

Applied HFM & Financial Reporting

Duration – 5 days

What you will learn

The Applied HFM and Financial Reporting course takes students through the typical steps needed in an implementation of Hyperion Financial Management (HFM) and Financial Reporting. Students develop and deploy HFM as an interactive case study through-out the week.

The course begins with a general overview of HFM and how it fits into the Hyperion suite of products. The class then focuses on metadata. Both methods of metadata management—classic and EPMA—are introduced. Students then set up the HFM dimensions. Advanced topics include alternate hierarchies, attributes, and importing/exporting. Students review importing and exporting data to/from HFM, and the various alternatives available.

The next major topic is an extensive coverage of rules. Then the focus is on security, showing students how to create and manage user and group access within HFM using Shared Services. Following are various administrator topics such as creating data entry forms, setting up process control, and other available controls.

The next component of the class focuses on end-user tasks including creating and modifying grids, debits and credits with journals, inter-company reporting, process control, and building reports using Smart View. Financial Reporting, including developing and formatting reports and working with formulas is the last day of the course.

Upon completion of this course, students will be able to create and deploy HFM applications and metadata, set up and maintain security, load, translate and consolidate data from external systems, create rules, manage review process and create reports with Hyperion Financial Reporting.

Who should attend?

- HFM administrators, HFM project team members, HFM super users

Topics Covered

- Overview of HFM
- Creating an Application
- Metadata Modeling
- Data Loading
- Rules
- Security
- Data Grids and Forms
- Journals
- Inter-Company Reporting
- Process Control
- Smart View
- Financial Reporting

Prerequisites

- Accounting or Financial background recommended.