OVERVIEW

As part of the new Hyperion System 9 Applications +, Hyperion® System™ 9 Financial Management™ 9.2 introduces the following six major features:

- Security Administration over the Web: User Management provides a single point for the administrator to create users for the Hyperion environment, and assign them to specific BPM domains.
- The Process Control module provides a centralized place for controlling both the review process and consolidation process with enhanced status and monitoring features.
- Alerting capability is now available within Process Management, Intercompany Matching reports, and the Intercompany Transactions module.
- Workspace enhancements include support for indented organizations and nested workspaces.
- Support for Web data forms in Smart View provides a complete alternate data input environment for users.
Performance enhancements include the ability to support a simplified Value dimension for applications using default consolidation rules, and increased capacity for larger data volumes (subcubes) above the current limit.

In addition, this release presents compliance enhancements, as well as Intercompany Transaction module enhancements such as monitoring transactions, and metadata enhancements such as support for 80 characters for the description and a new calculation attribute.

SECURITY ADMINISTRATION

User Management provides a single point for the administrator to create users for the Hyperion environment and assign them to specific BPM domains. The benefits of this functionality include:

- Individual Hyperion products can be grouped into Projects, which represent a BPM domain or a folder. For example, the Planning domain could be made up of Planning, Financial Reporting, and Analytic Services. This allows for an easier approach for managing security and users across multiple product solutions.
- Ability to create local users, or use external users directly from LDAP, MSAD, or NTLM security repositories
- Assignment of users to defined projects, which significantly reduces the need to utilize individual product administration consoles
- Assignment of roles to the project, which identify the types of access the users in the project have to the underlying BPM modules

For more information about security administration, see the Hyperion System 9 Financial Management Administrator’s Guide.

PROCESS CONTROL

Financial Management introduces a new module called Process Control. You can use process management to manage the review process of financial data while ensuring data privacy. In addition, to provide a centralized place for controlling both the review process and consolidation process, the existing Process Management module has been enhanced to include consolidation features as well as new process management features.

You can use the Process Control module on the Web to perform process management tasks as an alternative to using data grids. From the Process Control module, you can view consolidation status and perform various calculation, translation, and consolidation tasks. The Process Control module also offers a tree view of the Entity dimension, and introduces calculation and journal status, and the ability to drill down into details for journals, consolidation status, and currency rate information. In addition, the new module provides a single view or multiple view periods grid.
For more information about process control, see the *Hyperion System 9 Financial Management User’s Guide*.

### ALERTING CAPABILITY

Alerting capability is available within Process Management, Intercompany Matching reports, and the Intercompany Transactions module.

### PROCESS CONTROL

Process Management is used to control the closing cycle process and to help ensure data ownership at the lowest level of the organization. When a change of review level occurs for a process unit, you now have the ability to trigger alerts based on the change of status in Process Management. Financial Management provides e-mail alerting capability in Process Management as a way to improve communication during the review process.

This new feature is based on:

- A new security role access called “Receive Email Alert for Process Management” to support the e-mail alert.
- For the Scenario dimension, an additional setting for the “Supports Process Management” attribute called “A” to generate e-mail alerts during the review process for a specific scenario.
- A new attribute called “SupportAlert” that you assign to the security class when you assign access rights to the security class.

You can manage the review process of a process unit from within a Web data grid or from the new Process Control module. When any review action is performed in either one of these two modules, the system automatically generates the e-mail alerts to the appropriate users as part of the action.

E-mail alerts are sent to the users at the prior level before the action, and to the users at the current level after the action. The user who generated the alert receives a confirmation e-mail.
INTERCOMPANY TRANSACTION AND MATCHING MODULE

Financial Management provides the ability for you to send e-mail alerts for intercompany transactions and from Intercompany Matching reports. For example, if you notice that a transaction between an entity and partner has a mismatched status, or if you are unable to reconcile the differences in an Intercompany Matching report, you can send an e-mail alert to the partner entity for information.

This new feature is based on:

- A new security role access called “Receive Email Alert for IC Transactions” to support the e-mail alert.
- A new attribute called “SupportAlert” that you assign to the security class when you assign access rights to the security class.

In the Process IC Transaction window, you can select the transactions and then manually invoke the e-mail action. You can select one of the following distribution options:

- Generate email for unique entity
- Generate email for unique partner
- Generate email for both entity and partner
WORKSPACE ENHANCEMENTS

Workspaces provide a seamless way for users to interact with Financial Management applications without necessarily having to know multiple modules or have extensive knowledge and training on the system. Workspaces enable you to quickly access frequently used tasks and documents and complete your workflow without navigating among forms, grids, and report modules.

This release introduces the concept of indented organizations within a workspace. This includes the ability to attach folders and even a workspace to an existing workspace. Incorporating folders, objects, and workspaces facilitates maintenance for the administrator and also enhances the usability of workspaces.

For more information about workspaces, see the Hyperion System 9 Financial Management User’s Guide.

SMART VIEW ENHANCEMENTS

Hyperion System 9 Smart View™ for Office provides a common Microsoft Office interface for Analytic Services, Financial Management, Planning, Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis. Hyperion System 9 Smart View for Office replaces the existing spreadsheet add-ins for Financial Management and Planning 4.0; in addition, it provides tighter Microsoft Office integration by allowing end users to import Hyperion System 9 BI+ content into Microsoft Word or PowerPoint, and import BI+ content grids into Microsoft Excel.

AD HOC MODULE

- Point of View (POV) Manager
- Smart View toolbar
● Free Form Grids
● Undo/Redo
● Data Adjustment
● Format Retention
● New End User Options
● Cell Styles
● Error Logging Options
● Undo Setting
● Ability to save the ad hoc grid as a spreadsheet that includes the POV

FORMS
● Support for Financial Management and Planning Data Forms
● Formula Preservation

FUNCTIONS
● Financial Management and Analytic Services support

HYPERION SYSTEM 9 BI+ CONTENT
● Image Import in Word and PowerPoint
● Image or Query Ready Grids in Excel

For more information about Smart View, see the *Hyperion System 9 Smart View for Office User’s Guide*.

COMPLIANCE ENHANCEMENTS

DOCUMENT ATTACHMENTS

Hyperion Financial Management 4.0 introduced new compliance updates designed to support better documentation by end users. This feature enables users to attach documents in Web data forms, Web grid cells, and in Process Management tasks. Financial Management provides security and administration enhancements by offering some end user limitation. In this release, the administrator can define the maximum number of documents per user and a maximum size for each document in the application settings.

For more information about process control, see the *Hyperion System 9 Financial Management User’s Guide*. 
CELL TEXT

Hyperion Financial Management 4.0 provided the ability to support up to 2000 characters in cell text. This release increases the cell text size up to 8000 characters. The limit number of characters supported within one application is defined in the application settings.

For more information about cell text, see the Hyperion System 9 Financial Management Administrator’s Guide.

METADATA ENHANCEMENTS

This release provides:

Description length up to 80 characters for every metadata member and documents (Data forms, Reporting and Custom documents) to provide better flexibility and to be consistent with the other Hyperion System 9 applications.

A new attribute called Calculate attribute, exposed both in Data forms and Data grids. This attribute can support any calculation information that the administrator would like to share with the user.

For more information about metadata, see the Hyperion System 9 Financial Management Administrator’s Guide.

INTERCOMPANY TRANSACTION MODULE ENHANCEMENTS

The existing Intercompany Transaction module provides flexible intercompany matching and reporting capabilities. With a large volume of intercompany transactions being entered to the system for the period, the matching process can be a lengthy process to ensure that all transactions are entered and matched successfully. Since not all transactions are entered at the same time, it is important to be able to monitor the matching process.

The transaction module provides a new task called Monitor IC Process. This features enables you to easily find out which intercompany partners have started their transactions process. It displays a list of intercompany entities with their Process status and Lock status that link to Intercompany Transactions Monitor Detail information.

For more information about intercompany transactions, see the Hyperion System 9 Financial Management Administrator’s Guide.
PERFORMANCE ENHANCEMENTS

Performance enhancements include the ability to support a simplified Value dimension for applications using default consolidation rules, and increased capacity for larger data volumes (subcubes) above the current limit.

HYPERION SYSTEM 9

Hyperion System 9 is a comprehensive Business Performance Management system. It integrates financial applications with a business intelligence platform to provide a modular system that adapts to any business need.

The major components of Hyperion System 9 are Hyperion System 9 Applications+, Hyperion System 9 Foundations Services and Hyperion System 9 BI+.

Hyperion System 9 Applications+ is a set of packaged applications for planning, consolidation, and scorecarding.

Hyperion System 9 Foundation Services is a base of common technologies used by multiple products. It eases the installation and configuration process and provides metadata management and a common Microsoft Office interface. Hyperion System 9 Foundation Services includes Hyperion System 9 Shared Services, Hyperion System 9 Data and Application Integration, Hyperion System 9 Master Data Management, Hyperion System 9 BI+ Workspace, Hyperion License Server and Hyperion System 9 Smart View for Office.

Hyperion System 9 BI+ is a comprehensive business intelligence platform. It provides management reporting and analysis from any data source, including transactional systems, data warehouses, SAP BW, Analytic Services, and Hyperion financial applications.

Hyperion System 9 BI+ offerings:

- User interaction with all types of information in one environment - viewing reports, processing of reports and queries that include parameters, and using dynamic dashboards to view and interact with content
- The richly interactive BI+ user interface, which serves as a single thin client for reporting, analysis, and metrics management
- The broadest set of modular BI functionality in the market, including production reporting, financial reporting, ad hoc query and analysis, and advanced analytics
- Seamless integration and interaction with Microsoft Office
- Flexible and complete content access, which integrates third-party content with Hyperion content in an easy to use interface
- Capabilities including subscription notifications, favorites, and scheduling options to support a wide range of application uses
- Integration with the full Hyperion System 9 Foundation Services for central provisioning and management of all Hyperion System 9 users

Hyperion System 9 BI+ Module descriptions:

- Essbase Analytics and Enterprise Analytics - Collectively referred to as Analytic Services; provides powerful OLAP capabilities for high performance multidimensional reporting, analysis, and modeling
- Interactive Reporting - Self-service, ad hoc query and analysis for relational databases that enable users to pivot interactively, and to slice and drill from summary to detailed data
● Production Reporting - Visually clear, high volume, enterprise reporting with parameters
● Financial Reporting - Highly formatted financial reports with access to Hyperion System 9 Applications+, Hyperion System 9 BI+ Analytic Services, and SAP BW
● Web Analysis - Interactive visualization and reporting against Hyperion System 9 BI+ Analytic Services, Hyperion System 9 Applications+, and SAP BW
● Enterprise Metrics - Enterprise metrics management and analysis delivered through personalized, interactive dashboards

HYPERION SYSTEM 9 INSTALLATION CHANGES

HYPERION LICENSE SERVER

Hyperion now uses a common license server to provide you with a more uniform and consistent method of governing the use of your Hyperion products. Hyperion License Server uses a license file specific to your site to assist you in tracking and monitoring the following information:

● The products that you have purchased
● Your feature options
● The number of users that can access each product
● Your maintenance agreements
● The expiration dates of your license and maintenance agreements

Hyperion License Server also uses a third-party component to give you one, centrally managed administrative tool for handling license issues. This tool provides the following capabilities:

● Ensuring license compliance
● Monitoring use of licenses
● Generating reports of license events

Because Hyperion License Server is a process, not a physical server, it need not be installed on a dedicated computer. Hyperion License Server can be installed on a shared computer, so you can install it in an environment that enables the most efficient use of resources.

For more information about Hyperion License Server, see the Hyperion System 9 Shared Services Installation Guide available on the Hyperion Download Center.

HYPERION SYSTEM 9 SHARED SERVICES USER MANAGEMENT

Shared Services User Management enables centralized management of user access rights and accessibility to applications created under various projects of different products. The user management process allows the administrator or delegated administrator to associate users and groups to projects and give them specific roles in that application.

User IDs and groups may exist in various authentication systems and also within products in an existing installation. Also, you can create new users and groups and roles at the native level. Every product has product-specific roles defined at the product level.
A project may contain one or more applications. Users or groups can be associated with an application and can be assigned one or more roles per application.

For additional information about Shared Services user management, see the Hyperion System 9 Shared Services User Management Guide available on the Hyperion Download Center.

**HYPERION CONFIGURATION UTILITY**

This release of Financial Management introduces a new common tool, the Hyperion Configuration Utility. The utility guides you through a series of screens to complete the following configuration tasks:

- Product activation
- Product registration with Hyperion System 9 Shared Services
- Configuration of relational databases as product data sources
- Automatic deployment of products to application servers

If your product has unique configuration requirements, the Configuration Utility displays additional options.

You can launch the Configuration Utility from the final screen of each product installer or from the start menu (Start > Programs > Hyperion System 9 Foundation > Configuration Utility.) The Configuration Utility also enables you to reconfigure Hyperion products. The reconfiguration process is similar to the initial process.

For details, see the Hyperion System 9 Financial Management Installation Guide.

**WHERE TO GET MORE INFORMATION**

Except for the most recent information, each topic in this booklet is described in more detail in the documentation.

For answers to questions about the product, contact your authorized technical support provider or visit the Hyperion Solutions Web site.
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