



HFM: KEY USER



This two day course gives an overview of Hyperion Financial Management (HFM), the dimensionality, data input, consolidation, adjustments and reporting functionality.

Learning Objectives:

Learn about the dimensionality and functionality of financial consolidation within HFM from a key user's perspective.

Course Description:

An overview of HFM ideal for covering everything key users need to know about HFM applications. This course explores HFM dimensionality, how data is input, consolidated, adjusted, translated and then analysed using standardised financial reporting and ad hoc spreadsheet analysis.

During the course you will explore the look, feel, and functionality of Financial Management, Financial Reporting and Smart View.

Key users will follow the typical path of an end user through the system, understanding how to enter data through FDMEE and data forms.

Learn how to use both data grids and data forms to review and analyse data. You will create journals to adjust data and run intercompany matching reports to analyse mismatches.

Key users will gain an understanding of the consolidation process and the use of process control to sign off data.

Create basic reports and performing ad hoc analysis in Microsoft Excel using Smart View.

Course Information:

Audience:	Users
Pre-requisites:	None
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	14 Credits - Specialized Knowledge and Applications
Programme Level:	Intermediate

Summary by Day:

Day 1:

Overview, Navigation, Dimensionality and Entering Data

Day 2:

Reports, Consolidation, Translation, Process Control and Smart View

Detailed Agenda

HFM Overview

- Logging on to Workspace
- Access & navigate HFM Web
- HFM dimensions
- Setting a Point of View (POV)

Task Lists

- Using task lists

FDMEE

- Loading ERP data to a target Oracle EPM application

Data Forms

- Analysing data using data entry forms
- Entering data using data entry forms

Data Grids

- Understanding data grids
- Design considerations for data grids

Intercompany

- Intercompany (IC) input & elimination
- ICP matching report

Journals

- Creating journals
- Processing journals
- Journal reports

Consolidation and Translation

- Running consolidations
- Value dimension review

Process Control

- Transferring ownership of data

Financial Reporting

- Running Financial Reports
- Embedding reports in Microsoft Office

Smart View Overview

- Smart View panel
- Smart View toolbar
- Member selection
- Ad Hoc analysis
- Smart View options
- Writing functions
- HsSetValue
- Smart View data forms