

Hyperion Financial Management 9.3 for Interactive Users

O que é que gostaria de aprender

This course is designed to teach you how to enter, view, consolidate, and manage financial information using the features of Financial Management. You work with a completed application to learn how to enter and view data and create and perform journal entries and intercompany transactions. You execute business calculations, perform consolidations, and analyze data using Smart View; and create and view reports using Financial Reporting. Finally, you put your new skills to work by completing hands-on exercises developed for the course content.

Audiência

Business Analysts
End Users

Pré-requisitos

Familiarity with basic Microsoft Windows skills.
Knowledge of spreadsheets.
Familiarity with the data source, Hyperion Financial Management, relational or SAP-BW, for the reports

Objetivos do Curso

Navigate Financial Management
Enter and calculate data
Create journal entries and enter intercompany data
Consolidate data and manage the financial review cycle
Analyze and enter data using Smart View
View, create, and format reports using Financial Reporting
Add text and mathematical functions to reports using Financial Reporting

Tópicos do Curso

Introduction to Financial Management

About Financial Management
Product Components
Financial Management Architecture
Related Hyperion Products

Navigating Financial Management

Logging On to Workspace

Accessing Financial Management from Workspace
Managing Folders
Creating Favorites
Removing Favorites

Viewing and Entering Data Using Data Grids

Opening Data Grids
Changing Grid Layouts
Entering and Spreading Data
Adding Cell Text and Line Item Detail
Viewing data from Hyperion FDM

Loading Data

Data Load Files
Loading Options
Copying Data
Data Synchronization
Removing Data

Entering Data in Data Forms

Accessing Data Forms
Entering Data in Data Forms
Calculating Data
Linking Forms
Adding Members to Data Forms
Suppressing Data
Exporting Data to Excel

Adjusting Data with Journals

Journals
Opening Periods for Journal Entries
Creating Journal Templates
Creating Journals

Processing and Reporting Journals

Managing the Journal Review Process
Processing Journals
Viewing Adjusted Data in Data Grids
Generating Journal Reports

Eliminating Intercompany Balances

Intercompany Transactions
Creating Intercompany Reports

Managing Intercompany Transactions

Intercompany Transactions Module
Entering Intercompany Transactions
Matching and Posting Intercompany Transactions

Running Consolidations

Financial Management Business Process
Translating Financial Data
Utilizing Consolidation and the Value Dimension

Managing Review Cycles Using Process Control

Process Management
Managing Process Unit Status
Locking and Unlocking Data

Analyzing Data Using Smart View

Smart View
Connecting to Data Sources
Ad Hoc Analysis Tools
Calculating, Translating, and Consolidating Data

Entering Data in Smart View

Opening and Navigating Data Forms
Adjusting and Spreading Data Values
Working with Formulas and Cell References in Data Forms
Submitting Data

Retrieving & Submitting Data Using Functions in Smart View

Functions in Smart View
Creating Functions
POV Manager
Retrieving and Submitting Data
Importing Reports and Functions into Microsoft Office
Smart Tags
Conversion Utility

Navigating Financial Reports in Workspace

Financial Reporting Features
Security Overview
About Financial Reporting Web Client
Setting Preferences
Browsing the Repository
Previewing Reports
Printing Reports and Snapshots
Integrating Reports into Microsoft Office Applications

Navigating Financial Reporting Studio

Financial Reporting Studio Overview

Opening Reports

Previewing and Printing Reports

Creating Basic Reports

Creating Grids

Selecting Members for Rows and Columns

Setting the Point of View

Formatting Cells and Grids

Formatting Cells

Formatting Grids

Suppressing Data

Applying Conditional Formatting in Grids

Creating Report Objects

Report Objects Overview

Creating Text Boxes

Adding Images

Saving Report Objects

Inserting Saved Report Objects

Linked Object Properties

Designing Headers and Footers

Adding Text Functions

Text Functions Overview

Inserting Text Functions in Text Boxes

Inserting Text Functions in Headings and Text Cells

Creating Dynamic Values with the Current Keyword

Displaying the Row and Column IDs

Displaying Text Function Errors

Common Text Functions

Adding Auto Calculations and Mathematical Functions

Auto Calculations Overview

Mathematical Functions

Mathematical Operands in Expressions

Formulas Overview

Common Mathematical Functions

Printing Multiple Reports with Books

Books Overview

Previewing and Printing Books

Changing the Book POV

Creating Books

Changing the Appearance of Books
Collating the Table of Contents by Member Selection