



keyteachTM

FINANCIAL REPORTING: WEB STUDIO



This two day course for the new web interface version of the software, explores all aspects of report design and maintenance. You'll learn how to create dynamic reports and books in the most efficient way.

Learning Objectives:

Working with the new Financial Reporting Web Studio you'll create and manage reports using dynamic design characteristics. Use the web studio to update grids, text and image objects automatically. Find out how to generate dynamic text functions and formulas to produce sophisticated analysis of your data and reduce the time and effort required to maintain your reports.

Course Description:

This comprehensive course addresses all aspects of report design and no prior knowledge is assumed. You'll gain an understanding of how to build and maintain the most efficient reports and books for your management and statutory reporting requirements. You'll focus on the use of dynamic functionality and features to ensure that your reports are up-to-date and require little maintenance.

Financial Reporting Web Studio is hugely powerful and can be used across Oracle's Cloud Services and "On-Premises" software.

The Web Studio is replacing the Window's Client version which is being discontinued. This course will ensure that you're up to speed with the very latest features of this web-based reporting solution.

This course will enable you to deliver complex, yet elegant reports that can be produced automatically. You'll find out how they can be distributed via email as PDF reports or books, produced as interactive HTML and embedded dynamically within Microsoft Office products such as Word, PowerPoint and Excel.



Also available
as a self-paced
"On Demand" course

Training in your own time at your own convenience

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Course Information:

Audience:	Report Developers who wish to develop Financial Reports for Oracle's Cloud solutions or "on premises" software
Pre-requisites:	None
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	14 Credits - Specialized Knowledge and Applications
Programme Level:	Intermediate

Summary by Day:

Day 1: Overview and Introduction to the Financial Reporting Web Studio, creating basic reports and dynamic member selection and design considerations

Day 2: Calculations, Formulas, functions, dynamic report building and key reporting features

Detailed Agenda

Introducing Financial Reporting

- Architecture
- Reporting options
- Financial reporting overview
- Viewing reports
- HTML vs PDF
- Incorporating dimensions
- Metadata and design considerations
- Managing the repository

Creating Basic Reports

- The reporting layout
- Dimension layout
- Selecting members for reports
- User and grid POV's
- Formatting
- Text functions
- Working with objects
- Inherit formatting

Selecting Members Dynamically

- Relative member function
- Working with ranges
- Current member and the POV
- Same As member selection
- Time members and period offset
- Conditional formatting
- Automatic calculations
- Working with prompts

Calculations in Reports

- Understanding reporting calculations
- Segments and cells
- Variance function
- IfThen function
- PercentOfTotal function
- Sorting and ranking

Dynamic Report Building

- Benefits of dynamic design
- Objects and report templates
- Related content
- Linked objects
- Row and column templates
- Charts
- Line item detail
- Cell text / annotations
- Expansions

Reporting Features

- Annotation
- Books
- Batches
- Data source connections
- Importing / Exporting Reports
- Understanding Smart Tags
- Security and Financial Reports
- Embedding reports in Microsoft® Office
- Interaction with Smart View



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