

Course: HFM Bootcamp

Duration	Cost	Prerequisites
4 Days	£2,700	Accounting Financial Background recommended

Course Description

The 4-day HFM Bootcamp course is designed to take students through the typical steps needed in an implementation of Hyperion Financial Management (HFM). Students develop and deploy HFM as an interactive case study throughout the course.

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.

Course Content

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

Course Outcomes

- Create and deploy HFM applications and metadata
- Set up and maintain security
- Learn how to work with function selections for members
- Load, translate and consolidate data from external systems
- Create Rules
- Manage review process

HFM Bootcamp – Daily Agenda

Day One:

Overview of HFM

Metadata

- Create application
- Dimension attributes and performance considerations
- Application Settings
- Deploying from EPMA

Day Two:

Review

Data Loading and Extracting

- Native data load and extract
- Various alternatives
- Copying and clearing data
- Analytic Link

Rules – Rest of Day

- Overview
- Subroutines
- Syntax
- Restricting when rules run and why
- Top 10 calculations
- Functions

Day Three:

Review/Assignment

Member Lists

Security

- Shared services Overview
- Security Classes
- Provisioning users/groups

“Admin Stuff” – Rest of Day

- Admin tasks – audit logs, system messages, etc.
- Task Automation
- Process control and validations – admin side
- Creating data entry forms

Day Four:

Review

Task Lists

Data Grids

Journals

Intercompany Reporting

Process Control – end user side

Running reports

Smart View and Microsoft Office

Our training

All of our courses are taught by our certified Oracle Consultants, and have been developed by the leading Oracle Hyperion training providers, 123OLAP. We share real-life examples of implementations and all training manuals have been developed for later use as comprehensive reference manuals.