



HFM: SMART VIEW KEY USER E-LEARNING



This self-paced E-Learning solution is available on a two-year subscription and has been designed for anybody that interacts with Hyperion Financial Management through Oracle Smart View.

About this Course

Perfect for existing and new users of Smart View this comprehensive and cost-effective learning package will help users exploit the full potential of Smart View.

Learn how to develop dynamic and sophisticated reports through functions and Ad Hoc queries. Exploit Task Lists and Data Forms for more efficient interaction with HFM direct from Microsoft Office.

Smart View is a very popular interface for HFM, because of the familiar Microsoft Office interface and is the reporting tool of choice for most users. It is a very powerful tool, but it is rarely exploited to its full potential. This package aims to address this by providing hints, tips and techniques that will enhance user knowledge and unlock Smart View's true capabilities.

It's modular by design, meaning that users can either work through the entire package in a systematic way or just dip-in to those elements where they need more support. An essential training tool for all users of HFM.

About Keyteach E-Learning

Keyteach host E-Learning subscriptions for thousands of users across the globe. Our packages are available 24/7 x 365 and are the perfect ongoing source of reference for all users of your system and include assessment exams and certification.

Advantages of E-Learning

- Perfect for existing and new users
- Cost-effective and compelling content
- The essential guide to being more productive
- Always up-to-date

Custom E-Learning is available please contact us for more details.

Course Information:

Audience:	HFM Key Users
Pre-requisites:	None
Delivery Method:	Self-Paced E-Learning
Duration	5 hours
Programme Level:	Introductory

Introducing Smart View

- **Getting Started**
Find out about Smart View, the Oracle Microsoft Office Add-In, including installation, navigation and the ribbons.
- **Installation**
Find out how to install the Add-In and add the Provider URL.
- **The Smart View Panel and Ribbons**
Explore the Smart View Panel and types of shared connections available. Review the different ribbons and components.

Data Source Connections

- **Connection Types**
Find out about the various connection types available with Smart View, including Shared and Private connections.
- **Active and Default Connections**
Learn about active connections by sheet and / or application and the use of default connections for all sheets.

Dimensions and Members

- **Understanding HFM Dimensions and Members**
Understand the selection of hierarchical dimensions for your reports within a spreadsheet environment.
- **Member Selection**
Discover the most efficient and effective ways of selecting dynamic combinations of members for your reports.

Ad Hoc Analysis

- **Exploring Ad Hoc Analysis** - Discover the benefits of using Ad Hoc Analysis functionality to create queries and analyse data from HFM.
- **Setting the Point of View** - Learn about the default point of view, valid intersections for your queries and multiple members to pivot to columns and rows.
- **Retrieval Operations** - Explore the key functionality of Ad Hoc Analysis such as Zoom-in/out, Keep & Remove Only and Pivot options for your reports.
- **Ad Hoc Mouse Operations** - Learn how to set mouse functionality to exploit drag / drop, single / double-click and left and right button to manipulate retrieval operations.
- **Cascade Reports** - Produce automated reports based on iterations of the point of view.
- **Query Designer** - Discover how to build reports with Query Designer, enabling you to create and preview Ad Hoc Queries, prior to the retrieval of data.

Smart View Options

- **Setting Options** - Determine the appearance and behaviour of Smart View.
- **Member Options** - Control the display of hierarchical dimension members.
- **Data Options** - The display of data within Smart View including suppression, display of zero values, missing data and invalid intersections.
- **Advanced Options** - Explore the default settings for connections, logging of errors, display of ribbons and menus and double-click mouse operations.
- **Formatting and Cell Styles**
Find out how to control the format of your queries and reports. Determine whether to use Smart View cell styles or Excel-based formatting. Control number formats and whether to repeat member labels.



Entering and Processing Data

- **Understanding Data Processing** - Understand how to submit and retrieve / refresh data.
- **Calculating Data** - Review calculation status and mechanics of calculating data in HFM.
- **Consolidation** - Running consolidations and the implication for HFM data.
- **Translation** - Perform on-the-fly translation.
- **Process Management**
Current status of the data - validated, signed-off and promoted?

Working with Functions

- **Understanding Functions** - Use functions to build highly formatted, structured reports.
- **Function Syntax** - Explore syntax used with functions for the retrieval of labels and descriptions of dimension members and the associated data from HFM.
- **Explore Functions** - HsLabel / HsDescription, HsGetSheetInfo, HsCurrency, HsGetValue, HsSetValue, HsGetText and HsSetText.
- **The POV Manager** - Learn when it is appropriate to take advantage of the POV Manager.
- **Optimise Functions** - Optimise HsGetValue and HsSetValue.
- **Exploit Excel Functionality** - Enhance and optimise Smart View when working with functions.

Free Form Mode

- **Guidelines for Using Free Form Reporting**
- **The Importance of Layout**

Smart View General Operations

- **Understanding General Operations**
- **Working with Metadata**

Data Forms and Task Lists

- **Tasks Lists** - Navigate Tasks Lists and explore the documents and tasks that can be accessed from within Smart View.
- **Opening and Using Data Forms in Excel** - Enhance data entry through Data Forms within Smart View.
- **Data Form Options** - Options that can impact the opening and usability of HFM Data Forms.

Smart Slices

- **Understanding Smart Slices**
Use special reporting objects such as sliders, graphs, grids and charts.

Financial Reports and Microsoft Office

- **Smart View across Microsoft Office**
Using Smart View across the suite of Microsoft Office products.
- **Embedding Financial Reports**
Find out how to embed dynamic financial reports into Office products. These will be updated automatically once a Smart View connection is established and will reflect the current point of view.
- **Copy and Paste Data Points**
Discover how to copy and paste Ad Hoc queries from Excel to other Office products, creating dynamic links that are updated automatically.