



HYPERION® SYSTEM™ 9

FINANCIAL MANAGEMENT™

RELEASE 9.2

USING THE NEW USER INTERFACE



Hyperion® System™ 9 Financial Management™ Release 9.2 builds on the enhanced user interface introduced in Release 4.0 by offering significant improvements to user navigation in workspaces. This interface is standardized for all Hyperion Business Performance Management Suite products, and provides superior end navigation and taskflow. This document describes the key user interface changes made for Releases 4.0 and 9.2.

This release represents the first major user interface redesign in several years. A primary goal of the design is to reflect more closely your work processes and how you interact with the system. The new user interface is the result of a user-centered design process that relied heavily on customer input.

Hyperion thanks everyone who participated in the design process and welcomes additional feedback to help drive future incremental enhancements. To send us your comments, please contact Hyperion Support.

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NEW AND IMPROVED USER INTERFACE

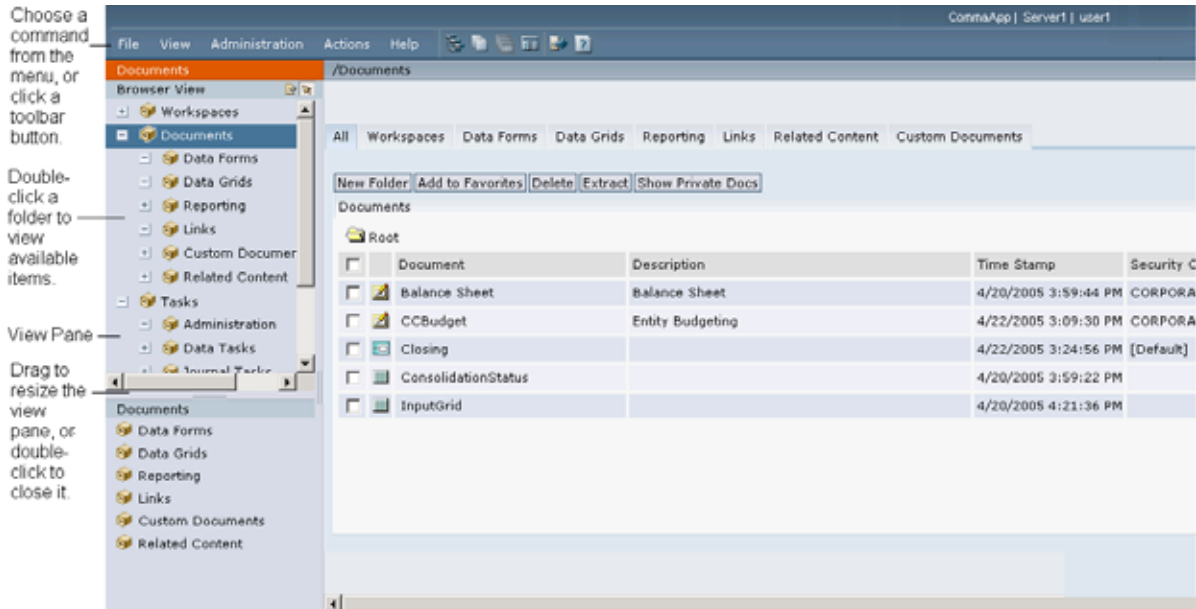
Financial Management Release 9.2 presents the new Web user interface introduced in Financial Management Release 4.0. The Web user interface more closely follows the way users interact with the application. It provides easier navigation and the ability to customize the application experience by user type. It also provides several consistent user interface elements across Hyperion products. These are some of the elements:

- **Masthead**—The masthead is the top section of the Web client. It displays information about the application and the user. You can minimize the masthead by selecting VIEW > Masthead from the menu bar.
- **Menu Bar**—The menu bar provides access to key functionality of Financial Management.
- **Toolbar**—The toolbar provides access to key functionality of Financial Management with shortcut buttons that you click.
- **View Pane**—The view pane is the vertical navigation pane on the left side of the Web client. The view pane is used to access all system documents and tasks, and it represents the navigation framework for the Web client.
- **Project View**—The Project view displays all workspaces to which a user has security access. The user can then navigate through a workspace using direct access to the available documents. The Project view is the default view for advanced users and can be displayed for basic users through the VIEW > View Pane menu command.
- **Browser View**—The browser view displays all documents and tasks contained within the system and is the central navigation component for the Financial Management Web client.
- **Content Frame**—The content frame is immediately to the right of the view pane. It is the area of the screen that displays what you have selected from the view pane.
- **Basic and Advanced Modes**—Depending on the tasks and how you prefer to work, you can work in Advanced or Basic mode. Advanced mode gives you more flexibility in selecting and working with the product. Basic mode enables you to focus on a task list that the administrator sets up for you. Basic mode also provides status indicators for tasks.
- **Basic User**—Basic User is a new user type introduced with Financial Management 4.0. Navigation for basic users is restricted to workspaces. The user selects the appropriate workspaces from a security-filtered drop-down box visible in the masthead and can access only the Project view of the view pane for easier workspace navigation. The default navigation for basic users is a vertical list displayed in the View pane. Basic users can be activated by way of the Advanced User mode in security configuration.
- **Advanced User**—Advanced User comprises the user types that were available in Financial Management releases 3.5.1 and earlier. Advanced users have full access to the view pane and all documents and tasks are displayed for which they have been assigned security rights.
- **Workspace**—Workspace functionality, which was introduced in Financial Management 3.x, makes it possible to group documents and tasks in an ordered task flow. By grouping documents and tasks, the administrator and users can configure task flows that fit various processes (such as month-end closing, monthly administration, and so forth). Financial Management 9.2 supports indented organizations within a workspace.

NAVIGATING IN FINANCIAL MANAGEMENT

After you log on to Financial Management, the start page is displayed. On the start page, you can open and work with Hyperion applications. [Figure 1](#) shows the start page.

Figure 1 Financial Management Start Page



The area at the top of the page, which is called the *masthead*, identifies the product and the current user. The masthead is displayed by default, above the menu bar. The Project View and Browser View buttons are on the top right corner of the view pane and there is a new Logoff button in the toolbar.

MENU BAR

Financial Management has the following menus:

FILE—Used to create, open, change, close, log off, and delete applications, set applications as defaults, and set user preferences.

VIEW—Used to show or hide the masthead and view pane and to switch between Advanced and Basic modes.

ACTION—Used to access all action buttons that were previously available in the content pane. The Actions menu is different for each Financial Management task or document displayed in the content pane. For example, you can use the Actions menu to launch a calculation in a Web data form or to promote an entity in Process Management.

ADMINISTRATION—Used to manage documents, workspaces, favorite documents and locations, users, and servers and applications. Also used to manage models, projects, and data and view integrations in Shared Services, register and unregister applications, manage task flows and view task flow status, and manage Smart View providers. In addition, you can use commands on this menu to audit tasks and data, run tasks, and work with system messages and Extended Analytics.

HELP—Used to access help for the selected task or document.

SHORTCUT BUTTONS

The shortcut buttons to the right of the menu bar give you quick access to specific pages and Financial Management functionality. The names of the shortcut buttons are displayed when you position the cursor over them. Shortcut buttons duplicate some functionality of menus and other buttons.

SUMMARY OF CHANGES TO KEY TASKS

Table 1 summarizes the changes to key tasks in Financial Management.

Table 1 Changes to Key Tasks in Financial Management

Module	Release 9.2	Release 3.x	Key Difference
Home Page	The system remembers the last page that you visited and returns you to that page the next time you log on.	The default home page was displayed each time that you logged on.	Release 9.2 intelligently tracks user activity to provide faster navigation.
Selecting Documents and Tasks	The view pane contains a hierarchical list of all documents and tasks in the system. Selected items from the view pane are displayed in the content pane. You can navigate quickly through the view pane to select another document without having to close the document or task that is currently open. The key subgroups are as follows: <ul style="list-style-type: none"> • Workspaces • Documents • Tasks • Favorites • Links 	You navigated by way of the top-level menus (Administration, Favorites, Documents, Tasks, and Workspace) or from the Home Page menu selections. You needed to return to these links to select another item to view.	The view pane is always displayed by default for non-Basic users and provides for smoother navigation to critical system documents (such as Web data entry forms) and tasks (such as Journals).
Workspaces	Workspaces are the focal point for system navigation. The Project View tab of the view pane displays all accessible workspaces and provides consistent left-side navigation for document access. A workspace can include all system-level documents or folders as well as URLs, and other documents, including Microsoft Office and PDF files.	Workspaces were available only with left-side navigation.	The addition of reports, URLs and documents provides for a complete end-to-end process flow for end users. The enhanced navigation options also increase the usability of this critical module. Basic users have access only to workspaces for all system interaction.
Web Data Entry Forms	Shortcut buttons to the right of the menu bar have replaced all action buttons (Calculate, Save, and so on). New features include formatting, enhanced suppression, cell text as a column, and others. For a complete list of new functionality, see <i>Hyperion System 9 Financial Management Release 9.2 New Features</i> .	All action buttons were displayed as textual buttons directly above the Web form.	Features have been added, and shortcut buttons to the right of the menu bar replace the action buttons used in earlier releases.

Table 1 Changes to Key Tasks in Financial Management (Continued)

Module	Release 9.2	Release 3.x	Key Difference
Running Consolidations	Executing consolidations by way of Web grids or the Process Management template launches a consolidation progress bar. This progress bar displays the current status of the consolidation and enables the user to cancel the process. Users can navigate to other documents and tasks while consolidations are running. A new module, Running Tasks, lists all consolidations and data loads that are running, by server or cluster. You can access the Running Tasks module from the Administration drop-down menu or from Tasks/Administration in the view pane.	Consolidations were executed by way of Web grids or Process Management template (Release 3.5 and later).	Release 9.2 has many new features designed to provide feedback to the end user during long-running tasks such as consolidations. The Consolidation progress bar and the Running Tasks module all provide insight into the processing of consolidations.
Point of View	New functionality displays only dimension members to which a user has security access. If you choose EnableMetadataSecurityFiltering in the metadata application settings, the system filters dimension members based on security. To preserve the dimension hierarchy, the system displays any ancestors of a member to which a user has access.	All dimension members were displayed in the Point of View selector.	Filtering the metadata by security provides users with faster navigation to their critical data.
Retrieving or Submitting data with Microsoft Excel	Hyperion Smart View for Office replaces Financial Management Retrieve, the Microsoft Excel add-in. Smart View provides the ability to perform both function-based retrievals and submissions as well as true ad hoc reporting. Smart View includes a migration utility that converts existing Financial Management Retrieve workbooks to the new syntax. Smart View includes many additional features, such as the ability to launch consolidations and input cell text that are described in <i>Hyperion System 9 Smart View for Office User's Guide</i> .	Hyperion Financial Management Retrieve (functions) and Pivot (ad hoc) provided the main interface between Excel and Hyperion Financial Management.	Smart View replaces the existing Financial Management Excel Add-in. Smart View includes a migration utility for migrating existing Retrieve workbooks to the new syntax.
Extended Analytics and Database Management	Extended Analytics and Database Management are included on the Web user interface. Only administrators can access Extended Analytics. You must be assigned the Database Management role to access Database Management functionality from the Web client.	Extended Analytics and Database Management were accessible only through the Windows client.	Enhanced Web functionality provides easier deployment of this advanced functionality.
Data Input in Web Grids	A new security role (Enable write back in Web Grids) can be utilized to prevent users from entering data by way of Web grids. This enables administrators to restrict data input to data loads and journal entries only.	All users submitted data by way of Web grids to any intersection to which they had write access.	Enhanced security offerings give administrators more ability to control their consolidation and reporting environments.

Table 1 Changes to Key Tasks in Financial Management (*Continued*)

Module	Release 9.2	Release 3.x	Key Difference
Process Control	To provide users with a centralized place for controlling both the review process and consolidation process, the existing Process Management module has been enhanced to include the consolidation features as well as new process management features.	The Process Management module was provided for users to manage the review process of financial data, but to perform a consolidation process, it was necessary to create a Web grid to view the consolidation status and launch the consolidation process.	One unique module to monitor process management and to run consolidations.
Intercompany Transactions	Intercompany reporting includes a new intercompany transaction module that enables companies to match intercompany balances at the transaction or invoice level. This module extends the intercompany capabilities in earlier releases to a much lower level and provides a completely Web-based solution. Transactions are summarized and posted into the existing intercompany accounts, which provides for drill-through from Web forms, Web grids, and intercompany system reports.	Intercompany details were maintained and matched at the account level.	Expanding intercompany to support transaction-level matching enables organizations to gain tighter control over their intercompany details and provides better insight into variances caused by timing and currency variations.

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

Hyperion Solutions Customer Support

Phone: 203.703.3600 (outside the U. S. A.)

Phone: 877.901.4975 (in the U. S. A.)

Internet: <http://support.hyperion.com>

Visit the Hyperion Solutions Web Site Home Page at <http://www.hyperion.com>.

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Printed in the U.S.A.

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