EPM Core & Technical Accelerated 9.1

Duration: 5 Days

What you will learn

This course covers core concepts necessary to deploy and maintain PeopleSoft's EPM solution. Students will learn about EPM Warehouses and Analytical Applications, IBM WebSphere DataStage, EPM business rules, metadata for Analytical Applications, EPM security, and Jobstreams.

Students will also create detailed ETL jobs using IBM WebSphere DataStage and learn how models, scenarios and warehouse business units are defined and used in EPM. They will define trees and tree metadata and become acquainted with metadata management utilities and other tools used in EPM.
Learn to:

Describe and create metadata for the Analytical Applications
Describe ETL in EPM
Create DataStage ETL Jobs
Use Models and Scenarios
Create Warehouse Business Units
Set up EPM security

Audience

Administrator
Business Intelligence Developer
Data Warehouse Administrator
Data Warehouse Analyst
Developer
Functional Implementer
Technical Administrator
Technical Consultant

Related Training

Suggested Prerequisites
Understanding of basic navigation and PeopleSoft concepts

Use of control tables to enforce business rules

Course Objectives

Describe and use the EPM solution

Describe EPM architecture

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Create Warehouse Business Units

Describe and create EPM metadata

Describe and create trees

Describe ETL in EPM

Use DataStage Administrator

Use DataStage Designer

Use DataStage Director

Set up EPM security

Create models and scenarios

Create and use EPM jobstreams

Use Allocation Manager

Use Data Mapper

Course Topics

Describing the EPM solution
ETL process in EPM
Operational Warehouse - Staging
Operational Warehouse - Enriched
Multidimensional Warehouse
PeopleSoft EPM Warehouses and Reporting
PeopleSoft EPM Analytical Applications
Finding information about EPM in PeopleBooks

ETL Overview
Describing IBM WebSphere DataStage Server and Client Components
Describing IBM WebSphere DataStage Terminology
Describing DataStage Administrator, Designer, and Director
Describing Other DataStage Components
Describing ETL Load Strategies in EPM
Describing Error Handling in ETL Jobs
Loading Source Data into Operational Warehouse - Staging (OWS) Tables

Using DataStage Administrator

Using DataStage Designer
Describing DataStage Designer
Managing Repository Objects
Analyzing Repository Object Usage

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Importing and Exporting Repository Components
Working with Table Definitions
Building DataStage Jobs
Compiling and Running Jobs
Editing Job Properties

Using DataStage Director

Describing EPM Business Rules Setup
Describing EPM Business Rule Setup
Defining EPM Sources
Defining Country and State Data
Accounting Calendars Setup
Unit of Measure Setup
Describing Multi-Currency Setup and Currency Conversion Rules
Defining Dimensions

Defining Warehouse Business Units
Describing Warehouse Business Units
Creating Warehouse Business Units

Resolving Dimension Collisions
Using the Business Unit Creation Wizard
Defining Collision Maps

Working with Trees
Describing PeopleSoft Trees
Describing Tree Utilities

Working with Metadata for the OWE and Analytical Applications
Describing Metadata for the EPM Analytical Applications
Defining Record Metadata
Defining TableMap Metadata
Defining DataMap Metadata
Defining Filters, Constraints, and Expressions
Defining Metadata for the Profit Manager Tool
Defining Rule Metadata for Models

Working with Models and Scenarios
Describing Models and Scenarios
Describing How Models Are Used in EPM Applications
Defining Models and Scenarios

Working with Jobstreams
Describing Jobstreams
Defining and Running Jobstreams

Using Data Enrichment Tools
Describing Allocation Manager
Setting Up Allocation Manager Rules
Setting Up Allocation Manager Rule Sets
Defining Fixed Dimensions

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Running Allocation Manager

Using Data Mapper
Describing Data Mapper
Defining Data Mapper Rule Sets
Defining Data Mapper Rule Groups
Defining Data Mapper Values

Using EPM Security
Describing EPM Security
Understanding EPM Security
Setting Up Security by User
Setting Up Security by Role
Setting Up Metric-Level Security
Using Security APIs
Using LDAP Security Data

Loading the Multidimensional Warehouse, EPM Warehouses, and Reporting
Loading Data Into the MDW
Describing the EPM Warehouses
Using Oracle OBIEE to Report on Data Stored in EPM Warehouses

Using ETL-Based Tree Processing for the Multidimensional Warehouse

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