

# **Oracle® Hyperion Financial Reporting**

## **Mobile User's Guide**

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# 1

## Accessing Financial Reporting From a Mobile Device

Users can view, launch, and interact with Oracle Hyperion Financial Reporting reports from mobile devices. For a list of supported mobile platforms, refer to the *Oracle Enterprise Performance Management System Certification Matrix*.

► To access Financial Reporting from a mobile device:

1 **Open a new browser page.**

2 **Enter one of the following URLs:**

`http://server:port/hr/mobile/HRMobileLogon.jsp`

`https://server:port/hr/mobile/HRMobileLogon.jsp`

where `server:port` is the address for your server and port.

3 **Enter user name and password, when prompted.**

4 **Press OK.**

The Financial Reporting repository is displayed.

After users access the repository, they can:

- Select and display reports and books. See [Chapter 2, “Viewing Reports and Books”](#).
- Work with reports and books, including responding to prompts and using expansions. See [Chapter 3, “Working With Reports and Books”](#).

When using Financial Reporting on a mobile device, be aware of the following differences between using Financial Reporting on a mobile device and using it on other platforms:

- A menu of report interactions is available at the top of reports that offers the following interactions:
  - HTML Preview
  - Refresh
  - PDF Preview
  - Preview User Point of View
- A PDF preview of a report only displays the page area that is currently visible within the mobile device screen. To scroll to another page or down within the same page, tap the **Launch Out** link at the top left of the screen. The report is then displayed in a separate browser tab that allows full interaction with all pages of the PDF report.

- To launch a report or book in PDF Preview on a mobile device, tap the PDF icon next to the report or book name in the repository list.
- POV and prompts are displayed on separate browser tabs.
- For devices like iPad and Android tablets, the folder and object list is displayed in one pane when a report or book is open, and the open report or book is displayed in another. However, for devices like iPhones and Android phones, when a report or book is opened, the report or book contents replace the folder and object list on the screen. Use the phone navigation buttons to move between the open report or book and the repository list.
- When accessing Financial Reporting from a mobile device, users cannot author reports, create books or batches, schedule batches, or edit Oracle Hyperion Enterprise Performance Management Workspace user preferences.
- Exporting a report to Microsoft Office is not supported for mobile devices.



# 2

## Viewing Reports and Books

If reports contain dimensions on the user POV, they are displayed above the report or book. Setting dimensions on the user POV enables modification of the dimensions, which results in a modified POV and requires regeneration of the report or book.

**Note:** In the repository, you can display the current user POV settings page before reports or books are run. Current user POV settings can be edited after reports or books are run.

Reports viewed in PDF are generated using the user POV and output in PDF. Reports with multiple page members are generated for all page members and displayed. HTML reports are generated using the user POV.

➤ To view a report:

- 1 **Select Explore.**
- 2 **Select File, then Open, and then Document.**
- 3 **Select a report or book.**

**Note:** The file opens in PDF or HTML, as set in **Preferences**.

**Tip:** Alternatively, right-click the report or book in the repository, select **Open in**, then **HTML Preview** or **PDF Preview**.

- 4 **Optional:** If the **Preview User POV Settings** dialog is displayed, change the settings and click **OK**.

If the page is displayed, User Point of View is selected in **Preferences** for Financial Reporting.

- 5 **On the POV bar located on top of the report, select a dimension to invoke member selection. Select another member, then click OK.**

The report content changes to reflect the POV change.

- 6 **Select View, then Preview User Point of View.**
- 7 **In Preview User Point of View, click Select to change dimension selections.**
- 8 **In Member Selection, select another member, click OK.**

The report is refreshed.

You can view books in HTML or PDF. In PDF, you can view the entire book or individual reports in the book. When you select a report name, the report is generated for all member combinations specified in the book. You can add reports to books and modify members.

You can preview the user POV before running books. When you view books, the user POV and Tables of Contents are displayed. The user POV specifies members for dimensions not defined on report grids. You can change the user POV members and then run the book to display new-member data.

Use the Table of Contents to locate reports that you want to view and to set options.

**Note:** The time required to generate and display books varies, depending on book size. You can cancel books at any time.

► To view a book:

- 1 From the list of files, select **View**, then **Display Items of Type**, then **Hyperion**, and then **Book**.
- 2 Right-click the book, select **Open In**, and then **HTML Preview** or **PDF Preview**.

**Note:** When a book contains HTML content and you select "Complete Book in PDF," the rendered and printed book will not include HTML content. This is expected behavior.

- 3 **Optional:** If the **Current User POV Settings** page is displayed, change the settings, then click **OK**.

If the page is displayed, User Point of View is selected in the Preferences dialog box for Financial Reporting.

- 4 **Optional:** Modify the User POV, from the **Book Table of Contents** page, and view the report for the new POV.
- 5 To view a specific document, highlight the document and click **Show Report**.

# 3

## Working With Reports and Books

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Users can interact with books and reports from mobile devices. They can:

- Change User POV. See “[Changing User POV](#)” on page 11.
- Respond to Prompts. See “[Responding to Prompts](#)” on page 12.
- Use expansions. See “[Using Expansions](#)” on page 12
- Use related content. See “[Using Related Content](#)” on page 13.
- Change page members. See “[Changing Page Members](#)” on page 14.

### Changing User POV

User POV, which specifies members for dimensions not defined on report grids, is available for dynamic reports and books, as specified during design time. You can change user POV members before running reports and books and then run the reports and books to display new-member data. You can also edit user POVs after running reports and books.

When you view a report or book in HTML, the user POV can be displayed above the report or the book Table of Contents in the Content area.

Each dimension or member is a link. When a link is selected, it displays a Member Selection page from which you can select members for the dimension. The members for a dimension are shown in Tree view, which is a hierarchal view of the members of the dimension. By default, Tree view shows only the top-level member. You can expand a member to see its children. If a user does not have access to parent members, the parent and child hierarchy cannot be rendered in a tree. The use is presented with a large flat list.

**Note:** Financial Management dimensions often have more than one top-level node.

**Note:** The tree view is limited to Administrators who have full access. Users who are not administrators are presented a flat list.


Member-search methods:

- Expand data-member rows, and search visually. You can use the Expand all Rows button to expand the rows.
- Use the Find text box to search by member or alias and description. Search criteria can include wildcards, such as \* and ?.

## Responding to Prompts

Some reports are designed with prompts, which are displayed when you view the reports or books containing the reports. You respond to prompts and provide requested information by selecting members from prompt lists. You can edit prompts manually. If prompts contain alias names, you convert them to member names.

► To respond to a prompt when previewing a report or book:

- 1 In the repository list, navigate to a report or book that has prompts.
- 2 Right-click the report or book, then select **Open in**, and then **HTML Preview** or **PDF Preview**.
- 3 Perform an action:
  - In the Selection text box, enter the member name for the respective prompt, if known. If the text box is disabled, the prompt contains alias names. To edit the text box, key over the existing text. Separate each member with a comma (,).
  - If the member name is not known, click **Go to Member Selection** . **Select Members** is displayed. Make your member selections, and then click **OK**.
- 4 **Optional:** To undo any changes, click **Reset** in **Respond to Prompts**.
- 5 To run the report for viewing, click **OK**.

## Using Expansions

Expansions, available only when viewing HTML reports, and not books, enable report viewers to see children of members and their corresponding data. Rows and columns for which expansions are enabled are displayed with right-facing triangles, which you click to view associated detail. After expansions are executed, pages are positioned near the rows or columns selected for expansion. Expansions are set up during design time.

► To use expansions, perform an action:

- Click the right-facing triangle for a row or column to view the next level of detail.  
Click multiple times, to see multiple levels of detail.

- Click the down-facing triangle for an expanded row or column to collapse its members.

## Using Related Content

Related Content links to other Financial Reporting documents and to documents on other Hyperion servers. Related Content, set up by report designers, is available in HTML only. You view Related Content links by clicking grid values, which are underlined by default.

Members of the cell selected for Related Content are passed to the user POV and used in the related content report. Thus, the context of the Related Content report is the cell selected in the primary report. For example, if you select the Margin row, Boston column cell, Oracle Hyperion Financial Reporting sets the user POV for the Account dimension to Margin and for the Entity dimension to Boston and then displays the Related Content report. See the *Oracle Hyperion Financial Reporting Studio User's Guide*.

Related Content rules:

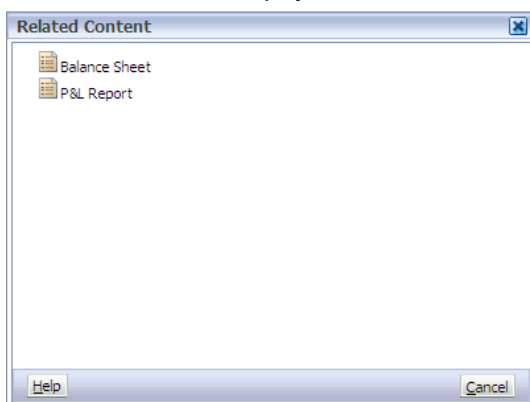
- If only one action (HTML) is enabled for the object, actions are not listed on the Related Content page.
- The default action (HTML) is listed next to the object label.
- Folders open in the Related Content area.
- Object-level security is observed inside folders and when reports are requested to be viewed.

➤ To use Related Content:

### 1 In a report, click a Related Content link.

The report opens if a single report is selected in the list of Related Content and only one action is specified. If multiple reports are selected or multiple actions are specified, the Related Content page is displayed in a separate browser window.

### 2 If Related Content is displayed, click a link.



If the link you click is not a folder, the document or action combination clicked is displayed.

## Changing Page Members

You can change a page member only if, during report design, multiple members are assigned to the page axis of a grid. You change a page member to see different report views—HTML reports only. After you change a page member, the report is refreshed and populated with the new page member.

► To change a page member:

- 1 Open a report with page-axis members in a grid.
- 2 From **Page**, select a member. The report is run, and data is displayed for the selected member.

**Note:** For PDF, data for page members is displayed on different pages.

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