



Hyperion - HFM



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Hyperion - HFM

Logging Into Workspace

Learning Objective: In this topic you will learn how to launch the Workspace.

Upon completion of this topic you will be able to:

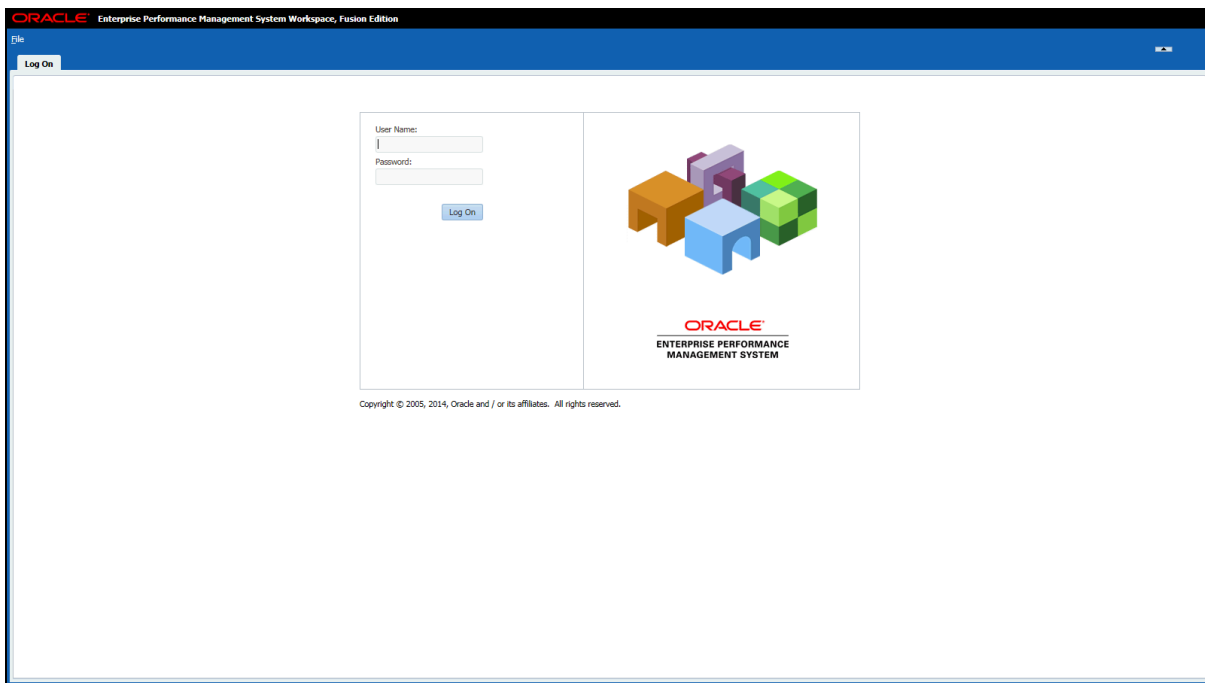
Launch the Workspace

Procedure

This topic will cover:

- Logging Into Workspace

Estimated time to complete this topic: **1 minute**



Step	Action
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Training Guide



Step	Action
1.	<p>The Oracle <i>Enterprise Performance Management (EPM) System Workspace</i> Log On page provides access to the Hyperion Applications and is the gateway into the applications that are assigned to your job role.</p> <p>To access the Hyperion Applications, enter the assigned user name into the User Name field.</p> <p>In this example enter "TestUser1g7".</p> <input data-bbox="358 604 643 653" type="text"/>
2.	<p>The System Administrator will assign an initial Password.</p> <p>Enter the assigned password into the Password field.</p> <p>Note: The Password field is case-sensitive</p> <p>In this example, enter "12345".</p> <input data-bbox="358 909 643 957" type="text"/>
3.	<p>Click the Log On button when you are finished entering the user name and password.</p> <input data-bbox="358 1056 467 1098" type="button" value="Log On"/>
4.	<p>The <i>Home</i> page is displayed.</p> <p>The Home page provides a single point of login for a user.</p> <p>The Home page contains:</p> <ul data-bbox="358 1255 695 1350" style="list-style-type: none">- Recently Opened Area.- Quick Links Area.- Workspace area.
5.	<p>This topic covered:</p> <ul data-bbox="358 1434 699 1476" style="list-style-type: none">- Logging Into Workspace. <p>End of Procedure.</p>



Opening HFM

Learning Objective: In this topic, you will learn how to open Hyperion Financial Management application.

In Financial Management, all data is processed within applications. You can open and work with multiple applications at one time.

Upon completion of this topic, you will be able to:

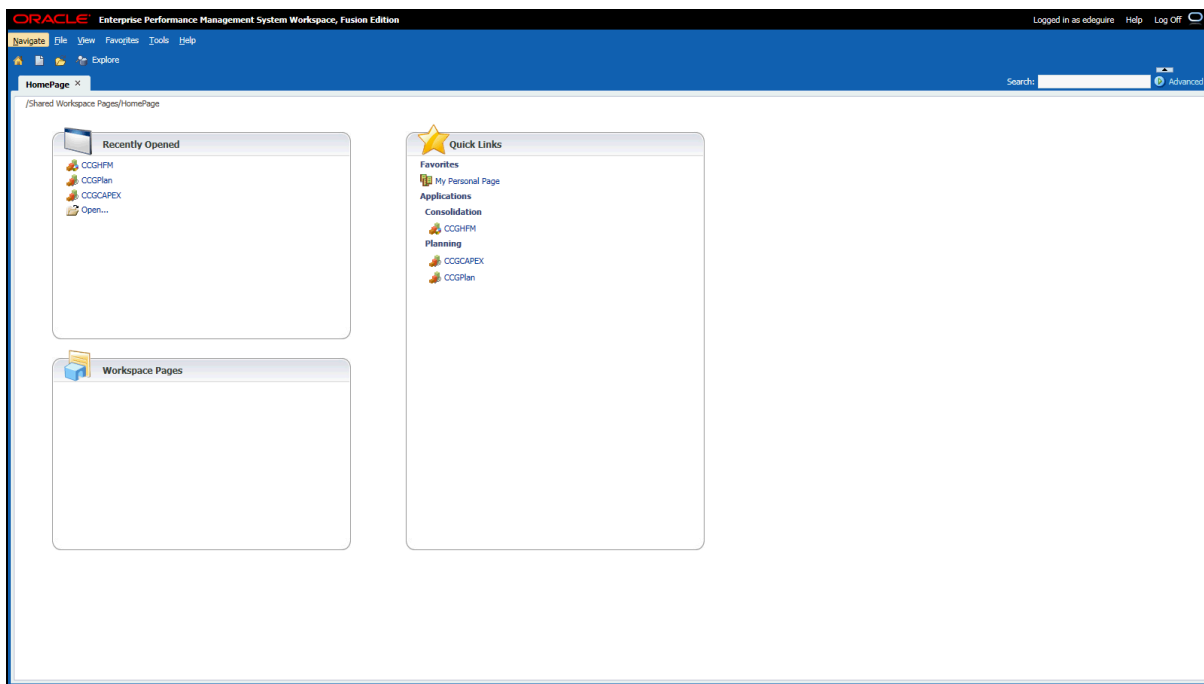
Open Hyperion Financial Management application

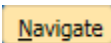
Procedure

This topic will cover:

- Opening Hyperion Financial Management

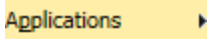
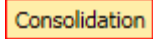
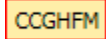
Estimated time to complete this topic: **1 minute**

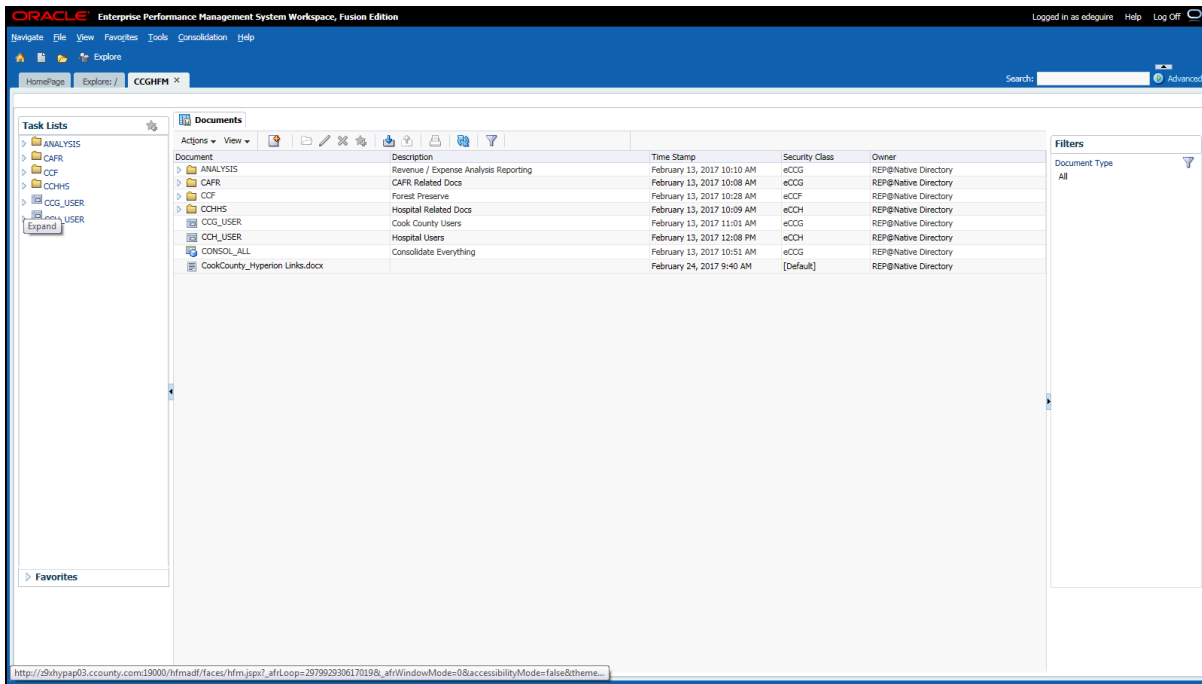




Step	Action
1.	From the Home page, click the Navigate menu. 

Training Guide

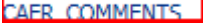

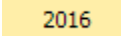




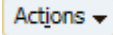
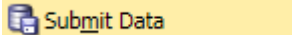


Step	Action
2.	Click the Applications menu. 
3.	Click the Consolidation menu. 
4.	Click the CCGHFM link. 
5.	The CCGHFM application <i>Task Lists</i> window is displayed on the left side (Navigation Pane). By default, HFM displays the data form or task that was opened in your previous session. In this case, the <i>Document Manager</i> (aka "Documents") window is displayed on the right side (Content Pane).







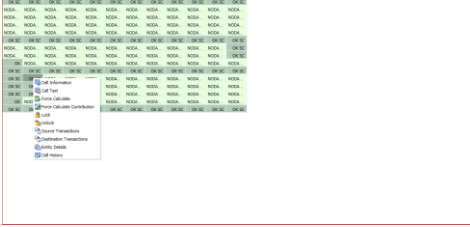



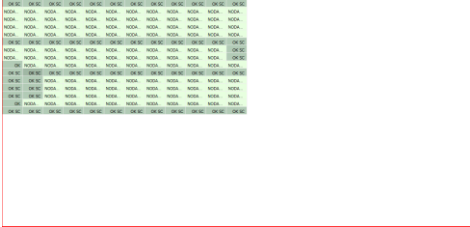


Step	Action
6.	To see more options under the CCG_USER folder, click the Expand button. 
7.	To see more options under the CAFR folder, click the Expand button. 



Step	Action
8.	Double-click the CAFR_COMMENTS link. 
9.	The <i>CAFR_COMMENTS</i> Entry Form page is displayed. In the Point of View section, click the Year button. 
10.	Click the 2016 list item. 
11.	Click the Nov- Line 1 cell. 
12.	Enter the appropriate comments into the Revenues, Expenses and Changes in Net Position - Line 1 field. In this example, enter " Note: 2015 Information has been restated for the implementation of GASB 68 & 71 ". 
13.	Click anywhere on the form. Click the Schedule S-1 cell. 
14.	The comments entered are displayed in the Line 1 cell. Open the Consolidation data grid. Double-click the CONSOL_CCG link. 
15.	The <i>CONSOL_CCG</i> Consolidation Data Grid is displayed. Each cell displays a status: - CN - Displayed in Yellow - NODATA - Displayed in Light Green - OK
16.	Click the Actions menu. 
17.	Click the Submit Data menu. 


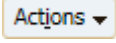

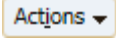
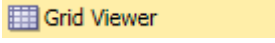
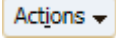


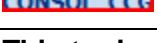
Training Guide



Step	Action
18.	Click the Refresh button. 
19.	Click the Refresh button. 
20.	Click the Jan cell. 
21.	Right-click the Jan cell. 
22.	Click the OK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SC SC NODA object. 
23.	Click the Jan cell. 
24.	Right-click the Jan cell. 
25.	Click the Jan cell. 
26.	Click the OK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SCOK SC SC NODA object. 
27.	Click the Submit Data button. 
28.	Click the Refresh button. 



Training Guide

Step	Action
29.	Click the Refresh button. 
30.	Click the Actions menu. 
31.	Click the New menu. 
32.	Click the Actions menu. 
33.	Click the Grid Viewer menu. 
34.	Click the Actions menu. 
35.	Click the Scroll button. 
36.	Click the CONSOL_CCG object. 
37.	Double-click the CONSOL_CCG object. 
38.	This topic covered: - Opening Hyperion Financial Management End of Procedure.

Training Guide



Setting Preferences in Financial Reporting

Learning Objective: In this topic you will learn how to set preferences in Financial Reporting.

Upon completion of this topic you will be able to:

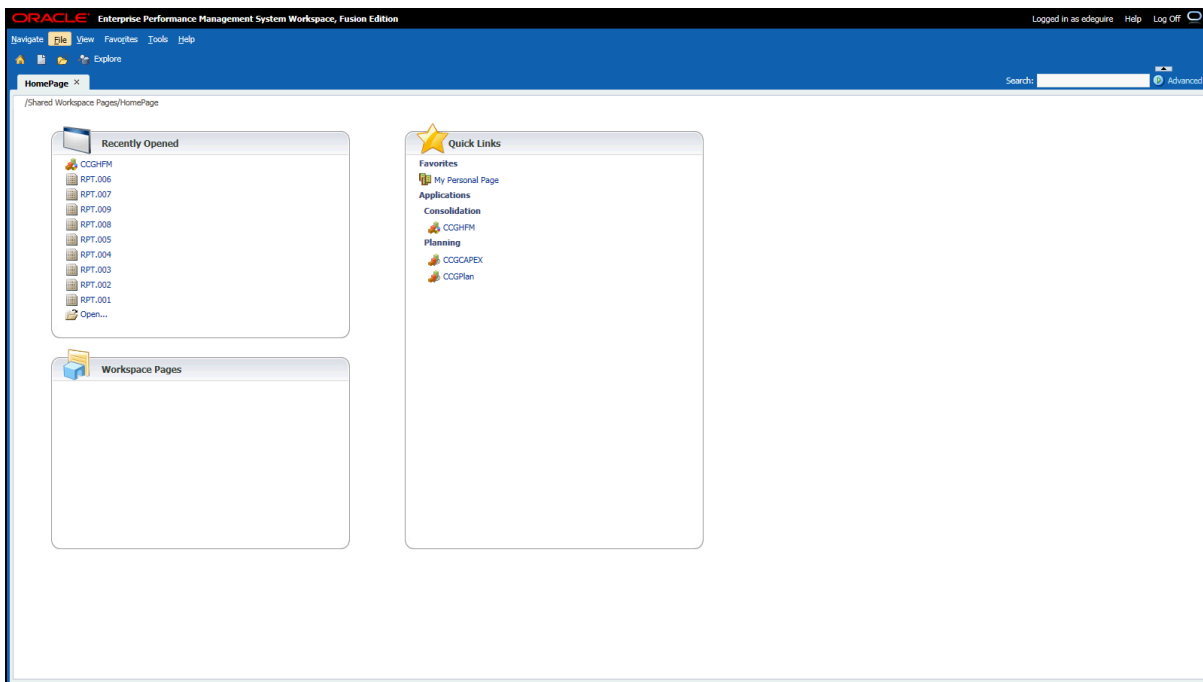
Set Preferences in Financial Reporting


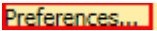
Procedure

This topic will cover:

- Setting preferences in Financial Reporting

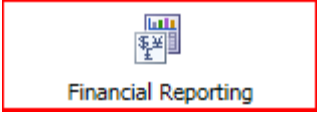


Estimated time to complete this topic is: **1 minute**



Step	Action
1.	After logging on with your username and password, the <i>Oracle Hyperion Home Page</i> is displayed. To set your preferences for Financial Reporting, click the File menu. 
2.	Click the Preferences link. 



Training Guide

Step	Action
3.	<p>The <i>Preferences</i> window is displayed.</p> <p>Click the Financial Reporting button.</p>  <p>The image shows a button with a small icon of a document with a dollar sign and a bar chart, and the text "Financial Reporting" below it. The button is enclosed in a red rectangular border.</p>
4.	<p>The <i>Financial Reporting</i> page is displayed.</p> <p>In order to view previews of reports, the User Point of View must be in "preview" mode.</p> <p>Click the On option.</p>  <p>The image shows a small red square checkbox followed by the text "On".</p>
5.	<p>Clicking the OK button will save your changes.</p> <p>Click the OK button.</p>  <p>The image shows a yellow button with the text "OK" in black, enclosed in a red rectangular border.</p>
6.	<p>This topic covered:</p> <ul style="list-style-type: none">- Setting preferences in Financial Reporting <p>End of Procedure.</p>

Training Guide



Running a Financial Report

Learning Objective: In this topic you will learn how to run a financial report.

Upon completion of this topic you will be able to:

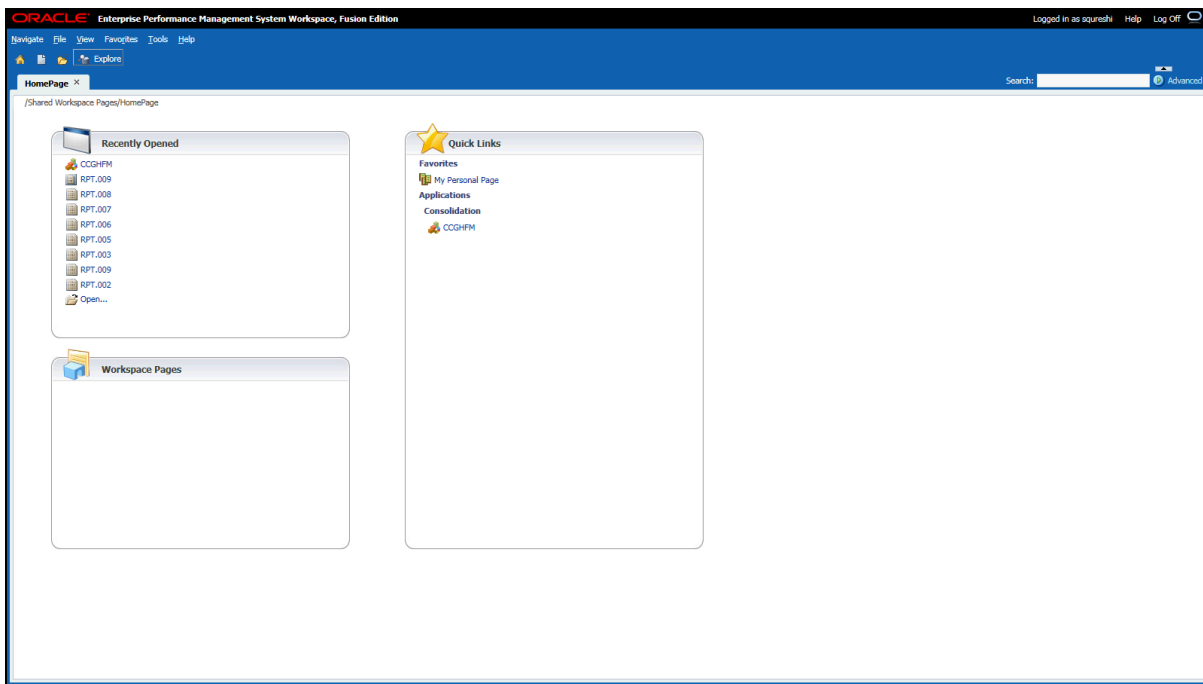
Run a Financial Report.


Procedure

This topic will cover:

- Running a Financial Report

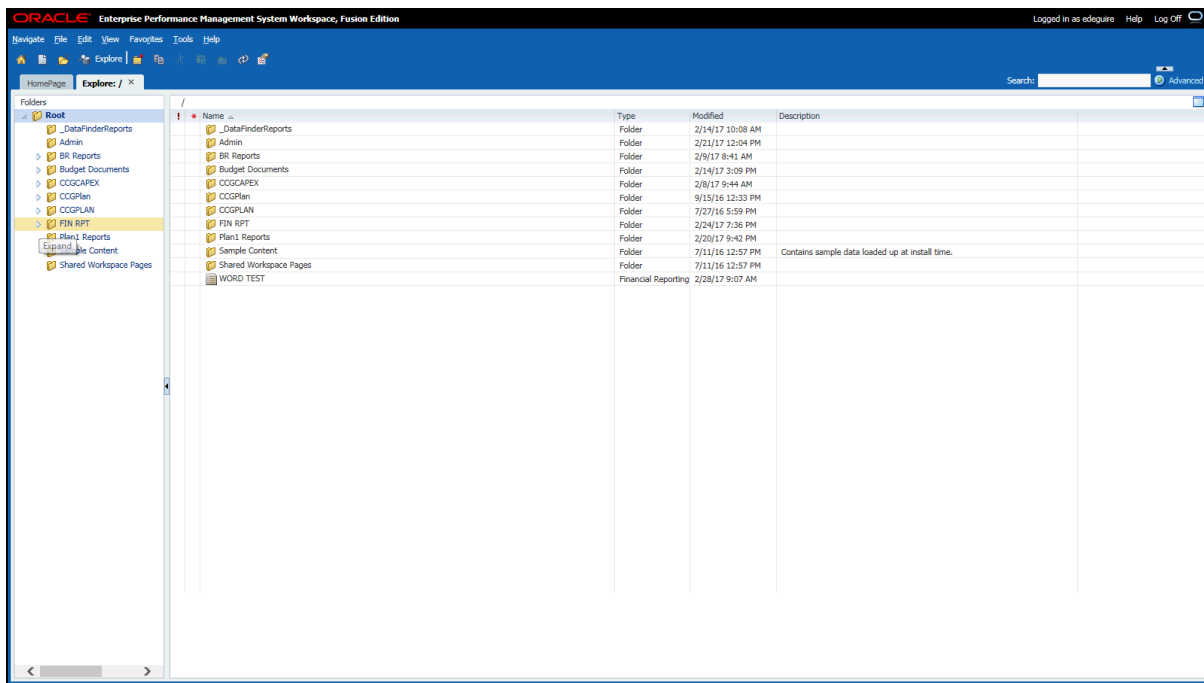
Estimated time to complete this topic is: **3 minutes**




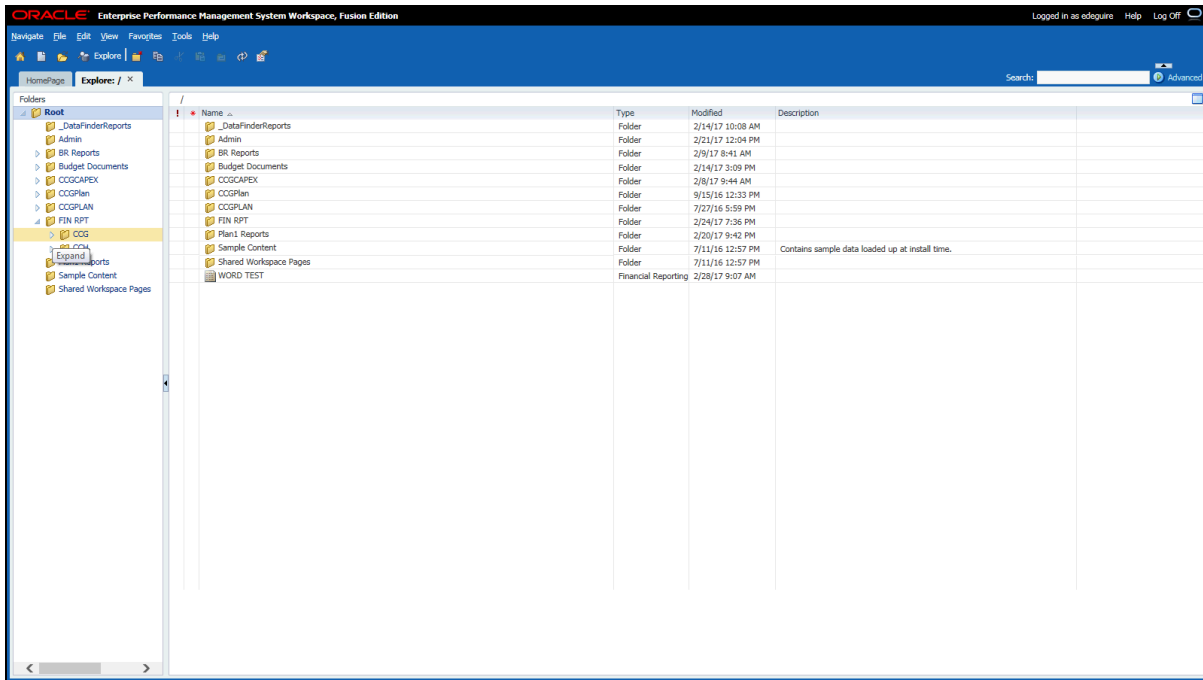
Step	Action
1.	<p>After logging on with your username and password, the <i>Oracle Hyperion Home Page</i> is displayed.</p> <p>From the Home Page, in the tool bar, click the Explore button.</p> 


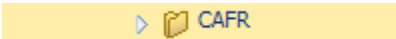
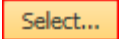



Step	Action
2.	<p>The <i>Explore</i> page is displayed.</p> <p>Use Explore to list and navigate repository contents and to manage and control files and folders.</p> <p>User's roles determine what parts of the user interface are shown. Access privileges or permissions determine which items you can view, modify, run and delete in the repository.</p>





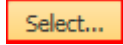





Step	Action
3.	<p>Click the Expand button before the FIN RPT folder.</p> 



Step	Action
4.	Click the Expand button before the CCG folder. 
5.	Click the CAFR folder. 
6.	Double-click the HFM.001 list item.
7.	Double-click the HFM.001 tree item.
8.	Click the Select... button. 
9.	The <i>Preview User Point of View</i> for Year is displayed. <p>Note: Both current, future and prior years are loaded in the system.</p> <p>In order to find the year we want, we might need to go back or forward one page.</p> <p>In this example, we need to go back to find "2016".</p> <p>Click the Previous Page button. </p>



Training Guide

Step	Action
10.	<p>The prior years are displayed.</p> <p>Click the 2016 option.</p> 
11.	<p>Click the OK button.</p> 
12.	<p>The "Year" field is updated.</p> <p>Click the Select... button.</p> 
13.	<p>The <i>Preview User Point of View</i> for Period is displayed.</p> <p>The periods are broken out be "Year", "Quarter" (e.g. "Q1" and "Month").</p> <p>Click the Expand Row button.</p> 
14.	<p>Click the Nov option.</p> 
15.	<p>Click the OK button.</p> 
16.	<p>The "Period" field is updated.</p> <p>Once the members are updated, clicking the "OK" button will automatically run the report.</p> <p>Click the OK button.</p> 
17.	<p>The selected report is displayed.</p> <p>This report displays 2015 and 2016 data.</p>
18.	<p>The report can also be opened in PDF format.</p> <p>Click the Open In PDF button.</p> 

Training Guide



Step	Action
19.	This topic covered: - Running a Financial Report End of Procedure.