COLLABORATE 12

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Tips, Tricks and the Things Everyone Tells You Can't be Done with Hyperion Financial Reports

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Agenda

- Introduction

- Hyperion Reports Basic Concepts

- Some tips and tricks for Reports that you might not know.

- Some of the newer features

- Some best practices

- Smart View use with Reports

- What's upcoming

Alex Ladd

- 14 Years of Planning/Essbase Experience

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Financial Reports Basics

- Formatted Reports

- Scheduling and good delivery options

- Books & Batch capability can incorporate other content

- Limited ad-hoc capabilities

- Can incorporate Cell Text and Annotations

- Has Charting functionality

- Reports has it's own Functions and Calculation capabilities

Tips

- Report Creation Basics

  - Layout of Reports (use the familial functions)

  - Utilize exception formatting

  - Make everything as Dynamic as possible

- Formatting Tips and the Lack of a proper preview

- Using Charts

Tricks

- Books can use external Content

- Creating Rolling Reports

- USE FINANCIAL REPORTS INSTEAD OF VBA!!!!

  - It's far cheaper!

Financial Reports Best Practices

- Different sources and different grids

  - If you have two different data sources use to grids and then reference from one to the other

- Use Simplistic functions to drive relationships to the User's Point of View instead of having multiple selections

- Have a central group validate or create reports

  - Don't try and create them all

- Commentary Functionality is robust

- Security

  - How new features help administer it

- How to leverage the User Default Point of Views

- Search

  - Workspace now has very good search capabilities and reports can be tagged with Key Words for Searching
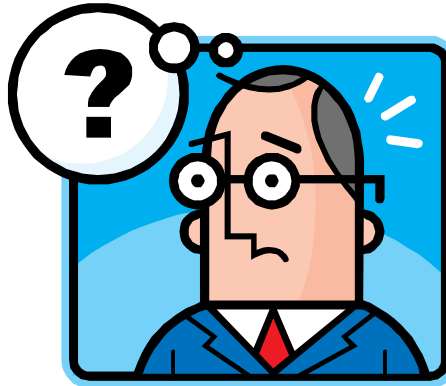
Smart View with Reports

- Great Complementary Tool to use with Reports

    - Reports can be exported to Excel in Query Ready Format which make great starting points for Ad-Hoc Analysis

- Charts and Graphs created in Financial Reports can be opened in PowerPoint, Word or Excel and then refreshed as needed.

    - This is very helpful for Management Reporting PowerPoint Presentations

- Reports connects to multiple Datasources

    - Smart View is built around one connection per page or sheet or slide but Reports can help solve that problem by allowing multiple data source connections in one report

Questions?

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