

## Oracle Hyperion Financial Management for the Power User

### Course Description

**Course Name:** Oracle Hyperion Financial Management for the Power User  
**Course Number:** O-HFM-P  
**Duration:** 2 Days

Power Users are staff that use Oracle Hyperion Financial Management (HFM) nearly every day to enter, manipulate and/or analyze data, and to create or modify reports. They may even have limited administrative responsibilities.

This course provides Power Users a comprehensive and interactive experience with HFM. After an HFM overview, users learn to load and manipulate data using data files, data forms and data grids.

The next section focuses on journals and the consolidation process. Finally, Power Users will learn to analyze data using Smart View and Reports.

#### Who Should Attend

- Power Users
- Report Developers

#### Prerequisites

- Basic Microsoft Windows skills
- Knowledge of spreadsheets
- Working knowledge of accounting

#### Course Information

**Advance Preparation:** None  
**Program Level:** Intermediate  
**Delivery Method:** Group – Live  
**CPE Credit:** 16 credits in Specialized Knowledge and Applications

**Course Registration:** 203-941-0714 or online at <http://www.compintelligence.com>  
**Policies:** For information regarding cancellations, refunds, or other questions, contact us at 203-941-0714 or [education@compintelligence.com](mailto:education@compintelligence.com)



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## Oracle Hyperion Financial Management for the Power User

### Course Outline

#### 1 Introduction to HFM

- Oracle Hyperion Financial Management
  - HFM Overview
  - HFM Task Flow
  - Enterprise Performance Management Overview
  - Dimensions Overview
- Best Practices

#### 2 Navigate HFM

- Overview
  - What's New
  - Before You Begin
- Navigate EPM Workspace
  - Log on to EPM Workspace
  - EPM HomePage
  - EPM Workspace Menu
  - EPM Workspace Toolbar
  - Open Financial Management Applications
- Navigate Financial Management
  - Documents Pane
  - Filters
  - Manage Documents List
- Close Financial Management Applications and Exit EPM Workspace
  - Close the Financial Management Applications
  - Log Off and Exit the EPM Workspace

#### 3 Load & Manage Data

- Manage Data
  - Overview
  - Load Data
  - Data Load Formats
  - Data File Format
  - Extract Data
  - Copy Data
  - Clear Data
- Best Practices

#### 4 Data Forms

- Data Forms
  - Key Benefits of Data Forms
  - Build Data Forms

# Oracle Hyperion Financial Management for the Power User

## Course Outline

- Form Details
- Point of View (POV)
- Columns
- Rows
- Special Fields in Row and Column Options Pane
- Style and Custom Header Style
- No Suppress
- Add Member
- Link
- Form Details Pane
- Headers Tab
- Insert Cell Text or Documents
- Data Forms – Suppress Rows, Columns, or Both
- Set the Point of View in Data Forms
- Use Data Forms to View and Enter Data
- Data Forms – Colors
- Enter and Save Data
- Spread Data for a Quarter

## 5 Data Grids

- Data Grids
  - Key Benefits of Data Grids
  - Build Data Grid
  - Change Data Grid Layout and Display
  - Data Grids – Colors
  - Data Grids for Currencies
  - Perform Admin Functions with Data Grids
- Best Practices

## 6 Journals

- Navigate Journals
  - Journals and the Value Dimension
  - Use Journals
- Manage Journal Periods
- Create Journal Templates
  - Create Standard Journal Templates
  - Create Recurring Templates
  - View Journal Template Lists
  - Filter Journal Template Lists
  - Display Columns in Journal Template Lists
  - Edit Journal Templates
  - Print Journal Templates
  - Delete Journal Templates
- Create Journals
  - Create New Journals

# Oracle Hyperion Financial Management for the Power User

## Course Outline

- Create Auto-Reversing Journals
- Create Journals by Using Recurring Templates

### Process Journals

- Journal Review Process
- Post Journals
- Journal Validation

### Create Journal Reports

- Preview Reports
- Save Private Journal Reports
- Edit Journal Reports
- Run Journal Reports

## 7 HFM Default Calculations

### Overview

- Consolidation
- Value Dimension
- Translation Process

## 8 Smart View

### Objectives

- Smart View
- Smart View Ribbon
- Access HFM Data in Smart View
- HFM Ribbons
- Ad Hoc Reporting
- Free-Form Ad Hoc Spreadsheets
- Data Forms in Smart View
- Excel Formulas and Cell References
- Smart View Reports

## 9 Hyperion Financial Reporting

### Overview

- Financial Reporting Studio
- Hyperion Financial Reporting Books / Batches
- Create Books
- Create and Schedule Batches

## 10 Navigate Financial Reports

### Financial Reporting Overview

- Access Financial Reports
- Explore Repository Toolbar
- Set User Preferences
- Limit User Point of View Selections
- Run Financial Reports and Books
- Financial Reports Toolbar

The banner features a blue background with a blurred image of a financial report or spreadsheet. The text "Oracle Hyperion Financial Management for the Power User" is centered in white, bold font.

# Oracle Hyperion Financial Management for the Power User

## Course Outline

- Run Financial Reports and Books
- View Reports in HTML Format
- View Reports as PDF Files
- Close Reports, Books and Folders
- Export Reports to Excel
- Query-Ready Reports
- Add and Remove Favorites