

Hyperion Financial Management 9.3.1 for Interactive Users

Süre: 3 Days

What you will learn

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 inter-company 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. Learn To: Enter data Create and post journal entries Run business calculations Translate and consolidate data Analyze data with Smart-View Create reports with Financial Reporting

Audience

Business Analysts
Sales Consultants

Prerequisites

Required Prerequisites

Familiarity with basic Microsoft Windows skills

Knowledge of spreadsheets

Familiarity with the data source, Hyperion Financial Management, relational or SAP-BW, for the reports

Course Objectives

Navigate Financial Management
Enter and calculate data
Create journal entries and enter inter-company 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

Course Topics

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