

## Financial Reporting for Oracle Hyperion Planning

### Course Description

**Course Name:** Financial Reporting for Oracle Hyperion Planning  
**Course Number:** O-PLN-RPT  
**Duration:** 2 Days

In this course, Report Developers and Power Users learn how to create and manage reports using Oracle Hyperion Financial Reporting Studio 11.1.2.4.x. Using Planning as the data source, students create basic reports and then add advanced member selections and report objects.

They go on to create more advanced reports and then create books, and batches. As part of the process, students also learn how to format reports, customize grids, and add auto calculations and mathematical functions to enhance their reports and books.

The course format consists of lecture plus exercises and workshops, building real-world reports against a Planning application.

### Who Should Attend

- Report Developers
- Power Users

### Prerequisites

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

### Course Information

**Advance Preparation:** None  
**Program Level:** Intermediate  
**Delivery Method:** Group – Live  
**CPE Credit:** 17 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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## Financial Reporting for Oracle Hyperion Planning

### Course Outline

#### **1 Navigate and Preview Reports**

- Navigate and Preview Reports
- Export a Report to Excel, Word or PowerPoint
- Print Reports
- Annotations

#### **2 Navigate Reports in Financial Reporting Studio**

- Working with Financial Reporting Studio

#### **3 Create Basic Reports**

- Create Basic Reports
- Define the Point of View (POV) and Preview the Report
- Apply Same As Member

#### **4 Use Advanced Member Selections**

- Create Reports Using Prompts and Functions
- Use Ranges for the Columns
- Define a Page Axis

#### **5 Customize Grids**

- Supporting Details in Planning
- Set up Expansions to Display Detail and Preview Expansions
- Create Related Content in Reports and Books

#### **6 Format Cells and Grids**

- Format Cells
- Apply Conditional Formatting

#### **7 Create Report Objects**

- Add Headers, Footers and Report Objects
- Link Objects
- Add Headers and Footers
- Define Row and Column Templates

#### **8 Add Text Functions**

- Text Function Overview
- Enter Header and Footer Functions
- Enter Page Functions

A blue banner with a background image of a financial report and a pen. The text "Financial Reporting for Oracle Hyperion Planning" is centered in white.

# Financial Reporting for Oracle Hyperion Planning

## Course Outline

Display Row, Column IDs and Text Errors

### **9 Add Auto Calculations and Mathematical Functions**

Apply Auto Calculations to Data Rows and Columns

Format Auto Calculations

### **10 Apply Mathematical Functions**

Create Formulas, Common Mathematical Functions and Percent of Total Calculation

Get Cell Function

Mathematical Operators in Expressions

### **11 Create Books**

What Are Books?

Create a Book

Preview the Report in HTML and PDF

Update the Book Layout

### **12 Create Batches**

Create and Schedule Batches

Schedule Batches

Review Batch Output