

**Oracle® Hyperion Enterprise Performance Management
Workspace**

User's Guide

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EPM Workspace User's Guide, 11.1.2.4

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Using EPM Workspace

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About EPM System and Enterprise Performance Management

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

- Oracle Hyperion Enterprise Performance Management Workspace—A zero-footprint client that provides the user interface for viewing and interacting with content created using Oracle Hyperion Reporting and Analysis authoring studios, financial applications, and Oracle Business Intelligence Enterprise Edition products.
- Oracle Hyperion Reporting and Analysis Framework—Management reporting including query and analysis in one coordinated environment
- Oracle Hyperion Foundation Services—Used to ease installation and configuration, provide metadata management, and support a common Microsoft Office interface
- Oracle 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 and non-Oracle content. Oracle content includes Reporting and Analysis Framework and Oracle's financial applications. Oracle Essbase is part of a comprehensive EPM system that integrates this business intelligence platform with Oracle's financial applications, and Oracle BI EE products.

EPM Workspace provides access to the following content:

- Oracle Hyperion Financial Reporting—Scheduled or on-demand highly formatted financial and operational reporting from almost any data source, including Oracle Hyperion Planning, Oracle Hyperion Financial Management, Oracle Hyperion Financial Close Management, Oracle Hyperion Profitability and Cost Management, Oracle BI Answers, Oracle BI Interactive Dashboards, Oracle BI Delivers, and Oracle Business Intelligence Publisher
- Oracle Hyperion Interactive Reporting—Ad hoc, relational query, self-service reporting and dashboards against any ODBC data source
- Oracle Hyperion Impact Management Services—Replaces Interactive Reporting data models.
- Oracle Hyperion SQR Production Reporting—High volume, enterprise-wide production reporting
- Oracle Hyperion Web Analysis—Interactive ad hoc analysis, presentation, and reporting of multidimensional data
- Financial Management and Planning—Consolidation and planning application tasks

- Profitability and Cost Management—Managing cost and revenue allocations that are necessary to compute profitability for a business segment
- Oracle Hyperion Financial Data Quality Management, Enterprise Edition—Module of Oracle Hyperion Financial Data Quality Management 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—Provides true end user ad hoc capabilities in a pure web architecture
- 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—Provides business activity monitoring and alerting that can reach users through multiple channels such as email, dashboards, and mobile devices
- BI Publisher (formerly known as XML Publisher)—Offers efficient; scalable reporting solution available for complex, distributed environments
- 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).
- Financial Close Management—Helps companies define, execute, and report on the interdependent activities of a financial close period.
- Tax Management—Includes the Oracle Hyperion Tax Provision and Oracle Hyperion Tax Governance applications.

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.

About EPM Workspace in Oracle General Ledger

EPM Workspace is the web user interface that is used to access all Oracle content. Oracle content includes Financial Reporting, Oracle Hyperion Calculation Manager, and Oracle Smart View for Office.

When used in Oracle General Ledger, EPM Workspace provides access to the following content:

- Financial Reporting—Scheduled or on-demand highly formatted financial and operational reporting from almost any data source, including Planning, Financial Management, and Profitability and Cost Management
- Calculation Manager—Create, validate, deploy, and administer sophisticated calculations that solve Financial Management, Planning, and Essbase business problems.
- Oracle BI Presentation Catalog—See the Oracle BI EE product guides for more information on using the catalog.

Note: Oracle BI Presentation Catalog can be accessed from the Navigate, then Applications, BI Catalog menu.

Note: Review the Oracle Enterprise Performance Management System Certification Matrix for information on system requirements.

Preparing to Use EPM Workspace

Prior to using EPM Workspace, familiarize yourself with your documentation set. In addition, Review the Oracle Enterprise Performance Management System Certification Matrix for information on system requirements.

Additional information that you need:

- Browser information—See the *Oracle Enterprise Performance Management System Security Configuration Guide*.
- EPM Workspace URL and domain
- User account—User name and password assigned to you. See your system administrator.
- Logon information—“[Logging on to EPM Workspace](#)” on page 20 (not available in Oracle General Ledger)
- Access permissions—“[Toolbars](#)” on page 35
- Preferences—[Chapter 2, “Setting Preferences and Personalizing EPM Workspace”](#)
- 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 Hyperion Enterprise Performance Management Workspace Administrator's Guide*.

► To enable Microsoft Internet Explorer (IE) to view PDF reports in EPM Workspace:

- 1 **Open Internet Explorer.**
- 2 **Select Tools, and then Internet Options.**
- 3 **In Internet Options, select the General tab, and then in Browsing History, select Settings.**
- 4 **In Settings, in Check for newer versions of stored page, 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 shows 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 browser's status bar while interacting with EPM Workspace. For Firefox, the status bar is disabled by default.

Deployment Workflow

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

Note: Deployment workflow is not available in Oracle General Ledger.

Accessing Modules from Navigate

From EPM Workspace, you can 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, Financial Close Management, Planning, Profitability and Cost Management, Tax 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 Reporting documents 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 17](#).

Accessing Modules from Navigate When Using Oracle General Ledger

From EPM Workspace in Oracle General Ledger, access the following from the Navigate menu:

- Applications enables you to access Oracle Business Intelligence applications and the catalog. Applications is only displayed when a user has rights and applications are available.
- Administer enables you to manage Workspace Server Settings, Annotations, BI Presentation Services, and Calculation Manager. (**Note:** Administer is only used by administrators.)
- Schedule enables you to schedule batches and events for Financial Reporting artifacts and automated processing, see the *Oracle Hyperion Financial Reporting Studio User's Guide*.
- Open items provides easy access to artifacts that you currently have open in EPM Workspace.

Menus and toolbar buttons are updated based on the following criteria:

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

EPM Workspace Tasks

Note: This topic does not apply to Oracle General Ledger.

From EPM Workspace, you use menus, toolbar buttons, and items from the Navigate menu 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 used and the task 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.

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

- View documents and dashboards
- Access application products

Table 1 Products Available from EPM Workspace

Product	For more information, see:
Financial Management	<i>Oracle Hyperion Financial Management User's Guide</i>

Product	For more information, see:
Financial Close Management	<i>Oracle Hyperion Financial Close Management User's Guide</i>
Planning	<i>Oracle Hyperion Planning User's Guide</i>
Oracle Hyperion Financial Data Quality Management, Oracle Hyperion Financial Data Quality Management, Enterprise Edition	<i>Oracle Hyperion Financial Data Quality Management Administrator's Guide</i>
Oracle Business Intelligence, Oracle Business Intelligence Answers, Oracle Business Intelligence Interactive Dashboards, Oracle Business Intelligence Delivers, and Oracle Business Intelligence Publisher	<i>Oracle Business Intelligence Suite Enterprise Edition User's Guide, Release 11.1.1.7.0 or later, and Oracle Business Intelligence Publisher User's Guide, Release 11.1.1.7.0 or later</i>
Profitability and Cost Management	<i>Oracle Hyperion Profitability and Cost Management User's Guide</i>
Tax Management, including Tax Governance and Tax Provision	<i>Oracle Hyperion Tax Governance User's Guide and Oracle Hyperion Tax Provision User's Guide</i>

- Perform Reporting and Analysis Framework tasks, including:
 - Scheduling batches, jobs, or events to automatically execute reports or create notifications, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*.
 - Creating Web Analysis and Interactive Reporting documents, 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*.
 - Using 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.
 - Using Schedule—Automatically run and manage documents, such as batches, jobs, and events

User Types and Module Tasks

Note: This topic does not apply to Oracle General Ledger.

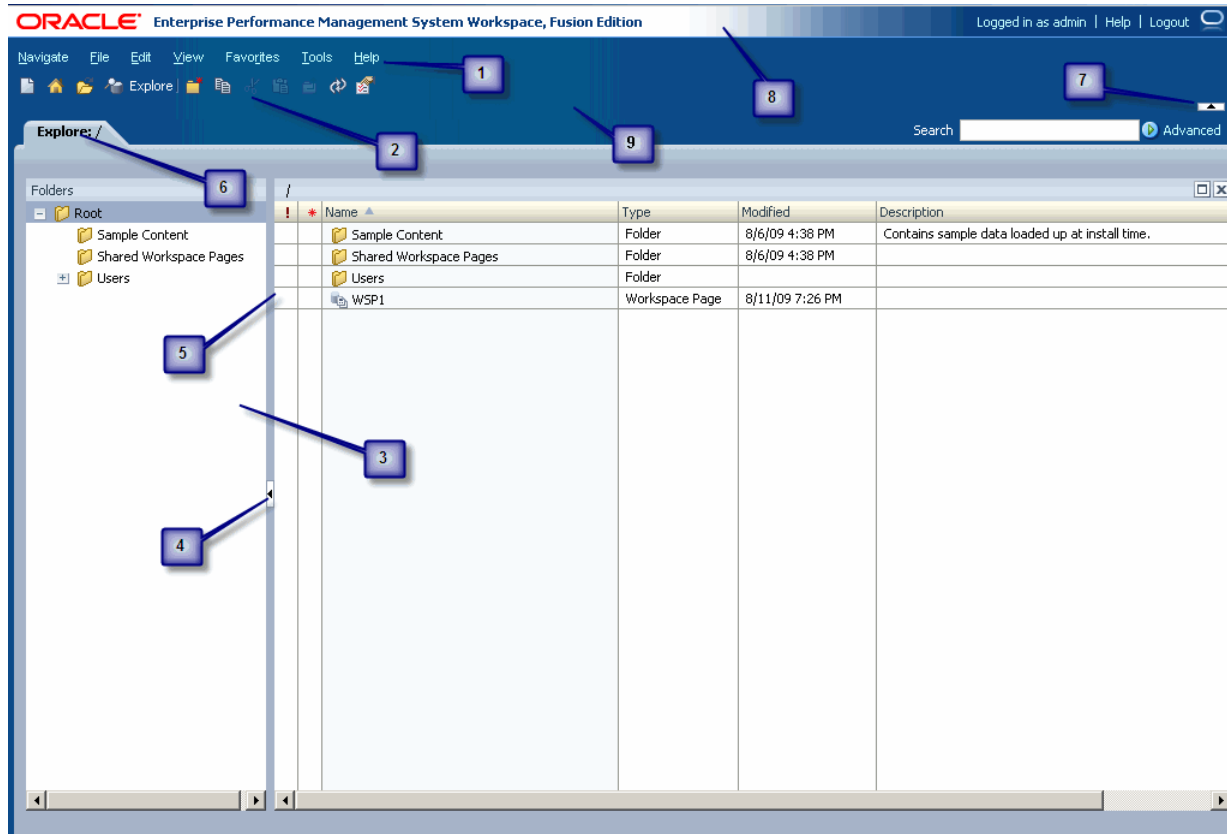
For a complete listing of the different users available from EPM Workspace, see the *Oracle Enterprise Performance Management System User Security Administration Guide*.

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 Enterprise Performance Management System User Security Administration 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 is installed and configured. The default is set from the Preferences dialog box. (See, [Chapter 2, “Setting Preferences and Personalizing EPM Workspace”](#))

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The EPM Workspace user interface includes these areas:

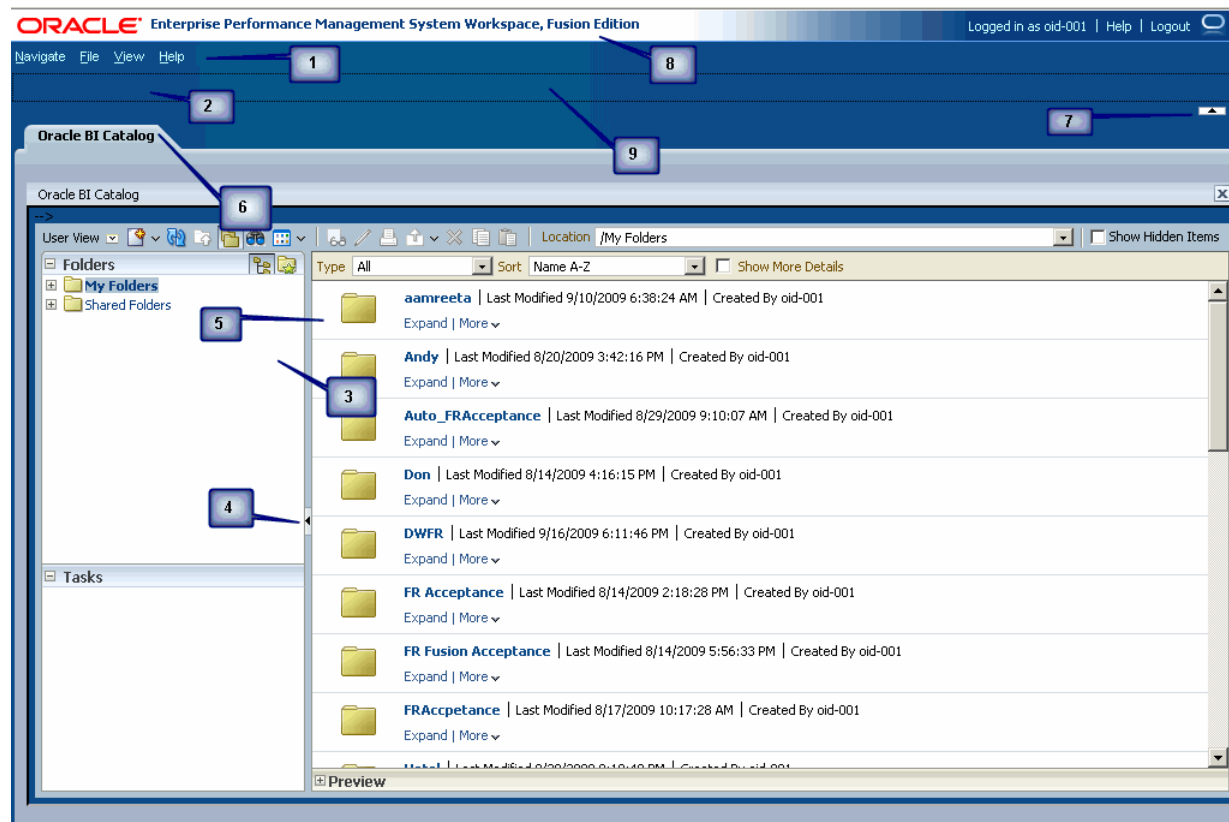
1. Menu Bar—Commands that organize tasks and modules (See [“Menus” on page 36](#))
2. Standard toolbar—Buttons for performing tasks (See [“Toolbars” on page 35](#))
3. View pane—Area that provides buttons to enable jumps between panels (each panel having a specific use and corresponding controls) and displays the list of documents and modules (Hiding this pane provides a larger content frame in which to use EPM Workspace. Select **View**, and 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—Shows or hides the menu bar and toolbar area.
8. Title Bar—Display the product name, the name of user logged in, and help and logout links.
9. Masthead—Area that provides masthead, menu bar and toolbar buttons. Select **View**, and then **View Masthead** to hide and display.

EPM Workspace User Interface in Oracle General Ledger

When you log on, the default EPM Workspace start page is displayed. The default is set from the Preferences dialog, “Types of Preferences” on page 43.

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The EPM Workspace user interface includes these areas:

1. Menu Bar—Commands and sub-commands that organize tasks and modules (See “Menus” on page 36)
2. Standard toolbar—Buttons for performing tasks (See “Toolbars” on page 35)
3. View pane—Area that provides buttons to 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**, and 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—A how or hide the menu bar and toolbar area.
8. Title Bar—Display the product name, the name of user logged in, and help and logout links.
9. Masthead—Area that provides masthead, menu bar and toolbar buttons. Select **View**, and 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. Reporting and Analysis Framework is not available in Oracle General Ledger.

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 by 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 one of the following ways:

- Through a URL provided by your administrator
- Through an Oracle application link

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

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

➤ To start a EPM Workspace session:

- 1 In your web browser, go to [EPM Workspace web page](#).
- 2 Enter you user name and password.

To determine if the 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 Preferences and Personalizing EPM Workspace”](#).

Logging on to EPM Workspace in Oracle General Ledger

EPM Workspace is accessed through a Fusion session from which you have already been authenticated. Therefore, the login screen for EPM Workspace is bypassed.

Starting Tasks

➤ To start 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.

Note: To start a task in Oracle General Ledger, from **Navigate**, select **Applications, Administer, Schedule, or Open Items**.

Note: Some tasks can also be performed using the toolbar, menus, and shortcut menus.

Creating Documents

Note: You must install Reporting and Analysis Framework in order to use Explore and Reporting and Analysis products in the following procedure. Reporting and Analysis Framework is not available in Oracle General Ledger.

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

- 1 Select **File**, then **New**, and then **Document**.
- 2 Select an option:
 - Create an Interactive Reporting Document

- Create a Web Analysis Document
- Collect reports into a Book
- Batch Reports for Scheduling
- Create a Workspace Page

For information on collecting reports into a book and batching reports for scheduling, see *Oracle Hyperion Financial Reporting User's Guide* . For information on creating Interactive Reporting documents, see the *Oracle Hyperion Reporting and Analysis Framework User's Guide*. For information on creating Web Analysis documents, see the *Oracle Hyperion Web Analysis Studio User's Guide*.

Selecting a Data Source for a Document

Note: This topic does not apply to Oracle General Ledger.

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 Analysis database 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. Reporting and Analysis Framework is not available in Oracle General Ledger.

➤ To open a document:

- 1 **Select File, then Open, and then Document.**
- 2 **In Open, 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, and then URL.**
- 2 **Enter the URL and then 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, and then Document.**
- 2 **Open a document, for example, a Financial Reporting document.**
You may need to open the document as HTML or PDF.
- 3 **Select File, then Print, then HTML or File, then Print, then PDF.**

Opening the BI Dialog in Oracle General Ledger

➤ To open the BI dialog in Oracle General Ledger:

- 1 **Select File, then Open, and then BI Dialog.**
- 2 **Open, select, or save an object.**
- 3 **Select OK.**

Setting File Properties

Subtopics

- [Setting File Properties in EPM Workspace](#)
- [Setting File Properties in Oracle General Ledger](#)

Setting File Properties in EPM Workspace

➤ To set file properties in EPM Workspace:

- 1 **From Explore, select a document without opening.**
- 2 **Select File, and then Properties.**

The General Properties option is selected by default in the Properties dialog box.

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

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

Setting File Properties in Oracle General Ledger

► To set file properties in Oracle General Ledger:

- 1 From the catalog, select a document without opening.
- 2 From the Tasks pane, select **Properties**.

The Properties Dialog opens. For additional property settings, see *Oracle Hyperion Application Builder for .NET Developer's Guide* Oracle® Business Intelligence Suite Enterprise Edition User's Guide 11g Release 1 (11.1.1.2).

You can modify the description and attributes. To change ownership of an object, the user must have full control over that object. For additional property settings, for example Permissions, see *Oracle® Business Intelligence Suite Enterprise Edition User's Guide 11g Release 1 (11.1.1.2)*.

Moving Files

Subtopics

- [Moving Files in EPM Workspace](#)
- [Moving Files in Oracle General Ledger](#)

Moving Files in EPM Workspace

► To move files or folders in Explore:

- 1 From Explore, select a document or folder.
- 2 Select **Edit**, and then **Cut** or **Copy**.
- 3 Select a repository location, and then select **Edit**, then **Paste**.

Moving Files in Oracle General Ledger

► To move files or folders in the catalog:

- 1 From the catalog, select a document or folder.
- 2 From the Tasks pane, select **Copy**. See *Oracle® Business Intelligence Suite Enterprise Edition User's Guide 11g Release 1 (11.1.1.2)* for details on copying in the catalog.
- 3 Select a repository location, and select **Paste**.

Renaming Files

Subtopics

- [Renaming Files in EPM Workspace](#)
- [Renaming Files in Oracle General Ledger](#)

Renaming Files in EPM Workspace

- To rename files in EPM Workspace:
 - 1 From **Explore**, select a document or folder.
 - 2 Select **Edit**, and then **Rename**.
 - 3 Enter a name, and then select **Save**.

Renaming Files in Oracle General Ledger

- To rename files in Oracle General Ledger:
 - 1 From the catalog, select a document or folder.
 - 2 From the Tasks pane, select **Rename**.
 - 3 Enter a name, and then 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. Reporting and Analysis Framework is not available in Oracle General Ledger.

- To add a document or folder to favorites:
 - 1 From **Explore**, select a document or folder.
 - 2 Select **Favorites**, and 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**, and then select **Manage Favorites**.
 - 2 Clear **Show**, or select **Remove**.

- To create a shortcut:
- 1 From **Explore**, select the document.
 - 2 Right-click the document, and then select **Create Shortcut**.
 - 3 Enter information in **General Properties**, and then select **OK**.

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. Reporting and Analysis Framework is not available in Oracle General Ledger.

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 objects, such as dashboards and KPIs, created 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 User's Guide* and *Oracle Business Intelligence Answers User's Guide*, Release 11.1.1.7.0 or later.

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 about the catalog, see the *Oracle® Business Intelligence Suite Enterprise Edition User's Guide 11g*, Release 11.1.1.7.0 or later.

Using Schedule

Note: You must install and configure Reporting and Analysis Framework in order to use Schedule in EPM Workspace. Reporting and Analysis Framework is not available in Oracle General Ledger.

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

Changing the Native Directory Password

Note: You cannot change the native directory password in Oracle General Ledger.

If you are using Oracle Internet Directory as the Native Directory, Oracle Hyperion Shared Services enforces the Oracle Internet Directory password policies. Shared Services prompts Oracle's 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 products. See *Oracle Enterprise Performance Management System Security Configuration 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 the password in Native Directory:

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

The new password must adhere to the Oracle Internet Directory password policies.

- 4 Click **OK**.

Using URLs in EPM Workspace

Subtopics

- [Opening a URL](#)
- [Opening a URL in a New Window](#)
- [Updating a URL](#)

Opening a URL

Note: This topic does not apply to Oracle General Ledger.

► To open a URL:

- 1 Select **File**, then **Open**, and then **URL**.
- 2 Enter the URL name, and then select **OK**.

Opening a URL in a New Window

Note: This topic does not apply to Oracle General Ledger.

► To open a URL in a new window:

- 1 Complete the procedure from [Opening a URL](#).
- 2 Select **New Window**.
- 3 Enter the URL, and then select **OK**.

Updating a URL

Note: This topic does not apply to Oracle General Ledger.

► To update a URL:

- 1 Complete the procedure from [Opening a URL](#).
- 2 Select **Update URL**.
- 3 Enter the URL, and then select **OK**.

Using Smart View

In EPM Workspace, Smart View provides a common Microsoft Office interface for Essbase, Financial Management, Planning, and the following EPM Workspace components:

In Oracle General Ledger, Smart View provides a common Microsoft Office interface for Essbase and Financial Reporting.

The centralized interface enables simultaneous use of multiple Oracle products and improves integration with Microsoft Office. Review the Oracle Enterprise Performance Management System Certification Matrix for information on system requirements.

Smart View functionality:

- Exports the current page of the current data object to Excel, Word, or PowerPoint as an image and re-queries the web application to refresh the image.
- in EPM Workspace, exposes Financial Management and Essbase functions in Excel, Word, and PowerPoint content
- In Oracle General Ledger, exposes Oracle Essbase functions in Excel, Word, and PowerPoint content
- Notifies you when you can upgrade to new releases of Smart View
- Exports 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.

➤ 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 a language, and then follow the prompts in the wizard.**
- 3 When installation is complete, click Finish.**

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

After installing Smart View, you can add the Planning Admin Extension. Using the Planning Admin Extension, you can perform several administrative tasks with Planning metadata from Smart View, such as importing Planning dimensions and designating shared members. For more information, see the *Oracle Hyperion Planning Administrator's Guide*.

For more information about Smart View, see the *Oracle Smart View for Office User's Guide*.

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: 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.

Note: In EPM Workspace, 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.

Note: In Oracle General Ledger, embedded invocations of EPM Workspace are not affected by this feature.

Customizing EPM Workspace

Subtopics

- [Launching an EPM Workspace Object as a Tab in EPM Workspace from Dashboard](#)
- [Enumerating the Repository Contents of a Folder in Dashboard](#)
- [Enumerating EPM Workspace Applications in Dashboard](#)
- [URLs Supported by EPM Workspace](#)

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

Note: This topic does not apply to Oracle General Ledger.

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><span
id="idnameFR" onClick="newtabFR()" style="cursor:pointer"><title
text></span>
```

- 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> <span id="idnamehfm"
onClick="newtabHFM()" style="cursor:pointer"><title text></span>
```

- To launch a Planning application:

```
@HTML(<script> function newtabPlan()
{top.gModuleManager.launchRelatedContentUri(top.location.href + "?
module=HyperionPlanning.planning&sourceApp=/Planning application
name&");} </script><span id="idnameplan" onClick="newtabPlan()"
style="cursor:pointer"><title text></span>
```

- To launch any URI:

```
@HTML(<script> function newtabURI()
{top.gModuleManager.launchUri("<valid URL>");} </script><span id
="idnameuri" onClick="newtabURI()" style="cursor:pointer"><title
text></span>
```

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 32](#).

Enumerating the Repository Contents of a Folder in Dashboard

Note: This topic does not apply to Oracle General Ledger.

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 hides the icons in the listing. The default value is true.

Enumerating EPM Workspace Applications in Dashboard

Note: This topic does not apply to Oracle General Ledger.

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

Subtopics

- [Default URL to Launch EPM Workspace](#)
- [URLs to Externally Launch From Within EPM Workspace](#)

Default URL to Launch EPM Workspace

Note: This topic does not apply to Oracle General Ledger.

The default URL to launch EPM Workspace is:

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

Additional parameters:

- Optional: `sso_username=<username>`
Name of the user attempting to log in.
- Optional: `sso_password=<password>`
Password of the user attempting to log in.

Administrators may need to change the “Accept Credentials in an HTTP Request URL” setting in the “Workspace Server Settings” dialog box to support `sso_username` and `sso_password`.
- Optional: `fullscreen=true/false`

True launches the page in full screen. The default value is false.

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.

URLs to Externally Launch From Within EPM Workspace

Subtopics

- [Selecting Multiple External URLs](#)
- [Launching Repository Content](#)
- [Launching Financial Management](#)
- [Launching Planning](#)

Selecting Multiple External URLs

Note: This topic does not apply to Oracle General Ledger.

When you select 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 an existing EPM Workspace session is open, the newly-selected item is added as a tab in the existing EPM Workspace session.

The format of the URL is:

```
http://<host>:<port>/workspace/?<additional parameters>
```

You can specify a module to open and pass parameters to that module. For example, to open Oracle Hyperion Calculation Manager, use:

```
http://<host>:<port>/workspace/?module=calcmgr.filterview
```

Launching Repository Content

Note: This topic does not apply to Oracle General Ledger.

To open an object in the repository, use:

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

For example, to open the Sample Content folder:

```
http://<server>:<port>/workspace/?  
module=wksp.relatedcontent&repository_path=/Sample+Content
```

Launching Financial Management

Note: This topic does not apply to Oracle General Ledger.

To launch Financial Management, use:

```
http://<server>:<port>/workspace/?  
module=hfmadf.application&sourceApp=<hfm_application_name>&cluster=<clustername>
```

Additional parameters:

- **Optional:** `showViewPane=true/false`
False hides the left pane when the module is loaded. The default value is true.
- **Optional:** `bpm.logoff=true/false`
False prevents the system from logging off if using the same session. The default value is true.

Launching Planning

Note: This topic does not apply to Oracle General Ledger.

To launch Planning, use:

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

Additional parameters:

- **Optional:** `showViewPane=true/false`
False hides the left pane when the module is loaded. The default value is true.
- **Optional:** `bpm.logoff=true/false`
False prevents the system from logging off if using the same session. The 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 Enterprise Performance Management System. For more information on configuring UPK, see “Server Settings” in the *Oracle Hyperion Enterprise Performance Management Workspace Administrator's Guide* and the “Oracle User Productivity Kit” section in the *Application Support Guide*.

Note: Pre-built UPK content modules are available. See the data sheets that include UPK for Oracle 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. 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 Oracle Smart View for Office or Oracle Hyperion Financial Reporting Studio content.

To open UPK Help, do one of the following:

- From the Help menu, 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 .

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. 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.

Menus

Subtopics

- [About Menu](#)
- [Navigate Menu](#)
- [File Menu](#)
- [Edit Menu](#)
- [View Menu](#)
- [Favorites Menu](#)
- [Tools Menu](#)
- [Help Menu](#)

About Menu

Menus are updated based on:

- The roles granted to you
- The products installed
- The navigate item used and the task performed

Navigate Menu

Table 2 Navigate Menu Commands

Command	Description
Applications	<p>Open an application.</p> <p>Available applications are determined by the applications installed and by user rights and roles. If instanced products are installed, but the current user is not provisioned for any application instances, “No Applications” is displayed.</p>
Explore	<p>Open Explore, where you can list items in the repository, navigate the repository, and manage and control files and folders.</p> <p>User’s roles, access privileges, and permissions determine which items you can view, modify, run, and delete in the repository. The installed Reporting and Analysis modules determine what parts of the Explore user interface are shown. As a result, some documents are displayed in the content area and others can also be opened in their own studios. For example, you can set Interactive Reporting to always open documents in Oracle Hyperion Interactive Reporting Web Client.</p> <p>For details on using Explore, see “Using Explore ” in the <i>Oracle Hyperion Reporting and Analysis Framework User’s Guide</i>.</p> <p>Note: Explore is not available in Oracle General Ledger.</p>

Command	Description
Workspace Pages	<p>Create, edit, and aggregate EPM Workspace repository content from Oracle and non-Oracle sources into a single environment.</p> <p>My Workspace Pages are customized EPM Workspace pages. These pages are marked so that you can access them from one place without navigating the repository. You can create shortcuts to My Workspace Pages and store them in any folder.</p> <p>Shared Workspace Pages are stored in a system folder that authorized users can access from Explore.</p> <p>For details about using Workspace Pages, see the <i>Oracle Hyperion Reporting and Analysis Framework User's Guide</i>.</p> <p>Note: Explore is not available in Oracle General Ledger.</p>
Administer	<p>Manage settings that control how users interact with EPM Workspace.</p> <p>For details about using these settings, see <i>Oracle Hyperion Reporting and Analysis Framework User's Guide</i>, <i>Oracle Hyperion Reporting and Analysis Framework Administrator's Guide</i>, or the guide for the product you selected.</p>
Schedule	<p>Manage jobs and schedule batches and events for automated processing. Use Batch Scheduler to create and edit schedules for Financial Reporting batches.</p> <p>For details about using jobs and events, see <i>Oracle Hyperion Reporting and Analysis Framework User's Guide</i>. For details about using Batch Scheduler, see <i>Oracle Hyperion Financial Reporting Administrator's Guide</i> and <i>Oracle Hyperion Financial Reporting User's Guide</i>.</p>
Impact Manager	<p>Update Interactive Reporting documents when database structures, database connections, or links to external data sources change.</p> <p>For details about using Impact Manager, see the <i>Oracle Hyperion Reporting and Analysis Framework User's Guide</i> and the <i>Oracle Hyperion Reporting and Analysis Framework Administrator's Guide</i>.</p> <p>Note: Impact Manager is not available in Oracle General Ledger.</p>
Open Items	<p>Display items that are open in EPM Workspace.</p>

File Menu

Subtopics

- [File Menu in EPM Workspace](#)
- [File Menu in Oracle General Ledger](#)

File Menu in EPM Workspace

Note: Some File menu commands (such as Export, Import, and Properties) are available only when Explore is the current active module.

Table 3 File Menu Commands

Command	Description
New	Create a new document, Workspace Page, Personal Page, or folder.

Command	Description
Open	Open a document, Workspace Page, URL, or application. The available applications are determined by which applications are installed and by user rights and roles. If instanced products are installed, but the current user is not provisioned for any application instances, “No Applications” is displayed.
Close	Close the current document, all documents, or all documents except for the current document.
Export	Export a Financial Reporting object.
Import	Import files, URLs, files as jobs, or Financial Reporting documents.
Properties	Set general properties, advanced properties, and permissions.
Subscribe	Select whether to send email notifications when the item you are subscribed to is changed.
Preferences	Set preferences for the default content, accessibility preferences, and product-specific preferences. (For Financial Reporting, you can also change the language selection.)
Log Off	End the session.
Exit	Exit from EPM Workspace.

File Menu in Oracle General Ledger

Table 4 File Menu Commands

Command	Description
Preferences	Set preferences for the default content, accessibility preferences, and product-specific preferences. (For Financial Reporting, you can also change the language selection.)
Open	Open BI Dialog.
Close	Close BI Dialog.
Log Off	End the session.
Exit	Exit from Oracle General Ledger

Edit Menu

Note: The Edit menu is available when Explore is the current active module.

Table 5 Edit Menu Commands

Command	Description
Copy	Copy an item in Explore.

Command	Description
Paste	Paste an item in Explore.
Rename	Rename an item in Explore.
Edit Permissions	Edit the currently-set permissions.
Apply Permission to Children	Apply permissions to the children of the item selected in Explore.

View Menu

Note: Some View menu commands are available only when Explore is the current active module.

Table 6 View Menu Commands

Command	Description
View Masthead	Show or hide the menu bar and the toolbar.
View Pane	Show or hide the View Pane.
Display Items of Type	Select the type of item to display.
Sort By	Sort by name, type, date modified, or description.
Show Columns	Select the columns to be displayed.
Show Hidden	Show or hide hidden columns.
Show Duplicates	Show or hide duplicates.
Refresh	Refresh the display.

Favorites Menu

Table 7 Favorites Menu Commands

Command	Description
Add to Favorites	Add an item to your favorites.
Manage Favorites	Add or remove items from your favorites.
Show Subscribed Items	Show items to which you have subscribed.
Manage Personal Pages	Add or remove items from your personal pages.
My Personal Page	Open My Personal Page.

Tools Menu

Table 8 Tools Menu Commands

Command	Description
Change Password	Change your password. Administrators can disable this option. This option is also disabled if the organization uses a external directory server to store user information.
Change Related Content Links	Change Financial Reporting related content links. This command is available only when Financial Reporting is installed and configured and when the active module is Explore.
Change Database Connections	Change Financial Reporting database connections. This command is available only when Financial Reporting is installed and configured and when the active module is Explore.
Database Connection Manager	Manage database connections for Financial Reporting. This command is available only when Financial Reporting is installed and configured and when the active module is Explore.
Install	Product installation options Administrators can disable this option.
Launch Financial Reporting Studio	Launch Financial Reporting Studio.
Links	Launch Oracle Hyperion Web Analysis Studio.

Help Menu

Table 9 Help Menu Commands

Command	Description
Help on this Topic	Display help for the current topic.
Contents	Open the online help Contents tab, from which you can search for specific topics.
Oracle User Productivity Kit Note: UPK is available in <i>Oracle Enterprise Performance Management Workspace, Fusion Edition 11.1.2.1</i> 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 users complete tasks. UPK must be enabled by an administrator. For more information, see the <i>Workspace Server Settings</i> section in the <i>Oracle Hyperion Enterprise Performance Management Workspace Administrator's Guide</i> .
Technical Support	Open the Oracle Technical Support home page.
EPM Documentation	Open the EPM documentation home page.

Command	Description
About Oracle Enterprise Performance Management System Workspace	Open the About Oracle Enterprise Performance Management System Workspace window, which contains information about EPM Workspace, including EPM Workspace, Reporting and Analysis Framework, UI, and Server versions and version details
About Oracle General Ledger	Open the About Oracle General Ledger window, which contains information about Oracle General Ledger, including UI and Server versions and version details

2

Setting Preferences and Personalizing EPM Workspace

In This Chapter

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Setting General Preferences	44

Types of Preferences

You can set preferences for the appearance of EPM Workspace, Explore, applications, file types, Oracle Hyperion Reporting and Analysis products, Oracle BI EE, and Oracle BI Publisher products. Some preferences can be overridden by menu options.

Table 10 Preferences in EPM Workspace

Preference	Where Documented
Explore, Oracle Hyperion Interactive Reporting, and Oracle Hyperion SQR Production Reporting	<i>Oracle Hyperion Reporting and Analysis Framework User's Guide</i>
Financial Management end-user preferences	<i>Oracle Hyperion Financial Management User's Guide.</i>
Oracle Hyperion Financial Reporting	<i>Oracle Hyperion Financial Reporting Studio User's Guide.</i>
Planning end-user preferences	<i>Oracle Hyperion Planning User's Guide</i>
Planning administrator and application preferences	<i>Oracle Hyperion Planning Administrator's Guide</i>
Profitability and Cost Management	<i>Oracle Hyperion Profitability and Cost Management User's Guide, and Oracle Hyperion Profitability and Cost Management Administrator's Guide</i>
Reporting and Analysis Framework	<i>Oracle Hyperion Reporting and Analysis Framework User's Guide</i>
Oracle Hyperion Web Analysis	<i>Oracle Hyperion Web Analysis Studio User's Guide.</i>

Note: In Oracle General Ledger, to enable accessibility mode for screen reader support and high contrast in EPM Workspace, see the *Oracle Fusion Applications User Guide*.

Setting General Preferences

Subtopics

- [Setting General Preferences in EPM Workspace](#)
- [Setting General Preferences in Oracle General Ledger](#)

Setting General Preferences in EPM Workspace

► To set General preferences:

1 Select **File**, and then **Preferences**.

The email address displayed is the email address registered in your user security settings. You cannot update it. If your email address is not registered in security settings, **No email address found** is displayed.

2 Select **Prompt to Save Unsaved Files** to save any unsaved files.

3 Clear **Show Path For Documents** to hide document file paths in the progress bar.

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 Oracle Hyperion Reporting and Analysis Framework is installed and configured.

5 Depending on your selection in [step 4](#), complete the following:

- In **Explore**, click **Select**, then select a folder, and then click **OK**.
- In **Document**, click **Select**, then select a document, and then click **OK**.
- In **Favorite**, perform an action:
 - Select a favorites page to display in the content area.
 - Click **My Personal Page**.
- In **Application**, select from the following:
 - Consolidation (for Financial Management applications)
 - Planning (for Planning applications)
 - Tax Management (for Tax Governance and Tax Provision)
 - Financial Close Management (for Financial Close Management)
 - 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.

6 **Optional:** Select **Use Current Page** to use the **Current Page** button.

The Current Page button is an easier and faster way to set the default startup options. If you select this option, ensure that the current active page is the one that you want to set as the default startup option.

- 7 Click **OK** to save your changes.

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

Setting General Preferences in Oracle General Ledger

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

► To set General preferences:

- 1 Select **File**, and then **Preferences**.

The email address displayed is the email address registered in your user security settings. You cannot update it. If your email address is not registered in security settings, **No email address found** is displayed.

- 2 Clear **Show Path For Documents** to hide document file paths in the progress bar.
- 3 In **Default Startup Options**, select an option to display by default whenever you log in to EPM Workspace.
- 4 **Optional:** Select **Use Current Page** to use the Current Page button.

The Current Page button is an easier and faster way to set the default startup options. If you select this option, ensure that the current active page is the one that you want to set as the default startup option.

- 5 Click **OK** to save your changes.

3

Launching Applications

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Launching Applications in EPM Workspace

Applications available from the Navigate menu include Profitability and Cost Management, Oracle Business Intelligence, Planning, Financial Management, Oracle Hyperion Financial Close Management, and Tax Management.

An application is displayed if both of the following are true:

- A user has rights
- The application has been installed and provisioned for the user

The list of available applications is retrieved from Oracle 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.

Note: For additional information on using Oracle Hyperion Planning applications, see *Oracle Hyperion Planning User's Guide*, for Oracle Hyperion Financial Management applications, see *Oracle Hyperion Financial Management User's Guide*, for Oracle Hyperion Profitability and Cost Management applications, see *Oracle Hyperion Profitability and Cost Management User's Guide*, for Oracle Hyperion Tax Governance and Oracle Hyperion Tax Provision, see *Oracle Hyperion Tax Governance User's Guide* and *Oracle Hyperion Tax Provision User's Guide*, and for Oracle BI EE application products, see the Oracle BI EE product guides, Release 11.1.1.7.0 or later.

► To launch an application:

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

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

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.

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 Preferences and Personalizing EPM Workspace.”](#)

Launching Applications in Oracle General Ledger

Applications from the Navigate menu include Oracle Business Intelligence applications. 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.

An application 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 are filtered by the user's provisioned status. For Oracle BI EE application products, see the Oracle BI EE product guides.

Note: All functionality for Oracle BI EE products use the catalog. See the Oracle BI EE product guides for more information on using the catalog. Oracle BI Presentation Catalog can be accessed by the Navigate, then Applications, BI Catalog menu.

► To launch an application:

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

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

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.

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 Preferences and Personalizing EPM Workspace.”](#)

4

Using Oracle BI EE

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Overview

Oracle BI EE provides a full range of business intelligence capabilities that allow you to:

- Collect up-to-date data from your organization
- Present the data in easy-to-understand formats such as tables and graphs
- Deliver data in a timely fashion to the employees in your organization

Oracle BI EE content (Release 11.1.1.7.0 or later) can be created and accessed within EPM Workspace. Information about using Oracle BI EE is available in the “User's Guide for Oracle Business Intelligence Enterprise Edition”, Release 11.1.1.7.0 or later.

Note: The Oracle BI Presentation Catalog, Oracle BI EE Home Page, BI Interactive Dashboards, BI Publisher (in integrated mode only), and BI Delivers are the only Oracle BI EE modules available from EPM Workspace. The BI Answers Module is launched when specific objects are open.

Accessing Oracle BI EE from EPM Workspace

Subtopics

- [Oracle BI EE Catalog](#)
- [Oracle BI EE Home Page](#)
- [Oracle BI EE Interactive Dashboards](#)

➤ To access Oracle BI EE, Release 11.1.1.7.0 or later, from EPM Workspace:

- 1 In EPM Workspace, select **Navigate**, and then **Applications**.
- 2 Select an Oracle BI EE option:

- **BI Catalog**—Provides access to all areas of the file system to which users have privileges
- **BI Home**—Provides access to Oracle BI EE functionality
- **BI Interactive Dashboards**—Provides access to Oracle BI EE dashboard creation, editing, viewing and interaction

See [Chapter 3, “Launching Applications”](#) for additional information about availability of these products based on user rights, and roles, and product availability from EPM Workspace.

Oracle BI EE Catalog

The Oracle BI EE Catalog stores business intelligence objects and provides an interface where users create, access, and manage objects, and then perform specific object-based tasks (for example, export, print, and edit). The catalog is organized into folders that are either shared or personal.

Note: All functionality for Oracle BI EE products uses the catalog.

For more information about the Oracle BI EE Presentation Catalog, see the “User's Guide for Oracle Business Intelligence Enterprise Edition,” Release 11.1.1.7.0 or later.

Oracle BI EE Home Page

The Oracle BI EE Home Page provides a starting point for performing tasks in Oracle BI EE. The Home page is divided into sections that allow you to quickly begin a specific task, locate an object, or access technical documentation. It also includes sections (for example, Recent and Favorites) that allow you to quickly access objects that you have recently viewed, created, or updated, and objects that are accessed the most often by the users assigned to the groups to which you belong.

For more information about the Home page, see the “User's Guide for Oracle Business Intelligence Enterprise Edition,” Release 11.1.1.7.0 or later.

Oracle BI EE Interactive Dashboards

Oracle BI EE interactive dashboards provide knowledge workers with intuitive, interactive access to information that is actionable and dynamically personalized based on the individual's role and identity. In the Oracle BI EE interactive dashboards environment, the end user works 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 EE interactive dashboards can also aggregate content from a wide variety of other sources, including the Internet, shared file servers, and document repositories.

For more information about Oracle BI EE interactive dashboards, see the “User's Guide for Oracle Business Intelligence Enterprise Edition,” Release 11.1.1.7.0 or later.

Setting Oracle BI EE Preferences

Before using Oracle Hyperion Enterprise Performance Management Workspace with Oracle BI EE, Oracle recommends that you modify the default settings and preferences for Oracle BI EE products.

► To set Oracle BI EE preferences:

- 1 **Select File, and then Preferences.**
- 2 **Select Oracle BI, and then complete the tasks in the displayed tabs.**

See the “User's Guide for Oracle Business Intelligence Enterprise Edition”, Release 11.1.1.7.0 or later, for information about specifying Oracle Business Intelligence Enterprise Edition settings and preferences.

- 3 **When you are finished specifying settings and preferences for all tabs, select OK.**

