enabled for offline usage by administrator are available for this selection. Data forms that are not enabled for offline usage will not be displayed. Downloading data forms for offline usage may take a few minutes, depending on the amount of data forms you have chosen to download for offline usage. Click the + button before the Folder tree item.' The tooltip includes 'Resume' and 'Actions' buttons.





UPK "See It!" Captions / Smartview

The screenshot shows the Microsoft Excel interface with the Essbase SmartView add-in. The 'Essbase' ribbon is active, showing various analysis tools. A 'Preferences' dialog box is open, displaying settings for the current SmartView. The 'Row Suppression' section is highlighted with a red box, showing 'Missing' set to 'Disabled'. A yellow callout box titled 'See It!' provides instructions on how to set this option.

Name	Value
Row Suppression	Missing
Zoom-In	Bottom
Include Selection	Enabled
Repeat Member Labels	Suppression
Missing Label Text	Value
No Access Text	Value
Alias Table Name	Value

See It! Actions X

Click in each field to set options. Depending on the subset you are defining it may be best to set Row Suppression - Missing to "Disabled".

This way users will not have an error on initial retrievals for levels or intersections without data.

Click the **Option Box** list item.

Resume





UPK “See It!” Captions / Planning

The screenshot displays the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The interface includes a navigation pane on the left with a tree view of folders such as 'Forms', 'Active Entities', 'Regional Inputs', 'Admin', 'NA Regional Office', 'Capital', 'Operations', 'Closure', 'Archive', and 'Planning Training'. The main content area shows a 'Comment Area' field for 'WH037 : Inflation_Salaried'. A red box highlights this field. A yellow tooltip with the title 'See It!' and an 'Actions' button is overlaid on the field, containing the text: 'Please note that comments you enter will be saved into this specific intersection. Click in the **Comment Area** field.' and a 'Resume' link. The background shows a grid with columns for 'FY13' and 'Jul', 'Aug'.





UPK "See It!" Captions / Planning

Supporting Detail

Account: WH037 : Inflation_Salaried Activity: 0000 Default CostCenter: 0000 Balance Sheet Currency: Local
Product: NoProduct Entity: 149 [REDACTED]

Add Child Add Sibling Delete Delete All Promote Demote Move Up Move Down Duplicate Row

	+	CurBud
		Working
		FY13
		Jan
		Total:

Help Refresh Save Cancel

See It! Actions X

In here, you can start building the detail outline that aggregate to the final number you want to show in the data form.

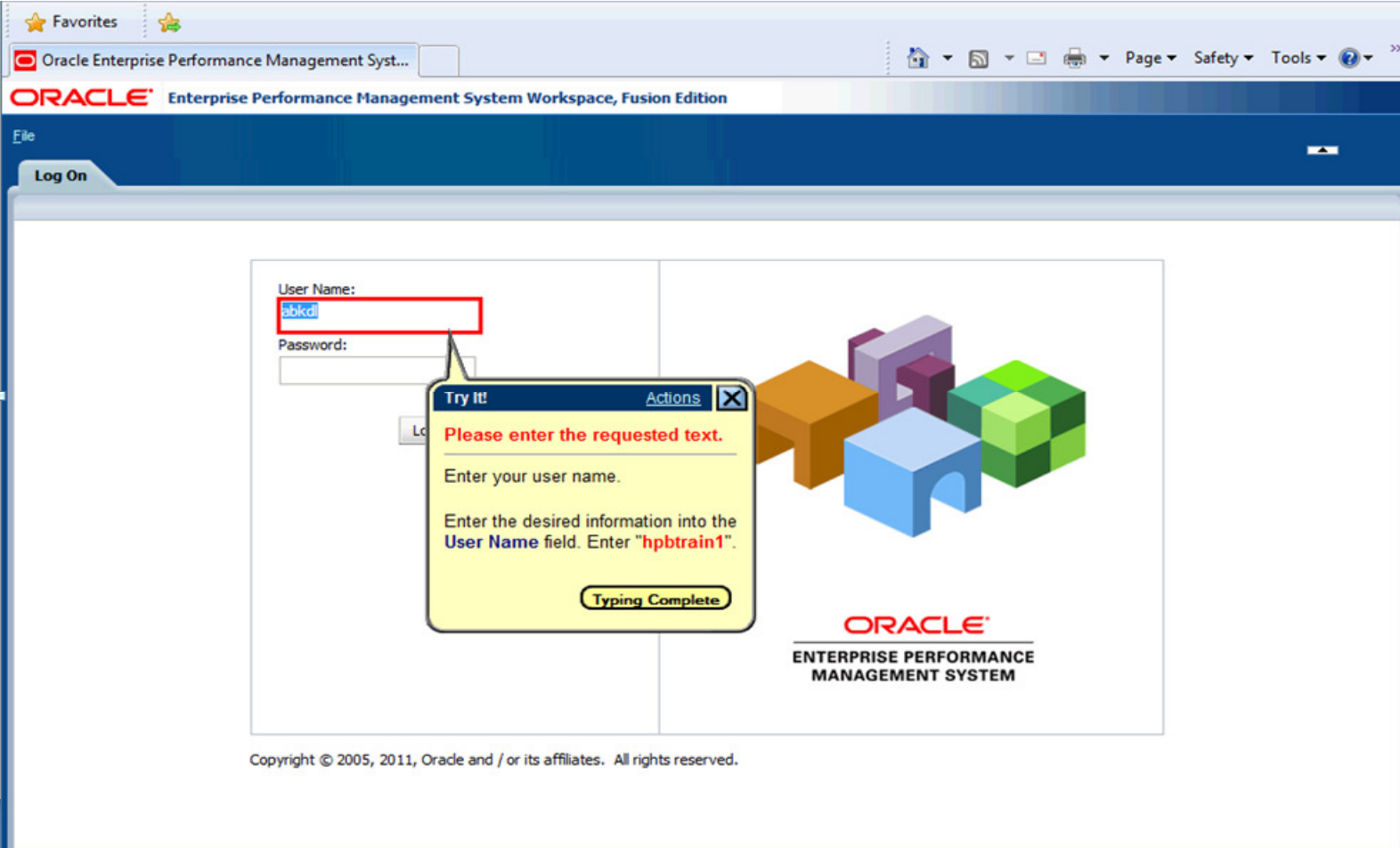
You can use the Add Child or Add Sibling button to build the desired structure and calculations.

Enter the desired information into the **Line Item** field. Enter **"Training"**.

[Resume](#)



UPK “Try It!” Practice



The screenshot shows a web browser window displaying the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The browser's address bar shows the URL "Oracle Enterprise Performance Management Syst...". The page header includes the Oracle logo and the text "Enterprise Performance Management System Workspace, Fusion Edition". Below the header is a "Log On" button. The main content area features a login form with a "User Name:" label and a text input field containing "abkd", which is highlighted with a red border. Below the "User Name:" field is a "Password:" label and an empty text input field. A "Log On" button is partially visible below the password field. A yellow dialog box titled "Try It!" is overlaid on the form. The dialog box contains the following text: "Please enter the requested text." in red, "Enter your user name." in blue, and "Enter the desired information into the User Name field. Enter 'hpbrain1'." in blue. The dialog box also has a "Typing Complete" button at the bottom. To the right of the dialog box is a graphic of several colorful 3D blocks (orange, purple, blue, green) arranged in a cluster. Below the graphic is the Oracle logo and the text "ORACLE ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM". At the bottom of the page, there is a copyright notice: "Copyright © 2005, 2011, Oracle and / or its affiliates. All rights reserved."



UPK “Try it!” Practice

Enterprise Performance Management System Workspace, Fusion Edition

Logged in as hpbtrain2 | Help | Log Off

Edit View Favorites Tools Help

Explore | **Add to Favorites**
Manage Favorites...

Explore: / *
Show Subscribed Items
Manage Personal Page

My Personal Page

Type	Modified	Description
Folder	3/23/12 4:39 PM	
Folder	2/27/12 3:24 PM	
Folder	2/23/12 9:59 AM	
Folder	2/27/12 3:33 PM	
Folder	2/27/12 3:34 PM	
Folder	2/10/12 9:42 AM	Contains sample data loaded up at install time.
Folder	2/10/12 9:42 AM	
Folder		
Financial Reporti...	2/23/12 9:59 AM	
Financial Reporti...	2/23/12 10:02 AM	
Financial Reporti...	2/23/12 10:03 AM	

Try It! Actions X

Please complete the action in the highlighted area.
Click the Add to Favorites menu.





UPK “Know It!” Testing your Knowledge

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition login page. The page title is "ORACLE Enterprise Performance Management System Workspace, Fusion Edition". The main content area contains a login form with "User Name:" (tchiu) and "Password:" fields, and a "Log On" button. A "Know It?" dialog box is overlaid on the page, titled "Know It?" with "Actions" and a close button. The dialog box text reads: "Logging Into Workspace", "Score Needed: 100%", and "Press [Enter] to [start](#)". The Oracle logo and "ORACLE ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM" are visible at the bottom of the main content area. The footer contains the copyright notice: "Copyright © 2005, 2011, Oracle and / or its affiliates. All rights reserved." The browser status bar at the bottom shows "Done", "Local intranet | Protected Mode: Off", and "100%".





UPK “Know It!” Assessing your knowledge

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition interface. A 'Know It?' dialog box is displayed in the center, titled 'Logging Into Workspace'. The dialog box contains the following information:

Total % of Steps Without Assistance:	100%
% Needed to Pass:	100%
Result:	Pass

Below the table, there are two links: [Print Results](#) and [Press \[Enter\] to Finish.](#)

The background interface shows a 'Recently Opened' section with items like NATrain, PlanAF, and Open... and a 'Workspace Pages' section.





UPK “Know It!” Do you need help?



ORACLE Enterprise Performance Management System Workspace, Fusion Edition

File

Log On

User Name:
hpbrain1

Password:
●●●●●●

Log On

Know It? Actions X

If you choose to see this step, it will be graded as incorrect.

Do you wish to see this step?

Yes No

Do not display this message again during this topic.

ORACLE
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

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UPK “Do It!” Live application



Do It! Actions

The new workspace has a new look and feel and a new connection URL.

Please note this is the URL for the test environment. Confirm the appropriate URL with the Hyperion administrator.

Now, let's login to the System 11 Workspace. Enter your user name and password.

Enter the desired information into the **Password:** field. Enter a valid value e.g. "password".

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

File

Log On

User Name:

Password:

Drag to see the rest of this graphic or right-click to reset.





UPK Job Aids - Graphical

Smart View Basic

Establishing a Shared Connection

Shared Connections URL: <https://cantorhpbtl3:197000/workspace/SmartView>

Before connecting to the shared connection, make sure the URL is updated to Barrick's URL.
Smart View -> Options -> Advanced -> Shared Connections URL

Establishing a Private Connection

You can create a private connection by saving a shared connection to your local machine.
Right click on the database you want to add as a private connection, then select Add to Private connections

Connecting to a Data Form

Make sure you choose Oracle Hyperion Planning as the data source from the connection panel.
Select the form that you want to open and click Open Forms.

Smart View Ribbons

Annotations:
Undo or Redo Smart View actions (Home)
Lock & Send data (Data)
Worksheet connection (Smart View)

Job Aid fits on one card





UPK Job Aids - Informational



Essbase Basic									
Period	Year	HSP_Rates	Currency	Scenario	Version	Product	CostCenter	Activity	Entity
YearTotal	FY09	HSP_InputValues	Local	CurBud	Working	10	CostCenter	Activity	EOMNA
Net Income	\$ 8,872,212.67								

Dimensions Listed			To Get Data You Must:																	
Period			1) Select a valid Account (You will not see value at Parent "Account" Level).																	
YearTotal	Q1	Jan	2) Be in the correct Year for the Scenario (Curbud = FY08)																	
		Feb	3) Select HSP_InputValues																	
		Mar	4) Must be in a Valid Year Member (FY06 for LOM)																	
	Q2	etc	5) Must select a Valid Period Member (YearTotal for Jan-Dec)																	
	Q3	etc	6) Currency Must be set to Local																	
	Q4	etc	7) Must select an Entity that you have access to																	
YTD(period) or W-T-D(period) Return Year to Date			8) Must select a Product you have access to																	
QTD(period) Returns Quarter to Date																				
Year			Data you can Leave at the Dimension Name Level																	
FY07-FY40	QTD(mmm)		1) CostCenter																	
FY06 is LOM	YTD(mmm) or W-T-D(mmm)		2) Activity																	
HSP_Rates			3) Entity - Only if you have Access to All Entities																	
HSP_InputValues	All data is loaded to this member		4) Product - Only if you have Access to All Products																	
Currency			Commonly Used Options																	
Local	All data is loaded to this member		<table border="1"> <thead> <tr> <th>General</th> <th></th> <th>Next Level</th> </tr> </thead> <tbody> <tr> <td>Zoom In Level</td> <td></td> <td></td> </tr> <tr> <td>Member Name Display</td> <td></td> <td>Member Name and Description</td> </tr> <tr> <td>Indentation</td> <td></td> <td>Subname</td> </tr> <tr> <td>Ancestor Position</td> <td></td> <td>Top</td> </tr> </tbody> </table>			General		Next Level	Zoom In Level			Member Name Display		Member Name and Description	Indentation		Subname	Ancestor Position		Top
General		Next Level																		
Zoom In Level																				
Member Name Display		Member Name and Description																		
Indentation		Subname																		
Ancestor Position		Top																		
USD	Reporting Only - Metric		<input checked="" type="checkbox"/> Include Selection <input type="checkbox"/> Within Selected Group <input type="checkbox"/> Remove Unselected Groups																	
USD_Imp	Reporting Only - Imperial		Select "Member Name and Description" to display both member name and alias																	
Scenario			Comments and Formulas <input checked="" type="checkbox"/> Preserve Formulas and Comments on Adhoc operation (except pivot) <input type="checkbox"/> Formula/Format Fill																	
Actual	Reporting Only		You can change the Zoom level and Indentation.																	
PriorBud	Last Year Budget (FY09)		Suppress Rows <input type="checkbox"/> No Data / Missing <input type="checkbox"/> Zero <input type="checkbox"/> No Access <input type="checkbox"/> Invalid <input type="checkbox"/> Underscore Characters <input type="checkbox"/> Repeated Members																	
CurBud	Current Budget (FY10)		You can Suppress missing information. Caution: If you suppress missing data and your report doesn't have any values you will get an error																	
CurFcst	Working Forecast (FY09)		Suppress Columns <input type="checkbox"/> No Data / Missing <input type="checkbox"/> Zero (0) <input type="checkbox"/> No Access (0)																	
2+ 10/5+7/8+4/10+2fcst	Reporting Only		Replacements <table border="1"> <tbody> <tr> <td>#NoData/Missing Label:</td> <td>#Missing</td> </tr> <tr> <td>#NoAccess Label:</td> <td>#No Access</td> </tr> <tr> <td>#InvalidMembers:</td> <td>#Invalid</td> </tr> </tbody> </table>			#NoData/Missing Label:	#Missing	#NoAccess Label:	#No Access	#InvalidMembers:	#Invalid									
#NoData/Missing Label:	#Missing																			
#NoAccess Label:	#No Access																			
#InvalidMembers:	#Invalid																			
Act vs Fcst (%)	Reporting Only																			
Act vs Bud (%)	Reporting Only																			
Fcst vs Bud (%)	Reporting Only																			
Version																				
Working	All info loaded to this member																			
Draft1	Reporting Only - Site Meeting																			
Draft2	Reporting Only - Regional Meetings																			
Final	Reporting Only																			
Product																				
10	Gold																			
20	Copper																			
CostCenter	All valid GCOA Cost Centers (C Prefix)																			
Activity	All valid GCOA Activities (A Prefix)																			
Entity	All valid GCOA Entities (E Prefix)																			
Account	All valid GCOA Accounts																			





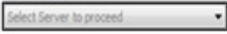
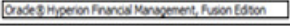



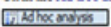
Job Aid
Tips &
Tricks





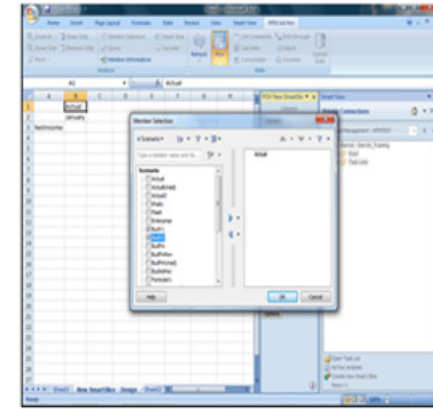
UPK Instructor Manual






Step	Action
6.	To select a connection, click the Open button from the Smart View Ribbon. Click the Open button. 
7.	Click the Shared Connections button. 
8.	Click the Select Server to proceed dropdown button to activate the menu. 
9.	Click the Oracle® Hyperion Financial Management, Fusion Edition list item. 
10.	Expand the server to select the application you want to connect to. Click the + button before the Server tree item. 
11.	Expand the application to select the database you want to connect to. In this example we are going to use the "HFMTtrain" application. Click the + button before the Application tree item. 
12.	To work with Ad hoc analysis, click on the application to see the Ad hoc analysis option. Click the HFMTtrain tree item. 
13.	Click the Ad hoc analysis menu. 

Step by Step for the Instructor

Provides teaching notes for the instructor




Step	Action
10.	Click the Add button. 
11.	Click the OK button. 
12.	Continue selecting members. Click the list. 
13.	You need to set data boundaries for each dimension. So when users are connected to the smart slice, they are only able to select members that you have included here. If you want future addition of members to be automatically inherited in the smart slice definition, make sure to use member relationships. We will use the DESCENDANTS relationship function when selecting members. To learn how to use functions to select member, please watch the "Ad Hoc Analysis" video.





Results of Training

- 60+ Key Stakeholders successful trained as Global Instructors on the new Hyperion Planning, Reporting and Smartview environment
 - 6 Full Course Modules presented over an 8 week period
 - Over 50 UPK Videos for Hyperion Planning, Reporting, and Smartview
 - 10 different job aids to provide quick reference materials to end-users
 - Additional request to have MindStream assist in Global Training of 800+ CCMs – completed in October 2011
 - Reinforceable over time
 - On the way to successful Change!
- 




Lessons Learned / Tips & Tricks


- Training Strategy
 - Don't assume buy-in from everyone
 - People don't tend to like change – many are set in their ways
 - Need to understand cultural differences
 - Meet with as many groups / departments as you can to understand needs of business prior to developing content
 - Read the Requirements / Design documents
 - Training is a gradual process – not fully accomplished in one classroom or on-line session




Lessons Learned / Tips & Tricks

- Tools
 - Have a dedicated Training application or even environment
 - Need to have multiple tools
 - Self Paced – on your own schedule
 - Classroom training – make you think
 - Reinforcements – job aids
 - In small doses – build gradually memory learning
- 


Lessons Learned / Tips & Tricks (cont'd)

- Classroom
 - Test your Training environment and demonstrations
 - Test your exercises – make sure they produce desired results
 - Don't be afraid to “Park” issues – you don't have to answer everything
 - Have questions for your audience – keep them engaged
 - Use name tags – but know the names by Day 2
 - 10-15 trainees maximum per class – more is counterproductive
 - Have a comfortable room with good acoustics
 - Don't go more than 90-120 minutes without a break – but announce the end of your break prior to actual start
 - Set a timed agenda - Have “Dry Runs” (Practice sessions) to work out issues and have simulated questions given to instructor
- 

Lessons Learned / Tips & Tricks (cont'd)

- Webinars
 - Make sure your on-line tool is compatible with client network
 - Go-To Meeting / Webinar
 - Webex
 - Microsoft Live Meeting
 - Have “listeners” use land lines when possible – reduces latency – if using VOIP, try to avoid wireless
 - Don’t put fancy animations in your PowerPoints – reduces latency
 - Have easy to use “mute” features to avoid feedback
 - Avoid the “ums” and “ahs” by taking brief pauses – be confident in what you say
 - Have notes to help keep your points concise – keep listeners alert
- 

Lessons Learned / Tips & Tricks (cont'd)

- UPK
 - Have a concise outline of topics
 - Excellent source for creating job aids
 - Oracle has pre-built content for Hyperion tools – although works very well from scratch
 - Don't over complicate your videos
 - Make your videos relatively short (usually under 10 minutes)
 - Videos are more for understanding a tool than business process
- 



Course Evaluations & Continuous Improvement



Two Types of Training Evaluations

- Level 1: Measures students reaction to training
- Level 2: Measures Level of Knowledge Transfer to Training Participants

Why Develop Training Evaluations?

- Achievement of Learning Goals
 - Course Improvement
 - Delivery Method
 - Content
 - Materials
- Learning Exercises
- Simulations
- Instructor delivery/effectiveness improvement

Evaluations measures participant reaction to training

- Did the participants find the training useful?
- Was the course content relevant?
- How was the course material?
- How was the instructor?
- How were the training facilities?
- Does the end user believe the training objectives were met?

Training Evaluation Process

- During the last 10 minutes of each course, participants will be required to complete an evaluation of the course
- At completion of the evaluation, users will receive credit for completion of the course
- Evaluation data will be collected by the Instructor(s) and made available to the Training Leads for analysis
- Training Leads will talk with instructors daily during Train-the-Trainer and End User Training Delivery to discuss opportunities to improve course materials and design
- Individual discussions with instructors to review feedback information and suggested improvements will take place on an as-needed basis

Evaluation Tools

- The evaluations tools will be developed during the Build phase of the project, concurrent with course content development.
- Each question will be measured on a five point scale, from “strongly disagree” to “strongly agree,” to provide consistent and measurable results





Questions



Thank You !

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