

Hyperion Financial Reporting 9.3.1 for Essbase and Planning

Duration: 2 Days

What you will learn

This course is designed to teach you how to create and manage reports with Financial Reporting, and use Essbase or Planning as the data source. You create reports, report objects, books, and batches; format reports; and add auto calculations and functions. You also learn to manage items in the repository and define permissions for report items. Exercises help you practice the skills taught.

Audience

Reports Developer

Prerequisites

Required Prerequisites

Basic knowledge of Essbase or Planning data sources

Basic Microsoft Windows skills

Course Objectives

Describe Financial Reporting architecture and client-server components

View reports and set related preferences in Workspace

Create reports and report objects (grids, text boxes, charts, images, and templates)

Apply member selection by using members, lists, and functions for rows, columns, and pages

Format reports

Define auto calculations and functions in reports

Create books and batches to generate reports

Set permissions for report items

Course Topics

Financial Reporting Overview

Oracle's Enterprise Performance Management Overview

Oracle's Business Intelligence Suite Enterprise Edition Plus

Hyperion Product Components

Financial Reporting Features and Architecture

Data Sources for Financial Reporting

Navigating Reports in Workspace

Workspace Overview

Setting Preferences

Browsing the Repository

Previewing and Printing Reports

Integrating Reports into Microsoft Office Applications

Navigating Reports in Financial Reporting Studio

Financial Reporting Studio Overview

Opening Reports

Previewing and Printing Reports

Creating Basic Reports

Report Creation Overview

Creating Reports and Grids

Selecting Members for Rows and Columns

Setting the Point of View

Adding Rows or Columns

Saving Reports

Applying Advanced Member Selections

Selecting Members by Using Lists

Selecting Members by Using Functions

Selecting Multiple Members by Using Expressions

Selecting Members for the Page Axis

Optimizing Data Queries

Customizing Grids

Selecting Database Connections in Reports

Attaching Documents to Reports

Displaying Supporting Details

Setting Up Expansions to Display Detail Data

Adding Related Content Links to Reports

Formatting Cells and Grids

Formatting Cells

Formatting Grids

Suppressing Data

Applying Conditional Formatting in Grids

Setting Up Pages

Creating Report Objects

Adding Text Boxes and Images

Saving Report Objects

Inserting Saved Report Objects

Designing Headers and Footers

Designing Row and Column Templates

Creating Charts

Charts Overview

Chart Types

Designing Charts

Formatting Charts

Adding Text Functions

Text Functions Overview

Inserting Text Functions

Common Text Functions

Adding Auto Calculations and Mathematical Functions

Auto Calculations Overview
Mathematical Functions
Mathematical Operators in Expressions
Formulas Overview
Common Mathematical Functions

Creating Books

Books Overview
Previewing and Printing Books
Changing the Book POV
Creating Books
Changing the Appearance of Books

Creating Batches

Working with Batches
Scheduling Batches
Scheduling Batch-Bursting Options
Monitoring Batch Schedules

Managing Items in the Repository

Managing User POVs
Creating and Managing E-Mail Links
Managing Repository Items
Managing Database Connections
Setting Permissions for Repository Items