Oracle® Hyperion Enterprise Performance Management Workspace

Administrator's Guide

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Oracle Hyperion Enterprise Performance Management Workspace Administrator's Guide, Release 11.1.2.4

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Administering EPM Workspace

Related Topics:

- About EPM Workspace in General Ledger
- Accessing EPM Workspace Server Settings
- Customizing the User Interface
- Organizing Items and Folders

About EPM Workspace in General Ledger

Oracle Hyperion Enterprise Performance Management Workspace is the web user interface that is used to access all Oracle content.

When used in Oracle Fusion General Ledger, 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, and Oracle Hyperion Profitability and Cost Management
- Oracle Hyperion Calculation Manager—Create, validate, deploy, and administer sophisticated calculations that solve Financial Management, Planning, and Oracle Essbasebusiness problems.
- Oracle BI Presentation Catalog—See the Oracle Business Intelligence Enterprise Edition product guides for more information on using the catalog.

Accessing EPM Workspace Server Settings

To access Oracle Hyperion Enterprise Performance Management Workspace Server settings, select **Navigate**, then **Administer**, then **Workspace Settings**, and then **Server Settings**.

> **Note:**
>
> If you make changes to the EPM Workspace Server Settings, you must log out and restart the browser for the changes to take effect.

Table 1-1 General EPM Workspace Server Settings

Setting	Description
Supported Locales	Locales supported by EPM Workspace Select **Click here to edit** to open the Values List. You can move the supported locales between Possible Values and Assigned Values for your specific EPM Workspace configuration.
Default Locale	Default locale for the application if no user requested locales can be loaded. Default value is English, en.
Client Debug Enabled	Whether to suppress browser-side EPM Workspace debug features. Default value is No.
Session Timeout	Interval time in minutes before idle users are forcibly logged out of EPM Workspace from the Client side. Default value is 30. Maximum value is 1440.
Keep-Alive Interval	Interval time in minutes between EPM Workspace pings to each open context in order to keep HTTP sessions alive. This is on the server side. Default value is 10.
Accept Credentials in an HTTP Request URL	Default value is No. When set to No, the request parameters `sso_token`, `sso_username`, and `sso_password` are ignored in any HTTP request URL. They are accepted only when sent in an HTTP POST request body. Example of a URL that stops working: `http://host:port/workspace/?sso_username=admin&sso_password=mypassword`
Allow Direct Logon After SSO failure	Default value is No. Select Yes to allow a user to logon directly if Single Sign-On (SSO) is enabled and SSO authentication fails.
Enable User Display Name	Default value is No. If set to Yes, the user's full display name is displayed in the welcome message area in the upper-right corner of EPM Workspace. The display name usually consists of First and Last Name. For example, when the value is set to Yes, **Logged in as John Smith** is displayed instead of **Logged in as JSMITH**.
Remember User Name at Logon	When set to Yes, the user's name is remembered as a cookie after a successful logon (otherwise, an existing cookie is deleted). The default value is Yes.
Message File	Select **Click here to edit** to open a dialog box where you can Enter text for the message you want to send out to users. Messages are sent to all users who are currently logged in or users logging in to EPM Workspace for the first time.
Client Message Polling Interval	Time interval for checking new messages. Value entered is in minutes. A value of zero disables messaging system and newly logged on users do not receive messages. Default is 0.
Server Message Cache	How often the Web application checks for changes in message status. Use this parameter if you update messages from the command line. Note that if messages are changed from the dialog box, the changes take effect immediately. The value entered represents minutes. Ten minutes is the default value.
Post Logoff URL	URL to which the UI is redirected after users log off
Smart View URI	URI to the Oracle Smart View for Office Client installer. The URI can be absolute or relative. The URI entered here is the URI accessed when you select **Tools**, then **Install**, and then **Smart View** from EPM Workspace.

Table 1-1 (Cont.) General EPM Workspace Server Settings

Setting	Description
Enable Installer Menu Items in Workspace	Whether to enable installer menu items in EPM Workspace. These items are located in the Tools menu. The default value is Yes.
Enabled Products	Disable products which are installed but not running. A dialog box is displayed with products that can be deselected. If the checks are cleared, the products are de-integrated at the next logon, as if they were never installed.

Customizing the User Interface

Related Topics:

- Changing the Default Language Selection
- Replacing the Logon Panel Image
- Redirecting URLs After Users Log Off
- Removing Access to Client Installers

Changing the Default Language Selection

Oracle Hyperion Enterprise Performance Management Workspace reads locale information from your web browser and selects the language to use based on browser locale settings. In certain cases, you may want to view content in a language other than that determined by the browser locale. You can override locale-based language selection by adding languages to your web browser language options and moving the language that you want the browser to use to the top of the list.

EPM Workspace automatically selects the supported language in order of priority. It attempts an exact match between language and locale code. If a close match is not found, EPM Workspace attempts to match based only on language code and ignores the country code.

> **Note:**
>
> The settings that you select for the default language apply to all of the components in EPM Workspace.

Replacing the Logon Panel Image

To replace the image that is displayed on the logon panel:

1. Create an image file named `logon_panel.gif` with dimensions that match a previous image.
2. Follow the steps to Extracting a File in the EPM Workspace Web Application.

3. Replace the `logon_panel.gif` file in the following directory with the `logon_panel.gif` file that you created in step 1:

   `<temp directory>/war/bpmstatic/themes/theme_skyros/images_global/`

4. Follow the steps to Repacking a File in the EPM Workspace Web Application.

Redirecting URLs After Users Log Off

To facilitate integration with custom portals, administrators can redirect web browsers to an arbitrary static URL after users log off Oracle Hyperion Enterprise Performance Management Workspace. This can be configured in Server Settings. See Accessing EPM Workspace Server Settings. Note that the default value logs users off of EPM Workspace.

Removing Access to Client Installers

Administrators can hide the Install menu option (select **Tools**, and then **Install**) that enables users to install Oracle Smart View for Office, Predictive Planning, Financial Reporting Studio, Planning Admin Extension, and EPM Automate. This setting can be configured in Oracle Hyperion Enterprise Performance Management Workspace Server Settings. See Accessing EPM Workspace Server Settings.

Organizing Items and Folders

For efficient Oracle Hyperion Enterprise Performance Management Workspace functioning, structure folders so that users can access items quickly and easily. In the folder hierarchy, balance folder size against hierarchy depth. Folders should not contain large numbers of items or excessive numbers of levels in the folder hierarchy. Certain folders should not be deleted.

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Administration Tools and Tasks

Related Topics:

- Understanding Oracle Home and Install Home
- Administration Tools for EPM Workspace
- Starting EPM Workspace
- Securing Your EPM Workspace Production Environment
- Lifecycle Management
- Changing Service Port Assignments
- Extracting a File in the EPM Workspace Web Application
- Repacking a File in the EPM Workspace Web Application
- Customizing the Logon Page

Understanding Oracle Home and Install Home

When multiple Oracle products are installed on one computer, common internal and third-party components are installed to a central location, called *Oracle Home*.

On Windows platforms, the Oracle Home (contains Oracle database products) location is defined in the system environment variable called `EPM_ORACLE_HOME` (contains all Oracle products) and the default location is `C:/Oracle/Middleware/PMSystem11R1`. Middleware contains products such as WebLogic.

On UNIX platforms, the Oracle Home value is stored in `.hyperion.<hostname>` in the home directory, and the default location is `$HOME/Oracle/Middleware/EPMSystem11R1`.

See the *Oracle Enterprise Performance Management System Installation and Configuration Guide* for information on changing the Oracle Home location.

Oracle Home contains a `\common` directory. An Oracle Hyperion Enterprise Performance Management Workspace installation adds a `EPM_ORACLE_HOME/products/Foundation/workspace` directory to Oracle Home, which is the default installation location or Install Home for EPM Workspace (that is, `EPM_ORACLE_HOME\products\Foundation\workspace` on Windows, or `EPM_ORACLE_HOME/products/Foundation/Workspace` on UNIX).

For Oracle Hyperion Reporting and Analysis, it is possible to have multiple Install Homes on one physical host. All Java services in an Install Home run in one process space and share a GSM (not necessarily on one host). If a host has multiple Install Homes, each Install Home requires its own separate services process space and is managed by its own GSM. Services in an Install Home are referred to collectively as an Install Home.

Administration Tools for EPM Workspace

Related Topics:

- EPM Workspace Configuration Information
- EPM Workspace Timeouts
- Lucene Index Report

EPM Workspace Configuration Information

Configuration information about Oracle Hyperion Enterprise Performance Management Workspace installations is available at:

`http://hostname:port/workspace/debug/configInfo.jsp`

where *hostname* is the name of the EPM Workspace server, and *port* is the TCP port on which the HTTP or application server is listening.

The default port for EPM Workspace is 19000 if using Oracle Application Server. 19000 is the default TCP port on which the HTTP server is listening. This port number does not depend on used application server or servlet container.

> **Note:**
>
> To disable the configuration URL, see Securing Your EPM Workspace Production Environment

EPM Workspace Timeouts

Oracle Hyperion Enterprise Performance Management Workspace manages a user's active session in these ways:

- EPM Workspace sends keep alive requests to all application servers (including its own) used in the user's current session.
  The keep alive request maintains the session between the browser and the application server so that the application server does not invalidate the session. For example, once a Oracle Hyperion Financial Reporting report is opened, EPM Workspace sends keep alive requests to the Financial Reporting server so that the user can open more Financial Reporting reports without having to reopen the session with the Financial Reporting application server.

  The interval for sending these requests is configured by the EPM Workspace Server Settings, `KeepAliveInterval` property. This property must be set to less then the timeout value for any application server used by EPM Workspace, if it is set to a higher value, the user may receive error messages due to application server timeouts.
- EPM Workspace closes the session when the user has stopped using EPM Workspace but has not closed the browser.

If there is no activity in EPM Workspace per the EPM Workspace Server Setting, `SessionTimeout` property, the user is warned that the session is about to end. If the user does not take action within five minutes, the user is logged out.

Use the WebLogic Administration Console to edit the `timeout` setting for the EPM Workspace deployment.

> **Note:**
>
> All web applications session timeouts should be greater than 10 minutes.

Lucene Index Report

This is a report on the Lucene search indices used by online help. Information is available at:

`http://<hostname>:<port>/workspace/debug/helpIndexInfo.jsp`

The Lucene Index report is only accessible if the **Client Debug Enabled** entry is set to Yes in the Oracle Hyperion Enterprise Performance Management Workspace Server Settings module.

Starting EPM Workspace

Start the Oracle Hyperion Enterprise Performance Management Workspace server according to the instructions given in your web server documentation. Make the URL available to your system's end-users. Starting Oracle Home Services is a separate service or shell script.

For Windows, see the Oracle Hyperion Foundation Services Manager in *MIDDLEWARE_HOME*`/user_projects/epmsystem1/bin/startFoundationServices.bat`, where the default location for *MIDDLEWARE_HOME* is `C:\Oracle\Middleware`.

For UNIX, see the Foundation Services Manager in *MIDDLEWARE_HOME*`/user_projects/epmsystem1/bin/startfoundationservices.sh`. The Oracle Process Manager is the service used to start the http server.

For EPM Workspace, enter the following URL:

`http://`*hostname:port*`/workspace/`

where *hostname* is the name of the EPM Workspaceserver, and *port* is the TCP port on which the application server is listening. The default port for EPM Workspace is 19000 if using Oracle Application Server. 19000 is the default TCP port on which HTTP server, for example Oracle Application server, is listening. This port number does not depend on used application server or servlet container (including Oracle Application server).

Securing Your EPM Workspace Production Environment

For security purposes, the following Oracle Hyperion Enterprise Performance Management Workspace parameters are disabled and are not available by default. To

enable these parameters, set the Client Debug Enabled parameter in the Server Setting to Yes.

- **Configuration URL**—See EPM Workspace Configuration Information for details about system configuration which requires administrative credentials to access.
- **EPM Workspace test module**—`wksp.widgets` contains test cases and debugging utilities and is accessible when EPM Workspace is running in debug mode.
- **Client-side debug mode**—Client-side debug console – pass debug = true, which is used for debugging purposes. This enables the debug console which shows client debug messages and also forces the application to use the uncrunched Javascript code.

EPM Workspace ships with uncrunched JavaScript code for troubleshooting.

To remove this code so that it cannot be accessed:

1. Follow the instructions to Extracting a File in the EPM Workspace Web Application.
2. Delete the .js files under `bpmstatic/js` and `static/js` that do not match the directory name in which they exist.

   For example, remove all files in `/js/com/hyperion/bpm/web/common` except for `/js/com/hyperion/bpm/web/common/Common.js`.
3. Follow the instructions about Repacking a File in the EPM Workspace Web Application.

   Note that applying service fixes restores these files.

Lifecycle Management

Oracle Hyperion Enterprise Performance Management System Lifecycle Management provides a consistent way for Oracle Enterprise Performance Management System products to migrate an application, a repository, or individual artifacts across product environments and operating systems. Generally, the Lifecycle Management interface in Oracle Hyperion Shared Services Console is consistent for all EPM System products that support Lifecycle Management. However, EPM System products display different artifact listings and export and import options in the Lifecycle Management interface.

Lifecycle Management features:

- Viewing applications and folders
- Searching for artifacts
- Migrating directly from one application to another
- Migrating to and from the file system
- Saving and loading migration definition files
- Viewing selected artifacts
- Auditing migrations
- Viewing the status of migrations
- Importing and exporting individual artifacts for quick changes on the file system

In addition to providing the Lifecycle Management interface in Shared Services Console, there is a command-line utility called Lifecycle Management Utility that provides an alternate way to migrate artifacts from source to destination. The Lifecycle Management Utility can be used with a third-party scheduling service such as Windows Task Scheduler or Oracle Enterprise Manager.

Lastly, there is a Lifecycle Management Application Programming Interface (API) that enables users to customize and extend Oracle Fusion Lead Management functionality.

Changing Service Port Assignments

For information on system requirements, see the Oracle Hyperion Enterprise Performance Management System Certification Matrix at http://www.oracle.com/technetwork/middleware/bi-foundation/hyperion-supported-platforms-085957.html. Also review *Oracle Enterprise Performance Reporting Cloud Getting Started for Administrators* guide for information about release compatibility, prerequisites, default ports, and other information needed to plan a successful installation.

Extracting a File in the EPM Workspace Web Application

To extract files in the Oracle Hyperion Enterprise Performance Management Workspace web application:

1. Stop the service for Oracle Hyperion Foundation Services Managed Server.
2. Back up the file *EPM_ORACLE_HOME*/products/Foundation/workspace/InstallableApps/workspace.ear.
3. Using an unarchiving utility, extract the contents of *EPM_ORACLE_HOME*/products/Foundation/workspace/InstallableApps/workspace.ear into a <*temp directory*>.
4. Create <*temp directory*>/war.
5. Extract the contents of <*temp directory*>/workspace.war into <*temp directory*>/war.
6. Update the file you are patching under<*temp directory*>/war.

Repacking a File in the EPM Workspace Web Application

To repackage a file in the Oracle Hyperion Enterprise Performance Management Workspace web application:

1. Archive the files in <*temp directory*>/war into <*temp directory*>/workspace.war.
2. Archive the <*temp directory*>/workspace.war into *EPM_ORACLE_HOME*/products/Foundation/workspace/InstallableApps/workspace.ear.
3. Remove the contents of the WebLogic temp directory *MIDDLEWARE_HOME*/user_projects/domains/domainName/servers/FoundationServices/tmp/.
4. Remove the contents of the WebLogic temp directory /Documents and Settings/<machine user name/Local Settings/Temp/<machine user name/servers/FoundationServices/tmp/.
5. Start the Service for Oracle Hyperion Foundation Services Managed Server.
6. Clear your browser cache.

Customizing the Logon Page

You can customize the logon page to add a proprietary disclaimer. This allows a company to broadcast this to all users when logging in to Oracle Hyperion Enterprise Performance Management Workspace. This information is displayed below the Copyright information.

To customize the logon page:

1. Stop all services.
2. Backup *EPM_ORACLE_HOME*/common/bpmui-common/11.1.2.0/bpmui.jar.
3. Using an unarchiving utility, extract the contents of *EPM_ORACLE_HOME*/common/bpmui-common/11.1.2.0/bpmui.jar into a <temp directory>.
4. Edit file <*temp directory*>/com/hyperion/bpm/Resources_en.properties.
5. Search for the property bpm.logonCopyright.
6. Modify the text to the right of the equal sign (=). Use \n to get a new line.
7. Save your changes.
8. Repeat Step 4 through step 7 for all the other Resources_xx.properties files for other locales.
9. Jar the contents of <*temp directory*> to *EPM_ORACLE_HOME*/common/bpmui-common/11.1.2.0/bpmui.jar.
10. Start all services.
11. Clear the browser cache.

3
Exploring and Managing Annotations

Related Topics:

- About Annotations
- Searching for Annotations
- Viewing Reports Associated With Annotations
- Replying to Annotations
- Deleting Annotations
- Changing the Source For Annotations
- Changing Annotation Elements
- Modifying Annotation Permissions
- Auditing Annotations

About Annotations

Annotations, used with Oracle Hyperion Financial Reporting reports, capture collective information that can be shared on documents and data. Annotations provide a range of flexibility from simple notations to full-fledged threaded discussions, laying the foundation for collaboration, compliance reporting, and business process analysis. Authorized users can create, edit, remove, and respond to annotations. Annotations can be attached to a report object (grid object, text object, chart object, and image object), and can reference a full or partial POV. Annotations included in reports can be viewed when selected for books and snapshot books.

Searching for Annotations

To search for annotations:

1. In Oracle Hyperion Enterprise Performance Management Workspace, select **Navigate**, then **Administer**, and then **Annotations**.
   As a default, no annotations are initially displayed.
2. In **Explore Annotation**, select a search method, and then click **Search.**
   - **All**—Search based on text located in Title, Author, Description, Context, or Category. Case-insensitive text, trailing asterisks, and wildcard strings are acceptable.
   - **Title**—Search based on text located in Title. Case-insensitive text, trailing asterisks, and wildcard strings are acceptable.
   - **Author**—Search based on text located in Author.
   - **Category**—Search on category.
   - **Description**—Search based on text located in Description. Case-insensitive text, trailing asterisks and wildcard strings are acceptable.

- **Context**—Search based on a data source, element name, and element value. Data sources are displayed for existing annotations. The "fr" data source is displayed if annotations are set on an object. If "fr" is preceded by a data source, annotations are set for a particular report. To specify multiple element values, separate each value with a comma (,). Only one value must be met.
- **Advanced Search**—Define your search based on a combination of Title, Author, Description, Posted Date Range, Category or Context.

3. Click the annotation to view annotation content.

> **Note:**
>
> Reports that have deleted annotations are displayed with a warning (!) icon

Viewing Reports Associated With Annotations

You can view reports and their attachments that are associated with one or more annotations. An annotation summary row is displayed for each annotation in a report.

To view reports associated with annotations:

1. In Oracle Hyperion Enterprise Performance Management Workspace, select **Navigate**, then **Administer**, and then **Annotations**
2. In **Explore Annotation**, search for annotations.
3. Right-click an annotation, and then select **Show Reports/Documents.**

When viewing reports associated with annotations, keep in mind the following:

- Annotation icons in the report indicate the location of the annotation references. An eye icon is displayed for annotations associated with read-only reports and documents.
- If an error occurs when attempting to view a report, the data source for the report may have changed. You must match the data source for the annotations.
- If the report name is changed in EPM Workspace using the **Rename** menu option, then any object-level annotations remain associated with the renamed report. However, if the name is changed using the **Save As…** option in Oracle Hyperion Financial Reporting Web Studio, then the duplicated report and any object-level annotations from the original report are not copied to the report with the new name.

Replying to Annotations

To reply to annotations:

1. In Oracle Hyperion Enterprise Performance Management Workspace, select **Navigate**, then **Administer**, and then **Annotations**
2. In **Explore Annotation**, search for annotations, and then do one of the following:
   - Right-click an annotation, and then select **Reply.**
   - Double-click an annotation.

- Highlight an annotation, and then click the **Reply** icon.

Deleting Annotations

To delete annotations:

1. In Oracle Hyperion Enterprise Performance Management Workspace, select **Navigate**, then **Administer**, and then **Annotations**
2. In **Explore Annotation**, search for annotations, and then do one of the following:
   - Right-click an annotation, and then select **Delete**.
   - Highlight an annotation, and then click the **Delete** icon.

Changing the Source For Annotations

You can change any source element associated with annotations. Data source elements consist of Type, Server, Application, and Database. The data source can be applied to a selected annotations or to all annotations that meet the original data source criteria.

To change the source for annotations:

1. In Oracle Hyperion Enterprise Performance Management Workspace, select **Navigate**, then **Administer**, and then **Annotations**
2. In **Explore Annotation**, search for annotations.
3. Right-click an annotation, and then select **Change Source**.
4. Enter data source options.
5. Select **Apply to All Annotations** to apply the source change to all annotations that meet the data source criteria, or clear **Apply to all Annotations** to apply the element change to the highlighted annotations only.
6. Click **OK.**
   A confirmation message presents the number of changed documents. The changed documents are highlighted in the list.

Changing Annotation Elements

You can change the dimension or dimension member value for annotations associated with a specific data source.

To change the elements for an annotation:

1. In Oracle Hyperion Enterprise Performance Management Workspace, select **Navigate**, then **Administer**, and then **Annotations**
2. In **Explore Annotation**, search for annotations.
3. Right-click an annotation, and then select **Change Element**.
   The **Change Element** dialog box is displayed with the current data source.
4. In the **Change Element** dialog box:
   - Select a data source.
   - Select an option:

  - **Change Element**—Changes a dimension. In Replace, select a dimension, and in With, enter a new dimension.
  - **Change Element Value For**—Changes a dimension and a member. In Replace select a new dimension, and in With, enter a member.
- Select **Apply to All Annotations** to apply the element change to all annotations that meet the data source criteria, or clear **Apply to all Annotations** to apply the element change to the highlighted annotations only.

5. Click **OK**.
   A confirmation message presents the number of annotations changed to the new element. The changed documents are highlighted in the list.

Modifying Annotation Permissions

Annotation permissions define the level of access based on users, groups, or roles. To set permissions, right click an annotation, and then select **Permissions.**

You can set the following permissions:

- **No Access**—User cannot see the annotation.
- **View**—User can view the annotation.
- **Modify**—User can respond to an annotation but not delete.
- **Full Control—**User can view, respond, delete, and set permissions to an annotation.

Auditing Annotations

Information about annotations, such as creation date and date last modified, are necessary for general auditing and compliance reporting. Annotation information is logged on the Oracle Hyperion Financial Reporting server for annotations associated with Financial Reporting reports in the file `AnnotationAudit.log`. For each annotation, this file contains:

- Action taken: annotation created, replied to, or deleted
- Annotation title
- Data source associated with the annotation
- Annotation context
- User ID of the user who added, changed, or deleted the annotation
- Time and date the annotation was created, modified, or deleted
- Name and path of the report associated with the annotation
- Object type associated with the annotation (grid, chart, image, text box)

> **Note:**
>
> Annotation permission changes are not logged.

4

Managing Book HTML Output Layout

Related Topics:

- Customizing Book Output
- Editing the Template Files for Books
- Editing HTML Files for Books
- Template Samples

Customizing Book Output

When outputting a book to a static HTML web site, you can customize the output layout by modifying content, changing formats, and adding images. After you make changes, you can run the book to reflect the new layout.

The files for customizing a book are located in the `...statiticbook\lib` directory and can be changed using the `SchedulerTemplateLocation` property.

The files you can modify are located in the following folders in the lib directory:

- **css**—Sets the layout and look and feel for the following areas:
  - template.css—Default template in the book layout used to generate HTML output
  - template2.css—Reserved template that can be used to replace template.css
  - template3.css—Reserved template that can be used to replace template.css
  - highlight.css—Defines the appearance of highlighted search results
  - print.css—Defines the content and format of printed output
  - psbtreeview.css—Defines the textual appearance in the table of contents
- **html**—Changes the content of the book layout.
- **img—**Adds or replaces .png images for the book layout.
  Change the banner.png in this folder to reflect your company's image.

Do *not* modify the following folders:

- **jquery**—Contains the library for the table of contents and other JavaScript tasks
- **js**—Contains internal JavaScript files

Editing the Template Files for Books

You are provided with three basic template files for HTML book layout: `template.css`, `template2.css`, and `template3.css`. The template files contains default formats that can be changed to your company's requirements.

The `template.css` file is the default file used in the generated HTML output. To use `template2.css` or `template3.css`, you must rename the file to `template.css`. For

example, to use `template2.css` as the default, first disable the original `template.css` file by renaming it, for example, to `template4`. Then rename `template2.css` to `template.css`.

The layout for `template.css` differs from `template2.css` and `template3.css` in that `template.css` has the table of contents on the left, and `template2` and `template3` may have the table of contents either on the left, on the right, or on both sides.

The `template.css` file provides format settings for the following areas:

- **Body Format—**Settings for the background color and text alignment
- **Container Styles**—Settings for the container area
- **Header Logo Styles**—Settings for the `header_log` area
- **Header Menu Styles**—Settings for the menu area. Change this area to your company's logo.
- **Footer Styles**—Settings for the Footer area
- **Column Layout**—Settings for column borders
- **Left Column**—Settings for the `content_left` area
- **Right Column**—Settings for the `content_right` area
- **Center Column**—Settings for the `content_center` area
- **Right Column Bread Crumbs**—Settings for the `content_center_breadcrombs` area
- **Document Content**—Settings for the `content_center_container` and `content_center_single` areas
- **FR Related to Switch Pages**—Do not change

Editing HTML Files for Books

Use the HTML directory to change the content of various areas of a book template.

The areas you can change include:

- Content Left
- Content Right—This area is not available in the original `template.css` file, but can be added. It is available in the original `template2.css` and `template3.css` files.
- Footer
- Header— Replace the logo with your company's logo.
- Menu

Template Samples

Related Topics:

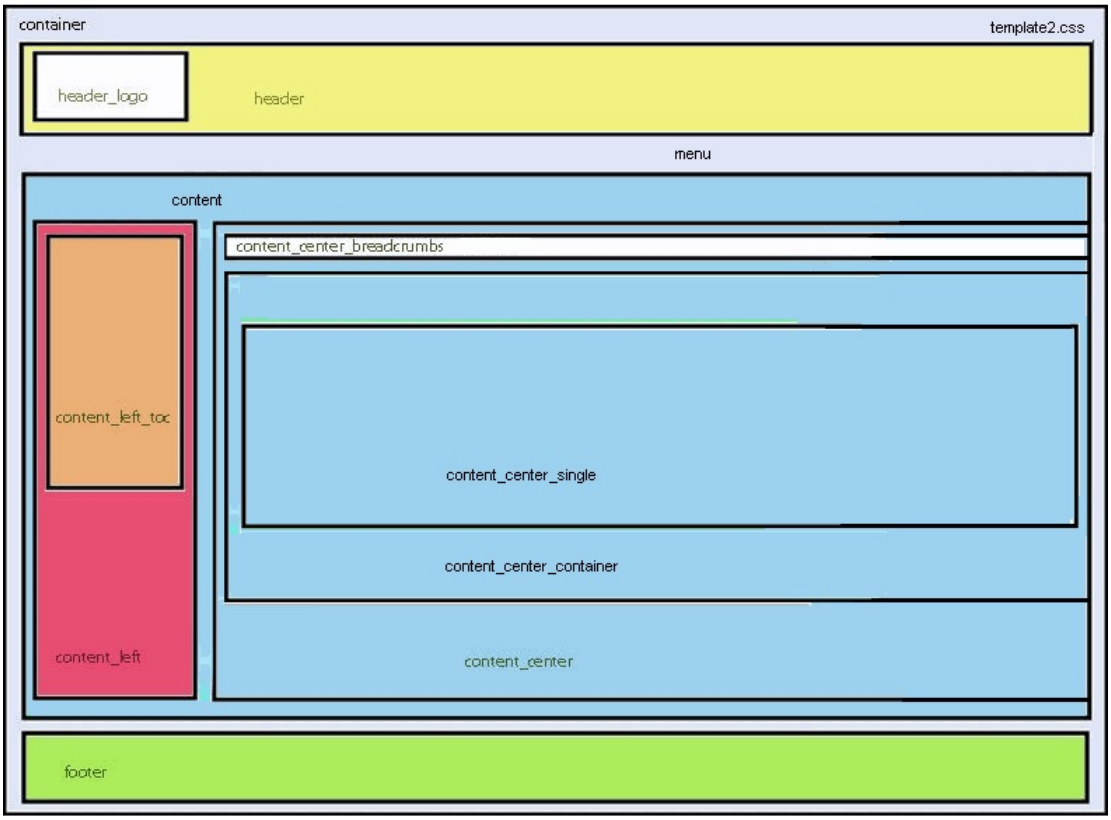
- template.css
- template2.css
- template3.css

template.css

In `template.css`, the `content_right` and `content_left` panels are displayed if they are specified in `content_right.html` and `content_left.html` respectively.

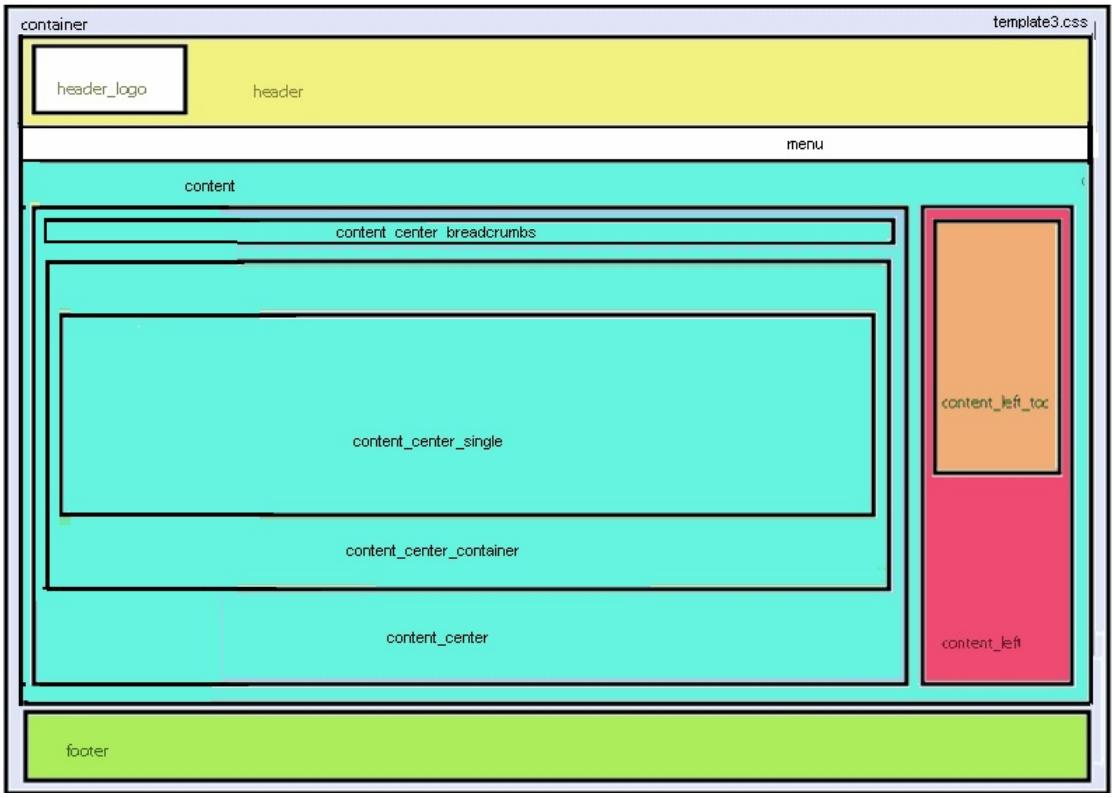
template2.css

In `template2.css`, the `content_right` panel is removed, and the `content_center` panel extends to the right edge.



template3.css

In `template3.css`, the `content_left` panel replaces the `content_right` panel, and the `content_center` panel extends to the left edge.


container
template3.css
header_logo
header
menu
content
content_center_breadcrumbs
content_center_single
content_left_toc
content_center_container
content_center
content_left
footer

5

Opening a Snapshot Book That Has the Same Name as Other Financial Reporting Objects

Use the following URL to open a Snapshot Book that has the same name as other Oracle Hyperion Financial Reporting objects:

```
http://servername:portNumber/workspace/browse/get/Smartcut%20Folder/report_name?
mimetype
=application/hyperion-reports-snapshot_book
```

Use `Latest=true` along with the `mimetype` variable to get latest object:

```
http://servername:portNumber/workspace/browse/get/Smartcut%20Folder/report_name?
mimetype
=application/hyperion-reports-snapshot_book&Latest=true
```

Use `Version=1` along with the `mimetype` variable to get latest object, or the specific version of the object output:

```
http://servername:portNumber/workspace/browse/get/Smartcut%20Folder/report_name?
mimetype
=application/hyperion-reports-snapshot_book%version=1
```

Below are possible values for the `mimetype` variable for Financial Reporting objects. These values are retrieved from the `NAME` field in the V8_METATYPE table in the Financial Reporting repository. Look for `DESCRIPTION` fields containing Financial Reporting related objects, and then retrieve the corresponding `NAME` field to use in the MIME type variable.

From V8_METATYPE:

- `application/hyperion-reports-report`
- `application/hyperion-reports-snapshot_report`
- `application/hyperion-reports-book`
- `application/hyperion-reports-snapshot_book`

A
Property Information

You can use Oracle Enterprise Manager to define and manage the various properties Oracle Hyperion Financial Reporting and the applications that run with it.

To access Financial Reporting properties:

1. Log on to Enterprise Manager .
   For example: `http://localhost:7001/em`
2. Navigate to **WebLogic Domain**, then **Bifoundation_domain**, and then **System MBean Browser**.
3. Navigate to **Application Defined MBeans**, then **com.hyperion**, then **Server: bi_server1**, and then **Financial Reporting (and Annotations)**.

Table A-1 Properties

Name	Default Value	Description
AllowCellTextAsAnnotations	false	Display cell text for Oracle Hyperion Financial Management and Oracle Hyperion Planning as annotations in a report.
AllowDocumentAttachmentAsAnnotations	false	Display LROs for Oracle Essbase, Cell Documents for Financial Management, and Document Attachments for Planning as annotations in a report.
AllowPlanningUnitAnnotationsAsAnnotations	false	Display Planning Unit Annotations (PUA) for Planning as annotations in a report.
AttachedFileMaxSize		
BaseConfigServlet	`/browse/configURL`	Location of the main configuration servlet path
BaseFRWebApp		Display the base Financial Reporting web application in a report.
BaseWebApp		URL link to the Oracle Hyperion Enterprise Performance Management Workspace web application
BaseWebContext	Workspace	Context for the EPM Workspace web application
BatchBurstingThreads	10	Number of parallel threads that a scheduled job will spawn when a batch is burst
BookTOCPrintTemplate	`BookTOCPrintTemplate=${oracle.instance}/bin/toc-template.rtf`	Location of the RTF template file used when generating the book Table of Contents using the print engine that uses the Oracle Business Intelligence Publisher FO processor.
CacheADMConnectionBasedOnSession	true	Caches the ADM connection (for connecting to Essbase, Planning, and Financial Management) in a connection pool for each user session.

Table A-1 (Cont.) Properties

Name	Default Value	Description
CachePDFForSnapshots	false	Whether snapshots and snapshot books produced by the scheduler generate and cache PDFs in EPM Workspace. This improves PDF retrieval times for snapshots for web viewers. Notes: • This requires additional space in EPM Workspace • Regardless of this setting, PDFs are cached in EPM Workspace after the first request for a snapshot or snapshot book in PDF format.
Categories		Annotation categories
ChangeExtensions		Change extensions of files attached to an email sent as a result of Scheduled Job execution. This is because some companies do not allow extensions for attachments to emails. The extension is changed to the value specified. Each property is separated by comma, and each property is specified as `Prop1=value1`, `prop2=value2`
ChartPlottingIgnores		How charts treat #MISSING, #ERROR and #ZERO values. Must be a comma-delimited list of the possible values which are “error”, “missing” and “zero” in any order. The values are case-insensitive. If left blank, all values are treated as zeroes.
ClassicPrintServerPrinterMask	HRPrinter#	Printer name mask (note that # is dynamically replaced by the print server). The install creates printers HRPrinter1-5 by default. To create printers with a different name, edit `HRCreatePrinters.ini` and run `HRCreatePrinters.exe` in `financialreporting\bin`.
ClassicPrintServerPrinterPool	5	Number of printers available for PDF output. By default, the install creates five printers. To create additional printers, edit `HRCreatePrinters.ini` and run `HRCreatePrinters.exe` in `financialreporting\bin`.
CleanUpThreadDelay	300000	Frequency (in milliseconds) at which the `MinimumConnectionInactiveTime` cleanup thread runs. The default is to check for inactive connections every 300000 milliseconds (5 minutes).
ClientSystemProperties		The syntax should be: `FolderLabel1=FolderPath1,FolderLabel2=FolderPath2`, and so on. Each property is separated by comma, and each property is specified as `Prop1=value1`, `prop2=value2`
com.hyperion.pbm.general.ColorTheme	null	Color theme across the product

Table A-1 (Cont.) Properties

Name	Default Value	Description
com.hyperion.reporting.HRPrefs.Units	inches	Value for ruler (inches or centimeters)
com.hyperion.reporting.HPrefs.colorcontrast	false	High-contrast color mode for accessibility. Supported only on the same platforms on which screen readers are supported.
com.hyperion.reporting.HPrefs.country	US	ISO country code for supported country
com.hyperion.reporting.HRPrefs.dateformat	null	Date format across the product
com.hyperion.reporting.HRPrefs.decimalsymbol	,	Value for a decimal symbol. Value can be comma (,). or underscore (_).
com.hyperion.reporting.HRPrefs.digitgroup	,	Value for digit grouping. Value can be comma (,). or underscore (_).
com.hyperion.reporting.HRPrefs.footnote_param	Title & Detail & Category & Author & Date & Description & Attachments & Replies:All	In Annotations, default print options such as title, category, author, descriptions and attachment.
com.hyperion.reporting.HRPrefs.filter_by_security	false	Filters member selection based on Planning security
com.hyperion.reporting.HRPrefs.glcolor	#000000	Grid line color Enter the value in the format of #RRGGBB where RR is hex value for red, GG is hex value for green, and BB is blue as specified by HTML.
com.hyperion.reporting.HRPrefs.glsnap	true	Whether to enable grid line snapping
com.hyperion.reporting.HRPrefs.glspacing	null	Background spacing between guidelines in Oracle Hyperion Financial Reporting Studio
com.hyperion.reporting.HRPrefs.glstyle	dot	Grid line style. Value can be either line or dot.
com.hyperion.reporting.HRPrefs.HelpUserTrainingUri		Read Only. Administrative setting in EPM Workspace to enable UPK (User Productivity Kit).
com.hyperion.reporting.HRPrefs.language	EN	User language. Can be any ISO language code for supported languages.
com.hyperion.reporting.HRPrefs.locationuserpov	above	Location of the User POV bar. Value can be either “above ” or “viewpane.”
com.hyperion.reporting.HRPrefs.merge_equal_prompts	true	Default behavior for users who have not explicitly set the "Merge Equivalent Prompts" setting in Web User preferences. “True” means that equivalent prompts are merged, “ false” means equivalent prompts are not merged.
com.hyperion.reporting.HRPrefs.previewuserpov	false	Whether to show the Preview User POV dialog box
com.hyperion.reporting.HRPrefs.viewtype	HTML	View type (“html” or “pdf”)

Table A-1 (Cont.) Properties

Name	Default Value	Description
DbConnRetryInterval		In Annotations, if you have a database rack and failover happens, how long, in milliseconds, do you want to wait for a successful attempt to the database.
DbMaxConnectAttempts		In Annotations, if you have a database rack and failover happens, how many retries to connect should be made.
DiscManMappingToolWSDL		Read only. Identifies the WSDL path for Disclosure Management
DiscManSessionWSDL		Read only. Identifies the WSDL path for Disclosure Management
DisplayDatasourceInFlatList	false	Displays all data sources used in a report or book in a flat list in the Preview User POV dialog box
DisplayFilterBySecurity	true	Changes the `FilterBySecurity` settings in the web. When set to *false*, users cannot change the `FilterBySecurity` options, and cannot see members to which they lack access. When set to *true,*, users can change the `FilterBySecurity` settings on the web and can see members to which they lack access.
EnableSMTPServerAuthentication	false	Uses the SMTP server to authenticate sending emails from the Scheduler.
EntityCurrency	USD=$,Euro=€	Financial Management entity currency. You can specify a value to be used instead of an Entity Currency code when shown by the `HFMCurrency` text function in a report. For example: if the `HFMCurrency` function returns “USD”, you can specify that it show the symbol “$”. Notes: • Non-ASCII characters must be specified as unicode encoded strings (\u20ac). • Each property is separated by comma, and each property is specified as `prop1=value1`, `prop2=value2`
EssbaseJAPIServer	Localhost	APS Server machine name when using 3 Tier APS mode to access Essbase.
EssMetaJNDIName	Fressclient/metaservice	JNDI context for the ESS metaservice.
EssbaseUseMDX	true	Ensures that the query language to access Analytic Services (Essbase Analytic and/or Enterprise Analytic) is MDX.
EssRuntimeJNDIName	Fressclient/runtimeservice	JNDI context name for the ESS runtime service.
ExportExcelUseRawNumbers	false	Exports to Microsoft Excel without scaling

Table A-1 (Cont.) Properties

Name	Default Value	Description

ExportFolders		Folder locations when exporting and deploying a book as HTML.
		The syntax should be:
		`FolderLabel1=FolderPath1,FolderLabel2=FolderPath2`
		For example:
		`export1=e:\\exportfolder1,export2=e:\\exportfolder2`

FollowedUrlPrefixList		Semicolon-delimited list of URLs from where HTML content is fetched and included in the Budget Book if it refers to it.
GsmServers		Foundation server for annotations
HRWebHtmlLocation		Location where the Financial Reporting web application stores temporary interactive web files. The default location for Oracle Enterprise Performance Management System is `${EPM_ORACLE_INSTANCE}/products/financialreporting/temp/","java.lang.String"`
HRWebKeepAliveInterval	1	Frequency, in minutes, at which the web application server sends replies back to the browser client. This is useful if HTTP traffic passes through a proxy server that imposes timeouts.
HRWebStaticHTMLLocation		Location where the Financial Reporting web application temporarily stores static HTML files. The default location for EPM System is `${EPM_ORACLE_INSTANCE}/products/financialreporting/temp/","java.lang.String`
HTTPProxyHost		Proxy server host name for HTTP connections required by Financial Reporting books
HTTPProxyPort		Proxy server port number for HTTP connections required by Financial Reporting books
HasEntityCurrencyMappings	false	Financial Management entity currency. Set to true to define entity currency mappings.
HssLocation		Read Only. Oracle Enterprise Performance Management System only: Location of the Application Management Server
HtmlFormat	0	HTML format the scheduler generates: • 0—generic HTML with images in a subdirectory . • 1—mhtml format with embedded images. (works only with Internet Explorer; file extension is .mht). • 2—Mozilla compatible single file with imbedded images. (works only with Netscape, Mozilla, and Firefox)
InstalledDir	`${home.reports.lib}`	Where the Financial Reporting scheduler server persists its state in `scheduler.xml`

Table A-1 (Cont.) Properties

Name	Default Value	Description
MaxEmailAttachmentSize	0	Maximum attachment size for emails. Values or 0 or less means no limit for attachments. Specify the value in kilobytes. The following example sets maximum attachment size to 128 KB: `AttachmentSize = 128`
MaxExpandAllCount		In Member Selection, the maximum items to display when clicking "Expand All"
MaxImportFileSize	0	Maximum file size for files imported to Financial Reporting. By default, there is no limit on import file size. For example, if `MaxImportFileSize` is set to 1000, the import file size is limited to 1 MB. This means, importing any file, including .zip files, larger than 1 MB fails. This restriction also applies to files within a .zip file. If the .zip file size is less than 1 MB, but the actual size of a compressed file in the .zip file is more than 1 MB, the import fails.
MaxPortUsage	0	Upper threshold for number of ports used by the windows system after which report queries will start queuing up until some get released. A value of 0 means that no limit is imposed.
MaxSearchResult	50	Maximum number of members that will be returned as a result of a member selection search query.
MaximumCalculationIterations	5	Report Server Calculation Setting. Specifies the maximum number of calculation iterations for all grids and cells. During the calculation process of a grid, it may be necessary to evaluate a cell multiple times due to reference precedence. This mostly occurs in grids with references to other grids. If there are no circular references and calculation cells are retuning Error, increasing the value may resolve the problem. **Note:** A high number may degrade grid execution performance.
MemberSelectionDoInitialSearch	false	If set to *true*, the member selector searches for the member that was previously selected and expands the tree to where it is located.
MemberSelectionRowsPerPage	20	Number of rows returned per page as a result of the member selection search query. Only standard values of 5, 10, 20 ,50, 100, 250, and 500 are recommended to be used for this property under MBeans.

Table A-1 (Cont.) Properties

Name	Default Value	Description
MinimumConnectionInactiveTime	300000	Connection Manager Setting. The Connection Manager is a subcomponent of the Report Server, Web Application and Oracle Hyperion Financial Reporting Web Studio. Minimum time (in milliseconds) before an inactive data source connection is closed. The default is to close connections that have remained inactive for 300000 milliseconds (5 minutes).
MissingValuesAreZeroInFormulasInHFM	true	Report Server calculation setting. For Oracle Fusion Forecast Management data sources, whether to treat missing values as zero in formula calculations. • *False* means that missing values are not the same as zero values in formula calculations, • *True* means that missing values are treated as a value of zero in formula calculations **Note:** This property is only effective for Financial Management data sources.
NumberDecimalPlacesForZero	2	How many decimal places a number must have before it is considered a zero (0)
NumberDecimalPlacesForZeroInSuppression	5	How many digits to the right of the decimal place are evaluated when determining if a numeric value is zero in conditional suppression and conditional formatting. When you do conditional suppression/format against a 'Value' of '0', the comparison is to compare the value to absolute zero (0). For example, using the default property of 5, a value of 0.00001 is considered zero.
OBIEEServer		Location used when adding Oracle Business Intelligence Enterprise Edition server for book integration.
PassCSSTokenToHssEssDriver		
PDFRootDir	`${EPM_ORACLE_INSTANCE}/products/financialreporting/temp/PDFOutput/`	Location where the Financial Reporting Print Server temporarily stores PDF files
PUASeparator		Separates Planning Unit Annotations. If no `PUASeparator` is specified, the default is the Em-Dash (—).

Table A-1 (Cont.) Properties

Name	Default Value	Description
PassCSSTokenToHssEssDriver	true	Whether an underlying data source should be passed CSS tokens. Do not change this setting unless there are specific reasons which cause issues with the current settings. When there are no property file entries, the token is passed to the data source for user validation.
PrintServerResultCacheTime	6000000	Time (in milliseconds) that completed reports, snapshots, books, and snapshot books remain on the print server before they are removed
PrintServerResultsCleanUpThreadDelay	36000000	Frequency (in milliseconds) at which the `PrintServerResultCacheTime` cleanup thread runs. Setting this too low could cause running requests to be terminated and removed.
PrintServers		Comma separated list of print servers available to the report server in the 'server:port' format. For example: `printserver1:10999,printserver2:10999`.
PrintingMaxThreads	10	Maximum number of threads created for printing/generating PDF files at one time. The default is based on the number of CPUs in the host machine. Five threads are allowed for each CPU. For example, the default for a system with two CPUs is ten threads. Specifying 0 allows an unlimited number of threads to be created
RemoteAdmServer	null	Identifies a remote server from which the data source is accessed.
RMIClientSocketFactory		Overrides the Client Side Socket Factory implementation used for RMI. By default a custom client socket factory is used for RMI.
RMIPortRangeLower		Starting port number that Financial Reporting uses for an RMI communication. You should set this when using firewalls.
RMIPortRangeUpper		Upper Port number that Financial Reporting uses for an RMI communication. When configured with firewalls, you can specify `RMIPortRangeLower` and `RMIPortRangeUpper` values to limit the number of ports used by RMI.
RMIServerSocketFactory	Default factory implementation as shipped with JDK	Overrides the Server Side Socket Factory implementation used for RMI.
RegisteredRelatedContentURLs	null	Default Related Content provider The format of the value is: `Product/server name/url` where `Product` is the product name, `server name` is the server location, and `url` is the provider URL.

Table A-1 (Cont.) Properties

Name	Default Value	Description
RelatedContentAliases	empty string	Aliases for the related content server and ports used in the product are useful for migration purposes.
RelatedContentURLs	empty string	URLs to specify the related content.
RelativeRelatedContentServers	empty string	Specifies the Related Content servers in a relative manner. This is useful when doing SSL offloading.
ReportServerMaxThreads	5	Maximum number of threads created to runreports. The default is based on the number of CPUs in the host machine - 5 threads per CPU. • 1 CPU = 5 threads • 2 CPUs = 10 threads • 3 CPUs = 15 threads • 4 or more CPUs = 20 threads • 0 = an unlimited number of threads
ReportServerReportCacheTime	72000000 milliseconds (20 hours)	Time (in milliseconds) that completed reports, snapshots, books, and snapshot books remain on the Report Server before they are removed. Also, the period of time before which uncollected, or *orphaned*, results are deleted. A result may become orphaned if you request a report and then close the web browser before the report finishes running.
ReportServerReportCleanUpThreadDelay	36000000 milliseconds (10 hours)	Frequency (in milliseconds) at which the `ReportServerReportCacheTime` cleanup thread runs. Setting this too low could cause running requests to be terminated and removed.
ReportServerWaitCount		In Scheduler, the number of attempts to connect to the report server
ReportServerWaitDelay		Number of seconds to wait before Scheduler tries to reconnect to report server
RowsPerPage		How may rows per page to display (Annotations Manager preference)
SchedulerType	ESS or embedded	Whether to use the embedded scheduler or ESS
SMTPMailServer		Read Only. The SMTP mail server used when sending emails from Scheduler.
SMTPPort		SMTP server port used when sending emails from Scheduler
SMTPServerPassword		Password to access the SMTP server if it is password protected
SMPTServerUserID		User ID to access the SMTP server if it is protected
SSASImpersonate	false	Allows impersonation of a Windows user to access an SSAS data source. If true, you can connect to the SSAS data source as the currently logged in Windows user If false, the passed credentials are used. **Note:** Financial Reporting does not use SSAS data source.

Table A-1 (Cont.) Properties

Name	Default Value	Description
ScheduledBatchCacheTime	0	Configuration setting for the Financial Reporting scheduler server. Specify the time in milliseconds to retain completed batch results. For example, to delete batch results older than 5 days, specify 432000000 milliseconds. The `ScheduledBatchCleanUpThreadDelay` property must be set to a value greater than 0 to enable this cleanup option. Pending batches are not removed. The default value of 0 means that batch results will not be removed.
ScheduledBatchCleanUpThreadDelay	0	How often the scheduler checks for batch results to remove (in milliseconds). For example, specify 86400000 milliseconds to check every 24 hours. The default value of 0 means that the scheduler will not remove batch results.
SchedulerServer		Configured scheduler server name
SchedulerTemplateLocation	`${EPM_ORACLE_INSTANCE}/products/financialreporting/data/SchedulerTemplate`	Location where the Financial Reporting scheduler server gets template files
SchedulerOutputLocation	`SchedulerOutputLocation, PropType.NORMAL,"${EPM_ORACLE_INSTANCE}/FinancialReporting/data/SchedulerOutput/","java.lang.String"`	Location where the context of resulting files for batch execution is stored
SortUsesJavaCollator	true	Whether to use the default Java collator for sorting
StellentServer		Oracle Universal Content Management server name. This is useful if the content for Oracle Universal Content Management is added to a Financial Reporting book as external content.
StudioInstallerLocation		Read Only. The location for the Studio Installer. When `HRStudioRetrieve.jsp` is called, this is the location from which it serves up the Studio MSI (Windows installer).
SystemMode		Read Only. Show Fusion applications or no Fusion applications.

Table A-1 (Cont.) Properties

Name	Default Value	Description
TextPrintTemplate	`C:/Oracle/products/financialreporting/install/scripts/../../bin/FR_TextTemplate.doc`	Full path to a Microsoft Word document used as a template for text file printing. Used by cell documents in a report and external content in a book.
UrlLaunchMode	post,yahoo.com|google.com	A regular expression used to determine exceptions The value contains two components. The first component is the type used for launching URLs. The second component is a regular expression to identify exceptions for how to launch the URL. Also, the type of HTTP request made for related content links and exceptions. The first value is the default and should be *post* or *get.* The second value is any exception that should not use that request type. **Note**: The default is *post* except when Google or Yahoo.

UseEssbaseEDS	true	Whether to use the Oracle Hyperion Provider Services driver instead of the native ADM driver.
		If using APS remote mode, uncomment the EssbaseEDSSErver property and specify your APS server name as its value:
		`UseEssbaseEDS=false`
		`EssbaseEDSServer=`
		`EssbaseEDSDriver=HssEdsDriver`

WebCatLocation	N/A	Read Only. The location of the Oracle BI EE repository WSDL file.
Word2007ExportIgnorePageBreak	true	Whether to ignore page breaks when exporting to Microsoft Word. • If *true*, Financial Reporting ignores manual page breaks and BI Publisher generates page break automatically. • If *false*, Financial Reporting paginates and BI Publisher generates a .docx file, which has page break information.
ZipEmbedded	true	Zips up the files when "Export to HTML" is selected as an output type for a scheduled job