Oracle® Enterprise Performance Management Workspace, Fusion Edition

User's Guide

RELEASE 11.1.2.1

ORACLE®

ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

EPM Workspace User's Guide, 11.1.2.1

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1 Using EPM Workspace

In This Chapter

About EPM System and Enterprise Performance Management

Enterprise Performance Management (EPM) system consists of these products:

Note: See About EPM Workspace for more information on products supported.

- Oracle Enterprise Performance Management Workspace, Fusion Edition is a zero-footprint client that provides the user interface for viewing and interacting with content created using Oracle's Hyperion Reporting and Analysis authoring studios, financial applications, and Oracle Business Intelligence Enterprise Edition products.
- Oracle's Hyperion Reporting and Analysis Framework—Management reporting including query and analysis in one coordinated environment
    - Oracle's Hyperion® Foundation Services — Used to ease installation and configuration, provide metadata management, and support a common Microsoft Office interface
- Oracle's Hyperion® Application Builder for .NET—Coordinated planning, consolidation, and scorecard applications

About EPM Workspace

EPM Workspace is the Web user interface that is used to access all Oracle Hyperion and non-Oracle Hyperion content. Oracle Hyperion content includes Reporting and Analysis Framework and Oracle's Hyperion financial applications. Oracle Essbase is part of a comprehensive EPM system that integrates this business intelligence platform with Oracle's Hyperion financial applications, Oracle Hyperion Performance Scorecard, Fusion Edition, and Oracle BI EE products.

EPM Workspace, a modular business intelligence platform, providing access to management reporting, query, and analysis capabilities for a wide variety of data sources in a single coordinated environment.

EPM Workspace provides access to the following content:

- Oracle Hyperion Financial Reporting, Fusion Edition—for scheduled or on-demand highly formatted financial and operational reporting from almost any data source, including Oracle Hyperion Planning, Fusion Edition, Oracle Hyperion Financial Management, Fusion Edition, Oracle Hyperion Profitability and Cost Management, Fusion Edition, Oracle BI Answers, Oracle BI Interactive Dashboards, Oracle BI Delivers, and Oracle Business Intelligence Publisher
- Oracle's Hyperion® Interactive Reporting—for ad hoc, relational query, self-service reporting and dashboards against any ODBC data source

  Oracle's Hyperion® Impact Management Services module is used to replace Interactive Reporting data models.

- Oracle's Hyperion® SQR® Production Reporting—for high volume, enterprise-wide production reporting
- Oracle's Hyperion® Web Analysis—for interactive ad hoc analysis, presentation, and reporting of multidimensional data
- Performance Scorecard—a Web-based solution that enables your organization to set goals, and to use scorecard methodologies to measure and monitor business performance
- Financial Management and Planning—for consolidation and planning application tasks
- Profitability and Cost Management—for managing cost and revenue allocations that are necessary to compute profitability for a business segment
- Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications — a module of Oracle Hyperion Financial Data Quality Management, Fusion Edition that enables you to integrate metadata and data from an Enterprise Resource Planning (ERP) source system into an Enterprise Performance Management (EPM) target application.
- Oracle BI Answers—Oracle BI Answers provides true end user ad hoc capabilities in a pure Web architecture
- Oracle BI Interactive Dashboards—Oracle BI Interactive Dashboards provides intuitive, interactive access to information that is actionable and dynamically personalized based on the individual's role and identity
- Oracle BI Delivers—Oracle BI Delivers provides business activity monitoring and alerting that can reach users through multiple channels such as email, dashboards, and mobile devices
- BI Publisher—BI Publisher (formerly known as XML Publisher) offers efficient; scalable reporting solution available for complex, distributed environments
- Oracle Hyperion Disclosure Management—toolset designed to help you create, edit, and submit instance documents for submission to a regulatory agency (for example a 10K or 10Q submitted to the SEC).
- Oracle Hyperion Financial Close Management—helps companies define, execute, and report on the interdependent activities of a financial close period.

Note: *Studio* refers to Java or Windows components that have a rich authoring environment. EPM Workspace refers to the user thin client (UTC) or common user interface of the product.

Preparing to Use EPM Workspace

Prior to using EPM Workspace, familiarize yourself with your documentation set.

Note: Review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information on system requirements. You can find it at http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html (under Business Intelligence).

Additional information that you need:

- Browser information– See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.
- EPM Workspace URL and domain
- User account – the user name and password assigned to you. See your system administrator.
- Logon information – "Logging on to EPM Workspace" on page 17
- Access permissions – "Toolbars" on page 30
- Preferences – "Setting Preferences" on page 18
- Database information

For Financial Reporting, Adobe Acrobat Reader must be installed on your computer. Before you can view reports in PDF, a PDF writer (Adobe Acrobat Distiller, GNU Ghostscript or AFPL Ghostscript) must be installed with your print server. If a PDF viewer is not available, only report names are listed. For information on printing PDF and text files, see the *Oracle Enterprise Performance Management Workspace Administrator's Guide*.

➤ To enable the use of Microsoft Internet Explorer (IE) for viewing PDF reports on EPM Workspace:

1 Open Internet Explorer.

2 Select **Tools** , then **Internet Options.**

3 In the **Internet Options** dialog box, select the **General** tab, and then **in the Temporary Internet Files topic,** select **Settings.**

4 In the **Settings** dialog box, in the **Check for newer versions of stored pages topic**, select **Every visit to the page.**

Note: Oracle recommends that you add EPM Workspace to the exceptions for your Web pop-up blocker. When you perform some EPM Workspace tasks on the Web such as loading data, a status window pops up showing the task status. If you have a pop-up blocker enabled on your computer, the status window is not displayed.

Note: The first time you access a database connection, you may be prompted to log on. This occurs if the user name and password you use to log on to the Web application differs from the user name and password for the database connection. Your administrator can provide you with the required database connection logon information.

For Internet Explorer, status information is displayed in the browsers status bar while interacting with EPM Workspace. For Firefox, the status bar is disabled by default.

➤ To enable the status bar for Firefox for additional progress information:

1 Select **Tools**, then **Options.**

2 Select **Content.**

3 Select **Advanced.**

4 From the Advanced Javascript Settings dialog box, select **Change status bar text.**

5 Click **OK.**

Deployment Workflow

For deployment task information, see *Hyperion Enterprise Performance Management Deployment Guidelines*.

Accessing Modules from Navigate

From EPM Workspace access the following from the Navigate menu:

- In Explore, you organize, search for, or assign access permissions to files. When you select Explore, the View pane shows folders, and the content pane shows files and folders. Explore is displayed when Reporting and Analysis Framework has been installed and configured.
- Applications enables you to access Financial Management, Planning, Performance Scorecard, Profitability and Cost Management, and Oracle Business Intelligence applications. Applications is only displayed when a user has rights and applications are available.
- From Workspace Pages, access My Workspace Pages and Shared Workspace Pages. My Workspace Pages can be stored in any folder that the user has access to. My Workspace Pages is similar to a favorites folder – allows a user to go to one location to access all of their personal Workspace Pages without having to navigate through the repository. Shared Workspace Pages are stored in a system folder that authorized users can access from Explore module. Users that have access to this folder can move their personal pages manually within the Explore module to promote them to the rest of the organization. Workspace Pages is displayed when Reporting and Analysis Framework has been installed and configured.
- Administer enables you to manage users, groups, user preferences, roles, SmartCuts, Explore Annotations, and authentication methods.
- Schedule enables you to manage jobs and schedule batches and events for automated processing.
- Impact Manager enables you to update Interactive Reportingdocuments when database structures, database connections, or links to external data sources change.
- Open items provides easy access to artifacts that you currently have open in EPM Workspace.

EPM Workspace can also be installed with the following Reporting and Analysis Framework thin client products: Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis. These products are used to create documents and modify document elements. These installed components determine your available features. For example, Web Analysis must be installed to view Web Analysis documents. For information on tasks performed in these modules, see “User Types and Module Tasks” on page 16.

EPM Workspace Capabilities

Subtopics

- Modules Used to Perform Tasks
- Accessing Items from Navigate

EPM Workspace tasks include the following based on what you have installed and configured with EPM Workspace:

- Viewing documents and dashboards
- Accessing the following application products:
    - Financial Management—For more information on using Financial Managementapplications from EPM Workspace, see *Oracle Hyperion Financial Management User's Guide*
    - Performance Scorecard—For more information on Performance Scorecard from EPM Workspace, see *Oracle Hyperion Performance Scorecard User Guide*
    - Planning applications—For Planning applications from EPM Workspace, see *Oracle Hyperion Planning User's Guide*
    - Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications— a module of Oracle Hyperion Financial Data Quality Management, Fusion Edition that enables you to integrate metadata and data from an Enterprise Resource Planning (ERP) source system into an Enterprise Performance Management (EPM) target application.
    - Oracle Business Intelligence—Includes Oracle Business Intelligence Answers, Oracle Business Intelligence Interactive Dashboards, Oracle Business Intelligence Delivers, and BI Publisher. For more information on the Oracle BI EE products, see the Release 10.1.3.4 documentation for *Oracle Business Intelligence New Features Guide*. For more information on Oracle BI Publisher, see the *Oracle BI Publisher User's Guide*.
    - Profitability and Cost Management—For more information on Profitability and Cost Management from EPM Workspace, see *Oracle Hyperion Profitability and Cost Management User's Guide*
- Reporting and Analysis Framework products include the following:
    - Scheduling batches, jobs, or events to automatically execute reports or create notifications, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*.
    - Create Web Analysisand Interactive Reportingdocuments, books, or batches, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*
    - Personalizing EPM Workspace and thus managing information delivery by using a start page (also known as Home page), personal pages, favorites, and Workspace pages. For personal pages and Workspace Pages, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*.

From EPM Workspace, you use menus, toolbar buttons, and items from Navigate to perform tasks. Based on the following criteria, menus and toolbar buttons are updated as you use the system:

- The roles granted you by the administrator. Roles determine which modules are displayed in the View pane and toolbar.
- The products being used and the task being performed. For example, if you use an administer menu item, the menus and toolbar icons contain tasks associated with administration related tasks. If you use Explore, the menu contains file tasks.

Modules Used to Perform Tasks

You use EPM Workspace to perform user tasks:

- Navigate Menu – access Explore, Workspace Pages, Applications, Administer, Schedule, Impact Manager, and Open Items.
- Applications – access and view applications such as Financial Management, Planning, Oracle Business Intelligence applications, Profitability and Cost Management, and Performance Scorecard.
- Reporting and Analysis Framework functionality:
    - Workspace Pages – aggregate content from Oracle and non-Oracle sources. Workspace Page is a page made up of content from multiple sources including documents, URL's, and other content types.
    - Schedule– automatically run and manage documents, such as batches, jobs, and events

  Note: The Administer and Impact Manager modules are used only by administrators. See the *Oracle Hyperion Reporting and Analysis Framework Administrator's Guide*. Additional information for the Explore, Workspace Pages, and Schedule modules can be found in the *Oracle Hyperion Reporting and Analysis Framework User's Guide*.

- Open Items – view all documents or items you have open in EPM Workspace.

Accessing Items from Navigate

Perform an action:

- From Navigate, click the <*item name*>.
- From the toolbar, select Explore. Explore is the only item available for the toolbar from the Navigate menu.

The italics, <*item name*> is replaced by Explore, Applications, Workspace Pages, Administer, Schedule, Impact Manager, or Open Items.

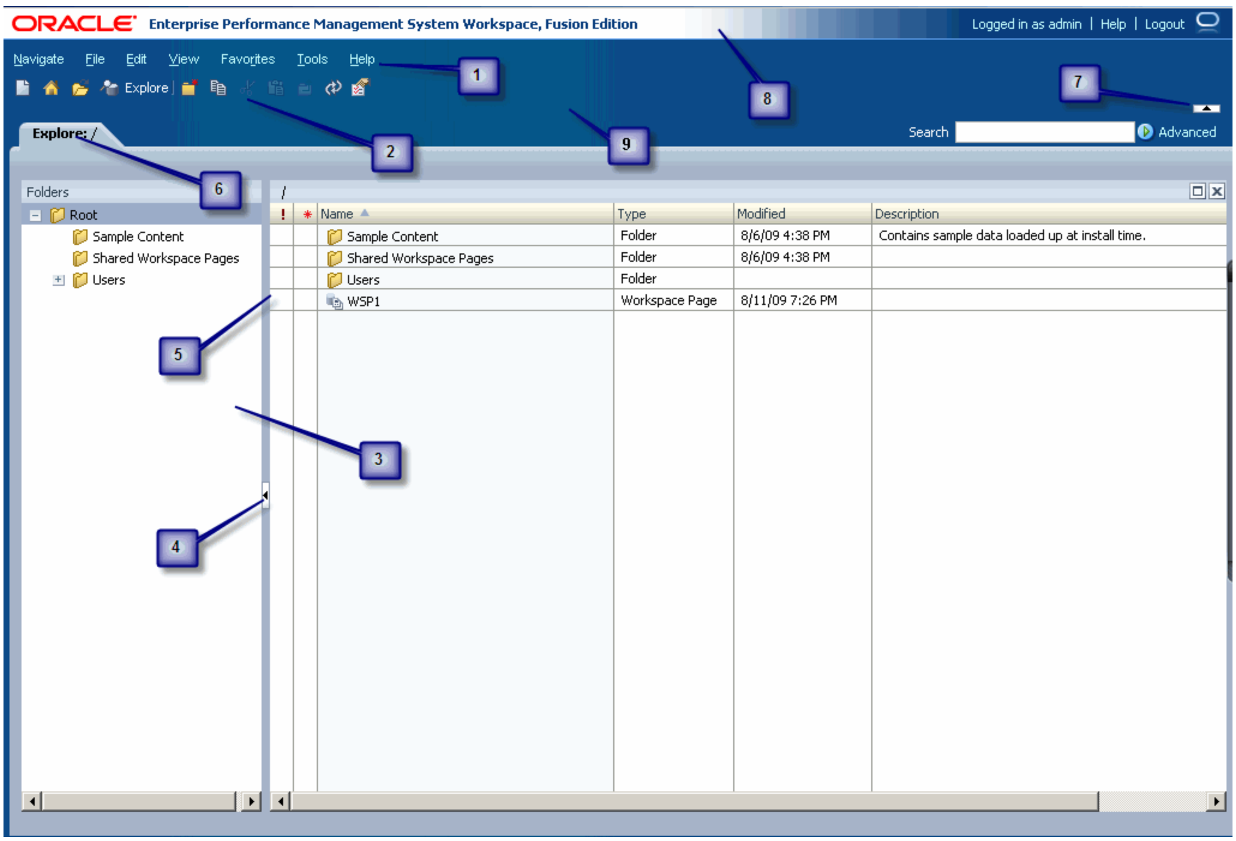
User Types and Module Tasks

For a complete listing of the different users available from EPM Workspace, see the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

The available tasks from EPM Workspace depend on the roles and permissions assigned to you by the system administrator. For information on roles, see the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide* .

EPM Workspace User Interface

When you log on, the default EPM Workspace start page or Home page is displayed. Home page is available when Reporting and Analysis Framework has been installed and configured. The default is set from the Preferences dialog, “Setting Preferences” on page 18.



The EPM Workspace user interface includes these areas:

1. Menu Bar – Commands and sub-commands that organize tasks and modules (See “Menus” on page 31)
2. Standard toolbar – Buttons for performing tasks, see “Toolbars” on page 30
3. View pane – Area that provides buttons that enable jumps between panels (each panel having a specific use and corresponding controls) and displays the list of documents and modules (Hiding this pane provides a larger content frame in which to use EPM Workspace. Select **View**, then **View Pane** to hide and display).

4. View Pane or Content Area Adjuster – Setting to adjust the size of the View pane and content area.
5. Content area – Area in which you view active-module documents, tasks, or files
6. Document tab bar – Information bar specific to the current module (If multiple documents are open, the current document tab is highlighted).
7. Masthead Area Adjuster – Select to show or hide the menu bar and toolbar area.
8. Title Bar – Displays product name, name of user logged in, and help and logout links.
9. Masthead – Area that provides masthead, menu bar and toolbar buttons. Select **View**, then **View Masthead** to hide and display.

Reporting and Analysis Framework Repository

Note: This is available if you have installed and configured Reporting and Analysis Framework.

Explore is used to access the repository. It is used to store, access, and share documents and files. You can access items such as documents, files, and folders in various ways, including browsing or searching for documents, subscribing to folders, and using dashboards. You make documents, files, and folders available to others, for example you can import documents to the repository. For more information on Explore, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*.

Documents show information and data in a predefined format. You can use jobs and batches to generate documents automatically. You can run jobs and batches at any time or schedule them to run automatically.

Note: Your file permissions determine which repository items you can view, modify, run, and delete.

Logging on to EPM Workspace

You can access EPM Workspace in two ways: through a URL provided by your administrator or through an Oracle application link.

Note: Once logged in to EPM Workspace, you can access the help menu.

Note: Access through Oracle application links requires that single sign-on be enabled.

➤ To start a EPM Workspace session:

1 **In your Web browser, go to EPM Workspace Web page.**

2 **Enter user name and password.**

Tip: The user name and password may be case sensitive. To determine if user name and password are case sensitive, refer to authentication sources documentation.

3 **Click Log On.**

Your start or home page is displayed. For more information on setting your start or home page, see Chapter 2, “Setting General Preferences and Personalizing EPM Workspace”.

Setting Preferences

As a designer, you can set defaults for the general appearance of EPM Workspace user interface, Explore, Reporting and Analysis products, Oracle Business Intelligence products, and authentication for changing user passwords. Preference settings for Explore, Interactive Reporting and Production Reporting products can be found in the *Oracle Hyperion Reporting and Analysis Framework User's Guide*. Preference settings for Web Analysis can be found in the *Hyperion Web Analysis User's Guide*. Preference settings for Financial Reporting can be found in the *Oracle Hyperion Financial Reporting User's Guide*. For Planning end-user preference settings see the *Oracle Hyperion Planning User’s Guide* and for administrator and application preferences, see the *Oracle Hyperion Planning Administrator’s Guide*. Financial Managementpreferences are set from EPM Workspace, see the *Oracle Hyperion Financial Management User’s Guide*. Preferences for Oracle Business Intelligence products in EPM Workspace are set in EPM Workspace. Default startup options can be set for the content area. Some settings can be overridden through menu options. See Chapter 2, “Setting General Preferences and Personalizing EPM Workspace”.

Note: Your e-mail address, which you cannot update, is the address set by the system administrator. See “Setting General Preferences” on page 40 for more information.

Starting Tasks

Most tasks in EPM Workspace start the same way.

Note: Some tasks can also be performed using the toolbar, menus, and shortcut menus. For a list of EPM Workspace specific toolbars, menus, and shortcut menus, see “Toolbars” on page 30. For additional information on product specific toolbars and menus, see the respective product documentation.

➤ To begin a task:

1 **From Navigate, select Explore, Applications, Workspace Pages, Administer, Schedule, Impact Manager, or Open Items.**

2 **From any of the menus, select a task. For example, from the File menu, select New, then Workspace Page.**

Creating Documents

With EPM Workspace, you can use the new document wizard to create Web Analysisor Interactive Reportingdocument, Financial Reporting book or batch, or create a Workspace Page.

Note: You must install Reporting and Analysis Framework in order to use Explore and Reporting and Analysis products in the following procedure.

➤ To create a Web Analysis or Interactive Reporting document, Financial Reporting book or batch, or Workspace page:

1. Select **File**, then **New**, then **Document.**
2. Select an option:
   - Create an Interactive Reporting Document
   - Create a Web AnalysisDocument
   - Collect reports into a Book
   - Batch Reports for Scheduling
   - Create a Workspace Page

   See *Oracle Hyperion Financial Reporting User's Guide* for more information on collecting reports in a book and batch reports for scheduling. For more information on creating Interactive Reportingdocuments, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*. For more information on creating Web Analysis, see the *Hyperion Web Analysis User's Guide*.

➤ To create a Financial Reporting batch:

1. Select **File**, then **New Scheduled Batch.**
2. Select an option:

   See *Oracle Hyperion Financial Reporting User's Guide* for more information on batch reports for scheduling.

Selecting a Data Source for a Document

To create a document, you must specify a data source. The data source determines the document type.

- To create a Web Analysis document, specify a Web Analysisdatabase connection.
- To create an Interactive Reporting document based on an existing document, specify the existing document.

Opening and Printing Documents or URLs

Note: You must install Reporting and Analysis Framework in order to use Explore in the following procedure.

➤ To open a document:

1 **Select File , then Open, then Document.**

The Open dialog box is displayed.

2 **Select a document.**

Note: The list of open documents can be located from the Open Items option from the Navigate menu and from tabs at the top of EPM Workspace. You can toggle between open documents.

➤ To open a URL:

1 **Select File, then Open, then URL.**

2 **Enter the URL.**

3 **Select OK.**

Note: The following procedure only applies to Financial Reporting, Web Analysis, or Production Reporting documents.

➤ To print a document:

1 **Select File, then Open, then Document.**

2 **Open a document, for example, a Financial Reporting document.**

Note: You may need to open the document as HTML or PDF.

3 **Select File, then Print, then HTML or File, then Print, then PDF.**

Setting File Properties and Moving Files

Note: You must install Reporting and Analysis Framework in order to use Explore.

➤ To set file properties:

1 **From Explore, select a document without opening.**

2 **Select File, then Properties.**

The General Properties option is selected by default in the Properties Dialog.

You can modify the file name, description, and change the owner of an object. To change ownership of an object, the user must have full control over that object. For additional property settings, for example Permissions, see *Oracle Hyperion Reporting and Analysis Framework User's Guide*.

➤ To move files or folders in Explore:

1 From Explore, select a document or folder.

2 Select **Edit**, then **Cut** or **Copy.** See *Oracle Hyperion Reporting and Analysis Framework User's Guide* for details on copying in Explore.

3 Select a repository location, and select **Edit**, then **Paste.**

Renaming Files

➤ To rename files:

1 From Explore, select a document or folder.

2 Select **Edit**, then **Rename.**

3 Enter a name.

4 Select **Save.**

Adding and Removing Documents from Favorites

Note: You must install Reporting and Analysis Framework in order to view the Favorites menu in EPM Workspace.

➤ To add a document or folder to favorites:

1 From Explore, select a document or folder.

2 Select **Favorites**, then **Add to Favorites.**

3 Select **Favorites.**

The document or folder that you added is displayed as a menu option.

➤ To remove a document or folder from Favorites:

1 Select **Favorites**, then **Manage Favorites.**

2 Clear **Show,** or select **Remove.**

➤ To create a shortcut:

1 From **Explore**, select the document.

2 Right-click the document, and select **Create Shortcut.**

3 **Complete the General Properties dialog box, and select OK.**

For instructions, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*.

Using Explore

Note: You must install and configure Reporting and Analysis Framework in order to see Explore in EPM Workspace. See the *Oracle Hyperion Reporting and Analysis Framework User's Guide* for details on using Explore.

In Explore, you organize, search for, or assign access permissions to files. When you select Explore, the View pane shows folders, and the content pane shows files and folders.

Explore features:

- **Folder tree**-Navigate through folders
- **View File Properties**-View file information, such as type, owner, creation date, access permissions, modified date, and description
- **Launch documents–** Open a document in a new tab or window

Using the Catalog

The catalog stores the objects, such as dashboards and KPIs, that you create using the Oracle BI EE application and, if integrated, these Oracle Business Intelligence Publisher objects: Data models, Reports Style templates and sub template, and Schedules. For information about these objects, see the *Oracle Business Intelligence Publisher Report Designer's Guide and the Oracle Business Intelligence Publisher Administrator's and Developer's Guide*. Users have their own folders (My Folders) where they save objects that they created. These objects cannot be accessed by other users. Users can add sub-folders to their My Folders to organize their content in the way that is the most logical to them. Users can also store objects in shared folders where other users or groups can access the objects. You can perform a variety of basic (copy and rename objects, for example) and object-specific (modify a KPI using the KPI editor) tasks from the catalog. For more information on the catalog, see the *Oracle® Business Intelligence Suite Enterprise Edition User's Guide 11g Release 1 (11.1.1.2)*.

Using Schedule

Note: You must install and configure Reporting and Analysis Framework in order to use Schedule in EPM Workspace.

Use Schedule to manage and schedule batches, jobs, and events and to view status. Schedule is primarily used by Financial Reporting, Interactive Reporting, and Production Reporting.

Schedule features:

- Batch Scheduler
- Job Queue
- Job Notifications
- Show Parameters
- Jobs Running
- Manage Events
- Consolidated Job Status

See *Oracle Hyperion Reporting and Analysis Framework User's Guide*.

Using Open Items

Open Items from Navigate displays a list of opened modules or documents, so you can quickly switch between the opened documents.

Changing Native Directory Password

If you are using Oracle Internet Directory as the Native Directory, Shared Services enforces the Oracle Internet Directory password policies. Shared Services prompts Oracle's Hyperion product to change their passwords based on these policies. Because your Native Directory account is segregated from the user accounts created to support other corporate applications, Native Directory password changes affect only Oracle's Hyperion products. See *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* for more info. Change Password is displayed when the feature has been enabled and you have Shared Services native user rights.

Note: You can change your Native Directory password at any time by modifying your Native Directory user account.

➤ To change password in Native Directory:

1. Select **Tools**, then **Change Password.**
2. In Current Password, enter your existing password.
3. In New Password and Confirm Password, enter your new password.

   Note: The new password must adhere to the Oracle Internet Directory password policies.
4. Click **OK.**

Using URLs in EPM Workspace

Use these steps to open URLs in EPM Workspace.

- Opening a URL
- Opening a URL in a New Window
- Updating a URL

Opening a URL

Perform the following steps to open a URL.

➤ To open a URL:

1 Select **File**, then **Open**, then **URL**.

2 Enter the URL name.

3 Select **OK**.

Opening a URL in a New Window

➤ To open a URL in a new window:

1 Complete procedure from Opening a URL.

2 Select **New Window**.

3 Enter the URL.

4 Select **OK**.

Updating a URL

Perform the following steps to update the content of an existing URL displayed in the content area.

➤ To update a URL:

1 Complete procedure from Opening a URL.

2 Select **Update URL**.

3 Enter the URL.

4 Select **OK**.

Using Smart View

Oracle Hyperion Smart View for Office, Fusion Edition provides a common Microsoft Office interface for Essbase, Financial Management, Planning, and four EPM Workspace components:

- Financial Reporting
- Production Reporting
- Web Analysis
- Interactive Reporting (Smart View export options not enabled)

The centralized interface enables simultaneous use of multiple Oracle products and improves integration with Microsoft Office. Review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information on system requirements. You can find it at http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html (under Business Intelligence). The Smart View implementation provides the following EPM Workspace functionality:

- Exports the current page of the current data object to Excel, Word, or PowerPoint
- Exposes Financial Management and Oracle Essbase functions in Excel, Word, and PowerPoint content
- Notifies you when you can upgrade to new releases of Smart View

Smart View enables two export options:

- You can export the current page of the current data object to Word, PowerPoint, or Excel as an image, and later, re-query the Web application to refresh the image.
- You can export documents to Excel as query-ready or formatted HTML.

When you export content as query-ready HTML, the current page of the current data object is converted to HTML, and Oracle-specific formatting is removed. Thus, Smart View can re-query the data source independent of the Web application.

When you export content as formatted HTML, the current page of the current data object is converted to HTML, and Oracle formatting definitions and calculated members are retained. Thus, Smart View cannot directly query the data source, but Oracle content can be leveraged by Microsoft Office applications. Not all export options are supported by all data sources and Web applications. See *Oracle Hyperion Reporting and Analysis Framework User's Guide*.

➤ To install Smart View:

1. **Do one of the following:**

   a. From eDelivery, download Smart View. If you are licensed to use Visual Explorer, the filename is `smartviewHVE.exe`. Otherwise, it is `smartview.exe`.

   b. In EPM Workspace, select **Tools**, then **Install**, and then Smart View.

2. **Select the language to use for the installation wizard.**
3. **Click Next.**

4 **Follow the prompts in the wizard.**

5 **When installation is complete, click Finish.**

6 **Smart View is displayed the next time you open a Microsoft Office application.**

For more information on Smart View, see the *Oracle Hyperion Smart View for Office, Fusion Edition*.

Single Instance of EPM Workspace

In releases earlier than EPM Workspace 11.1.2.1, when `/workspace` or `/workspace/index.jsp` is accessed, a new instance of EPM Workspace launches in a separate browser window. With the single instance feature, subsequent invocations of `/workspace/` and `/workspace/index.jsp` open items in EPM Workspace tabs in the existing EPM Workspace instance, even when launched from an external URL. Single instance also prevents extra EPM Workspace windows from closing existing sessions where multiple EPM Workspace windows were previously allowed.

Note: Embedded invocations of EPM Workspace are not affected by this feature. An example of embedded EPM Workspace use would be the display of SmartCut URLs.

URL Parameter to Override Single Instance Behavior

By default, there can be only one instance of EPM Workspace on a client machine. This behavior can be overridden using the URL parameter and value `multi_process=true`. In certain instances multiple sessions of EPM Workspace must remain open. For example, Financial Management users may need to do a side-by-side comparison of applications. An example URL with this parameter: `http://<host>:19000/workspace/?multi_process=true`.

Note: Customers using this URL parameter should not use it for any other use case. Because the URL parameter enables multiple EPM Workspace windows, Oracle cannot support Oracle Hyperion Financial Close Management or other products externally launching EPM Workspace items in an EPM Workspace tab when the special URL parameter has been used to launch EPM Workspace.

Customizing EPM Workspace

You can customize EPM Workspace to do the following:

- "Launching an EPM Workspace Object as a Tab in EPM Workspace from Dashboard" on page 27
- "Enumerating the Repository Contents of a Folder in Dashboard" on page 27
- "Enumerating EPM Workspace Applications in Dashboard" on page 28
- "URLs Supported by EPM Workspace" on page 28

Launching an EPM Workspace Object as a Tab in EPM Workspace from Dashboard

Create a text label dashboard graphics object and add a script similar to examples below into the objects title in the Properties dialog:

- To launch a Financial Reporting report:

  @HTML(<script> function newtabFR() {top.gModuleManager.launchRelatedContentUri(top.location.href + "?module=wksp.relatedcontent&repository_path=/<*encoded path to repository object*>&showViewPane=false");}</script><*title text*>)

- To launch a Financial Management application:

  @HTML(<script> function newtabHFM() {top.gModuleManager.launchRelatedContentUri(top.location.href + "?module=hfm.appcontainer&sourceApp=<*hfm app*>&cluster=<*clustername*>");} </script> <*title text*>)

- To launch a Planning application:

  @HTML(<script> function newtabPlan() {top.gModuleManager.launchRelatedContentUri(top.location.href + "?module=HyperionPlanning.planning&sourceApp=<*Planning application name*>");} </script><*title text*>)

- To launch any URI:

  @HTML(<script> function newtabURI() {top.gModuleManager.launchUri(<*"valid URL"*>);} </script><*title text*>)

Note: top.location.href is http://server:port/context

These URLs are for Interactive Reporting dashboards. For more examples of supported URLs, see "URLs Supported by EPM Workspace" on page 28.

Enumerating the Repository Contents of a Folder in Dashboard

This allows a user to list and launch repository contents of a folder within a dashboard. In the dashboard, create an embedded browser object and set the URL similar to following:

http://server:port/workspace/browse/dyn?page=/jsp/com/hyperion/tools/workspacepages/folderlisting.jsp&repository_path=<*encoded path to repository object*>

Other parameters include:

- Optional: showViewPane=true/false

False to hide the view pane when launching enumerated content. Default value is true.

- Optional: showIcons=true/false

  False to hide the icons in the listing. Default value is true.

Enumerating EPM Workspace Applications in Dashboard

This allows a user to list and launch EPM Workspace Applications within a dashboard. In the dashboard, create an embedded browser object and set the URL similar to following:

http://server:port/workspace/browse/dyn?page=/jsp/com/hyperion/tools/workspacepages/appslisting.jsp

URLs Supported by EPM Workspace

The following are published URLs that EPM Workspace supports:

- Normal URL:

  http://<*server*>:<*port*>/*workspace*/

  Note: Included in the URL is the trailing slash and no index.jsp. Using index.jsp is not recommended since the Web browser's Back button is enabled, and selecting it can cause issues. Using the trailing slash is encouraged. Without it, the Web server does a redirect to the URL with the trailing slash. Prior to 9.3.1, the *Install Start Here Guides* omitted the trailing slash.

  Additional parameters:

  - Optional: sso_username=<*username*>

    The name of the user attempting to log in.

  - Optional: sso_password=<*password*>

    Password of the user attempting to log in.

    Note: The Administrator may need to change the "Accept Credentials on HTTP GET Request" setting in "Workspace Server Settings" dialog to support these two parameters above, sso_username and sso_password. See the *EPM Workspace Administrator's Guide*.

  - Optional: fullscreen=true/false

    True launches page in full screen. Default value is false.

- External Launch into EPM Workspace

  When a user selects multiple external URLs to launch EPM Workspace and to limit EPM Workspace proliferation, the following scenarios are possible:

  - a new EPM Workspace session opens if there are none on the desktop

    - if there is an existing EPM Workspace session open, this adds the newly selected item as a tab within the existing EPM Workspace session.

    Format of URL is as follows: http://*<host>*:*<port>/workspace/WorkspaceLaunch.jsp?&uri=<encoded uri to workspace with parameters>*

    - URI is not optional and you also may specify module parameters in the URI

    For Example: http://host:port/workspace/WorkspaceLaunch.jsp?&uri=index.jsp%3fmodule%3dcalcmgr.filterview

    Note: You must encode the URI parameter value.

- URL to launch repository content:

  http://*<server>*:*<port>/workspace/?module=wksp.relatedcontent&repository_path=<encoded path to repository object>*

- URL to launch Financial Management(Consolidation) Application:

  http://<server>:<port>/workspace/?module=hfm.appcontainer&sourceApp=<hfm_application_name>&cluster=<clustername>

  Additional parameters:

  - Optional: showViewPane=true/false

    False to hide left pane when module is loaded. Default value is true.

  - Optional: bpm.logoff=true/false

    False prevents system from logging off if using the same session. Default value is true.

- URL to launch Planning Application:

  http://<server>:<port>/workspace/?module=HyperionPlanning.planning&sourceApp=<appname>

  Additional parameters:

  - Optional: showViewPane=true/false

    False to hide left pane when module is loaded. Default value is true.

  - Optional: bpm.logoff=true/false

    False prevents system from logging off if using the same session. Default value is true.

Using Oracle User Productivity Kit

If the Oracle User Productivity Kit (UPK) is deployed and EPM Workspace is configured by an Administrator with a valid URL for the UPK Player package, users can access UPK content for Oracle Hyperion Enterprise Performance Management System. For more information on configuring UPK, see the "*Workspace Server Settings*" section in the *Oracle Enterprise Performance Management Workspace Administrator's Guide* and the "Oracle User Productivity Kit" section in the *Application Support Guide*.

Note: There are pre built UPK content modules available. See the data sheets that include UPK for Oracle Hyperion Enterprise Performance Management System available on Oracle.com, http://www.oracle.com/us/products/applications/tutor-upk/064788.html. Financial Management and Planning modules include appropriate content for Smart View and Oracle Hyperion Financial Reporting Studio, Fusion Edition. Financial Management and Planning support invoking UPK content in a context sensitive manner. UPK content launched from Smart View or Reporting Studio launches the full player package outline unfiltered for context. Reporting Studio and Smart View users can utilize a roles filter to see only the Smart View or Oracle Hyperion Financial Reporting Studio, Fusion Edition content.

➤ To open UPK Help:

1. **Take one action:**
   - Select the Help menu, and then select Oracle User Productivity Kit.
   - From the Help tool bar, click UPK.
   - From a dialog box, click Help, then from the Help toolbar click UPK .
2. **Optional: If you opened a dialog box, close the dialog box when done.**

Title Bar Area

In addition to product name, the current user is displayed, help can be accessed, and you can logout from the title bar area.

Toolbars

Toolbars provide quick, context-sensitive access to commonly used features. Button availability is determined by the content-area module.

Note: Your roles determine which toolbars, menus, shortcut menus, and modules are displayed on the user interface. For example, if your role enables you to create documents, the toolbar button New Document is displayed. When EPM Workspace is installed standalone, only the Home button is displayed in the toolbar area.

For additional information on Reporting and Analysis Framework toolbars, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide, Oracle Hyperion Financial Reporting User's Guide*, and the *Hyperion Web Analysis User's Guide*.

EPM Workspace Toolbar

The EPM Workspace toolbar displays the following button:

Table 1 EPM Workspace Toolbar Buttons

Button	Menu Command	Description
	NA	Opens the Home page that was selected from the Preferences dialog, Default Startup Options.

Menus

Subtopics

- From EPM Workspace, the standard menus are Navigate, File, View, Tools, and Help. These are explained in the following tables.
- Menus and buttons are updated as you use the system, based on the following criteria:
  - The roles granted to you. Role determines which items are displayed from Navigate.
  - What has been installed for Reporting and Analysis Framework or Application products.
  - The Navigate item being used and the task being performed. For example, if you use Explore, the menus contain file or folder tasks.

Navigate Menu

The Navigate menu is available for all EPM Workspace modules. Options displayed for each item depend on your role and rights and what you have installed from the Reporting and Analysis Framework or Applications products. For example, if you have installed Reporting and Analysis Framework, Explore is displayed as an option.

Table 2 Navigate Menu

<table>
<tr><th>Command</th><th>Description</th></tr>
<tr><td>

Applications

then Consolidation (Financial ManagementApplications)
then Planning (Planning Applications)
then Performance Scorecard
then Profitability (Profitability and Cost Management Applications)

,

Oracle BI

Oracle Business Intelligence Answers
Oracle Business Intelligence Interactive Dashboards
Oracle Business Intelligence Delivers

BI Publisher

Note: If instanced products are installed but the current user is not provisioned for any application instances, the Navigate, then Applications menu displays a No Applications disabled menu item. . Refresh menu is always displayed with Applications menu. No Applications menu is displayed depending if there are applications provisioned or not. The same applies to the File, then Open, and then Applications menu.
</td><td>Opens applications that are available based on rights and roles</td></tr>
</table>

<table>
<tr><th>Command</th><th>Description</th></tr>
<tr><td>

Explore
Workspace Pages
Administer

Shared Services Console
Workspace Server Settings
Reporting and Analysis

General
Services
Web Applications
Agents
Production Reporting Engines
Production Reporting Database Servers
Generic Job Applications
Pass-through Configuration
Physical Resources
Mime Types
Notifications
Change Ownership
Usage Tracking
Event Tracking
Row Level Security

Annotations
Dimension Library
Application Library
Data Synchronization
Calculation Manager
Application Upgrade
Library Job Console
Classic Application Administration, then Consolidation Administration or Planning Administration[1]
Consolidation System Messages
Consolidation Users on System
Manage Consolidation Servers and Application
ERPI

</td><td>Use Administer module to manage settings that control how end users interact with EPM Workspace. For details on using these menu items, see Oracle Hyperion Reporting and Analysis Framework User’s Guide , Oracle Hyperion Reporting and Analysis Framework Administrator's Guide, Oracle Hyperion Financial Management Administrator’s Guide, and Oracle Hyperion Planning Administrator’s Guide.</td></tr>
</table>

Command	Description
● Schedule ❍ Batch Scheduler ❍ Job Queue ❍ Job Notifications ❍ Show Parameters ❍ Jobs Running ❍ Manage Events ❍ Consolidated Job Status	Schedule enables you to manage jobs and schedule batches and events for automated processing
● Impact Manager ❍ Synchronize Metadata ❍ Update Data Models ❍ Javascript Update ❍ Custom Update ❍ Manage Task List ❍ Show Task Status ❍ Show Impact of Change	Impact Manager enables you to update Interactive Reportingdocuments when database structures, database connections, or links to external data sources change.
Open Items (List of open modules)	Displays items open in EPM Workspace

[1]Classic Application Administration is enumerated with both Consolidation Administration and Planning Administration if a user has Dimension Editor and application creator roles for Financial Managementand Planning.

File Menu

The File menu is available for all EPM Workspace modules. Option availability depends on the content of the current window, module from which the menu is accessed, products installed from Reporting and Analysis Framework and Applications, and user role. For example, user with Explorer role does not have File, then New option available.

Table 3 File Menu

Command	Description
● File ❍ New ❑ Document ❑ Personal Page ❑ Workspace Page ● Open ❍ Document ❑ Workspace Pages ● My Workspace Pages ● Shared Workspace Pages ❍ URL ❍ Applications ❑ Consolidation (Financial ManagementApplications), ❑ Performance Scorecard ❑ Planning (Planning Applications), ❑ Oracle Business Intelligence Answers ❑ Profitability and Cost Management ❑ Oracle Business Intelligence Interactive Dashboards ❑ BI Publisher ● Close ❍ Current ❍ Other ❍ All **Note:** If instanced products are installed but the current user is not provisioned for any application instances, the File, then Open, and then Applications menu displays a No Applications disabled menu item followed by a Refresh menu item. The No Application labels is not displayed if the user is provisioned for any application instances.	Create documents, such as books, batches, or analysis documents, create Personal Pages and Workspace Pages and folders, use repository documents, open applications, Personal Pages, Workspace Pages. Open option is used to open documents, such as books, batches, or analysis documents, use repository documents, open applications, Personal Pages, Workspace Pages. Close option is used to close only the current document you have open and is in focus or all documents that are open can be closed. The Others option is used to close all documents except for the one in focus or active. For more information on Import, Properties, and Subscribe, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*.
● Preferences	Opens the Preferences dialog box. Preferences are used to set the default content, accessibility preferences, and product specific preferences. For Financial Reporting, you can also change your language selection and enable XBRL editing
● Logout	End the session
● Exit	Exit EPM Workspace

View Menu

The availability of View menu options depends on the content of the current window and the module from which the menu is accessed.

Table 4 View Menu

Command	Description
View Pane	Show or hide the View Pane
View Masthead	Show or hide menu bar and toolbar

Tools Menu

The Tools menu is always available. Command availability is determined by product and roles.

Note: The administrator can prevent items from appearing in the Install menu by setting a flag in Workspace Server Settings.

Table 5 Tools Menu

Command	Description
Links, then Web Analysis Studio	Connects to Oracle's Hyperion® Web Analysis Studio
Change Password	Modify native password
Install, then Interactive Reporting Client Smart View Oracle BI for Microsoft Office Offline Planning	Install the Oracle's Hyperion® Interactive Reporting Web Client. Oracle Hyperion Smart View for Office, Fusion Edition, see "Using Smart View" on page 25 for more information. Oracle BI for Microsoft Office. For Oracle BI Microsoft Office, see *Oracle BI Help* from product. Offline Planning allows the user to execute the offline Planning installer by downloading the offline executable. For more information, see *Oracle Hyperion Planning User's Guide*.

Help Menu

You use the Help menu to access EPM Workspace Help and information about EPM Workspace.

Table 6 Help Menu

Command	Description
Help on this Topic	Displays help for the current topic
Contents	Opens the online help Contents tab, from which you can search for specific topics

Command	Description
Oracle User Productivity Kit **Note:** UPK is available in *Oracle Enterprise Performance Management Workspace, Fusion Edition 11.1.2.1* for products that support it. For example, Planning, and Financial Management.	The Oracle User Productivity Kit (UPK) includes a library designed to support users in live environments. When integrated with help systems, UPK delivers context-sensitive training simulations that reflect the way that users complete tasks. UPK must be enabled by an administrator using the Navigate, then Administer, Workspace Server Settings Dialog. Once UPK has been enabled, from the EPM Workspace Help menu, the Oracle User Productivity Kit is listed. For online help, in the toolbar, there is a UPK button as well. For more information, see the *Workspace Server Settings* section in the *Oracle Enterprise Performance Management Workspace Administrator's Guide*.
Technical Support	Opens the Oracle Technical Support home page
EPM Documentation	Opens the EPM documentation home page
Oracle Web site	Opens the Oracle home page
About Oracle Enterprise Performance Management System Workspace, Fusion Edition	Opens the About Oracle Enterprise Performance Management System Workspace, Fusion Edition window, which contains information about EPM Workspace, including EPM Workspace, Reporting and Analysis Framework, UI, and Server versions and version details

2 Setting General Preferences and Personalizing EPM Workspace

In This Chapter

Setting Preferences

Subtopics

- Setting General Preferences
- Setting Preferences for Oracle BI Publisher
- Setting Preferences for Oracle Business Intelligence Products

Set defaults for initial view of EPM Workspace following login, for Explore, applications, file types, Oracle's Hyperion Reporting and Analysis products, Oracle BI EE, and Oracle BI Publisher products. Preferences are also set for Accessibility Mode in EPM Workspace, see Appendix A, "Accessibility." For Reporting and Analysis Framework preferences, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*. For Planning end-user preference settings see the *Oracle Hyperion Planning User's Guide* and for administrator and application preferences, see the *Oracle Hyperion Planning Administrator's Guide*. For Financial Management end user preference settings see the *Oracle Hyperion Financial Management User's Guide*. For Performance Scorecard, see the *Oracle Hyperion Performance Scorecard User Guide and the Oracle Hyperion Performance Scorecard Application Designer's Guide*. For Profitability and Cost Management, see the *Oracle Hyperion Profitability and Cost Management User's Guide* and the *Oracle Hyperion Profitability and Cost Management Administrator's Guide*. Use these preference tabs:

- "Setting General Preferences" on page 40
- For Explore preferences, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*
- For Oracle's Hyperion® Web Analysis preferences, see the *Hyperion Web Analysis User's Guide*
- For Oracle Hyperion Financial Reporting, Fusion Edition preferences, see the *Oracle Hyperion Financial Reporting User's Guide*
- For Oracle's Hyperion® SQR® Production Reporting and Oracle's Hyperion® Interactive Reporting Web Client, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*

- For Oracle Business Intelligence Publisher, see "Setting Preferences for Oracle BI Publisher" on page 41
- For Oracle BI EE products, see "Setting Preferences for Oracle Business Intelligence Products" on page 42

Setting General Preferences

All users have access to general preferences. For example, a Planning or Financial Management user can set an application as their default startup item at logon. General preferences set defaults for default start page for the Content area, displaying document paths, prompting to save files, setting accessibility mode, and a default e-mail address.

Changes made using Preferences go into effect next time you log on.

➤ General preferences:

1 **File** then **Preferences.**

Note: The e-mail address displayed is your e-mail address registered in your user security settings. You cannot update it. If your e-mail address is not registered in security settings, **No e-mail address found** is displayed.

2 EPM Workspace prompts you to save unsaved files by checking Prompt to Save Unsaved Files.

3 Hide document file paths in the progress bar by clearing Show Path For Documents.

4 In Default Startup Options, select an option to display by default whenever you log in to EPM Workspace. The default is Home Page, if Reporting and Analysis Framework are installed and configured.

5 Depending on your selection in step 4, complete the following if Oracle's Hyperion Reporting and Analysis Framework is installed and configured:

- Explore option, click **Select**. From Select, select a folder and click **OK**. The path and folder displays in Folder.
- Document option, click **Select**. From Select, select a document and click **OK**. The path and document name displays in the Document text box.
- Favorite option, select one of the following:
  - Select a favorites page you have saved from the Favorites menu to display in the content area.
  - Click **My Personal Page**.
- For Application option, select the drop-down arrow next to the Application field. Select the following:
  - Consolidation for Financial Management applications
  - Planning for Planning applications
  - Profitability for Profitability and Cost Management
  - Oracle BI EE applications

Note: If instanced products are installed but the current user is not provisioned for any application instances, that user must have provisioned applications in order to select an application as a default startup option. The same applies to the File, then Open, and then Applications menu.

- Scorecards, if Performance Scorecard is installed and configured

6 **Use Current Page button is used for easier and faster way to set Default Startup Option. If you choose to use the Use Current Page button, do the following:**

   a. Make sure that current active page is the one that you want to set as Default Startup Option. It could be any Document or Explore.

   b. Select **Use Current Page**.

   c. The Content drop down menu automatically selects Document or Explore and value of the Document or Folder will be automatically set as well.

7 **Perform one of the following tasks:**

   - Save changes, click **OK**.
   - Cancel changes, click **Cancel**.

Note: For details on Accessibility Mode, see Appendix A, "Accessibility."

Setting Preferences for Oracle BI Publisher

Use the Preferences page to set the following:

- UI Language
- Report Locale
- Report Time Zone
- SVG support in HTML
- Report Viewer Height

➤ To set preferences for Oracle BI Publisher:

1 **Select File, then Preferences.**

2 **Select Oracle BI Publisher. Complete the tasks in the following sections.**

Setting UI Language

The UI language is the language that your user interface displays in.

Note: The Locale and Use Interface Languages lists are read-only, because you cannot modify them. The locale and language are inherited from EPM Workspace. See the *Oracle Enterprise Performance Management Workspace, Fusion Edition Administrator's Guide* for information on setting the locale.

Setting Report Locale

A locale is a language and territory combination, for example, English (United States) or French (Canada). Oracle BI Publisher uses the report locale selection to determine the following:

- The template translation to apply
- The number formatting and date formatting to apply to the report data.

Note: A particular report must have an available template translation for the selected locale. If not, Oracle BI Publisher applies a locale fallback logic to select the template. For more information, see *Oracle Business Intelligence Publisher User's Guide*.

The appropriate number and date formatting are applied independently of the template translation.

Setting Report Time Zone

Select the time zone to apply to your reports. Reports run by this user display the time according to the time zone preference selected here. You can override this setting for a particular report. See Schedule Report in the *Oracle Business Intelligence Publisher User's Guide*.

Note: The time displayed on the user interface and reflected in report processing times is governed by the Oracle BI Publisher server time zone.

Enable SVG for HTML

You can choose to have graphics in your HTML reports displayed using scalable vector graphics (SVG) technology. Your browser may require a plug-in to enable SVG. If so, you are prompted to download this plug-in the first time you attempt to view an HTML graphic with SVG enabled. If you do not wish to use the SVG plug-in, select No.

Report Viewer Height

You can set report viewer height by entering a value in the text box.

Setting Preferences for Oracle Business Intelligence Products

You can perform the following actions from the Preferences page:

Note: The Locale and Use Interface Languages lists are read-only, because you cannot modify them. The locale and language are inherited from EPM Workspace. See the *Oracle Enterprise Performance Management Workspace, Fusion Edition Administrator's Guide* for information on setting the locale.

- View general account information, such as your display name and user ID.
- View and modify your preferences such as a default dashboard.
- View and modify your delivery options for Oracle BI Delivers iBots.
- View the Presentation Services groups to which you currently belong.

Note: Depending on your privilege settings, not all of these options may be available.

➤ To change your preferences:

1. Select **File**, then **Preferences.**
2. Select **Oracle Business Intelligence.**
3. In the Preferences section, perform one of the following actions:
   - In the Default Dashboard drop-down list, select the dashboard you want to display when you log in to Oracle BI.
   - Select a time zone from the Time Zone drop-down box. For details on setting time zones, see "Setting Your Oracle BI EE Time Zone" on page 43.

Setting Your Oracle BI EE Time Zone

You can use the time zone option to choose your Oracle BI EE account's preferred time zone. This option allows system users who do not reside in the same physical location to override the default time zone that was set by the system administrator. For example, suppose the Oracle BI server that sends you alerts resides in the US Pacific time zone, but your work location is in the US Central time zone. After you set the Central time zone as your preferred time zone setting, the delivered time on your alerts appears in Central time. Your account's time zone automatically apply to any items that you create, modify, run, receive, and print.

The date and time columns included in reports appear according to the report designers specifications. The report designer can force a specific time zone to appear in the column, or allow the users default time zone to appear in the column. A clock icon appears in the column heading, and when you mouse over this icon, the name of the time zone used in the column is displayed.

For more information on how the administrator sets the Oracle BI Presentation Server's time zone, see the *Oracle Business Intelligence Presentation Services Administration Guide*.

Setting Your Oracle BI EE Delivery Options

This section of the Oracle BI EE preferences dialog allows you to add or modify the devices on which you receive notifications from Oracle BI Delivers.

Note: If devices or profiles have been preconfigured for you, do not change them without first consulting your Oracle BI administrator.

For more information on setting your delivery options, see "Configuring Your Oracle BI Delivers Devices, and Delivery Profiles" on page 44.

Configuring Your Oracle BI Delivers Devices, and Delivery Profiles

Oracle BI users can configure delivery devices and delivery profiles through the My Account link. These links are available on the main page in Oracle BI Answers, Oracle BI Delivers, and Oracle BI Interactive Dashboards.

Devices and delivery profiles control how Oracle BI Delivers reach you when an alert is triggered by an iBot. After you add one or more devices, you can create delivery profiles, and specify which delivery profile should be your active profile for receiving alerts.

Note: If your Delivery Options area already contains devices and profiles, do not make any changes to the Delivery Options area without first consulting your Oracle BI administrator (any changes you make will override the delivery device and profile information that was configured for you).

Users can also add devices, specify alternative default devices, and configure their delivery profiles.

➤ To configure a delivery option for Oracle BI Delivers:

1. Select **File**, then **Preferences.**
2. Select **Oracle Business Intelligence.**
3. To add a device, perform the following steps:
    a. Select the tab for the device you want to add. For example, select the Email tab.
    b. Select the **Add Device** link (for example, the Add Email Device link). The Device page appears with the Device Name field populated, and options are available in the Device / Provider list.
    c. Select the appropriate option for the device category from the Device / Provider drop-down list.
    d. Enter the address for the device in the Address field. For example, this would be an email address for email, or a telephone number for a digital phone.

       Note: When typing a phone number for a device, do not use punctuation such as spaces, dashes, or parentheses.
    e. Select **Finished** to return to the My Account page. The device appears in the Devices area for the appropriate category (for example, Email devices).
    f. To change information for the device, select the **Edit** link to go back to the Device page.
    g. If you decide you do not want the device, select the **Delete** link. This removes the device from the Devices area.
    h. To add another device, repeat the preceding steps.

4 **To specify an alternative default device, perform the following:**

a. Select the tab for the device category in which you want to set a default device (for example, Email, Phone). All devices for the selected device category are displayed.

b. Click the Radio button next to the device that you want to select as the default. If you select a default device here (for example, Email1), and select the Email check box in the iBot Destinations page, the default device overrides other Email devices in your active delivery profile. For more information, see Selecting Destinations for an Oracle BI Delivers iBot.

5 **To add a delivery profile, perform the following:**

a. Select the Add Delivery Profile link. The Delivery Profile page is displayed.

b. Enter a delivery profile name in the Name field. For more information about your choices at the Delivery Profile page and how delivery profiles work, see "Using Oracle BI Delivers Delivery Profiles" on page 45.

c. Select **Finished** to return to the Delivery Profile page. The profile appears in the Delivery Profiles list.

d. To change information for the delivery profile, select the **Edit** link to go back to the Delivery Profile page.

e. If you decide you do not want the delivery profile, select the **Delete** link. This removes the delivery profile from the Delivery Profiles area.

f. To add another delivery profile, repeat the preceding steps.

6 **To make a delivery profile the active profile, select the radio button next to the profile. The radio button next to the profile is filled in to indicate that it is the active delivery profile.**

Using Oracle BI Delivers Delivery Profiles

Oracle BI Delivers uses your active delivery profile to determine how to reach you when an alert is triggered by an iBot, and which devices should receive delivered content. You configure your delivery profile from the My Account page. For information about accessing the My Account page to configure your delivery profile, see "Configuring Your Oracle BI Delivers Devices, and Delivery Profiles" on page 44.

iBot contents can be delivered to a range of devices, including Web, wireless, and mobile devices. By default, iBot contents are available for delivery to the dashboard and the appropriate devices defined in your active delivery profile (based on the priority of the iBot contents). Content may be specifically directed to a device, and if so, you will receive content on that device if it is defined, even if it is not in your active delivery profile.

Content is delivered to the intersection of devices as determined by the active delivery profile and the specific devices defined for the target content. Content is delivered only once to a device, even if that device is in your active delivery profile and specifically selected as a delivery device for the iBot content. If a specifically requested device or active delivery profile cannot be found, iBot content is automatically pushed to the dashboard.

iBot content is assigned a specific priority. The default priority is normal. When you select devices for your active profile, you can indicate what priority content should be sent to that device. For example, if you have added a pager to your delivery profile, you might associate it with high priority content only. When you know that you will be away from your office frequently, and out of email range, you may select to receive only low priority content through your office email.

You can create any number of delivery profiles. However, only one profile can be active at any given time.

➤ To add or edit an Oracle BI Delivers delivery profile:

1 **At the Delivery Profile page, enter the name of the profile in the Name field.**

2 **For each device you want to use in the profile, select the priority of the content to be delivered.**

Note: Do not set the priority for devices that you do not want to use. Devices that do not have a priority selected are not used by the profile.

You can select any or all priorities by clicking the appropriate check boxes.

3 **Select Finished to save this profile and return to the My Accounts page. The delivery profile appears in the Delivery Profiles list.**

Selecting Destinations for an Oracle BI Delivers iBot

Use the Destinations tab to specify a range of desired devices and destinations for iBots. This section contains the following topics:

- About User Destinations for the Oracle BI Delivers iBot
- About Specific Devices for the Oracle BI Delivers iBot
- About System Services for the Oracle BI Delivers iBot

➤ To specify devices and destinations for the iBot:

- Select a check box next to a device or destination to select it for the iBot.

About User Destinations for the Oracle BI Delivers iBot

This section describes the user destinations available for the iBot on the Destinations page.

- Interactive Dashboard

  Active iBots appear in a Dashboard Alerts section as well as on the Alerts! page. A link to this summary appears together with the application navigation links when new iBots are delivered. After these are cleared on the Alerts page, the alert link is removed.

- Active Delivery Profile

  iBots will be sent to specified devices in the active delivery profile. The active delivery profile is configured through the My Account page. For more information, see "Configuring Your Oracle BI Delivers Devices, and Delivery Profiles" on page 44.

About Specific Devices for the Oracle BI Delivers iBot

If you select a specific device on the Destinations page, the default device selected on the My Account page will override the devices set in the active delivery profile for a user. Devices specified on the Destinations page act as additions to the active delivery profile. An iBot, for example, need not be dependent upon a users configuration. The iBot could just be configured to use device information from default devices in the Devices area in the My Account page.

For more information about active delivery profiles and Devices, see "Configuring Your Oracle BI Delivers Devices, and Delivery Profiles" on page 44.

These are the available devices:

- Email
- Pager
- Digital Phone
- Handheld Device
- Other Device

About System Services for the Oracle BI Delivers iBot

This section describes the system services available for administrators on the Destinations page.

- Oracle BI Server Cache

  This is used for seeding cache.

  Oracle BI administrators can create Server cache for individual users. The cache seeding operation allows administrators to run requests on dashboard pages or requests stored in the Presentation Catalog, and create a Server cache. This speeds up response time for users when they actually run the requests on the dashboards. If data already exists in the cache for a given request, the data is deleted and refreshed when the iBot runs.

  The cache for the request or the dashboard page is created at the appropriate schedule for the indicated set of users.

  Note: To have the cache created for each user, choose the Personalized option for data visibility at the General tab.

  You would typically not select any other destination for this kind of request.

- Disconnected Application Cache

This setting is for organizations that have licensed Disconnected Analytics or a disconnected application such as Oracle's Siebel Pharma Mobile Analytics. It is related to the preprocessed synchronization mode in Disconnected Analytics applications.

You can create server datasets for users of disconnected applications, so that when they synchronize their applications, the data downloads are faster.

The preprocessed synchronization mode is the recommended data download mode for users. It avoids the potential overhead that can occur from running data creation requests in online mode during normal business hours and reduces wait time for the download. Preprocessed data is stored under each users directory on the computer running Oracle BI Web. If you decide to use this mode to schedule data cache creation, make sure that adequate disk space is available. For more information about Oracle Disconnected Analytics, see *Siebel Business Intelligence Server Administration Guide*.

Note: To have the disconnected application cache created for each user, choose the Personalized (individual data visibility) option for Data Visibility at the General tab. (Nonpersonalized data is not used for Disconnected Analytics users.)

You would typically not select any other destination for this kind of request.

3 Launching Applications

In This Chapter

Launching Oracle's Hyperion Applications

Applications from the Navigate menu can contain a list of Profitability and Cost Management, Oracle Business Intelligence, Oracle Hyperion Performance Scorecard, Fusion Edition, Planning, or Financial Management applications which you can open.

Applications is displayed if both of the following are true:

- A user has rights
- Applications have been installed and are available

The list of available applications is retrieved from Oracle's Hyperion® Shared Services. When an application is selected, it launches in a new tab, passing the single sign on token so you are not prompted again for credentials.

The list of available applications are filtered by the user's provisioned status. For example, if the currently logged on user was not provisioned for a project that included the Planning Real App, it would not be listed. For additional information on using Planning applications, see *Oracle Hyperion Planning User's Guide*, for Oracle Hyperion Financial Management, Fusion Edition applications, *Oracle Hyperion Financial Management User's Guide*, Oracle Hyperion Profitability and Cost Management, Fusion Edition applications, see *Oracle Hyperion Profitability and Cost Management User's Guide*, and for Oracle BI EE application products, see the Oracle BI EE product guides.

➤ To launch applications:

1 Select **Navigate** , then **Applications.**

A list of available applications for the products installed and for those you have rights to are displayed.

Note: If instanced products are installed but the current user is not provisioned for any application instances, the Navigate, then Applications menu displays a No Applications disabled menu item followed by a Refresh menu item. Except for Refresh, none of these items display if the user is provisioned for any application instances. The same applies to the File, then Open, and then Applications menu.

2 **Select the application you want to open.**

The application launches as a tab at the top of the EPM Workspace allowing easy switching between screens.

Note: Preferences can be set when viewing certain applications from EPM Workspace. See Chapter 2, "Setting General Preferences and Personalizing EPM Workspace."

4

Using Oracle BI EE

In This Chapter

Overview

Subtopics

- Oracle BI Answers
- Oracle BI Interactive Dashboards
- Oracle BI Delivers
- About Oracle BI Publisher

Additional information on topics in this chapter can be found in the Release 10.1.3.4 documentation of the *Oracle BI EE New Features Guide*.

From the Applications module of the Navigate menu, you can select the following Oracle Business Intelligence products:

- Oracle BI Answers
- Oracle BI Interactive Dashboards
- Oracle BI Delivers
- Oracle BI Publisher

See Chapter 3, “Launching Applications” for additional information on availability of these products based on user rights, roles, and availability of these products from EPM Workspace. For additional information on setting preferences for these products, see “Setting Preferences for Oracle BI Publisher” on page 41 and “Setting Preferences for Oracle Business Intelligence Products” on page 42. For details on Oracle BI EE functionality available in EPM Workspace, see the documentation for Release 10.1.3.4 for documentation on *Oracle BI EE New Features Guide*.

See Chapter 3, “Launching Applications” for additional information on availability of these products based on user rights, roles, and availability of these products from EPM Workspace. For details on Oracle BI EE functionality available in EPM Workspace, see the documentation for Release 10.1.3.4 for documentation on *Oracle Business Intelligence Enterprise Edition New Features Guide*.

Oracle BI Answers

Oracle BI Answers provides true end user ad hoc capabilities in a pure Web architecture. Users interact with a logical view of the information—completely hidden from data structure complexity while simultaneously preventing runaway queries—and can easily create charts, pivot tables, reports, and visually appealing dashboards, all of which are fully interactive and drillable and can be saved, shared, modified, formatted, or embedded in the user's personalized Oracle BI Interactive Dashboards. The results are new levels of business user self-sufficiency in an environment that is fully secure and controlled by IT. See “Overview” on page 51 for availability and preferences for these products.

Oracle BI Interactive Dashboards

Oracle BI Interactive Dashboards provides any knowledge worker with intuitive, interactive access to information that is actionable and dynamically personalized based on the individual's role and identity. In the Oracle BI Interactive Dashboards environment, the end user is working with live reports, prompts, charts, tables, pivot tables, graphics, and tickers in a pure Web architecture. The user has full capability for drilling, navigating, modifying, and interacting with these results. Oracle BI Interactive Dashboards can also aggregate content from a wide variety of other sources, including the Internet, shared file servers, and document repositories. See “Overview” on page 51 for availability and preferences for these products.

Oracle BI Delivers

Oracle BI Delivers is a proactive intelligence solution that provides business activity monitoring and alerting that can reach users through multiple channels such as email, dashboards, and mobile devices. Oracle BI Delivers includes a full Web-based self-service alert creation and subscription portal. This next-generation product can initiate and pass contextual information to other alerts to execute a multistep, multi-person, and multi-application analytical workflow. Furthermore, it can dynamically determine recipients and personalized content to reach the right users at the right time with the right information. See “Overview” on page 51 for availability and preferences for these products.

About Oracle BI Publisher

Oracle BI Publisher (formerly known as XML Publisher) offers efficient; scalable reporting solution available for complex, distributed environments. It provides a central architecture for generating and delivering information to employees, customers, and business partners - both securely and in the right format. Oracle BI Publisher report formats can be designed using Microsoft Word or Adobe Acrobat - tools most users are already familiar with. Oracle BI Publisher also allows you to bring data in from multiple data sources into a single output document. Reports can be delivered through printer, e-mail, fax, WebDav, or publish your report to a portal. Oracle BI Publisher can be used as a standalone reporting product or integrated with the Oracle Business Intelligence Suite Enterprise Edition Plus.

When used as part of the suite, Oracle BI Publisher leverages common dashboarding, metadata, security, calculation, caching, and intelligent request generation services. For more information, see the*Oracle Business Intelligence Publisher User's Guide*.

A Accessibility

In This Appendix

Note: This appendix describes EPM Workspace accessibility and compatibility features. For information regarding the recommended screen reader and magnifier to use with this product, refer to *Oracle's Hyperion Reporting and Analysis Readme*.

Note: If you are using JAWS® Screen Reading Software, we recommend using the Internet Explorer browser.

Enabling Screen Reader Support for EPM Workspace

The Screen Reader Support preference for EPM Workspace enables screen readers and magnifiers to access and work with EPM Workspace. If you change the Screen Reader Support preference setting during a session, you must restart your browser to enable the changes.

Note: The Enable Screen Reader Support option is displayed in EPM Workspace user preferences General tab when using Internet Explorer 7 and 8.

➤ To enable accessibility:

1. Select **File**, then **Preferences.**
2. Under **General**, then **Accessibility Mode** section, select **Enable Screen Reader Support.**
3. Click **OK.**

Setting High-Contrast Mode

A high-contrast color mode is available for accessibility.

➤ To set high-contrast mode:

1 **Perform an action:**

- Select **File**, then **Preferences**. Under General, Accessibility Mode section, from the Select Theme menu select **High Contrast**.
- Ctrl+Shift+H toggles the theme.

2 **Click OK.**

Using the Tab Key in the EPM Workspace UI

Default tab order in the EPM Workspace UI flows from left to right, top to bottom. The tab order loops in both directions so that tabbing from the last item focuses the first item, and reverse-tabbing from the first item focuses the last item.

Using Global Navigation Shortcuts

EPM Workspace provides keyboard shortcuts for general navigation:

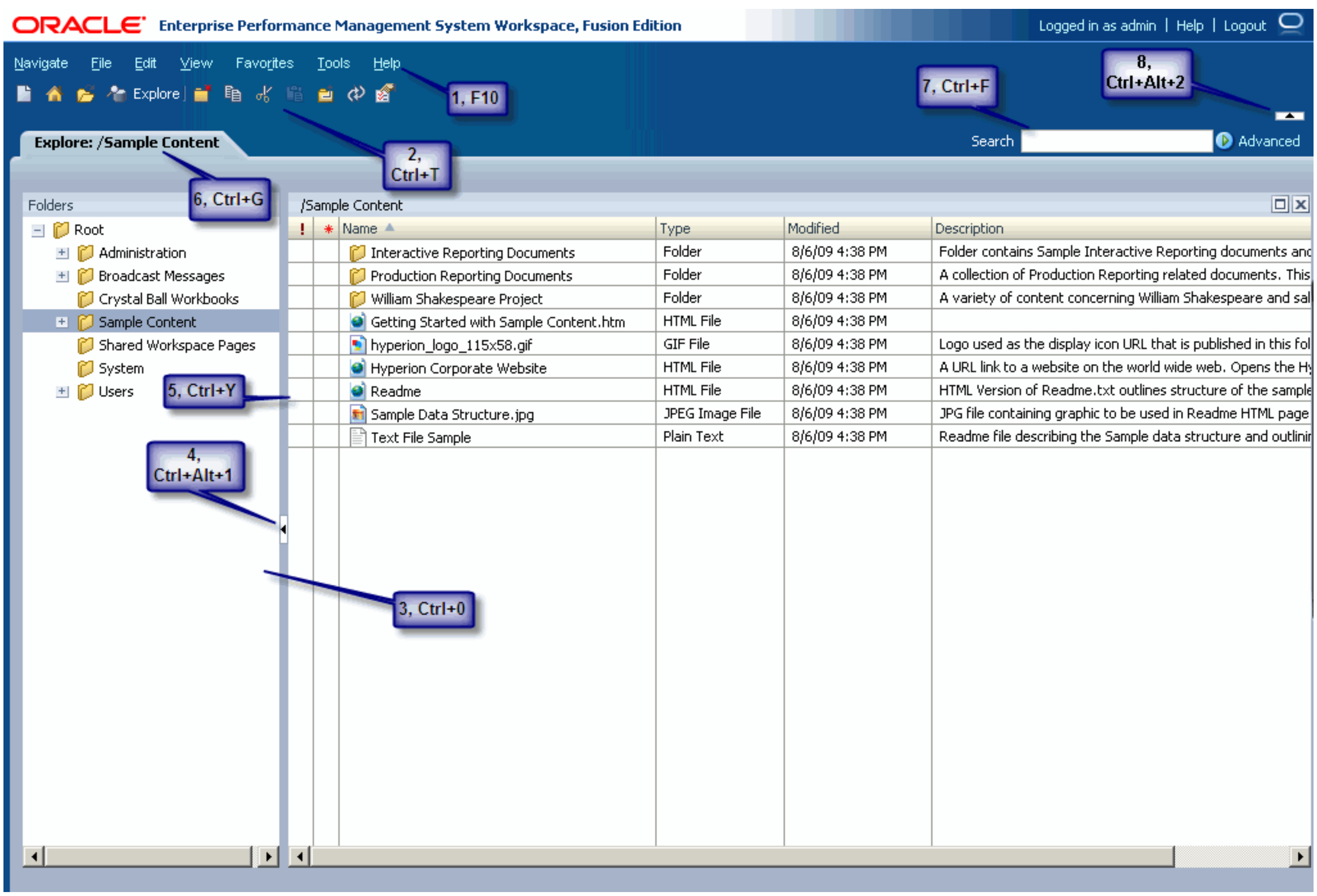
Table 7 Global Navigation Shortcuts

Key	Action
F10	Move the focus to the first menu in the menu bar.
Ctrl+0	Focus current view pane (because a view pane cannot have focus itself, this focuses the first valid child in the tab order). If there is no view pane, nothing happens.
Ctrl+1,2...9	As with Ctrl+0, but select the first, second, through ninth view pane and move focus to its first focusable child.
Ctrl+B	Focus Annotations Area control. (for Financial Reporting, see *Oracle Hyperion Financial Reporting User's Guide*.)
Ctrl+G	Focus top Content tab bar of EPM Workspace (which lists open modules). Focus goes to current module tab. If multiple documents are open, the current module tab is highlighted. If no tabs are open, nothing happens.
Ctrl+F	Focus the Search field.
Ctrl+T	Focus the Standard toolbar. Use the Tab key to select individual buttons.
Ctrl+Y	Focus the Content area. This transfers focus to the first valid child in the tab order of the Content area of an active document.
Ctrl+F4	Close current active module - document, tasks, or files. If none are open, nothing happens.
Ctrl+Shift+H	Toggle the selected theme to change the color scheme of the user interface (UI).
Ctrl+F6	Enter a frame's content area and focus the first focusable element (if any).

Key	Action
Ctrl+Shift+F6	Exit the content area of a frame and return focus to the frame itself. You cannot immediately press Ctrl+F6 to return to the iframe, but you can tab to the other controls outside of iframe. To return to iframe after pressing Ctrl+Shift+F6, you can press Tab to move to another control, then Shift+Tab to bring focus back to the iframe and finally Ctrl+F6 to enter the iframe.
Ctrl+L	Presents a list of selectable navigation targets in the Links List window: ● Go to View Pane ● Go to Content Area ● Go to Annotations Area ● Go to Tab Bar ● Go to toolbar
Ctrl+Alt+O	Toggle the masthead to show or hide. **Note:** The masthead cannot be hidden using the navigation shortcut keys for the logon page.

EPM Workspace Graphic with Callouts

The graphic below shows how to navigate Explore using keyboard shortcuts; other EPM Workspace modes use the same shortcuts.



The EPM Workspace user interface includes these areas.

1. Menu bar (F10) — Commands and sub-commands that organize tasks and modules.
2. Standard toolbar (Ctrl+T) — Buttons for performing tasks.
3. View pane (Ctrl+0) — Area that provides buttons that enable jumps between zero or more panels, each panel having a specific use and corresponding controls.
4. View pane and content area adjuster (Ctrl+Alt+1) — Setting to adjust the size of the View pane and content area. Hiding the view pane provides a larger content frame in which to use EPM Workspace. Select **View**, then **View Pane** to hide or display the View pane.
5. Content area (Ctrl+Y) — Area in which you view active module documents, tasks, or files.
6. Content tab bar (Ctrl+G) — Information bar specific to the current module. If multiple documents are open, the current document tab is highlighted.
7. Search field (Ctrl+F) — A space where you enter text you want to search for within the Repository.
8. Menu and toolbar display (Ctrl+Alt+0) — Setting to show or hide the menu and toolbar area.

Accessibility Behaviors for General UI Elements

Listed below are specific keystrokes that are handled by individual User Interface (UI) elements, as well as expected behavior of screen readers when the UI element is focused:

Table 8 User Interface Element Types

UI Element	Key Event
Button	Either Enter or Space activates the button, causing the same action as a left click. **Note:** In Internet Explorer, button accelerator is triggered by Alt+<letter> and in Firefox, by Alt+Shift+<letter>.
ComboBox	1. Up or down arrow keys display the popup menu and allow selection of combobox values. 2. Space or Enter selects a combobox item from the popup. 3. If editable, alphanumeric keys cause an edit.
Dialog	1. If the dialog has an accept button defined, Enter key activates it. 2. The dialog is modal and blocks all other keyboard events.
Content Area (IFrame)	1. Press Ctrl+F6 to enter a frame, then you may need to press Tab to select the first focusable item. **Note:** If frame contains text or HTML, and there are no focusable items, you have to use Virtual PC Cursor option in the screen reader in order to read the text. Press Insert+Z to toggle the Virtual PC Cursor and use up and down arrows to go to the previous and next lines. Turn Virtual PC Cursor off before exiting IFrame. 2. Press Ctrl+Shift+F6 to exit the content area of a frame and return focus to the frame itself.

UI Element	Key Event
List	1. The up or down arrow keys move selection focus up or down through the list elements. The selection is continually updated. An arrow key press results in a selection event. 2. Ctrl+Up or Down key: item focus moves up or down without changing the current selection. Spacebar can be used to add the focused item to the selection. 3. Shift+Up or Down key: item focus moves up or down and the newly focused item is added to the selection. **Note:** If the list supports only a single selection, the Ctrl and Shift modifiers have no effect.
Tab Bar	Left or right arrow key moves selection focus and selects the new tab immediately. Selection focus *wraps around* the ends of the tab bar.
Text Field	1. If editable, alphanumeric keys cause an edit. 2. Tab proceeds in the tab order. Tab cannot be entered as a character in the text field.
Tree	The left and right arrow keys collapse or expand the current node if it has children. If it has no children, there is no effect. The expansion is non-recursive. However, if the tree is capable of remembering previous expansion state of any subnodes, it should do so.

Accessibility Behavior for Non-standard Controls

The following text describes the accessibility behaviors for non-standard controls:

- "Content Tab Bar" on page 59
- "Accessibility for Sidebar Icon List (File Preferences/Properties)" on page 59
- "Accessibility for Online Help" on page 60

Content Tab Bar

When the Content tab bar is focused, selection focus is on the current tab, if any.

Table 9 Content Tab Bar– Accessibility Keys

Key	Action
Content Tab Bar	
Right/Up arrows	When on any document content tab, to select next tab on right. The selection will wrap.
Left/Down arrows	When on any document content tab, to select next tab on left. The selection will wrap.

Accessibility for Sidebar Icon List (File Preferences/Properties)

The following keyboard shortcuts are supported on the sidebar icon list:

Table 10 Sidebar Icon List — Accessibility Keys

Keys	Action
Tab/Shift+Tab	Navigate up/down the items in the list.
Space bar	Select focused item in the list.

Accessibility for Online Help

When the Screen Reader Support preference is enabled, see "Enabling Screen Reader Support for EPM Workspace" on page 55, the help window is visually rearranged so that the help topic is first in document order, displaying above the help toolbar. This is to ensure that a screen reader program reads the help topic first when online help is invoked. Table 11 lists the keyboard shortcuts for online help.

The following is additional information you may need when using online help:

- To help screen reader users, when a page loads in the Help Topic frame, scripting shifts focus to the loaded document. For example, when help is opened, since the user most likely wants the context-sensitive help topic read, focus is set on the Help Topic frame document.
- When using a screen reader and Internet Explorer, if Forms Mode is on when focus is in a form, and you tab out of or manually move the cursor from the form controls, screen reader reading commands such as Say All may not work as expected. If you want to manually move focus from a form, toggle Forms Mode off before doing so.

  Note: You can avoid this issue by using the keyboard shortcuts for moving to the various frames; when EPM Workspace is in screen reader mode, those keyboard shortcuts script a blur event when focus is in a form, which disables Forms Mode before moving focus. For example, to move focus from the Search frame to the Help topic frame, press the online help keyboard shortcut Ctrl+Shift+4 instead of pressing Shift+Tab. Table 11 has additional online help keyboard shortcuts.

- HTML elements such as form controls typically function as would be expected for your browser (and screen reader, if applicable). Following are a few exceptions:
  - Contents page. In the tree used that displays the selected help system's table of contents, there are 2 types of links:
    - Links containing the titles of target topics. If you activate these links, the target topic opens in the Help topic frame, and focus moves to that topic.
    - Links that open subtopics of a topic. When focus is placed upon these links, a screen reader program says one of the following:
      - Collapse Node if the subtopic links are expanded; activating the link removes the subtopic links from the tab order.
      - Expand Node if the sub-topic links are collapsed; activating the link places the subtopic links in the tab order.

After activating this type of link, the next link in the tab order is the topic, followed by any subtopics.

These links are located before their corresponding topic links themselves in the tab order. You can determine whether a topic has subtopics by pressing the online help keyboard shortcut Shift+Tab; if the screen reader says Expand Node or Collapse Node, the topic has subtopics.

- Index and Contents pages: When a selection is made from the **Select product** dropdown list, the values currently on the **Select help system** dropdown list change to reflect the help system types available for the product. This is because after changing the product, you must select the desired help system type.

- Search page:
  - In Screen Reader mode, if you press the Enter key when focus is on one of the form controls, help removes focus from the focused element before submitting the form. This is to work around a screen reader issue which seems to relate to how screen readers use the Enter key to toggle Forms Mode.

    Note: Some screen reader programs may impact this behavior on at least some of the controls. For example, when using a screen reader, if focus was on one of the search page's checkboxes, the Enter key would toggle the checkbox, not submit the form. This only occurred with a screen reader running; if a screen reader controls a keystroke, help does not attempt to override that.

  - If the **All** checkbox is selected in the **Search help for the following products** group of checkboxes, any selected checkboxes for products are cleared.
  - If the **All** checkbox is selected in the **Search help for the following products** group of checkboxes, and then a checkbox for a product is selected, the **All** checkbox is cleared.
  - If the **All** checkbox is selected in the **Search the following types of help systems** group of checkboxes, any selected checkboxes for help types are cleared.
  - If the **All** checkbox is selected in the **Search the following types of help systems** group of checkboxes, and then a checkbox for a help type is selected, the **All** checkbox is cleared.

Table 11 Online Help — Keyboard Shortcuts

Shortcut	Description
Ctrl+Shift +1	Open and move focus to the table of contents page, in the Navigation frame. The displayed table of contents entries are for the help system that contains the currently displayed help topic. The table of contents consists of frames containing the following: ● A form to select a table of contents for a different help system. If you select a different help system, the help topic frame is also updated to display the help system's launch page. ● The table of contents links.

Shortcut	Description
Ctrl+Shift +2	Open and move focus to the index, in the Navigation frame. The displayed index entries are for the help system that contains the currently displayed help topic. The index consists of frames containing the following: ● A form to select an index for a different help system. If you select a different help system, the help topic frame is also updated to display the help system's launch page. ● Shortcut links to index entries, which are grouped by letter. ● Index entry links
Ctr+Shift+3	Open and move focus to the Search frame, in the Navigation frame.
Ctrl+Shift +4	Move focus to the content frame, which is the frame that contains help topics and search results. **Note:** If you are finding that a page is not reading as expected, try toggling off Forms Mode.
Ctrl+Shift +5	Move focus to the toolbar frame, which contains links to various help features. **Note:** The toolbar includes a link to the help topic describing accessibility information for EPM Workspace.

Considerations

The following items are noteworthy for accessibility users of this release.

Note: Review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information on system requirements. You can find it at http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html (under Business Intelligence).

- For EPM Workspace, the screen reader reads menu items after opening a new EPM Workspace page. When pressing **Esc** to exit the main menu, you must press **Esc** one more time after the menu closes to remove the focus from the menu bar.
- When importing Interactive Reporting (BQY) documents or jobs using the keyboard only, the Apply Option to All Queries dropdown should be operated as follows:
  - Use ALT+DOWN to open the dropdown
  - Use UP and DOWN to navigate among options
  - Use ENTER to select an option
- Keyboard navigation has been enabled by default in both the screen reader and non-screen reader modes for Oracle's Hyperion® Interactive Reporting documents in EPM Workspace. You can disable keyboard navigation when the screen reader setting is not active. To disable keyboard navigation, add the parameter: DISABLE_KEYBOARD_NAV_IN_NON_508_MODE=true to the Hyperion Interactive Reporting Service (BI) in Dynamic Service properties. For more information, see *Chapter 4, Using the Administer Module* of the *Oracle Enterprise Performance Management Workspace, Reporting and Analysis Framework User's Guide*.

- Accelerators for Next or Cancel buttons in dialogs containing I-Frames may need to be issued twice. For example, from the EPM Workspace Import dialog when focus is inside the dialog I-Frame, the accelerators for Next and Cancel buttons, Alt+X or Alt+L need to be issued 2 times. Pressing these keys for the first time removes you from the I-Frame and then the second time is when the accelerator is enabled.
- When entering an EPM Workspace Page, the screen reader may not read the layout area title, location, or keyboard shortcuts that are supported. For information on accessibility for EPM Workspace Pages, see *Accessibility for EPM Workspace Pages* in the *Oracle Enterprise Performance Management Workspace, Reporting and Analysis Framework User's Guide*.
- The optional Workspace Messaging administrative feature for broadcast notification of users may not get focus in Web browsers. Administrators of systems with users requiring accessibility should notify these users of other options for system messages such as using email.
- In some circumstances, screen readers may not initially read all the text in the Import dialogs (Import File, Import File as Job, Import Financial Reporting Documents, and Import URL). In order to read all the text in the Import dialogs, without closing the Import Dialog, use tab to traverse the dialog again; from the second time onwards, the screen reader reads the controls and text.
- The EPM Workspace Pages Quick Links and EPM Workspace Pages layout areas correctly read all individual content items as they receive focus. However, the grouping descriptions may not be read by accessibility tools. For reference, the Quick links are grouped in order as Favorites and then Applications. Similarly for the EPM Workspace Pages layout area, the grouping is in order of My Workspace Pages and then Shared Workspace Pages.
- Using a screen reader and Internet Explorer, if Forms Mode is on when focus is in a form, and you tab out of or manually move the cursor from the form controls, the screen reader reading commands such as Say All may not work as expected. If you want to manually move focus from a form, toggle Forms Mode off before doing so. You can also use the keyboard shortcuts for moving to the various frames; when EPM Workspace is in screen reader mode, those keyboard shortcuts script a blur event when focus is in a form, which disables Forms Mode before moving focus. For example, to move focus from the Search frame to the Help topic frame, press Ctrl+4 instead of pressing Shift+Tab.
- For systems which were upgraded from version 11.1.x, users who had selected the high-contrast theme in the previous version do not see the correct theme the first time they log on to the new version. The correct theme takes effect on their second log on.
- When using the F10 global navigation shortcut key to move focus to the first menu in the menu bar, in some Web browsers if the current focus is inside a combo box list, it may not work properly. Once the user moves focus out of the combo box, F10 works correctly.
- List of users, groups, or roles is unexpectedly scrolled up when selecting items using arrow keys. To avoid this, input more restrictive criterion in search field so that only one page of items is displayed.
- While using Oracle Hyperion Planning, Fusion Edition or Home Page, global shortcut keys (for example, Ctrl+T to get to the toolbar) may not work until Ctrl+Shift+F6 is pressed.

- Top level EPM Workspace menus can be accessed using the Alt key and the letter associated with that menu. Once the menu is opened, the Alt key is not necessary and should not be used to access menu items included in the menu currently open. Only press the letter associated with the submenu item desired. For example, Alt+F opens the File menu, N is all that is needed to select the New menu item under File menu.
- When in the Oracle's Hyperion® Shared Services Console and browsing through the user list, the arrow keys are not enabled. This occurs after tabbing through the User Filter and In Group(s) controls to reach the user list. Once in the user list, the arrow keys can be re-enabled by pressing Tab then Shift+Tab.
- Once the EPM Workspace menus are open, you can navigate through the menu items using the arrow keys. This is announced by accessibility tools when menus are opened. However, there may be instances when this navigation hint is read only after the user begins navigating inside the menu.
- Components that are in a disabled state are not focusable and not read.
- EPM Workspace uses the ARIA attribute `role=application`. This is done in one place when opening EPM Workspace. This may reduce the need to manually specify in accessibility tools settings that indicate EPM Workspace behaves more like an application rather than a Web document.
- After selecting an item from the Home Page Recently opened links area, the newly opened document may not get focus. In order for an accessibility tool to read this, it may also be necessary to set focus by using one of the EPM Workspace global navigation short cuts. For example, Ctrl+Y to focus the main content area.
- Screen readers may not read the EPM Workspace Favorites dialog title Favorites Manager Dialog when it is opened. However, focus is then available for the first favorite in the list which should be read.
- List box controls may not render properly when Oracle Enterprise Performance Management Workspace, Fusion Edition is used in accessibility mode and the display is scrolled. Internet Explorer 7 generally does not have these scrolling issues, although in some circumstances older video cards or drivers may display them. In addition, some list boxes may render as dropdown controls when in accessibility mode.
- In some circumstances, the screen reader may read more information than required, such as the image URLs.
- Advanced element info (tooltips) for Dashboards, Charts, and Reports not recognized by Screen Reader when using Ctrl+Alt+Enter. (Note: Screen Reader recognizes Dashboards, Charts and Reports when simply Tabbing through them).

Glossary

! See bang character.

#MISSING See missing data.

access permissions A set of operations that a user can perform on a resource.

accessor Input and output data specifications for data-mining algorithms.

account blocking The process by which accounts accept input data in the consolidated file. Blocked accounts do not receive their value through the additive consolidation process.

account eliminations Accounts which have their values set to zero in the consolidated file during consolidation.

account type A property that determines how an account's value flows over time and its sign behavior. Account type options can include expense, income, asset, liability, and equity.

accountability map A visual, hierarchical representation of the responsibility, reporting, and dependency structure of the accountability teams (also known as critical business areas) in an organization.

active service A service whose Run Type is set to Start rather than to Hold.

active-active high availability system A system in which all the available members can service requests, and no member is idle. An active-active system generally provides more scalability options than an active-passive system. Contrast with active-passive high availability system.

active-passive high availability system A system with active members, which are always servicing requests, and passive members that are activated only when an active member fails. Contrast with active-active high availability system.

activity-level authorization Defines user access to applications and the types of activities they can perform on applications, independent of the data that will be operated on.

ad hoc report An online analytical query that an end user creates dynamically.

adapter Software that enables a program to integrate with data and metadata from target and source systems.

adaptive states Interactive Reporting Web Client level of permission.

adjustment See journal entry.

Advanced Relational Access The integration of a relational database with an Essbase multidimensional database so that all data remains in the relational database and is mapped to summary-level data in the Essbase database.

agent An Essbase server process that starts and stops applications and databases, manages connections from users, and handles user-access security. The agent is referred to as ESSBASE.EXE.

aggregate cell A cell comprising several cells. For example, a data cell that uses Children(Year) expands to four cells containing Quarter 1, Quarter 2, Quarter 3, and Quarter 4 data.

aggregate function A type of function, such as sum or calculation of an average, that summarizes or performs analysis on data.

aggregate limit A limit placed on an aggregated request line item or aggregated metatopic item.

aggregate storage database The database storage model designed to support large-scale, sparsely distributed data which is categorized into many, potentially large dimensions. Upper level members and formulas are dynamically calculated, and selected data values are aggregated and stored, typically with improvements in overall aggregation time.

aggregate view A collection of aggregate cells based on the levels of the members within each dimension. To reduce calculation time, values are pre-aggregated and stored as aggregate views. Retrievals start from aggregate view totals and add up from there.

aggregation The process of rolling up and storing values in an aggregate storage database; the stored result of the aggregation process.

aggregation script In aggregate storage databases only, a file that defines a selection of aggregate views to be built into an aggregation.

alias table A table that contains alternate names for members.

alternate hierarchy A hierarchy of shared members. An alternate hierarchy is based upon an existing hierarchy in a database outline, but has alternate levels in the dimension. An alternate hierarchy allows the same data to be seen from different points of view.

ancestor A branch member that has members below it. For example, the members Qtr2 and 2006 are ancestors of the member April.

appender A Log4j term for destination.

application 1) A software program designed to run a specific task or group of tasks such as a spreadsheet program or database management system; 2) A related set of dimensions and dimension members that are used to meet a specific set of analytical requirements, reporting requirements, or both.

application administrator A person responsible for setting up, configuring, maintaining, and controlling an application. Has all application privileges and data access permissions.

application currency The default reporting currency for the application.

Application Migration Utility A command-line utility for migrating applications and artifacts.

application server cluster A loosely joined group of application servers running simultaneously, working together for reliability and scalability, and appearing to users as one application server instance. See also vertical application cluster and horizontal application cluster.

area A predefined set of members and values that makes up a partition.

arithmetic data load A data load that performs operations on values in the database, such as adding 10 to each value.

artifact An individual application or repository item; for example, scripts, forms, rules files, Interactive Reporting documents, and financial reports. Also known as an object.

assemblies Installation files for EPM System products or components.

asset account An account type that stores values that represent a company's assets.

assignment The association of a source and destination in the allocation model that controls the direction of allocated costs or revenue flow.

asymmetric topology An Oracle Fusion Middleware Disaster Recovery configuration that is different across tiers on the production site and standby site. For example, an asymmetric topology can include a standby site with fewer hosts and instances than the production site.

attribute A characteristic of a dimension member. For example, Employee dimension members may have attributes of Name, Age, or Address. Product dimension members can have several attributes, such as a size and flavor.

attribute association A relationship in a database outline whereby a member in an attribute dimension describes a characteristic of a member of its base dimension. For example, if product 100-10 has a grape flavor, the product 100-10 has the Flavor attribute association of grape. Thus, the 100-10 member of the Product dimension is associated with the Grape member of the Flavor attribute dimension.

Attribute Calculations dimension A system-defined dimension that performs these calculation operations on groups of members: Sum, Count, Avg, Min, and Max. This dimension is calculated dynamically and is not visible in the database outline. For example, using the Avg member, you can calculate the average sales value for Red products in New York in January.

attribute dimension A type of dimension that enables analysis based on the attributes or qualities of dimension members.

attribute reporting A reporting process based on the attributes of the base dimension members. See also base dimension.

attribute type A text, numeric, Boolean, date, or linked-attribute type that enables different functions for grouping, selecting, or calculating data. For example, because the Ounces attribute dimension has the type numeric, the number of ounces specified as the attribute of each product can be used to calculate the profit per ounce for that product.

authentication Verification of identity as a security measure. Authentication is typically based on a user name and password. Passwords and digital signatures are forms of authentication.

authentication service A core service that manages one authentication system.

auto-reversing journal A journal for entering adjustments that you want to reverse in the next period.

automated stage A stage that does not require human intervention; for example, a data load.

axis 1) A straight line that passes through a graphic used for measurement and categorization; 2) A report aspect used to arrange and relate multidimensional data, such as filters, pages, rows, and columns. For example, for a data query in Simple Basic, an axis can define columns for values for Qtr1, Qtr2, Qtr3, and Qtr4. Row data would be retrieved with totals in the following hierarchy: Market, Product.

backup A duplicate copy of an application instance.

balance account An account type that stores unsigned values that relate to a particular time.

balanced journal A journal in which the total debits equal the total credits.

bang character (!) A character that terminates a series of report commands and requests information from the database. A report script must be terminated with a bang character; several bang characters can be used within a report script.

base currency The currency in which daily business transactions are performed.

base dimension A standard dimension that is associated with one or more attribute dimensions. For example, assuming products have flavors, the Product dimension is the base dimension for the Flavors attribute dimension.

base entity An entity at the bottom of the organization structure that does not own other entities.

batch calculation Any calculation on a database that is done in batch; for example, a calculation script or a full database calculation. Dynamic calculations are not considered to be batch calculations.

batch file An operating system file that can call multiple ESSCMD scripts and run multiple sessions of ESSCMD. On Windows-based systems, batch files have BAT file extensions. On UNIX, batch files are written as a shell script.

Batch Loader An FDM component that enables the processing of multiple files.

batch POV A collection of all dimensions on the user POV of every report and book in the batch. While scheduling the batch, you can set the members selected on the batch POV.

batch processing mode A method of using ESSCMD to write a batch or script file that can be used to automate routine server maintenance and diagnostic tasks. ESSCMD script files can execute multiple commands and can be run from the operating system command line or from within operating system batch files. Batch files can be used to call multiple ESSCMD scripts or run multiple instances of ESSCMD.

block The primary storage unit which is a multidimensional array representing the cells of all dense dimensions.

block storage database The Essbase database storage model categorizing and storing data based on the sparsity of data values defined in sparse dimensions. Data values are stored in blocks, which exist only for sparse dimension members for which there are values.

Blocked Account An account that you do not want calculated in the consolidated file because you want to enter it manually.

book 1) In Financial Reporting, a container that holds a group of similar documents. Books may specify dimension sections or dimension changes; 2) In Data Relationship Management, a collection of exports that can be run together as a group. Export results can be combined together or output separately.

book POV The dimension members for which a book is run.

bookmark A link to a reporting document or a Web site, displayed on a personal page of a user. The types of bookmarks are My Bookmarks and image bookmarks.

bounding rectangle The required perimeter that encapsulates the Interactive Reporting document content when embedding Interactive Reporting document sections in a personal page, specified in pixels for height and width or row per page.

broadcast message A simple text message sent by an administrator to a user who is logged on to a Planning application. The message details information such as system availability, notification of application refresh, or application backups.

build method A method used to modify database outlines. Choice of a build method is based on the format of data in data source files.

business process A set of activities that collectively accomplish a business objective.

business rules Logical expressions or formulas that are created within an application to produce a desired set of resulting values.

cache A buffer in memory that holds data temporarily.

calc script A set of commands that define how a database is consolidated or aggregated. A calculation script may also contain commands that specify allocation and other calculation rules separate from the consolidation process.

Calculated Accounts Accounts with formulas that you cannot alter. These formulas are fixed to maintain the accounting integrity of the model that you are building. For example, the formula for Net Income, a Calculated Account, is modeled into Strategic Finance and cannot be changed in historical or forecast periods.

calculated member in MaxL DML A member designed for analytical purposes and defined in the optional WITH section of a MaxL DML query.

Calculation Manager A module of Enterprise Performance Management Architecture (EPMA) that Planning and Financial Management users can use to design, validate, and administrate business rules in a graphical environment. c

calculation status A consolidation status that indicates that some values or formula calculations have changed. You must reconsolidate to get the correct values for the affected entity.

calendar User-defined time periods and their relationship to each other. Q1, Q2, Q3, and Q4 comprise a calendar or fiscal year.

cascade The process of creating multiple reports for a subset of member values.

Catalog pane An area that displays a list of elements available to the active section. If Query is the active section, a list of database tables is displayed. If Pivot is the active section, a list of results columns is displayed. If Dashboard is the active section, a list of embeddable sections, graphic tools, and control tools are displayed.

categories Groupings by which data is organized. For example, Month.

cause and effect map A map that depicts how the elements that form your corporate strategy relate and how they work together to meet your organization's strategic goals. A Cause and Effect map tab is automatically created for each Strategy map.

CDF See custom-defined function.

CDM See custom-defined macro.

cell 1) The data value at the intersection of dimensions in a multidimensional database; the intersection of a row and a column in a worksheet; 2) A logical group of nodes belonging to one administrative domain.

cell note A text annotation for a cell in an Essbase database. Cell notes are a type of LRO.

CHANGED status Consolidation status that indicates data for an entity has changed.

chart template A template that defines the metrics to display in Workspace charts.

child A member with a parent above it in the database outline.

choice list A list of members that a report designer can specify for each dimension when defining the report's point of view. A user who wants to change the point of view for a dimension that uses a choice list can select only the members specified in that defined member list or those members that meet the criteria defined in the function for the dynamic list.

clean block A data block in which the database is fully calculated, if a calculation script calculates all dimensions at once, or if the SET CLEARUPDATESTATUS command is used in a calculation script.

cluster An array of servers or databases that behave as a single resource which share task loads and provide failover support; eliminates one server or database as a single point of failure in a system.

cluster interconnect A private link used by a hardware cluster for heartbeat information, to detect node failure.

cluster services Software that manages cluster member operations as a system. With cluster services, you can define a set of resources and services to monitor through a heartbeat mechanism between cluster members and to move these resources and services to a different cluster member as efficiently and transparently as possible.

clustered bar charts Charts in which categories are viewed side-by-side; used only with vertical bar charts.

code page A mapping of bit combinations to a set of text characters. Different code pages support different sets of characters. Each computer contains a code page setting for the character set requirements of the language of the computer user. In the context of this document, code pages map characters to bit combinations for non-Unicode encodings. See also encoding.

column In Data Relationship Management, a field of data associated with an import source or the results of a query, compare, validation, or export.

committed access An Essbase Kernel Isolation Level setting that affects how Essbase handles transactions. Under committed access, concurrent transactions hold long-term write locks and yield predictable results.

computed item A virtual column (as opposed to a column that is physically stored in the database or cube) that can be calculated by the database during a query, or by Interactive Reporting Studio in the Results section. Computed items are calculations of data based on functions, data items, and operators provided in the dialog box and can be included in reports or reused to calculate other data.

connection file See Interactive Reporting connection file (.oce)

consolidated file (Parent) A file into which all of the business unit files are consolidated; contains the definition of the consolidation.

consolidation The process of aggregating data from dependent entities to parent entities. For example, if the dimension Year consists of the members Qtr1, Qtr2, Qtr3, and Qtr4, its consolidation is Year.

consolidation file (*.cns) A graphical interface that enables you to add, delete, or move Strategic Finance files in the consolidation process using either a Chart or Tree view. It also enables you to define and modify the consolidation.

consolidation rule The rule that is executed during the consolidation of the node of the hierarchy. This rule can contain customer-specific formulas appropriate for the correct consolidation of parent balances. Elimination processing can be controlled within these rules.

content Information stored in the repository for any type of file.

content browser A component that eanbles users to browse and select content to be placed on a Workspace Page.

context variable A variable that is defined for a particular task flow to identify the context of the taskflow instance.

contribution The value added to a parent from a child entity. Each child has a contribution to its parent.

controls groups Groupings used in FDM to maintain and organize certification and assessment information, especially helpful for meeting Sarbanes-Oxley requirements.

conversion rate See exchange rate.

cookie A segment of data placed on your computer by a Web site.

correlated subqueries Subqueries that are evaluated once for every row in the parent query; created by joining a topic item in the subquery with a topic in the parent query.

critical business area (CBA) An individual or a group organized into a division, region, plant, cost center, profit center, project team, or process; also called accountability team or business area.

critical success factor (CSF) A capability that must be established and sustained to achieve a strategic objective; owned by a strategic objective or a critical process and is a parent to one or more actions.

crosstab reporting Reporting that categorizes and summarizes data in table format. The table cells contain summaries of the data that fit within the intersecting categories. For example, a crosstab report of product sales information could show size attributes, such as Small and Large, as column headings and color attributes, such as Blue and Yellow, as row headings. The cell in the table where Large and Blue intersect could contain the total sales of all Blue products that are sized Large.

cube A block of data that contains three or more dimensions. An Essbase database is a cube.

cube deployment In Essbase Studio, the process of setting load options for a model to build an outline and load data into an Essbase application and database.

cube schema In Essbase Studio, the metadata elements, such as measures and hierarchies, representing the logical model of a cube.

currency conversion A process that converts currency values in a database from one currency into another. For example, to convert one U. S. dollar into the European euro, the exchange rate (for example, 0.923702) is multiplied by the dollar (1* 0.923702). After conversion, the European euro amount is .92.

Currency Overrides A feature allowing the selected input method for any input period to be overridden to enable input of that period's value as Default Currency/Items. To override the input method, enter a pound sign (#) before or after the number.

currency partition A dimension type that separates local currency members from a base currency, as defined in an application. Identifies currency types, such as Actual, Budget, and Forecast.

custom calendar Any calendar created by an administrator.

custom dimension A dimension created and defined by users. Channel, product, department, project, or region could be custom dimensions.

custom property A property of a dimension or dimension member that is created by a user.

custom report A complex report from the Design Report module, composed of any combination of components.

custom-defined function (CDF) Essbase calculation functions developed in Java and added to the standard Essbase calculation scripting language using MaxL. See also custom-defined macro.

custom-defined macro (CDM) Essbase macros written with Essbase calculator functions and special macro functions. Custom-defined macros use an internal Essbase macro language that enables the combination of calculation functions and they operate on multiple input parameters. See also custom-defined function.

cycle through Perform multiple passes through a database while calculating it.

dashboard A collection of metrics and indicators that provide an interactive summary of your business. Dashboards enable you to build and deploy analytic applications.

data cache A buffer in memory that holds uncompressed data blocks.

data cell See cell.

data file cache A buffer in memory that holds compressed data (PAG) files.

data form A grid display that enables users to enter data into the database from an interface such as a Web browser, and to view and analyze data or related text. Certain dimension member values are fixed, giving users a specific view into the data.

data function Function that computes aggregate values, including averages, maximums, counts, and other statistics that summarize groupings of data.

data load location In FDM, a reporting unit responsible for submitting source data into the target system. Typically, one FDM data load location exists for each source file loaded to the target system.

data load rules A set of criteria that determines how to load data from a text-based file, a spreadsheet, or a relational data set into a database.

data lock A feature that prevents changes to data according to specified criteria, such as a period or scenario.

data mining The process of searching through an Essbase database for hidden relationships and patterns in a large amount of data.

data model A representation of a subset of database tables.

data value See cell.

database connection A file that stores definitions and properties used to connect to data sources and enables database references to be portable and widely used.

date measure In Essbase, a member tagged as Date in the dimension where measures are represented. The cell values are displayed as formatted dates. Dates as measures can be useful for analysis types that are difficult to represent using the Time dimension. For example, an application may need to track acquisition dates for a series of capital assets, but the acquisition dates span too large a period to allow for feasible Time dimension modeling. See also typed measure.

Default Currency Units The unit scale of data. For example, If you select to define your analysis in thousands and enter 10, this unit is interpreted as 10,000.

dense dimension In block storage databases, a dimension likely to contain data for every combination of dimension members. For example, time dimensions are often dense because they can contain all combinations of all members. Contrast with sparse dimension.

dependent entity An entity that is owned by another entity in the organization.

derived text measure In Essbase Studio, a text measure whose values are governed by a predefined rule expressed as a range. For example, a derived text measure, called "Sales Performance Index," based on a measure Sales, could consist of the values "High," "Medium," and "Low." This derived text measure is defined to display "High," "Medium," and "Low" depending on the range in which the corresponding sales values fall. See also text measure.

descendant Any member below a parent in the database outline. In a dimension that includes years, quarters, and months, the members Qtr2 and April are descendants of the member Year.

Design Report An interface in Web Analysis Studio for designing custom reports, from a library of components.

destination 1) In Business Rules, a block of the database where calculated values are stored; 2) In Profitability and Cost Management, the association of a source and destination in the allocation model that controls the direction of allocated costs or revenue flow.

destination currency The currency to which balances are converted. You enter exchange rates and convert from the source currency to the destination currency. For example, when you convert from EUR to USD, the destination currency is USD.

detail chart A chart that provides the detailed information that you see in a Summary chart. Detail charts appear in the Investigate Section in columns below the Summary charts. If the Summary chart shows a Pie chart, then the Detail charts below represent each piece of the pie.

dimension A data category used to organize business data for the retrieval and preservation of values. Dimensions usually contain hierarchies of related members grouped within them. For example, a Year dimension often includes members for each time period, such as quarters and months.

dimension build The process of adding dimensions and members to an Essbase outline.

dimension build rules Specifications, similar to data load rules, that Essbase uses to modify an outline. The modification is based on data in an external data source file.

dimension tab In the Pivot section, the tab that enables you to pivot data between rows and columns.

dimension table 1) A table that includes numerous attributes about a specific business process; 2) In Essbase Integration Services, a container in the OLAP model for one or more relational tables that define a potential dimension in Essbase.

dimension type A dimension property that enables the use of predefined functionality. Dimensions tagged as time have a predefined calendar functionality.

dimensionality In MaxL DML, the represented dimensions (and the order in which they are represented) in a set. For example, the following set consists of two tuples of the same dimensionality, because they both reflect the dimensions (Region, Year): { (West, Feb), (East, Mar) }

direct rate A currency rate that you enter in the exchange-rate table. The direct rate is used for currency conversion. For example, to convert balances from JPY to USD, in the exchange-rate table, enter a rate for the period/scenario where the source currency is JPY and the destination currency is USD.

dirty block A data block containing cells that have been changed since the last calculation. Upper-level blocks are marked as dirty if their child blocks are dirty (that is, if they have been updated).

Disaster Recovery The ability to safeguard against natural or unplanned outages at a production site by having a recovery strategy for applications and data to a geographically separate standby site.

display type One of three Web Analysis formats saved to the repository: spreadsheet, chart, and pinboard.

dog-ear The flipped page corner in the upper-right corner of the chart header area.

domain In data mining, a variable representing a range of navigation within data.

drill-down Navigation through the query result set using the dimensional hierarchy. Drilling down moves the user perspective from aggregated data to detail. For example, drilling down can reveal hierarchical relationships between years and quarters or quarters and months.

drill-through The navigation from a value in one data source to corresponding data in another source.

driver In Profitability and Cost Management, an allocation method that describes the mathematical relationship between the sources that use the driver and the destinations to which those sources allocate cost or revenue. For Business Modeling, see also cost driver and activity driver.

duplicate alias name A name that occurs more than once in an alias table and can be associated with more than one member in a database outline. Duplicate alias names can be used with duplicate member outlines only.

duplicate member name Multiple occurrences of a member name in a database, with each occurrence representing a different member. For example, a database has two members named New York. One member represents New York state and the other member represents New York city.

duplicate member outline A database outline containing duplicate member names.

Dynamic Calc and Store members Members in a block storage outline that Essbase calculates only upon the first retrieval of the value. Essbase then stores the calculated value in the database. Subsequent retrievals do not require calculating.

Dynamic Calc members Members in a block storage outline that Essbase calculates only at retrieval time. Essbase discards calculated values after completing the retrieval request.

dynamic calculation In Essbase, a calculation that occurs only when you retrieve data on a member that is tagged as Dynamic Calc or Dynamic Calc and Store. The member's values are calculated at retrieval time instead of being precalculated during batch calculation.

dynamic hierarchy In aggregate storage database outlines only, a hierarchy in which members are calculated at retrieval time.

dynamic member list A system-created named member set that is based on user-defined criteria. The list is refreshed automatically whenever it is referenced in the application. As dimension members are added and deleted, the list automatically reapplies the criteria to reflect the changes.

dynamic reference A pointer in the rules file to header records in a data source.

dynamic report A report containing data that is updated when you run the report.

Dynamic Time Series A process that performs period-to-date reporting in block storage databases.

dynamic view account An account type indicating that account values are calculated dynamically from the data that is displayed.

Eliminated Account An account that does not appear in the consolidated file.

elimination The process of zeroing out (eliminating) transactions between entities within an organization.

employee A user responsible for, or associated with, specific business objects. Employees need not work for an organization; for example, they can be consultants. Employees must be associated with user accounts, for authorization purposes.

encoding A method for mapping bit combinations to characters for creating, storing, and displaying text. Each encoding has a name; for example, UTF-8. Within an encoding, each character maps to a specific bit combination; for example, in UTF-8, uppercase A maps to HEX41. See also code page, locale.

ending period A period enabling you to adjust the date range in a chart. For example, an ending period of "month" produces a chart showing information through the end of the current month.

Enterprise View An Administration Services feature that enables management of the Essbase environment from a graphical tree view. From Enterprise View, you can operate directly on Essbase artifacts.

entity A dimension representing organizational units. Examples: divisions, subsidiaries, plants, regions, products, or other financial reporting units.

EPM Oracle home A subdirectory of Middleware home containing the files required by EPM System products. The EPM Oracle home location is specified during installation with EPM System Installer.

EPM Oracle instance A directory containing active, dynamic components of EPM System products (components that can change during run-time). You define the EPM Oracle instance directory location during configuration with EPM System Configurator.

Equity Beta The riskiness of a stock, measured by the variance between its return and the market return, indicated by an index called "beta." For example, if a stock's return normally moves up or down 1.2% when the market moves up or down 1%, the stock has a beta of 1.2.

essbase.cfg An optional configuration file for Essbase. Administrators may edit this file to customize Essbase Server functionality. Some configuration settings may also be used with Essbase clients to override Essbase Server settings.

EssCell A function entered into a cell in Essbase Spreadsheet Add-in to retrieve a value representing an intersection of specific Essbase database members.

ESSCMD A command-line interface for performing Essbase operations interactively or through batch script files.

ESSLANG The Essbase environment variable that defines the encoding used to interpret text characters. See also encoding.

ESSMSH See MaxL Shell.

exceptions Values that satisfy predefined conditions. You can define formatting indicators or notify subscribing users when exceptions are generated.

exchange rate type An identifier for an exchange rate. Different rate types are used because there may be multiple rates for a period and year. Users traditionally define rates at period end for the average rate of the period and for the end of the period. Additional rate types are historical rates, budget rates, forecast rates, and so on. A rate type applies to a specific time.

expense account An account that stores periodic and year-to-date values that decrease net worth if they are positive.

Extensible Markup Language (XML) A language comprising a set of tags used to assign attributes to data that can be interpreted between applications according to a schema.

external authentication Logging on to Oracle EPM System products with user information stored outside the application. The user account is maintained by the EPM System, but password administration and user authentication are performed by an external service, using a corporate directory such as Oracle Internet Directory (OID) or Microsoft Active Directory (MSAD).

externally triggered events Non-time-based events for scheduling job runs.

Extract, Transform, and Load (ETL) Data-source-specific programs for extracting data and migrating it to applications.

extraction command An Essbase reporting command that handles the selection, orientation, grouping, and ordering of raw data extracted from a database; begins with the less-than (<) character.

fact table The central table in a star join schema, characterized by a foreign key and elements drawn from a dimension table. This table typically contains numeric data that can be related to all other tables in the schema.

failover The ability to switch automatically to a redundant standby database, server, or network if the primary database, server, or network fails or is shut down. A system that is clustered for failover provides high availability and fault tolerance through server redundancy and fault-tolerant hardware, such as shared disks.

Favorites gadget A gadget that contains links to Reporting and Analysis documents and URLs. See also gadget.

file delimiter A character, such as a comma or tab, that separates fields in a data source.

filter A constraint on data sets that restricts values to specific criteria; for example, to exclude certain tables, metadata, or values, or to control access.

flow account An unsigned account that stores periodic and year-to-date values.

footer Text or images at the bottom of report pages, containing dynamic functions or static text such as page numbers, dates, logos, titles or file names, and author names.

format string 1) In Essbase, a method for transforming the way cell values are displayed; 2) In Data Relationship Management, a parameter of a Format or Formatted Date derived property that indicates the format in which a property value should be returned.

formula In Data Relationship Management, business logic used by a derived property to dynamically calculate a property value.

frame An area on the desktop. Two main areas: the navigation and workspace frames.

free-form grid An object for presenting, entering, and integrating data from different sources for dynamic calculations.

free-form reporting Creating reports by entering dimension members or report script commands in worksheets.

function In Data Relationship Management, a syntactic element of a derived property formula that accepts parameters and returns dynamic values.

gadget A simple, specialized, lightweight application that provides easy viewing of EPM content and enables access to core Reporting and Analysis functionality.

geneology data Additional data that is optionally generated after allocation calculations. This data enables reporting on all cost or revenue flows from start to finish through all allocation steps.

generation A layer in a hierarchical tree structure that defines member relationships in a database. Generations are ordered incrementally from the top member of the dimension (generation 1) down to the child members. Use the unique generation name to identify a layer in the hierarchical tree structure.

generic jobs Non-SQR Production Reporting or non-Interactive Reporting jobs.

global report command A command in a running report script that is effective until it is replaced by another global command or the file ends.

grid POV A means for specifying dimension members on a grid without placing dimensions in rows, columns, or page intersections. A report designer can set POV values at the grid level, preventing user POVs from affecting the grid. If a dimension has one grid value, you put the dimension into the grid POV instead of the row, column, or page.

group A container for assigning similar access permissions to multiple users.

GUI Graphical user interface

hardware cluster a collection of computers that provides a single view of network services (for example, an IP address) or application services (such as databases and Web servers) to clients of these services. Each node in a hardware cluster is a standalone server that runs its own processes. These processes can communicate with one another to form what looks like a single system that cooperatively provides applications, system resources, and data to users.

high availability A system attribute that enables an application to continue to provide services in the presence of failures. This is achieved through removal of single points of failure, with fault-tolerant hardware, as well as server clusters; if one server fails, processing requests are routed to another server.

Historical Average An average for an account over a number of historical periods.

holding company An entity that is part of a legal entity group, with direct or indirect investments in all entities in the group.

horizontal application server cluster A cluster with application server instances on different machines.

host A server on which applications and services are installed.

host properties Properties pertaining to a host, or if the host has multiple Oracle EPM homes, to an Oracle EPM home.

Hybrid Analysis An analysis mapping low-level data stored in a relational database to summary-level data stored in Essbase, combining the mass scalability of relational systems with multidimensional data.

hyperlink A link to a file, a Web page, or an intranet HTML page.

Hypertext Markup Language (HTML) A programming language specifying how Web browsers display data.

identity A unique identification for a user or group in external authentication.

image bookmarks Graphic links to Web pages or repository items.

IMPACTED status A status that indicates changes in child entities consolidating into parent entities.

implied share A member with one or more children but only one that is consolidated, so the parent and child share a value.

import format In FDM, the definition of the structure of the source file that enables the loading of a source data file to an FDM data-load location.

inactive group A group for which an administrator has deactivated system access.

INACTIVE status A status that indicates entities deactivated from consolidation for the current period.

inactive user A user whose account was deactivated by an administrator.

income account An account storing periodic and year-to-date values that, if positive, increase net worth.

index 1) A method where Essbase uses sparse-data combinations to retrieve data in block storage databases. 2) The index file.

index cache A buffer containing index pages.

index entry A pointer to an intersection of sparse dimensions. Index entries point to data blocks on disk and use offsets to locate cells.

index file An Essbase file storing block storage data retrieval information, residing on disk, and containing index pages.

index page A subdivision in an index file. An index page contains pointers to data blocks.

input data Data loaded from a source rather than calculated.

installation assemblies Product installation files that plug in to EPM System Installer.

integration A process that is run to move data between Oracle's Hyperion applications using Shared Services. Data integration definitions specify the data moving between a source application and a destination application, and they enable the data movements to be grouped, ordered, and scheduled.

intelligent calculation A calculation method tracking updated data blocks since the last calculation.

Interactive Reporting connection file (.oce) Files encapsulating database connection information, including the database API (ODBC, SQL*Net, and so on), database software, the database server network address, and database user name. Administrators create and publish Interactive Reporting connection (.oce) files.

intercompany elimination See elimination.

intercompany matching The process of comparing balances for pairs of intercompany accounts within an application. Intercompany receivables are compared to intercompany payables for matches. Matching accounts are used to eliminate intercompany transactions from an organization's consolidated totals.

intercompany matching report A report that compares intercompany account balances and indicates whether the accounts are in balance.

interdimensional irrelevance A situation in which a dimension does not intersect with other dimensions. Because the data in the dimension cannot be accessed from the nonintersecting dimensions, the nonintersecting dimensions are not relevant to that dimension.

intersection A unit of data representing the intersection of dimensions in a multidimensional database; also, a worksheet cell.

intrastage assignment An assignment in the financial flow to an object within the same stage.

introspection A deep inspection of a data source to discover hierarchies based on the inherent relationships in the database. Contrast with scraping.

Investigation See drill-through.

isolation level An Essbase Kernel setting that determines the lock and commit behavior of database operations. Choices are: committed access and uncommitted access.

iteration A pass of the budget or planning cycle in which the same version of data is revised and promoted.

Java application server cluster An active-active application server cluster of Java Virtual Machines (JVMs).

Java Database Connectivity (JDBC) A client-server communication protocol used by Java-based clients and relational databases. The JDBC interface provides a call-level API for SQL-based database access.

job output Files or reports produced from running a job.

jobs Documents with special properties that can be launched to generate output. A job can contain Interactive Reporting, SQR Production Reporting, or generic documents.

join A link between two relational database tables or topics based on common content in a column or row. A join typically occurs between identical or similar items within different tables or topics. For example, a record in the Customer table is joined to a record in the Orders table because the Customer ID value is the same in each table.

journal entry (JE) A set of debit-credit adjustments to account balances for a scenario and period.

JSP Java Server Page.

KeyContacts gadget A gadget that contains a group of Smart Space users and provides access to Smart Space Collaborator. For example, you can have a KeyContacts gadget for your marketing team and another for your development team. See also gadget.

latest A spreadsheet keyword used to extract data values from the member defined as the latest time period.

layer 1) The horizontal location of members in a hierarchical structure, specified by generation (top down) or level (bottom up); 2) Position of objects relative to other objects. For example, in the Sample Basic database, Qtr1 and Qtr4 are in the same layer, so they are also in the same generation, but in a database with a ragged hierarchy, Qtr1 and Qtr4 might not be in same layer, though they are in the same generation.

layout area An area on a Workspace Page where content can be placed.

legend box A box containing labels that identify the data categories of a dimension.

level A layer in a hierarchical tree structure that defines database member relationships. Levels are ordered from the bottom dimension member (level 0) up to the parent members.

level 0 block A data block for combinations of sparse, level 0 members.

level 0 member A member that has no children.

liability account An account type that stores "point in time" balances of a company's liabilities. Examples: accrued expenses, accounts payable, and long-term debt.

lifecycle management The process of migrating an application, a repository, or individual artifacts across product environments.

line item detail The lowest level of detail in an account.

lineage The relationship between different metadata elements showing how one metadata element is derived from one or more other metadata elements, ultimately tracing the metadata element to its physical source. In Essbase Studio, a lineage viewer displays the relationships graphically. See also traceability.

link 1) A reference to a repository object. Links can reference folders, files, shortcuts, and other links; 2) In a taskflow, the point where the activity in one stage ends and another begins.

link condition A logical expression evaluated by the taskflow engine to determine the sequence of launching taskflow stages.

linked data model Documents that are linked to a master copy in a repository

linked partition A shared partition that enables you to use a data cell to link two databases. When a user clicks a linked cell in a worksheet, Essbase opens a new sheet displaying the dimensions in the linked database. The user can then drill down those dimensions.

linked reporting object (LRO) A cell-based link to an external file such as cell notes, URLs, or files with text, audio, video, or pictures. (Only cell notes are supported for Essbase LROs in Financial Reporting.) Contrast with local report object.

load balancer Hardware or software that directs the requests to individual application servers in a cluster and is the only point of entry into the system.

load balancing Distribution of requests across a group of servers, which helps to ensure optimal end user performance.

local currency An input currency type. When an input currency type is not specified, the local currency matches the entity's base currency.

local report object A report object that is not linked to a Financial Reporting report object in Explorer. Contrast with linked reporting object.

local results A data model's query results. Results can be used in local joins by dragging them into the data model. Local results are displayed in the catalog when requested.

locale A computer setting that specifies a location's language, currency and date formatting, data sort order, and the character set encoding used on the computer. Essbase uses only the encoding portion. See also encoding, ESSLANG.

locale header record A text record at the beginning of some non-Unicode-encoded text files, such as scripts, that identifies the encoding locale.

location alias A descriptor that identifies a data source. The location alias specifies a server, application, database, user name, and password. Location aliases are set by DBAs at the database level using Administration Services Console, ESSCMD, or the API.

locked A user-invoked process that prevents users and processes from modifying data.

locked data model A data model that cannot be modified by a user.

LOCKED status A consolidation status indicating that an entity contains data that cannot be modified.

Log Analyzer An Administration Services feature that enables filtering, searching, and analysis of Essbase logs.

logic group In FDM, one or more logic accounts generated after a source file is loaded into FDM. Logic accounts are calculated accounts derived from the source data.

logical Web application An aliased reference used to identify the internal host name, port, and context of a Web application. In a clustered or high-availability environment, this is the alias name that establishes a single internal reference for the distributed components. In EPM System, a nonclustered logical Web application defaults to the physical host running the Web application.

LRO See linked reporting object.

managed server An application server process running in its own Java Virtual Machine (JVM).

manual stage A stage that requires human intervention.

Map File A file that stores the definition for sending data to or retrieving data from an external database. Map files have different extensions (.mps to send data; .mpr to retrieve data).

Map Navigator A feature that displays your current position on a Strategy, Accountability, or Cause and Effect map, indicated by a red outline.

Marginal Tax Rate The rate used to calculate the after-tax cost of debt; represents the tax rate applied to the last earned income dollar (the rate from the highest tax bracket into which income falls) and includes federal, state, and local taxes. Based on current level of taxable income and tax bracket, you can predict marginal tax rate.

Market Risk Premium The additional rate of return paid over the risk-free rate to persuade investors to hold "riskier" investments than government securities. Calculated by subtracting the risk-free rate from the expected market return. These figures should closely model future market conditions.

master data model An independent data model that is referenced as a source by multiple queries. When used, "Locked Data Model" is displayed in the Query section's Content pane; the data model is linked to the master data model displayed in the Data Model section, which an administrator may hide.

mathematical operator A symbol that defines how data is calculated in formulas and outlines. Can be any of the standard mathematical or Boolean operators; for example, +, -, *, /, and %.

MaxL The multidimensional database access language for Essbase, consisting of a data definition language (MaxL DDL) and a data manipulation language (MaxL DML). See also MaxL DDL, MaxL DML, and MaxL Shell

MaxL DDL The data definition language used by Essbase for batch or interactive system-administration tasks.

MaxL DML The data manipulation language used in Essbase for data query and extraction.

MaxL Perl Module A Perl module (essbase.pm) that is part of Essbase MaxL DDL. This module can be added to the Perl package to provide access to Essbase databases from Perl programs.

MaxL Script Editor A script-development environment in Administration Services Console. MaxL Script Editor is an alternative to using a text editor and the MaxL Shell for administering Essbase with MaxL scripts.

MaxL Shell An interface for passing MaxL statements to Essbase Server. The MaxL Shell executable file is located in the Essbase bin directory (UNIX: essmsh; Windows: essmsh.exe).

MDX (multidimensional expression) A language used for querying and calculation in multidimensional-compliant databases.

measures Numeric values in an OLAP database cube that are available for analysis. Measures are margin, cost of goods sold, unit sales, budget amount, and so on. See also fact table.

member A discrete component within a dimension. A member identifies and differentiates the organization of similar units. For example, a time dimension might include members Jan, Feb, and Qtr1.

member list A named system- or user-defined group that references members, functions, or member lists within a dimension.

member load In Essbase Integration Services, the process of adding dimensions and members (without data) to Essbase outlines.

member selection report command A type of Report Writer command that selects member ranges based on outline relationships, such as sibling, generation, and level.

member-specific report command A type of Report Writer formatting command that is executed as it is encountered in a report script. The command affects only its associated member and executes the format command before processing the member.

merge A data load option that clears values only from the accounts specified in the data load file and replaces them with values in the data load file.

metadata A set of data that defines and describes the properties and attributes of the data stored in a database or used by an application. Examples of metadata are dimension names, member names, properties, time periods, and security.

metadata elements Metadata derived from data sources and other metadata that is stored and cataloged for Essbase Studio use.

metadata sampling The process of retrieving a sample of members in a dimension in a drill-down operation.

metadata security Security set at the member level to restrict users from accessing certain outline members.

metaoutline In Essbase Integration Services, a template containing the structure and rules for creating an Essbase outline from an OLAP model.

Middleware home A directory that includes the Oracle WebLogic Server home and can also include the EPM Oracle home and other Oracle homes. A Middleware home can reside on a local file system or on a remote shared disk that is accessible through NFS.

migration audit report A report generated from the migration log that provides tracking information for an application migration.

migration definition file (.mdf) A file that contains migration parameters for an application migration, enabling batch script processing.

migration log A log file that captures all application migration actions and messages.

migration snapshot A snapshot of an application migration that is captured in the migration log.

MIME Type An attribute that describes the data format of an item, so that the system knows which application should open the object. A file's MIME (Multipurpose Internet Mail Extension) type is determined by the file extension or HTTP header. Plug-ins tell browsers which MIME types they support and which file extensions correspond to each MIME type.

mining attribute In data mining, a class of values used as a factor in analysis of a set of data.

minireport A report component that includes layout, content, hyperlinks, and the query or queries to load the report. Each report can include one or more minireports.

minischema A graphical representation of a subset of tables from a data source that represents a data modeling context.

missing data (#MISSING) A marker indicating that data in the labeled location does not exist, contains no value, or was never entered or loaded. For example, missing data exists when an account contains data for a previous or future period but not for the current period.

model 1) In data mining, a collection of an algorithm's findings about examined data. A model can be applied against a wider data set to generate useful information about that data; 2) A file or content string containing an application-specific representation of data. Models are the basic data managed by Shared Services, of two major types: dimensional and nondimensional application objects; 3) In Business Modeling, a network of boxes connected to represent and calculate the operational and financial flow through the area being examined.

multidimensional database A method of organizing, storing, and referencing data through three or more dimensions. An individual value is the intersection point for a set of dimensions. Contrast with relational database.

Multiload An FDM feature that allows the simultaneous loading of multiple periods, categories, and locations.

My Workspace Page Customizable Workspace Pages created by users. They are marked specially so that they can be easily accessed from one single place without having to navigate the repository.

named set In MaxL DML, a set with its logic defined in the optional WITH section of a MaxL DML query. The named set can be referenced multiple times in the query.

native authentication The process of authenticating a user name and password from within the server or application.

nested column headings A report column heading format that displays data from multiple dimensions. For example, a column heading that contains Year and Scenario members is a nested column. The nested column heading shows Q1 (from the Year dimension) in the top line of the heading, qualified by Actual and Budget (from the Scenario dimension) in the bottom line of the heading.

NO DATA status A consolidation status indicating that this entity contains no data for the specified period and account.

non-dimensional model A Shared Services model type that includes application objects such as security files, member lists, calculation scripts, and Web forms.

non-unique member name See duplicate member name.

null value A value that is absent of data. Null values are not equal to zero.

numeric attribute range A feature used to associate a base dimension member that has a discrete numeric value with an attribute that represents a value range. For example, to classify customers by age, an Age Group attribute dimension can contain members for the following age ranges: 0-20, 21-40, 41-60, and 61-80. Each Customer dimension member can be associated with an Age Group range. Data can be retrieved based on the age ranges rather than on individual age values.

ODBC Open Database Connectivity. A database access method used from any application regardless of how the database management system (DBMS) processes the information.

OK status A consolidation status indicating that an entity has already been consolidated, and that data has not changed below it in the organization structure.

OLAP Metadata Catalog In Essbase Integration Services, a relational database containing metadata describing the nature, source, location, and type of data that is pulled from the relational data source.

OLAP model In Essbase Integration Services, a logical model (star schema) that is created from tables and columns in a relational database. The OLAP model is then used to generate the structure of a multidimensional database. See also online analytical processing (OLAP).

online analytical processing (OLAP) A multidimensional, multiuser, client-server computing environment for users who analyze consolidated enterprise data in real time. OLAP systems feature drill-down, data pivoting, complex calculations, trend analysis, and modeling.

Open Database Connectivity (ODBC) Standardized application programming interface (API) technology that allows applications to access multiple third-party databases.

Oracle home A directory containing the installed files required by a specific product, and residing within the directory structure of Middleware home. See also Middleware home.

organization An entity hierarchy that defines each entity and their relationship to others in the hierarchy.

origin The intersection of two axes.

outline The database structure of a multidimensional database, including all dimensions, members, tags, types, consolidations, and mathematical relationships. Data is stored in the database according to the structure defined in the outline.

outline synchronization For partitioned databases, the process of propagating outline changes from one database to another database.

P&L accounts (P&L) Profit and loss accounts. P&L refers to a typical grouping of expense and income accounts that comprise a company's income statement.

page A display of information in a grid or table often represented by the Z-axis. A page can contain data from one field, derived data from a calculation, or text.

page file An Essbase data file.

page heading A report heading type that lists members represented on the current page of the report. All data values on the page have the members in the page heading as a common attribute.

page member A member that determines the page axis.

palette A JASC-compliant file with a .PAL extension. Each palette contains 16 colors that complement each other and can be used to set the dashboard color elements.

parallel calculation A calculation option. Essbase divides a calculation into tasks and calculates some tasks simultaneously.

parallel data load In Essbase, the concurrent execution of data load stages by multiple process threads.

parallel export The ability to export Essbase data to multiple files. This may be faster than exporting to a single file, and it may resolve problems caused by a single data file becoming too large for the operating system to handle.

parent adjustments The journal entries that are posted to a child in relation to its parent.

parents The entities that contain one or more dependent entities that report directly to them. Because parents are entities associated with at least one node, they have entity, node, and parent information associated with them.

partition area A subcube within a database. A partition is composed of one or more areas of cells from a portion of the database. For replicated and transparent partitions, the number of cells within an area must be the same for the data source and target to ensure that the two partitions have the same shape. If the data source area contains 18 cells, the data target area must also contain 18 cells to accommodate the number of values.

partitioning The process of defining areas of data that are shared or linked between data models. Partitioning can affect the performance and scalability of Essbase applications.

pattern matching The ability to match a value with any or all characters of an item entered as a criterion. Missing characters may be represented by wild-card values such as a question mark (?) or an asterisk (*). For example, "Find all instances of apple" returns apple, but "Find all instances of apple*" returns apple, applesauce, applecranberry, and so on.

percent consolidation The portion of a child's values that is consolidated to its parent.

percent control The extent to which an entity is controlled within the context of its group.

percent ownership The extent to which an entity is owned by its parent.

performance indicator An image file used to represent measure and scorecard performance based on a range you specify; also called a status symbol. You can use the default performance indicators or create an unlimited number of your own.

periodic value method (PVA) A process of currency conversion that applies the periodic exchange rate values over time to derive converted results.

permission A level of access granted to users and groups for managing data or other users and groups.

persistence The continuance or longevity of effect for any Essbase operation or setting. For example, an Essbase administrator may limit the persistence of user name and password validity.

personal pages A personal window to repository information. You select what information to display and its layout and colors.

personal recurring time events Reusable time events that are accessible only to the user who created them.

personal variable A named selection statement of complex member selections.

perspective A category used to group measures on a scorecard or strategic objectives within an application. A perspective can represent a key stakeholder (such as a customer, employee, or shareholder/financial) or a key competency area (such as time, cost, or quality).

pinboard One of the three data object display types. Pinboards are graphics composed of backgrounds and interactive icons called pins. Pinboards require traffic lighting definitions.

pins Interactive icons placed on graphic reports called pinboards. Pins are dynamic. They can change images and traffic lighting color based on the underlying data values and analysis tools criteria.

pivot Alter the perspective of retrieved data. When Essbase first retrieves a dimension, it expands data into rows. You can then pivot or rearrange the data to obtain a different viewpoint.

planner A user who can input and submit data, use reports that others create, execute business rules, use task lists, enable e-mail notification for themselves, and use Smart View. Planners comprise the majority of users.

planning unit A data slice at the intersection of a scenario, version, and entity; the basic unit for preparing, reviewing, annotating, and approving plan data.

plot area The area bounded by X, Y, and Z axes; for pie charts, the rectangular area surrounding the pie.

plug account An account in which the system stores any out-of-balance differences between intercompany account pairs during the elimination process.

post stage assignment Assignments in the allocation model that are assigned to locations in a subsequent model stage.

POV (point of view) A feature for setting data focus by selecting members that are not already assigned to row, column, or page axes. For example, selectable POVs in FDM could include location, period, category, and target category. In another example, using POV as a filter in Smart View, you could assign the Currency dimension to the POV and select the Euro member. Selecting this POV in data forms displays data in Euro values.

precalculation Calculating the database before user retrieval.

precision Number of decimal places displayed in numbers.

predefined drill paths Paths used to drill to the next level of detail, as defined in the data model.

presentation A playlist of Web Analysis documents, enabling reports to be grouped, organized, ordered, distributed, and reviewed. Includes pointers referencing reports in the repository.

preserve formulas User-created formulas kept within a worksheet while retrieving data.

primary measure A high-priority measure important to your company and business needs. Displayed in the Contents frame.

Process Monitor Report A list of locations and their positions within the FDM data conversion process. You can use the process monitor report to monitor the status of the closing process. The report is time-stamped. Therefore, it can be used to determine to which locations at which time data was loaded.

product In Shared Services, an application type, such as Planning or Performance Scorecard.

Production Reporting See SQR Production Reporting.

project An instance of Oracle's Hyperion products grouped together in an implementation. For example, a Planning project may consist of a Planning application, an Essbase cube, and a Financial Reporting Server instance.

provisioning The process of granting users and groups specific access permissions to resources.

proxy server A server acting as an intermediary between workstation users and the Internet to ensure security.

public job parameters Reusable named job parameters created by administrators and accessible to users with requisite access privileges.

public recurring time events Reusable time events created by administrators and accessible through the access control system.

PVA See periodic value method.

qualified name A member name in a qualified format that differentiates duplicate member names in a duplicate member outline. For example, [Market].[East].[State].[New York] or [Market].[East].[City].[New York].

query governor An Essbase Integration Server parameter or Essbase Server configuration setting that controls the duration and size of queries made to data sources.

reciprocal assignment An assignment in the financial flow that also has the source as one of its destinations.

reconfigure URL A URL that is used to reload servlet configuration settings dynamically when users are already logged on to the Workspace.

record In a database, a group of fields making up one complete entry. For example, a customer record may contain fields for name, address, telephone number, and sales data.

recurring template A journal template for making identical adjustments in every period.

recurring time event An event specifying a starting point and the frequency for running a job.

redundant data Duplicate data blocks that Essbase retains during transactions until Essbase commits updated blocks.

regular journal A feature for entering one-time adjustments for a period. A regular journal can be balanced, balanced by entity, or unbalanced.

Related Accounts Accounts related to the main account and grouped under the same main account number. The account structure groups all main and related accounts under the same main account number. The main account is distinguished from related accounts by the first suffix of the account number.

relational database A type of database that stores data in related two-dimensional tables. Contrast with multidimensional database.

replace A data load option that clears existing values from all accounts for periods specified in the data load file and loads values from the data load file. If an account is not specified in the load file, its values for the specified periods are cleared.

replicated partition A portion of a database, defined through Partition Manager, used to propagate an update to data mastered at one site to a copy of data stored at another site. Users can access the data as though it were part of their local database.

Report Extractor An Essbase component that retrieves report data from the Essbase database when report scripts are run.

report object In report designs, a basic element with properties defining behavior or appearance, such as text boxes, grids, images, and charts.

report script A text file containing Essbase Report Writer commands that generate one or more production reports.

Report Viewer An Essbase component that displays complete reports after report scripts are run.

reporting currency The currency used to prepare financial statements, and converted from local currencies to reporting currencies.

repository Storage location for metadata, formatting, and annotation information for views and queries.

resources Objects or services managed by the system, such as roles, users, groups, files, and jobs.

restore An operation to reload data and structural information after a database has been damaged or destroyed, typically performed after shutting down and restarting the database.

restructure An operation to regenerate or rebuild the database index and, in some cases, data files.

result frequency The algorithm used to create a set of dates to collect and display results.

review level A Process Management review status indicator representing the process unit level, such as Not Started, First Pass, Submitted, Approved, and Published.

Risk Free Rate The rate of return expected from "safer" investments such as long-term U.S. government securities.

role The means by which access permissions are granted to users and groups for resources.

roll-up See consolidation.

root member The highest member in a dimension branch.

runtime prompt A variable that users enter or select before a business rule is run.

sampling The process of selecting a representative portion of an entity to determine the entity's characteristics. See also metadata sampling.

saved assumptions User-defined Planning assumptions that drive key business calculations (for example, the cost per square foot of office floor space).

scaling Scaling determines the display of values in whole numbers, tens, hundreds, thousands, millions, and so on.

scenario A dimension for classifying data; for example, Actuals, Budget, Forecast1, or Forecast2.

schema In relational databases, a logical model that represents the data and the relationships between the data.

scope The area of data encompassed by any Essbase operation or setting; for example, the area of data affected by a security setting. Most commonly, scope refers to three levels of granularity, where higher levels encompass lower levels. The levels, from highest to lowest: the entire system (Essbase Server), applications on Essbase Server, or databases within Essbase Server applications. See also persistence.

score The level at which targets are achieved, usually expressed as a percentage of the target.

scorecard A business object that represents the progress of an employee, strategy element, or accountability element toward goals. Scorecards ascertain this progress based on data collected for each measure and child scorecard added to the scorecard.

scraping An inspection of a data source to derive the most basic metadata elements from it. Contrast with introspection.

secondary measure A low-priority measure, less important than primary measures. Secondary measures do not have Performance reports but can be used on scorecards and to create dimension measure templates.

security agent A Web access management provider (for example, Oracle Access Manager, Oracle Single Sign-On, or CA SiteMinder) that protects corporate Web resources.

security platform A framework enabling Oracle EPM System products to use external authentication and single sign-on.

serial calculation The default calculation setting. Divides a calculation pass into tasks and calculates one task at a time.

services Resources that enable business items to be retrieved, changed, added, or deleted. Examples: Authorization and Authentication.

servlet A piece of compiled code executable by a Web server.

shared disks See shared storage.

shared member A member that shares storage space with another member of the same name, preventing duplicate calculation of members that occur multiple times in an Essbase outline.

Shared Services Registry The part of the Shared Services repository that manages EPM System deployment information for most EPM System products, including installation directories, database settings, computer names, ports, servers, URLs, and dependent service data.

shared storage A set of disks containing data that must be available to all nodes of a failover cluster; also called shared disks.

Shared Workspace Pages Workspace Pages shared across an organization that are stored in a special System folder and can be accessed by authorized users from the Shared Workspace Pages Navigate menu.

sibling A child member at the same generation as another child member and having the same immediate parent. For example, the members Florida and New York are children of East and each other's siblings.

silent response files Files providing data that an installation administrator would otherwise be required to provide. Response files enable EPM System Installer or EPM System Configurator to run without user intervention or input.

single point of failure Any component in a system that, if it fails, prevents users from accessing the normal functionality.

single sign-on (SSO) The ability to log on once and then access multiple applications without being prompted again for authentication.

smart tags Keywords in Microsoft Office applications that are associated with predefined actions available from the Smart Tag menu. In Oracle EPM System products, smart tags can also be used to import Reporting and Analysis content and to access Financial Management and Essbase functions.

SmartCut A link to a repository item, in URL form.

snapshot Read-only data from a specific time.

source currency The currency from which values originate and are converted through exchange rates to the destination currency.

sparse dimension In block storage databases, a dimension unlikely to contain data for all member combinations when compared to other dimensions. Contrast with dense dimension. For example, not all customers have data for all products.

SPF files Printer-independent files created by an SQR Production Reporting server, containing a representation of the actual formatted report output, including fonts, spacing, headers, footers, and so on.

Spotlighter A tool that enables color coding based on selected conditions.

SQL spreadsheet A data object that displays the result set of a SQL query.

SQR Production Reporting A specialized programming language for data access, data manipulation, and creating SQR Production Reporting documents.

stage 1) A task description that forms one logical step within a taskflow, usually performed by an individual. A stage can be manual or automated; 2) For Profitability, logical divisions within the model that represent the steps in the allocation process within your organization.

stage action For automated stages, the invoked action that executes the stage.

staging area A database that you create to meet the needs of a specific application. A staging area is a snapshot or restructured version of one or more RDBMS.

staging table A database that you create to meet the needs of a specific application. A staging area is a snapshot or restructured version of one or more RDBMSs.

standard dimension A dimension that is not an attribute dimension.

standard journal template A journal function used to post adjustments that have common adjustment information for each period. For example, you can create a standard template that contains the common account IDs, entity IDs, or amounts, and then use the template as the basis for many regular journals.

Status bar The bar at the bottom of the screen that displays helpful information about commands, accounts, and the current status of your data file.

stored hierarchy In aggregate storage databases outlines only, a hierarchy in which the members are aggregated according to the outline structure. Stored hierarchy members have certain restrictions; for example, they cannot contain formulas.

strategic objective (SO) A long-term goal defined by measurable results. Each strategic objective is associated with one perspective in the application, has one parent, the entity, and is a parent to critical success factors or other strategic objectives.

Strategy map Represents how the organization implements high-level mission and vision statements into lower-level, constituent strategic goals and objectives.

structure view Displays a topic as a simple list of component data items.

Structured Query Language A language used to process instructions to relational databases.

Subaccount Numbering A system for numbering subaccounts using nonsequential whole numbers.

subscribe Flags an item or folder to receive automatic notification whenever the item or folder is updated.

Summary chart In the Investigates Section, a chart that rolls up detail charts shown below in the same column, plotting metrics at the summary level at the top of each chart column.

supervisor A user with full access to all applications, databases, related files, and security mechanisms for a server.

supporting detail Calculations and assumptions from which the values of cells are derived.

suppress rows A setting that excludes rows containing missing values and underscores characters from spreadsheet reports.

symmetric multiprocessing (SMP) A server architecture that enables multiprocessing and multithreading. Performance is not significantly degraded when a large number of users simultaneously connect to an single instance.

symmetric topology An Oracle Fusion Middleware Disaster Recovery configuration that is identical across tiers on the production site and standby site. In a symmetric topology, the production site and standby site have the identical number of hosts, load balancers, instances, and applications. The same ports are used for both sites. The systems are configured identically and the applications access the same data.

sync Synchronization of Shared Services and application models.

synchronized The condition that exists when the latest version of a model resides in both the application and in Shared Services. See also model.

system extract A feature that transfers data from application metadata into an ASCII file.

tabs Navigable views of accounts and reports in Strategic Finance.

target Expected results of a measure for a specified period of time (day, quarter, and so on).

task list A detailed status list of tasks for a particular user.

taskflow The automation of a business process in which tasks are passed from one taskflow participant to another according to procedural rules.

taskflow definition Business processes in the taskflow management system that consist of a network of stages and their relationships; criteria indicating the start and end of the taskflow; and information about individual stages, such as participants, associated applications, associated activities, and so on.

taskflow instance A single instance of a taskflow including its state and associated data.

taskflow management system A system that defines, creates, and manages the execution of a taskflow, including definitions, user or application interactions, and application executables.

taskflow participant The resource that performs the task associated with the taskflow stage instance for both manual and automated stages.

Taxes - Initial Balances Strategic Finance assumes that the Initial Loss Balance, Initial Gain Balance, and Initial Balance of Taxes Paid entries have taken place in the period before the first Strategic Finance time period.

TCP/IP See Transmission Control Protocol/Internet Protocol.

text measure In Essbase, a member tagged as Text in the dimension where measures are represented. The cell values are displayed as predefined text. For example, the text measure Satisfaction Index may have the values Low, Medium, and High. See also typed measure, text list, derived text measure.

time dimension The time period that the data represents, such as fiscal or calendar periods.

time events Triggers for job execution.

time scale A scale that displays metrics by a specific time span, such as monthly or quarterly.

time series reporting A process for reporting data based on a calendar date (for example, year, quarter, month, or week).

Timeline Viewer An FDM feature that enables users to view dates and times of completed process flow steps for specific locations.

Title bar A bar that displays the Strategic Finance name, the file name, and the scenario name Version box.

toast message A message that fades in the lower-right corner of the screen.

token An encrypted identification of one valid user or group on an external authentication system.

top and side labels Column and row headings on the top and sides of a Pivot report.

top-level member A dimension member at the top of the tree in a dimension outline hierarchy, or the first member of the dimension in sort order if there is no hierarchical relationship among dimension members. If a hierarchical relationship exists, the top-level member name is generally the same as the dimension name.

trace allocations A Profitability feature that enables you to visually follow the flow of financial data, either forwards or backwards, from a single intersection throughout the model.

trace level The level of detail captured in a log file.

traceability The ability to track a metadata element to its physical source. For example, in Essbase Studio, a cube schema can be traced from its hierarchies and measure hierarchies to its dimension elements, date/time elements, measures, and, ultimately, to its physical source elements. See also lineage.

traffic lighting Color-coding of report cells, or pins based on a comparison of two dimension members, or on fixed limits.

transformation 1) A process that transforms artifacts so that they function properly in the destination environment after application migration; 2) In data mining, the modification of data (bidirectionally) flowing between the cells in the cube and the algorithm.

translation See currency conversion.

Transmission Control Protocol/Internet Protocol (TCP/IP) A standard set of communication protocols linking computers with different operating systems and internal architectures. TCP/IP utilities are used to exchange files, send mail, and store data to various computers that are connected to local and wide area networks.

transparent login A process that logs in authenticated users without launching the login screen.

transparent partition A shared partition that enables users to access and change data in a remote database as though it is part of a local database.

triangulation A means of converting balances from one currency to another through a third common currency. For example, to convert balances from the Danish krone to the British pound, balances could be converted from the krone to the euro and from the euro to the pound.

triggers An Essbase feature whereby data is monitored according to user-specified criteria that, when met, cause Essbase to alert the user or system administrator.

trusted user Authenticated user.

tuple MDX syntax element that references a cell as an intersection of a member from each dimension. If a dimension is omitted, its top member is implied. Examples: (Jan); (Jan, Sales); ([Jan], [Sales], [Cola], [Texas], [Actual]).

two-pass An Essbase property that is used to recalculate members that are dependent on the calculated values of other members. Two-pass members are calculated during a second pass through the outline.

unary operator A mathematical indicator (+, -, *, /, %) associated with an outline member. The unary operator defines how the member is calculated during a database roll-up.

Unicode-mode application An Essbase application wherein character text is encoded in UTF-8, enabling users with computers set up for different languages to share application data.

unique member name A nonshared member name that exists only once in a database outline.

unique member outline A database outline that is not enabled for duplicate member names.

upgrade The process of deploying a new software release and moving applications, data, and provisioning information from an earlier deployment to the new deployment.

upper-level block A type of data block wherein at least one of the sparse members is a parent-level member.

user directory A centralized location for user and group information, also known as a repository or provider. Popular user directories include Oracle Internet Directory (OID), Microsoft Active Directory (MSAD), and Sun Java System Directory Server.

user variable A variable that dynamically renders data forms based on a user's member selection, displaying only the specified entity. For example, a user variable named Department displays specific departments and employees.

user-defined attribute (UDA) An attribute, associated with members of an outline to describe a characteristic of the members, that can be used to return lists of members that have the specified associated UDA.

user-defined member list A named, static set of members within a dimension defined by the user.

validation The process of checking a business rule, report script, or partition definition against the outline to ensure that the object being checked is valid.

validation rules Rules used in FDM to enforce data integrity. For example, in FDM, validation rules ensure that certain conditions are met after data is loaded from FDM to the target application.

value dimension A dimension that is used to define input value, translated value, and consolidation detail.

variance The difference between two values (for example, between planned and actual values).

version A possible outcome used within the context of a scenario of data. For example, Budget - Best Case and Budget - Worst Case where Budget is scenario and Best Case and Worst Case are versions.

vertical application server cluster A cluster with multiple application server instances on the same machine.

view A year-to-date or periodic display of data.

visual cue A formatted style, such as a font or a color, that highlights specific data value types. Data values may be dimension members; parent, child, or shared members; dynamic calculations; members containing a formula; read-only data cells; read-and-write data cells; or linked objects.

WebLogic Server home A subdirectory of Middleware home containing installed files required by a WebLogic Server instance. WebLogic Server home is a peer of Oracle homes.

weight A value assigned to an item on a scorecard that indicates the relative importance of that item in the calculation of the overall scorecard score. The weighting of all items on a scorecard accumulates to 100%. For example, to recognize the importance of developing new features for a product, the measure for New Features Coded on a developer's scorecard would be assigned a higher weighting than a measure for Number of Minor Defect Fixes.

wild card Character that represents any single character (?) or group of characters (*) in a search string.

WITH section In MaxL DML, an optional section of the query used for creating reusable logic to define sets or members. Sets or custom members can be defined once in the WITH section and then referenced multiple times during a query.

workbook An entire spreadsheet file with many worksheets.

workflow The steps required to process data from start to finish in FDM. The workflow consists of Import (loading data from the GL file), Validate (ensures that all members are mapped to a valid account), Export (loads the mapped members to the target application), and Check (verifies accuracy of data by processing data with user-defined validation rules).

Workspace Page A page created with content from multiple sources including documents, URL, and other content types. Enables a user to aggregate content from Oracle and non-Oracle sources.

write-back The ability for a retrieval client, such as a spreadsheet, to update a database value.

ws.conf A configuration file for Windows platforms.

wsconf_platform A configuration file for UNIX platforms.

XML See Extensible Markup Language.

XOLAP An Essbase multidimensional database that stores only the outline metadata and retrieves all data from a relational database at query time. XOLAP supports aggregate storage databases and applications that contain duplicate member names.

Y axis scale A range of values on Y axis of charts displayed in Investigate Section. For example, use a unique Y axis scale for each chart, the same Y axis scale for all Detail charts, or the same Y axis scale for all charts in the column. Often, using a common Y axis improves your ability to compare charts at a glance.

Zero Administration A software tool that identifies version number of the most up-to-date plug-in on the server.

ZoomChart A tool for viewing detailed information by enlarging a chart. A ZoomChart enables you to see detailed numeric information on the metric that is displayed in the chart.

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