Oracle® Fusion Cloud EPM

Working with Oracle Smart View for Office

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1

Creating and Running an EPM Center of Excellence

A best practice for EPM is to create a CoE (Center of Excellence).

An **EPM CoE** is a unified effort to ensure adoption and best practices. It drives transformation in business processes related to performance management and the use of technology-enabled solutions.

Cloud adoption can empower your organization to improve business agility and promote innovative solutions. An EPM CoE oversees your cloud initiative, and it can help protect and maintain your investment and promote effective use.

The EPM CoE team:

- Ensures cloud adoption, helping your organization get the most out of your Oracle Fusion Cloud EPM investment
- Serves as a steering committee for best practices
- Leads EPM-related change management initiatives and drives transformation

All customers can benefit from an EPM CoE, including customers who have already implemented EPM.

How Do I Get Started?

Click to get best practices, guidance, and strategies for your own EPM CoE: Introduction to EPM Center of Excellence.

Learn More

- Watch the Cloud Customer Connect webinar: Creating and Running a Center of Excellence (CoE) for Cloud EPM
- Watch the videos: Overview: EPM Center of Excellence and Creating a Center of Excellence.
- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.

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2

Welcome to the Smart View User's Guide

The User's Guide explains Oracle Smart View for Office features and options including concepts, processes, and examples.

It covers Smart View releases 11.1.2.5.600 and later.

Where to find Smart View documentation

The Smart View for Office documentation is available on the Oracle Help Center on the Enterprise Performance Management page under the **Smart View for Office** section.

Select a Smart View release library to access release-specific documentation.

- To read this guide online in a browser, click the guide name link.
- To download a PDF file of this guide, click the PDF icon

  next to the guide name. You can also download it from the online version by clicking

  in the left panel next to the Table of Contents.

How to find information in this guide

To find information in the guide:

- From the online help, in the left panel of the browser window, use the Table of Contents to navigate to topics, or enter a search term in the search text box.
- From the PDF file, navigate to topics from the table of contents, or use your reader's search functionality.
- See the Finding Information section in this guide's appendix for information on best practices, troubleshooting, accessibility, FAQs, and other documentation.

About this guide

This guide contains information applicable to Cloud providers.

Throughout this guide, unless otherwise noted:

- References to Planning apply to Planning in Oracle Fusion Cloud Enterprise Performance Management
- If a feature or functionality is supported by Planning, then it is also supported by Planning Modules.
- References to Oracle Hyperion Reporting and Analysis refer to the functionality accessed from the "Reporting Settings" option in Shared Connections.
- References to Financial Reporting apply to Financial Reporting for Cloud EPM.

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3

Introduction to Smart View for Office

Using Oracle Smart View for Office, you can view, import, manipulate, distribute, and share data from various data sources using Microsoft Excel, Word, Outlook, and PowerPoint.

Related Topics

- Overview of Smart View for Office
  Using Oracle Smart View for Office, you can view, import, manipulate, distribute, and share data from various data sources using Microsoft Excel, Word, Outlook, and PowerPoint.
- Supported Data Source Providers
  Oracle Smart View for Office supports connections to several Cloud EPM and EPM System data sources, along with Oracle Essbase, Oracle Analytics Cloud, and Oracle Business Intelligence Enterprise Edition data sources.
- Supported Smart View Extensions
  Oracle Smart View for Office works with several Cloud EPM and EPM System extensions, along with Oracle Essbase, Oracle Analytics Cloud, and Oracle Business Intelligence Enterprise Edition extensions.
- Smart View for Office Components
  The basic components of Oracle Smart View for Office, from which you connect to your data source and access Smart View functionality, are ribbons and the Smart View Panel.
- Smart View for Office Installation
  This topic contains links to instructions for installing Oracle Smart View for Office.
- Access to Smart View Functionality
- Translation Information
  This topic contains translation information for the Oracle Smart View for Office user interface and documentation.

Overview of Smart View for Office

Using Oracle Smart View for Office, you can view, import, manipulate, distribute, and share data from various data sources using Microsoft Excel, Word, Outlook, and PowerPoint.

Smart View gives you the ability to integrate Enterprise Performance Management and Business Intelligence data directly from the data source into Microsoft Excel, Word, and PowerPoint. Smart View provides these capabilities:

- Full ad hoc and free-form analysis capabilities for:
  - Oracle Fusion Cloud Enterprise Performance Management data sources, including Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, and Tax Reporting
  - Oracle Essbase cloud
- Work with views imported from Oracle Analytics Cloud
- Data access from relational or multidimensional sources
- An alternative, Office-based interface for leveraging on-premises and cloud product data entry forms

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Related Topics:

- Supported Data Source Providers
- Supported Smart View Extensions
- Smart View for Office Components
- Smart View for Office Installation
- Best Practices
- Troubleshooting Issues
- Frequently Asked Questions (FAQs) about Smart View

Supported Data Source Providers

Oracle Smart View for Office supports connections to several Cloud EPM and EPM System data sources, along with Oracle Essbase, Oracle Analytics Cloud, and Oracle Business Intelligence Enterprise Edition data sources.

Related Topics:

- Cloud EPM Data Sources
- Essbase Cloud Data Sources
- Oracle Analytics Cloud Data Sources
- Notes about Supported Data Sources

See also Supported Smart View Extensions.

Cloud EPM Data Sources

Oracle Fusion Cloud Enterprise Performance Management includes:

- Account Reconciliation

  Smart View connected to Account Reconciliation requires the Reconciliation Compliance extension.
- Enterprise Profitability and Cost Management
- Financial Consolidation and Close
- FreeForm
- Narrative Reporting

  Smart View connected to Narrative Reporting requires the Narrative Reporting extension.
- Planning
- Planning Modules
- Profitability and Cost Management
- Reporting Settings
- Sales Planning
- Strategic Modeling

  Smart View connected to Strategic Modeling requires the Strategic Modeling extension.
- Strategic Workforce Planning
- Tax Reporting

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Essbase Cloud Data Sources

- Oracle Essbase on Oracle Cloud Infrastructure via Marketplace includes:
  - Essbase 19c
  - Essbase 21c

  Smart View connected to Essbase cloud works with the Cube Designer extension.
- Oracle Analytics Cloud - Essbase

Oracle Analytics Cloud Data Sources

Smart View supports Oracle Analytics Cloud.

Smart View connected to Oracle Analytics Cloud requires the Oracle BI EE extension.

Notes about Supported Data Sources

In this guide:

- References to Financial Reporting apply to both the on-premises and Cloud EPM versions of Financial Reporting.
- About Essbase:
  - Essbase on Oracle Cloud Infrastructure via Marketplace is referred to as "Essbase cloud."
  - Essbase on Independent Deployments is referred to as "Essbase on-premises."
  - When a guideline or caveat applies to both Essbase cloud and Essbase on-premises, then simply "Essbase" is used.

Supported Smart View Extensions

Oracle Smart View for Office works with several Cloud EPM and EPM System extensions, along with Oracle Essbase, Oracle Analytics Cloud, and Oracle Business Intelligence Enterprise Edition extensions.

Related Topics:

- Cloud EPM Extensions
- Essbase Cloud Extensions
- Oracle Analytics Cloud Extensions
- Notes about Supported Extensions

See also Supported Data Source Providers.
For general information on Smart View extensions, see Extensions in the chapter, Smart View Options.

For information on installing, updating, and removing extensions, see the topics in Smart View Extensions.

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Cloud EPM Extensions

Table 3-1 Extensions Supported by Cloud EPM

Extension Name	Supported Data Sources
Admin Extension (also referred to as Smart View Add-on for Administrator)	• Enterprise Profitability and Cost Management • Financial Consolidation and Close • FreeForm • Planning • Planning Modules • Tax Reporting
EPM Books	• Enterprise Profitability and Cost Management • Financial Consolidation and Close • FreeForm • Narrative Reporting • Planning • Planning Modules • Tax Reporting
Enterprise Journals	Financial Consolidation and Close
Financial Reporting	• Enterprise Profitability and Cost Management • Financial Consolidation and Close • FreeForm • Planning • Tax Reporting
Narrative Reporting	Narrative Reporting
Predictive Planning	Planning Modules
Reconciliation Compliance	Account Reconciliation
Strategic Modeling	Planning Modules
Supplemental Data Manager	• Financial Consolidation and Close • Tax Reporting
Task Manager	• Enterprise Profitability and Cost Management • Financial Consolidation and Close • FreeForm • Planning • Planning Modules • Tax Reporting

Essbase Cloud Extensions

Table 3-2 Extensions Supported by Essbase Cloud

Extension Name	Supported Data Source
Cube Designer	Oracle Essbase Cloud

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Oracle Analytics Cloud Extensions

Table 3-3 Extensions Supported by Oracle Analytics Cloud

Extension Name	Supported Data Source
Oracle BI EE	Oracle Analytics Cloud The Oracle BI EE extension for Oracle Analytics Cloud is included in the \SmartView\extensions folder.

Notes about Supported Extensions

- Most of the extensions listed above are discussed in their respective guides (see the Oracle Help Center for more information). The EPM Books extension, Narrative Reporting extension, Reconciliation Compliance extension, and Oracle BI EE extension are discussed in this guide.
- In this guide, references to Financial Reporting apply to both the on-premises and Oracle Fusion Cloud Enterprise Performance Management versions of Financial Reporting.
- In this guide:
  - Essbase on Oracle Cloud Infrastructure via Marketplace is referred to as "Essbase cloud."
  - Essbase on Independent Deployments is referred to as "Essbase on-premises."
  - When a guideline or caveat applies to both Essbase cloud and Essbase on-premises, then simply "Essbase" is used.

Smart View for Office Components

The basic components of Oracle Smart View for Office, from which you connect to your data source and access Smart View functionality, are ribbons and the Smart View Panel.

The components displayed depend on the Microsoft Office application that you have open.

Related Topics:

Ribbons

Smart View Panel

Right-Click Context Menu

Ribbons

From Office applications, you access Oracle Smart View for Office functionality through ribbon commands.

Smart View ribbon

The **Smart View** ribbon contains commands for connecting to various data source providers, launching the Home panel and Options panel, performing operations such as Refresh or Submit Data, and viewing sheet information and health check parameters. The Smart View ribbon is always present.

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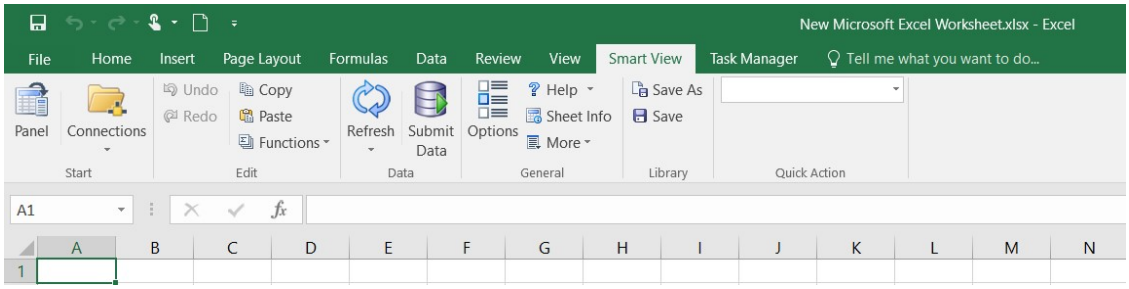
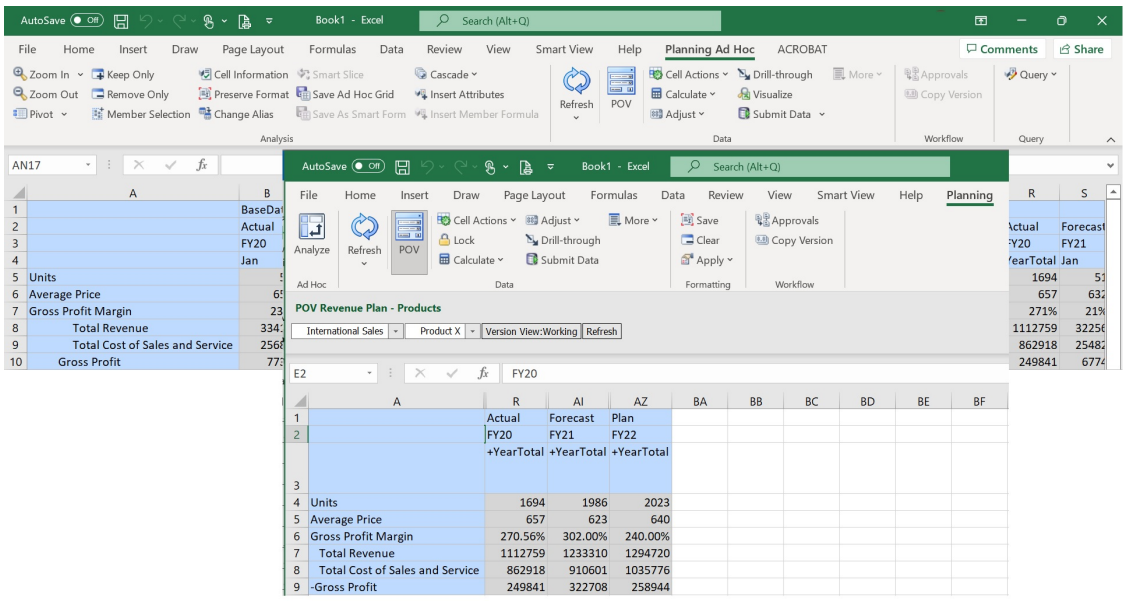


The customizable **Quick Action** menu on the Smart View ribbon helps you access various actions quickly, instead of switching between ribbons often or launching the Smart View Options dialog every time to change a setting. For more information, see Using Quick Actions.

> **Note**
>
> After installing Smart View, if the Smart View ribbon fails to display, try the solutions mentioned in Smart View Ribbon Fails to Display After Non-Admin Installation.

Provider and Provider Ad Hoc Ribbons

When you connect to a data source provider (other than Oracle Hyperion Reporting and Analysis), the corresponding provider ribbon is displayed. Each ribbon displays only the commands supported for that data source provider and mode. For example, in the following illustration for Planning, when you access a Planning form, the Planning ribbon is displayed; when you enter ad hoc analysis (see Ad Hoc Analysis), the Planning Ad Hoc ribbon is displayed.



The provider and provider ad hoc ribbons include the following:

- **Planning**
- **Planning Ad Hoc**
- **EPCM** (Enterprise Profitability and Cost Management)

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- **EPCM Ad Hoc**
- **FCCS** (Financial Consolidation and Close)
- **FCCS Ad Hoc**
- **TRCS** (Tax Reporting)
- **TRCS Ad Hoc**
- **Essbase**
- **Others**—If the Service Administrator has installed and configured your Smart View system with extensions, there may be other ribbons; for example, **Narrative Reporting**, **Task Manager**. For more information, see Supported Smart View Extensions.

Video

Your Goal	Watch This Video
Learn about navigating in Smart View, including working with ribbons.	Navigating Smart View

Smart View Panel

From the Smart View Panel, you can manage data source connections, access data and task lists, and create reports.

The Smart View Panel, opened from the Smart View ribbon, is displayed by default on the right side of the Microsoft Office application. You can move, resize, or close the Smart View Panel from the down arrow in the title bar.

The Smart View Panel contains the following panes:

- **Home**—A panel that displays links to Shared Connections and Private Connections as well as a list of recently used items—ad hoc grids, forms, and tasks lists—that you can click to establish a connection.
- **Shared Connections**—A drop-down menu of available connections from Application Management and a tree view of the contents of the currently selected connection.
- **Private Connections**—A drop-down menu of available connections saved on the local computer and a tree view of the contents of the currently selected connection. You can also enter a URL to connect directly to a data source here.
- **Search Box**—A way to search and access forms, reports, documents , and other artifacts faster. For more information, see Searching for Forms and Other Artifacts.
- **Task Lists**—A tree list of tasks from which you can manage your tasks. This pane opens only when you select a task list from Shared Connections or Private Connections.
- **Action Panel**—A list of operations available based on the selection in the shared connection, private connection, or task list tree.
- **Document Contents**—A task pane in the Smart View Panel that provides a view of the connections and content existing in the current Office document. For more information, see Using the Document Contents Pane.
- **Other**—If the administrator has installed and configured your Oracle Smart View for Office system with extensions, there may be other panels; for example, the Narrative Reporting Home panel.

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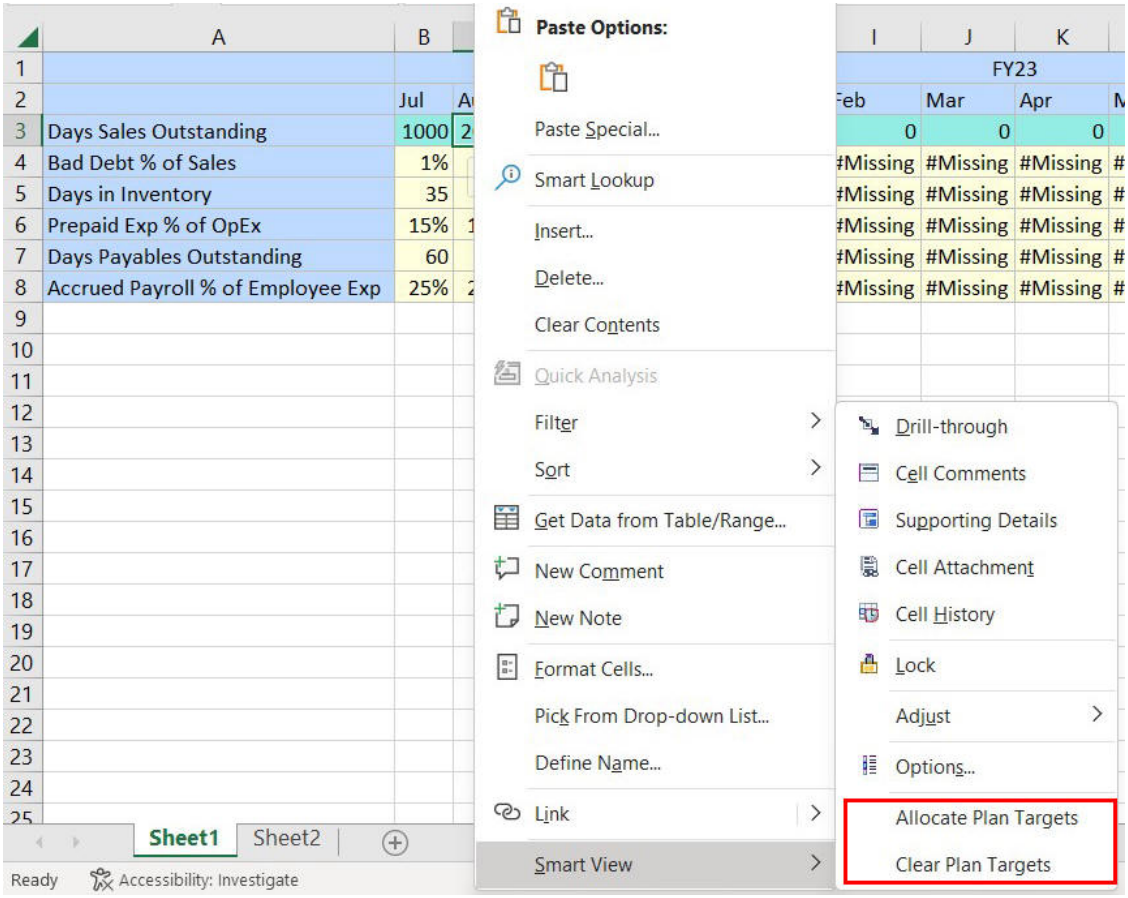
Right-Click Context Menu

The Right-Click Context menu, also known as the Action menu, is a convenient way to access frequently-used menu items within the context of the selected cell.

The right-click context menu is available in forms and ad hoc grids. To access the context menu, select a member or data cell in the sheet, right-click on it, and click the **Smart View** menu. The context menu commands are listed towards the end below the default menu.

In the below example, the highlighted commands **Allocate Plan Targets** and **Clear Plan Targets** are the context menu items configured for the form. The rest of the commands such as Cell Comments, Adjust, Options, and so on are the Smart View default menus.



The commands available in the context menu can vary depending on the selected member or data cell. They can also vary depending on forms, ad hoc grids, and cubes. These commands are determined by your Service Administrators and form designers in the **Action Menus** in the web application, and can consist of business rules or any action menu items that are defined for the form or ad hoc grid.

For ad hoc grids, the right-click context menu is always defined in the context of a cube. The menu can be associated with either a specific cube or multiple cubes. To enable a context menu for ad hoc grid, the Service Administrator navigates to the **Action Menus** page and selects the **Enable for Ad Hoc** check box for the specific Action menu and then selects the cubes for which the right-click context menu needs to be enabled.

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For more information on configuring the right-click context menu, see Administering Action Menus in *Administering Planning*.

Smart View for Office Installation

This topic contains links to instructions for installing Oracle Smart View for Office.

Locating Installation Instructions

- **Oracle Fusion Cloud Enterprise Performance Management:**
  - Users: Downloading and Installing Clients
  - Administrators: Downloading and Installing Clients
- **Oracle Essbase Cloud:**

  See Download and Run the Smart View Installer

Also, take note of the information in Windows, Office, and Smart View Locale Settings when installing Smart View.

For more information on troubleshooting installation issues, see Fixing Smart View Issues.

Installing the Browser Add-on

All providers: If you plan to use drill-through reports or launch Smart View from the web application, you require a browser add-on. For instructions on installing the add-on for Firefox, Chrome, and Edge, see "Installing Browser Add-ons" topic under "Installing Smart View" chapter in *Oracle Smart View for Office Installation and Configuration Guide*.

Video

Your Goal	Watch This Video
Learn about downloading and installing Smart View, and setting up data source connections.	Setting Up Smart View

Windows, Office, and Smart View Locale Settings

On your Oracle Smart View for Office client machine, the following locale settings should match:

- Smart View language option
- Microsoft Office language
- Windows Regional Settings
- Windows operating system

Running Smart View in a language other than the language of the machine's Windows operating system, system locale, or Office language, may result in incorrect data being returned. For example, if the Windows operating system, system locale, and Office language are English, and you run Smart View in Russian, reports or chart data may display incorrectly.

Ensure that on your Smart View client machine, the locale settings noted above match.

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Access to Smart View Functionality

Access to Oracle Smart View for Office functionality depends on the access that Service Administrators set up for users in the business process.

Service Administrators: For more information, see Administering Access Control.

Translation Information

This topic contains translation information for the Oracle Smart View for Office user interface and documentation.

The following items are translated:

Smart View User Interface

Smart View user interface is translated into Arabic, Chinese (Simplified and Traditional), Czech, Danish, Dutch, Finnish, French, French Canadian, German, Greek, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Portuguese (Brazilian), Romanian, Russian, Slovak, Spanish, Swedish, Thai, and Turkish.

To change the language displayed on the Smart View user interface, open any Microsoft Office application (Excel, Word, PowerPoint, or Outlook), and follow these instructions:

1. From an Office application, select the Smart View ribbon, click **Options**, and select the **Advanced** tab.
2. In the **Language** drop-down list, select a new display language.
3. Click **OK** at the prompt, and then click **OK** to close the **Options** dialog.
4. Restart the Office application.

   All Smart View-related user interface elements, such as ribbons, panels, and dialog boxes, will display in the new language.

> **Note**
>
> Any other currently opened Office applications must be restarted in order to display Smart View elements in the new language.

Smart View Online Help

The Smart View online help is translated into Chinese (Simplified and Traditional), Dutch, French, German, Italian, Japanese, Korean, Portuguese (Brazilian), and Spanish.

- When you use Smart View in any of these languages, the help is also displayed in that language.
- When you use Smart View in any other translated language (for example, Arabic or Hebrew), the help is displayed in English.

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Data Source Connections

Describes the management of data source connections in Oracle Smart View for Office.

Related Topics

- Connections
  You connect to data sources through shared or private connections in Oracle Smart View for Office.
- Shared Connections and Private Connections
  From Oracle Smart View for Office in Excel, Word, and PowerPoint, you can connect to various supported data sources, such as Oracle Fusion Cloud Enterprise Performance Management sources, using a shared or private connection.
- Connecting to Data Sources
  You can connect to various supported data sources, including Oracle Fusion Cloud Enterprise Performance Management sources from Oracle Smart View for Office in Excel, Word, and PowerPoint.
- Disconnecting from Data Sources
  You can disconnect from the current connection or from all connections.
- Creating Shared Connections
  You create a shared connection using a connection URL provided to you by your Oracle Smart View for Office administrator, or a vanity URL.
- Creating Private Connections
  You can create private connections in these ways: using the private connection wizard, using the quick connection method, or saving a shared connection as a private connection.
- Modifying Connections
  You can modify connections in two different ways: modify a private connection or modify the connection information for individual entities within an Office document.
- Managing Connection URL Mappings
  Connection URL Mapping allows you to migrate from one environment to another environment.
- Deleting Connections
  Delete connections in the Delete Connections URL dialog box.

Connections

You connect to data sources through shared or private connections in Oracle Smart View for Office.

You connect to data sources, manage your connections, and open grids, forms, and task lists all from the Smart View Panel. Depending on how the administrator configured Smart View, you may or may not be required to enter your user name and password as you change data providers and Office applications.

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Video

Your Goal	Watch This Video
Learn about Smart View connections.	Overview: Leveraging EPM Cloud and On-Premise Data Using Smart View Connections
Learn about navigating in Smart View, including connecting to a data source.	Navigating Smart View
Watch this video to learn how to set up multiple Cloud EPM business processes on a single connection.	Overview: Configure Navigation Flows to Integrate Business Processes

Related Topics:

Shared Connections and Private Connections

Connecting to Data Sources

Disconnecting from Data Sources

Creating Shared Connections

Creating Private Connections

Modifying Connections

Deleting Connections

Shared Connections and Private Connections

From Oracle Smart View for Office in Excel, Word, and PowerPoint, you can connect to various supported data sources, such as Oracle Fusion Cloud Enterprise Performance Management sources, using a shared or private connection.

Generally, you can connect to one provider data source per sheet. However, for the following providers, you can connect to multiple instances of the same data source type per sheet, slide, or document: Planning, Planning Modules, Enterprise Profitability and Cost Management, FreeForm, Financial Consolidation and Close, Tax Reporting, Oracle Essbase cloud, and Oracle Analytics Cloud.

As a Smart View user, you may have access to shared connections, private connections, or both. Starting in release 20.200, you can access your connections using vanity URLs, also referred to as custom URLs.

This topic covers the following sections:

- Shared Connections
- Private Connections
- Examples of Shared and Private Connections
- Guidelines for Shared and Private Connections

Shared Connections

You can create shared to connections to Cloud EPM sources sources.

For Cloud EPM sources, there are two ways to use a shared connection:

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- One cloud provider per shared connection.

  For example, shared Connection "A" connects you to your Planning business process instance; shared Connection "B" connects you to your Financial Consolidation and Close business process instance.

  Figure 1 illustrates this type of connection.

- Multiple Cloud EPM providers per shared connection. In this case, all supported cloud providers must reside on the same domain.

  For example, your organization is hosting Planning, Financial Consolidation and Close, and Tax Reporting on the same domain. Shared Connection "C" connects you to all three business process instances.

  In Smart View, this type of connection applies only to these Cloud EPM business processes:

  - Planning
  - Planning Modules
  - FreeForm
  - Financial Consolidation and Close
  - Tax Reporting
  - Enterprise Profitability and Cost Management
  - Narrative Reporting
  - Account Reconciliation

  Figure 2 illustrates this type of connection.

  Cloud EPM Administrators: For information on setting up multiple providers on a single shared connection, see the topic, "Connecting Environments in Cloud EPM" in the *Administering* guide for your business process. For example, in *Administering Planning*, see Connecting Environments in Cloud EPM.

Shared connections are either:

- Accessed from a host location and available to multiple users through the Smart View Panel.
- Stored on each Smart View client machine *or* on a web server in an XML file created by an administrator. The connections in the XML file are then available to the user through shared connections in the Smart View Panel.

  See Accessing Shared Connections from an XML File in the *Oracle Smart View for Office Installation and Configuration Guide* for information on preparing and distributing this XML file.

You cannot edit or rename shared connections, but you can save them as private connections, which you can edit and rename as described in Saving Connections as Private Connections.

Private Connections

Private connections are those that you create by saving a shared connection to your local computer, by using a wizard, or by entering a URL to a provider data source. When you create a private connection, it becomes the active connection.

Figure 3 illustrates this type of connecting, showing connections created using a wizard and connections created using the Quick Connection method.

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> **Note**
>
> When working with Oracle Analytics Cloud, Oracle Essbase, and Narrative Reporting, you must use a private connection, or add the private connection information to a shared connection XML file, as described in Accessing Shared Connections from an XML File in the *Oracle Smart View for Office Installation and Configuration Guide*.

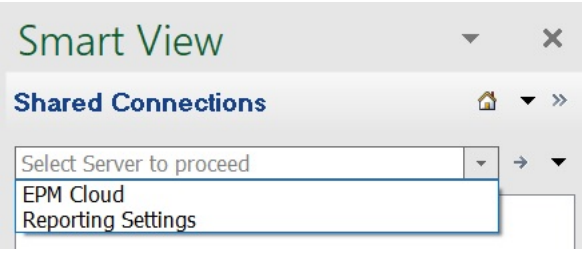
Examples of Shared and Private Connections

Following are examples of the various types of connections and how they would appear in the Smart View Panel. This will give you an idea of what to expect when you're connecting to data sources in Smart View.

Shared connection to a single Cloud EPM data source.

In the example drop-down menu in Figure 1, the user has access to a connection to a Planning data source (this is the **Cloud EPM** option) and to Financial Reporting (the **Reporting Settings** option).

Figure 4-1 Shared Connection to a Single Cloud EPM Data Source

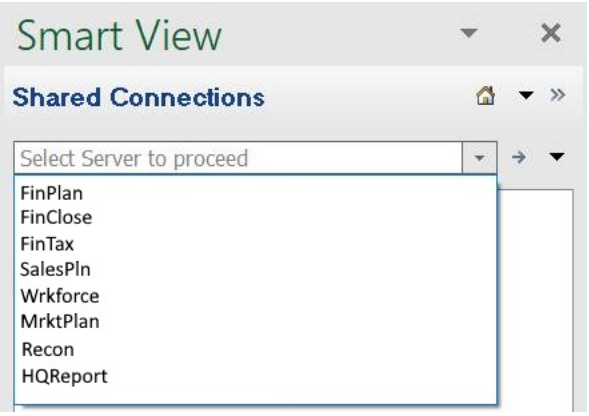


Shared connection to multiple Cloud EPM data sources on the same domain.

In the example drop-down menu in Figure 2, the user has access to multiple supported Cloud EPM data sources; for example, FinPlan connects to a Planning data source, FinClose connects to a Financial Consolidation and Close data source, Wrkforce connects to a Workforce data source, Recon connects to an Account Reconciliation data source, and so on.

Your service administrator specifies the data source names you will see in the drop-down menu.

Figure 4-2 Shared Connection to Multiple Cloud EPM Data Sources



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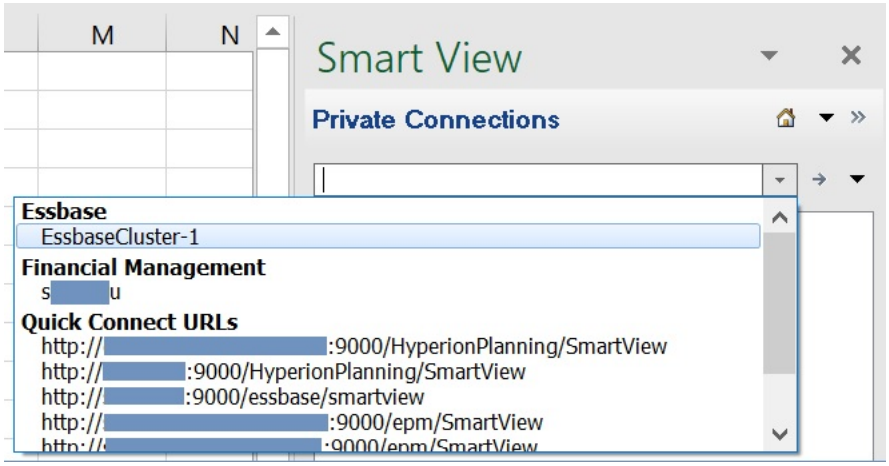
Cloud EPM Administrators: For information on setting up multiple providers on a single shared connection, see the topic, "Connecting Environments in Cloud EPM" in the *Administering* guide for your business process. For example, in *Administering Planning*, see Connecting Environments in Cloud EPM.

Private connections

The example drop-down menu in Figure 3 shows two connections, for Essbase and Oracle Hyperion Financial Management, that were created using the Private Connection wizard. The remaining connections displayed were created using the Quick Connection method and include, among others, connections to Planning and Essbase.

Figure 4-3 Various Private Connections



Guidelines for Shared and Private Connections

- Starting in Release 20.200, you can use custom URLs, or *vanity* URLs to access data source providers from Smart View. To configure your custom URL, you use a third-party link shortener, such as T.ly, Bitly, Rebrandly, TinyUrl, or is.gd, or an open source solution, such as YOURLS. Then, depending on the configuration, use the custom URL as your shared connection, private connection, or quick connection.

  > **Note**
  >
  > – When using a vanity URL, there is the possibility of transmitting sensitive data to your third-party link shortening vendor. For example, when performing a refresh or a submit, you may be transmitting password information during the transaction.
  >
  > – The extension installation and update command, **Check for Updates, New installs, and Uninstalls**, in the **Options** dialog, **Extensions** tab is not supported when logged in using a vanity URL.

  Administrators or Smart View users can create vanity URLs. For detailed information on creating vanity URLs, see the documentation from the third-party link shortener of your choice.

- For some data sources, you can connect to only one data source per worksheet. Exceptions and other connection guidelines are noted below.

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- Planning, Planning Modules, Enterprise Profitability and Cost Management, FreeForm, Financial Consolidation and Close, and Tax Reporting: You can connect to multiple databases on a single worksheet, as described in Changing Connections in Cloud EPM Multiple-Grid Worksheets.
- Oracle Essbase cloud:
  - When connecting to Essbase cloud, you must use a private connection.
  - You can connect to multiple Essbase databases on a single worksheet, as described in Changing Connections in Multiple-Grid Worksheets.
  - If external authentication is disabled, for security reasons, you must provide your user name and password each time you connect to a different application on the same server.
  - Once connected to an Essbase database, users can view database notes associated with the database. To display database notes, from the Smart View Panel, right-click the name of the Essbase database, and then select **Database Note**. You cannot edit these database notes from Smart View. Database notes can be implemented in VBA by using the VBA function, HypGetDatabaseNote (see HypGetDatabaseNote in *Developing Applications for Oracle Smart View for Office*).
- Oracle Analytics Cloud
  - When connecting to Oracle Analytics Cloud, you must use a private connection.
  - You can connect to multiple catalogs on a single sheet, as described in Connecting to Multiple Oracle Analytics Cloud Data Sources.
- When connecting to Narrative Reporting, you must use a private connection.
- If you face any issues while logging in to your data source from Smart View, see Diagnosing Login Issues.

Related Topics:

Connecting to Data Sources

Disconnecting from Data Sources

Creating Shared Connections

Creating Private Connections

Modifying Connections

Deleting Connections

Connecting to Data Sources

You can connect to various supported data sources, including Oracle Fusion Cloud Enterprise Performance Management sources from Oracle Smart View for Office in Excel, Word, and PowerPoint.

Related Topics

- Connecting Using a Shared Connection
  Use the procedure in this topic to connect to supported data sources using a shared connection.
- Connecting Using a Private Connection
  Use the procedure in this topic to connect to supported data sources using a private connection.

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- Setting the Active Connection for a Sheet
  You can connect to different data source providers on the different sheets within a workbook by setting the active connection for each sheet.

Connecting Using a Shared Connection

Use the procedure in this topic to connect to supported data sources using a shared connection.

To connect to a data source using a shared connection:

1. From the Smart View ribbon, click **Panel**.

   > **Note**
   >
   > To open a recently used item, click an item under **Recently Used**, and then skip to step 3. You can click to pin items to this list.

2. From the Smart View Panel or from the drop-down menu displayed when you click the down arrow next to , select **Shared Connections**.

   > **Note**
   >
   > Users of Smart View with Office 365 on a Windows machine, who are also provisioned as Smart View (Mac and Browser) users: If more than one Smart View ribbon tab appears in Office, and an error message is displayed in the panel, ensure that you launch the panel from the correct ribbon tab, as described in Ribbon Tab for Smart View (Mac and Browser) Displays in Smart View on Windows in the *Oracle Smart View for Office Installation and Configuration Guide*.

3. In the **Login** dialog, enter your user name and password.

   > **Note**
   >
   > - When accessing a cloud data source, the business process domain name appears next to **Welcome** in the **Login** dialog. If you need to change domains, click the **change domain** link, enter the new cloud Identity Domain name, and click **Go**. Then proceed with entering your user name and password.
   > - Depending on how your administrator configured Oracle Smart View for Office, you may or may not be required to enter your user name and password as you change data providers and Office applications.

4. In the Shared Connections panel, in the field labeled **Select Server to proceed**, select a data source type from the drop-down menu.

   Once you select a data source type, the connections available for the selected data source are displayed in a tree list in the Smart View Panel.

5. In the Smart View Panel, navigate the tree list, and then double-click the item—form, ad hoc grid, Smart Slice, task list, or catalog—that you want to open.

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You can also open items by right-clicking them and making a selection; or selecting an option from the Action Panel at the bottom of the Smart View Panel.

6. **Optional:** After the item is opened on the grid, to easily locate it in the tree view, click the arrow next to and select **Locate Worksheet Connection**.

> **Note**
>
> Depending on how the administrator configured Smart View, you may or may not be required to enter your user name and password as you change data providers and Office applications.

Connecting Using a Private Connection

Use the procedure in this topic to connect to supported data sources using a private connection.

To connect to a data source using a private connection:

1. From the Smart View ribbon, click **Panel**.

> **Note**
>
> To open a recently used item, click an item under **Recently Used**, and then skip to step 4. You can click to pin items to this list.

2. From the Smart View Panel or from the drop-down menu displayed when you click the down arrow next to , select **Private Connections**.

> **Note**
>
> Users of Smart View with Office 365 on a Windows machine, who are also provisioned as Smart View (Mac and Browser) users: If more than one Smart View ribbon tab appears in Office, and an error message is displayed in the panel, ensure that you launch the panel from the correct ribbon tab, as described in Ribbon Tab for Smart View (Mac and Browser) Displays in Smart View on Windows in the *Oracle Smart View for Office Installation and Configuration Guide*.

3. In the Private Connections panel, in the field labeled **Select Server or enter Provider url to proceed**, select a connection from the drop-down menu.

   Alternatively, enter a connection URL in the field, and then press Enter. For examples of the URL syntax to use, see Private Connection URL Syntax.

4. In the **Login** dialog, enter your user name and password.

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> **Note**
>
> - When accessing a cloud data source, the business process domain name appears next to **Welcome** in the **Login** dialog. If you need to change domains, click the **change domain** link, enter the new cloud Identity Domain name, and click **Go**. Then proceed with entering your user name and password.
> - Depending on how your administrator configured Oracle Smart View for Office, you may or may not be required to enter your user name and password as you change data providers and Office applications.

5. In the Smart View Panel navigate the tree list, and then double-click the item—form, ad hoc grid, Smart Slice, task list, or catalog—that you want to open.

   You can also open items by right-clicking them and making a selection; or selecting an option from the Action Panel at the bottom of the Smart View Panel.

6. **Optional:** After the item is opened on the grid, to easily locate it in the tree view, click the arrow next to and select **Locate Worksheet Connection**.

Setting the Active Connection for a Sheet

You can connect to different data source providers on the different sheets within a workbook by setting the active connection for each sheet.

To set the active connection for a worksheet:

1. Create a named connection by saving a shared or private connection as a private connection.

   This process is described in Saving Connections as Private Connections. Once these connections are available to you, you can set the active connection for a sheet to one of these private, or *named*, connections, as shown in the following steps.

2. Open a workbook and connect to a named private connection.

   Optionally, you can begin without connecting. You will be asked for your login credentials in the next step.

3. In the Smart View ribbon, select **Connections**, then **Active Connections**, and, if it is not already selected, then select the check box next to the connection name.

   If you did not connect in the previous step, then you will not see a connection name in the **Active Connections** list.

   If you do not see the connection name in the **Active Connections** list, then select **Connections**, then **Named Connections**, and then select the check box next to the connection name. You can then view the active connection for the sheet by selecting **Connections**, and then **Active Connections**.

4. **Optional:** Switch to another sheet and repeat the above steps to set the active connection for that sheet.

Disconnecting from Data Sources

You can disconnect from the current connection or from all connections.

To disconnect only from the *current* connection:

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1. From the Smart View Panel, select the connection that is currently open in the tree list.
2. **Optional:** To find this connection quickly, click the arrow next to and select **Locate Worksheet Connection.**
3. Right-click and select **Disconnect**.

   Disconnecting from the current connection does not invalidate single-sign on (SSO).

To disconnect from *all* connected shared connections and private connections:

1. From the Smart View Panel, click .
2. Select **Disconnect All.**

   This selection invalidates SSO, and you must log in again the next time you connect.

> **Note**
>
> If you are using WebView2 and have issues with Disconnect All not working or Excel failing during a Disconnect All, try adding the registry flag, PreserveThirdPartyCookies, and set it to "0". For more information, see WebView2 and Disconnect Issues in *Oracle Smart View for Office Installation and Configuration Guide*.

Creating Shared Connections

You create a shared connection using a connection URL provided to you by your Oracle Smart View for Office administrator, or a vanity URL.

When you have the connection URL information, you can complete the procedure in this topic.

> **Note**
>
> When specifying the <server> parameter, always include the domain name parameter, <domain>. For example:
>
> http(s)://<server>.<domain>:<port>/workspace/SmartViewProviders

To create a shared connection in Smart View:

1. From the Smart View ribbon ribbon, click **Options**.
2. In the **Options** dialog box, select the **Advanced** tab.
3. In the **Shared Connections URL** text box, enter the connection URL provided to you by your Smart View administrator.

   The URL syntax for a cloud connection to a single cloud business process is:

   http(s)://<serviceURL>/workspace/SmartViewProviders

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The URL syntax for a cloud connection to multiple Oracle Fusion Cloud Enterprise Performance Management business processes on the same domain is:

http(s)://<serviceURL>/HyperionPlanning/SmartView

> **Note**
>
> Cloud EPM Administrators: For information on setting up multiple providers on a single shared connection, see the topic, "Connecting Environments in Cloud EPM" in the *Administering* guide for your business process. For example, in *Administering Planning*, see Connecting Environments in Cloud EPM.

Starting in release 20.200, for vanity URLs (also referred to as custom URLs), using the syntax above, enter the URL you have configured with your third-party link shortening vendor. The syntax you use in your configuration depends on whether you are connecting to an on-premises data source, a single cloud business process, or multiple cloud business processes on the same domain. For example:

http(s)://<yourVanityURL>

4. Click **OK** to close the **Options** dialog box.
5. Connect by following the procedure in Connecting to Data Sources.

Creating Private Connections

You can create private connections in these ways: using the private connection wizard, using the quick connection method, or saving a shared connection as a private connection.

Related Topics

- Using the Private Connection Wizard
- Using the Quick Connection Method
- Saving Connections as Private Connections
- Private Connection URL Syntax

Using the Private Connection Wizard

To create a private connection using the wizard:

1. From the Smart View ribbon, click **Panel**.
2. From the Smart View Panel, click the arrow next to , and then select **Private Connections**.
3. In the Action Panel, click **Create new connection** to display the Add Connection wizard.

   Alternatively, click the arrow next to and select **Create new connection**.
4. In **Add Connection - URL**, enter the URL for the private connection, then click **Next**.

   Follow the syntax guidelines in Private Connection URL Syntax.

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5. In **Add Connection - Application/Cube**, navigate to the application and database to work with, select it, and then click **Next**.
6. In **Add Connection - Name/Description**, enter a friendly name for the connection and an optional description.

> **Note**
>
> Do not use spaces in the name.

7. Click **Finish**.
8. **Optional:** To select a private connection, click the drop-down arrow in the connection text box in the Smart View Panel.

   Private connections are listed by provider type.

Related Topics:

Using the Quick Connection Method

Saving Connections as Private Connections

Private Connection URL Syntax

Using the Quick Connection Method

You can create a private connection using the quick connection method if you know the URL. URLs are generally provided to you by your Oracle Smart View for Office administrator.

To create a private connection using the quick connection method:

1. From the Smart View ribbon, click **Panel**.
2. From the Smart View Panel, click the arrow next to , and then select **Private Connections**.
3. In the text box, enter the URL or the local storage directory for the data source to which you want to connect.

Figure 4-4 Text Box for Entering URL when Creating a Quick Connection

The URL syntax for the various data sources is listed in Private Connection URL Syntax. Contact your system administrator for the URL to use.

4. Click .
5. Expand the tree in the Smart View Panel and navigate to the application and database that you want to work with.

   If you are prompted to log in, enter your login credentials.

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Example 4-1 Deleting the List of Quick Connections

To delete the entire list of quick connections, click the arrow next to , and then select **Clear Quick Connect URL Entries**.

Related Topics:

Using the Private Connection Wizard

Saving Connections as Private Connections

Private Connection URL Syntax

Saving Connections as Private Connections

You can save shared or private connections as private connections and give them user-friendly names.

Although you cannot create shared connections without administrative privileges, you can save them as private connections. You can also save a private connection. In both cases, when saving these connections as private, you can provide a user-friendly name. These connections are referred to as *named* connections.

To create a private connection from a shared or private connection:

1. Connect using a shared or private connection.
2. In the Smart View Panel, in the tree list for a shared or private connection, select an item to save as a private connection.

   You can select either an application name or a database name.
3. From the Action Panel, select **Add to private connections**.

   This option is available only if the selected item is enabled for saving as a private connection.
4. **Optional:** From **Save as Private Connection**, edit the name and description of the connection.

   Oracle Smart View for Office appends connection URL_application name to the name of the item you selected. For example, if you selected a database named ABC in the application XYZ, the default connection name is:

   ABC - <connection_URL>_XYZ

   You can alter this name to make it more user-friendly; for example, you might change it to:

   MyABC
5. Click **OK** in the **Save as Private Connection** dialog.

   The connection name is displayed in the following:

   - The Shared Connections tree list, indicated as private by a small arrow,
   - The Private Connections tree list, indicated as private by a small arrow,
   - The Private Connections tree after selecting the server name, grouped under application type (such as Planning), from the private connection drop-down list
6. To ensure that the current worksheet is connected to the newly created private connection, in the Smart View ribbon, select **Connections**, then **Active Connections**, and then select the check box next to the new connection name.

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Alternatively, once you perform a Smart View action (for example, select **Ad hoc analysis** from the Action Panel), the connection is automatically made.

Related Topics:

Using the Private Connection Wizard

Using the Quick Connection Method

Private Connection URL Syntax

Private Connection URL Syntax

This topic lists the syntax that Oracle Smart View for Office requires for creating private connections to cloud data sources.

> **Note**
>
> On-Premises data sources: When specifying the <server> parameter, always include the domain name parameter, <domain>. For example:
>
> http(s)://<server>.<domain>:<port>/HyperionPlanning/SmartView

- Cloud EPM sources:
  - Planning, Planning Modules

    https://<serviceURL>/HyperionPlanning/SmartView
  - Enterprise Journals extension

    https://<serviceURL>/HyperionPlanning/ej/svp
  - Enterprise Profitability and Cost Management

    https://<serviceURL>/HyperionPlanning/SmartView
  - Financial Consolidation and Close

    https://<serviceURL>/HyperionPlanning/SmartView
  - Financial Reporting (Reporting Settings / Document Repository):

    https://<serviceURL>/hr/modules/com/hyperion/reporting/web/repository/HRRepositoryXML.jsp
  - FreeForm

    https://<serviceURL>/HyperionPlanning/SmartView
  - Narrative Reporting

    https://<serviceURL>/epm/SmartView

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  - Profitability and Cost Management:

    https://<serviceURL>/aps/SmartView

  - Sales Planning:

    https://<serviceURL>/HyperionPlanning/SmartView

  - Supplemental Data Manager extension (used with Financial Consolidation and Close and Tax Reporting)

    https://<serviceURL>/HyperionPlanning/sdm/svp

  - Strategic Modeling extension

    https://<serviceURL>/HyperionPlanning/SmartView

  - Strategic Workforce Planning

    https://<serviceURL>/HyperionPlanning/SmartView

  - Task Manager extension (used with Planning, Planning Modules, Financial Consolidation and Close and Tax Reporting)

    https://<serviceURL>/HyperionPlanning/cm/svp

  - Tax Reporting

    https://<serviceURL>/HyperionPlanning/SmartView

- Oracle Analytics Cloud:
  - Using the Private Connection wizard:

    https://<serviceURL>/analytics/jbips

  - Using the Quick Connection method:

    OBI:https://<serviceURL>/analytics/jbips

- Oracle Essbase cloud:

  https://<serviceURL>/essbase/smartview

Vanity URLs (Cloud data sources only)

In Smart View 20.200 and later, for vanity URLs (also referred to as custom URLs), using the syntax above, enter the URL you have configured with your third-party link shortening vendor. Use the cloud data connection format for your business process when creating your vanity URL For example:

http(s)://<yourVanityURL>

Related Topics:

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Using the Private Connection Wizard

Using the Quick Connection Method

Saving Connections as Private Connections

Modifying Connections

You can modify connections in two different ways: modify a private connection or modify the connection information for individual entities within an Office document.

Additionally, you can use the Edit Connection command to modify connections for Financial Reporting images and fully fomatted reports.

- **Modify a private connection.** You can modify a private connection to change the server, application, or database information for all data providers associated with the connection.

  The connection information can be changed whether you are connected or not.

  For example, you may be working in a test environment using a private connection. When you are ready to move to a production environment, you change the server information for that private connection to access the new environment.

  This procedure is described in Modifying Private Connections.

- **Modify the connection information for individual entities within a document.** You can modify the connection information for individual entities within a document using the Document Contents panel. You can change connections per sheet. Or, in a sheet containing multiple entities, you can change the server connection for one or more of the individual entities.

  For example, while connected to Oracle Business Intelligence Enterprise Edition, you may have inserted a compound view containing 10 graphs. Now you would like to pull data from a different Oracle BI EE server for three of the graphs. Using the Document Contents panel, you can modify the connection information for the each of the three graphs to point to the new Oracle BI EE server.

  This procedure is described in Modifying Connections within an Office Document.

- **Modify the connection information for individual Financial Reporting images and fully formatted reports images in Office documents.** Using the Edit Connection command accessed from the Smart View ribbon, you can change the connection information for entities in Excel, Word, and PowerPoint. This is useful when sharing an Office document between departments or when moving from a test to a production environment.

  See Modifying Connections for Financial Reporting Images and Fully Formatted Reports.

> **Note**
>
> When you modify connection information, the new data source that you point to must contain all the dimensions and members of the previous data source. Any missing dimensions or members in the new data source will cause errors upon refresh.

Modifying Private Connections

Use the Edit Connection wizard to modify a private connection.

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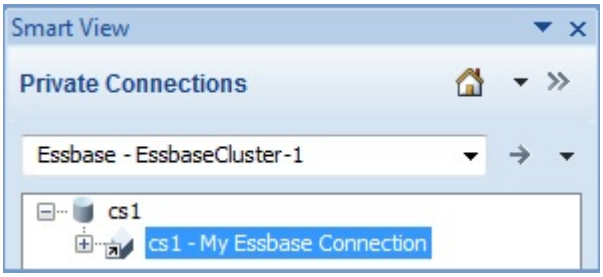
To modify a private connection:

1. From the Smart View ribbon, click **Panel**.
2. From the Smart View Panel, click the arrow next to , and then select **Private Connections**.
3. Click the arrow in the text box to select a private connection to modify, and then click .

> **Note**
>
> You may modify the private connection even if you are already connected to it.

4. In the Smart View Panel, expand the tree to the connection name, and then select it.

Figure 4-5 Tree Expanded with Connection Name Selected in Smart View Panel



5. In the Action Panel, select **Modify connection**.

   Alternatively, right-click the private connection name and select **Modify connection**.
6. In the **Edit Connection - URL** page, edit the URL as required, and then click **Next**.

   Optionally, select the **Set as default connection** check box, and then click **Next**.
7. In the **Edit Connection - Application/Cube** page, and navigate the tree to the new application and cube, select it, and then click **Next**.

   Alternatively, select the **Advanced Setup** check box and manually enter the new connection information in the **Server**, **Application**, and **Cube/Database** text boxes, and then click **Next**.
8. In the **Edit Connection - Name/Description** page, change the connection name and description as required, and then click **Finish**.

Modifying Connections within an Office Document

From the Document Contents pane, you can change connections for Oracle Smart View for Office objects within an Office document. This is useful when sharing an Office document between departments that point to different servers or when moving from a test to a production environment.

You can change the connection properties for all entities in a document that share the same connection information (for example, all worksheets or grids that point to the same application and database on a particular server). Or, in an Excel workbook, you can change the connection information sheet by sheet.

To modify connections from the Document Contents pane:

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1. Open the Office document.

> **Note**
>
> **Narrative Reporting:** To change the connection information for Smart View content in an Excel doclet, you must open the doclet from the report package and then check it out. See Checking Out Doclets.

2. In the Document Contents pane, from the drop-down list box, perform an action:
   - Select a sheet from a selected document
   - Select a particular connection
   - Select **All Connections**
3. Select the **Modify Connection** link at the bottom of the pane.

   Alternatively, right-click a connection name or sheet name and select **Modify Connection**. You can also modify connections as follows:
   - To modify a connection for all sheets in the workbook, select the top-level tree node connection name in Document Contents
   - To modify a connection for a specific sheet, select the connection name under the specific sheet-level tree node

   The **Edit Connection - URL** page of the wizard is displayed.
4. In the **URL** drop-down list, select an existing connection or enter a new connection URL.
5. Click **Next** and in **Edit Connection - Application/Cube**, expand **Servers**, and navigate to the application and database to which you want to connect, depending upon the provider requirements.

   Alternatively, select the **Advanced Setup** check box and manually enter the information for **Server**, **Application**, and **Cube/Database**, as the provider requires.

   For example, Figure 1 shows the entries for connecting to a cloud application and database.

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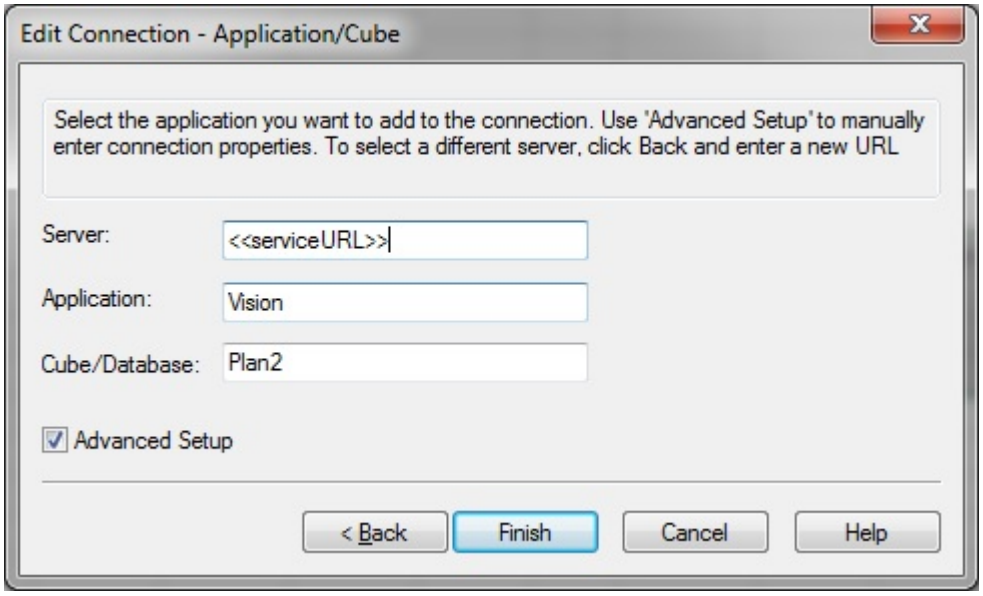
Figure 4-6 Edit Connection - Application/Cube Advanced Setup



6. Click **Finish**.
7. Select the **Refresh** link at the bottom of the Document Contents pane.
8. To save the modified connection information, save the workbook.

   The modified connection information is saved when you save the workbook.

> **Note**
>
> **Narrative Reporting:** Be sure to upload and check in the Excel doclet you're working with. The modified connection information is saved when you upload and check in the doclet. See Uploading and Working with Page Attributes and Slide Masters and Checking In Doclets.

Modifying Connections for Financial Reporting Images and Fully Formatted Reports

You can change connections for Financial Reporting fully formatted reports or images within an Office document using the **Private Connections** dialog, which is accessed from the **Connections** button on the Smart View ribbon.

This is useful when sharing an Office document between departments or when moving from a test to a production environment.

Before you begin, ensure the following:

- The data source you're changing *to* must contain the same folder structure and report as the original data source.
- You are working with a Financial Reporting report as follows:
  - Excel: Fully formated reports or images
  - PowerPoint and Word: Images

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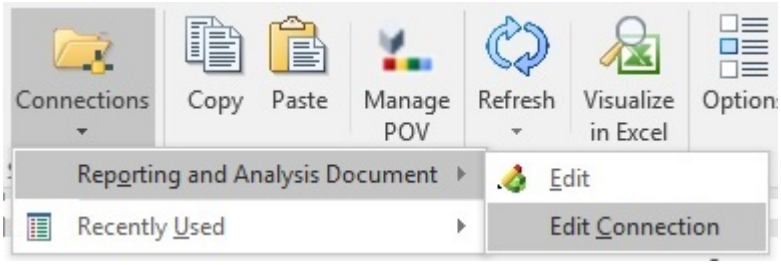
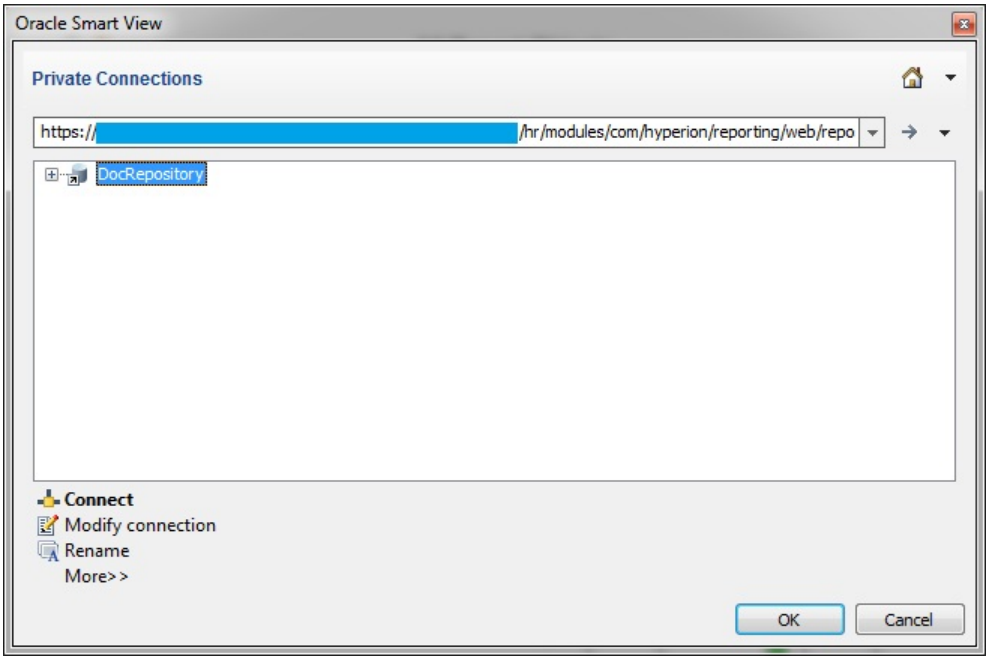
> **Note**
>
> This procedure applies to Financial Reporting fully formatted reports in Excel, Word, or PowerPoint. To modify connections for Financial Reporting query-ready reports and function grids in an Office document, see Modifying Connections within an Office Document.

To modify the connection for Financial Reporting entities:

1. Select a Financial Reporting entity in Word.
2. In the Smart View ribbon, select **Connections**, then **Reporting and Analysis Document**, and then **Edit Connection**.



3. In the **Private Connections** dialog box, select a data source from the drop-down menu, select the data source name in the tree, and then click **OK**.



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> **Note**
>
> Depending on the release, the connection syntax differs for Financial Reporting data sources:
>
> - Oracle Hyperion Reporting and Analysis - Release 11.1.2.4.7xx and earlier:
>
>   http(s)://*servername*:*port*/raframework/browse/listXML
>
> - Oracle Financial Reporting Document Repository - Release 11.1.2.4.9xx and later:
>
>   http(s)://*servername*:*port*/hr/modules/com/hyperion/reporting/web/repository/HRRepositoryXML.jsp

4. If you are prompted to log in, then provide your user name and password to the new data source.

   The **Import Workspace Document** dialog is displayed.

5. In **Import Workspace Document**, when the **Finish** button is enabled, click it.
6. Refresh the Office document.

   When the refresh is complete, a message notifies you of the number of pages that were updated.

7. Repeat this procedure for any other entities within the Office document

Managing Connection URL Mappings

Connection URL Mapping allows you to migrate from one environment to another environment.

Related Topics

- About Managing Connection URL Mappings
- Adding Connection URL Mappings
- Updating Connection URL Mappings
- Deleting Connection URL Mappings

About Managing Connection URL Mappings

Connection URL mappings allow you to migrate from one environment to another environment. Administrators configure mappings that replace old connection URLs with new URLs. The mappings can be managed from the Private Connections drop-down menu by selecting the **Manage URL Mappings** option.

After mapping, private and named connections are immediately migrated to the new URLs when Microsoft Excel is reopened. The new mappings persist even if a mapping is deleted. Any saved workbooks with functions using these private connections will continue to use the new URLs.

Working with Saved Workbooks Containing Ad Hoc Grids

- You configure the remapping of a URL only once, and then restart Microsoft Excel. Any workbook you open that used the old URL will automatically start using the new URL. The

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application and cube name and the outline must remain the same for refresh and other operations to complete successfully.

To summarize, once a mapping is created, then restart Excel, open a workbook, refresh, and then save the workbook. Thereafter, the workbook will always use the new URL. Subsequently, anytime you open a workbook that uses the new mapping, be sure to perform a refresh and save on that workbook.

- As a best practice, in ad hoc sheets in saved workbooks, you must perform a refresh and save the workbook for the new URL to persist. After the refresh and save, the mapping can be deleted, for both named and unnamed connections, and the new URL will continue to be used.
- If you are planning to delete the mapping but still want unnamed connections in a saved sheet to use a new URL, then you must activate each sheet and refresh it before saving the workbook. As a best practice, Oracle recommends using the Refresh All Worksheets command and then saving the workbook.
- If a mapping is deleted before the sheets were refreshed and saved, then the old URL will be used.
- If a mapping is deleted after the sheets were refreshed and saved, then the new URL will continue to be used.

Limitations

- Oracle Business Intelligence Enterprise Edition and Oracle Analytics Cloud are not supported.
- Oracle Hyperion Financial Management: Mappings will work only if the cluster name and application are same in the new and old environment.
- Oracle Essbase on-premises and Essbase cloud: Sheets created in the cloud environment do not work in the on-premises environment. Alternatively, sheets created in the on-premises environment do not work in the cloud environment.
- Nested URL mapping is not supported.
- Ensure that you enter the correct URL. URL entries are not validated, so it is possible to enter an incorrect URL entry.

Adding Connection URL Mappings

To add Connection URL Mappings:

1. In the Smart View Panel, select Private Connections.

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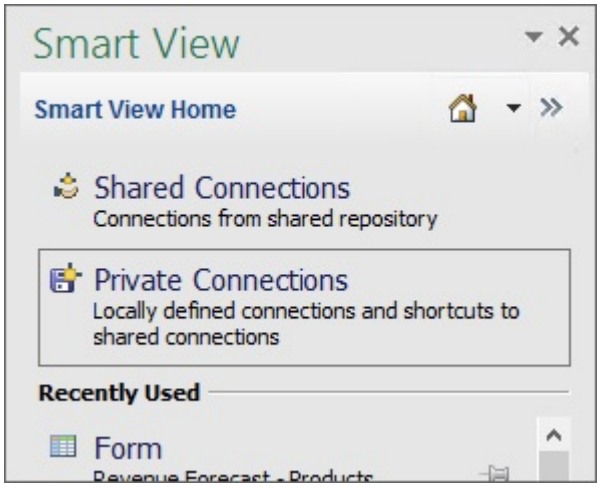
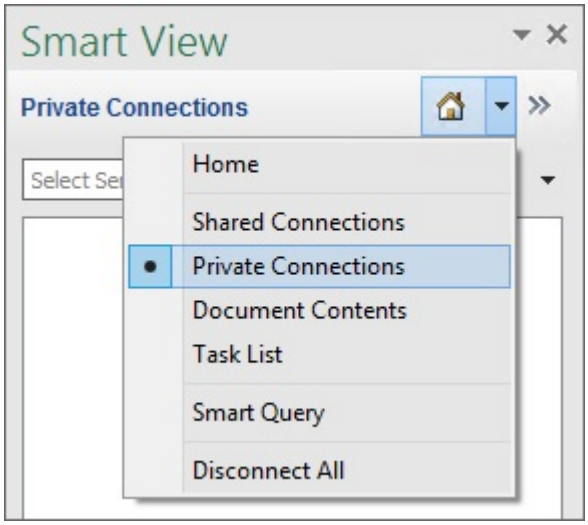
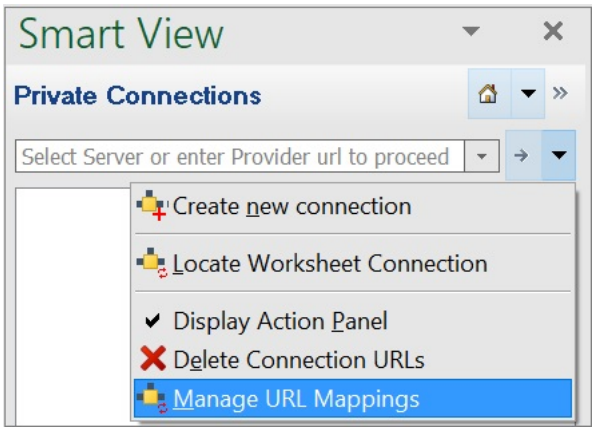


You can also select **Private Connections** from the drop-down menu on the Home button, :



2. Click the arrow next to and select **Manage URL Mappings** from the drop-down list.



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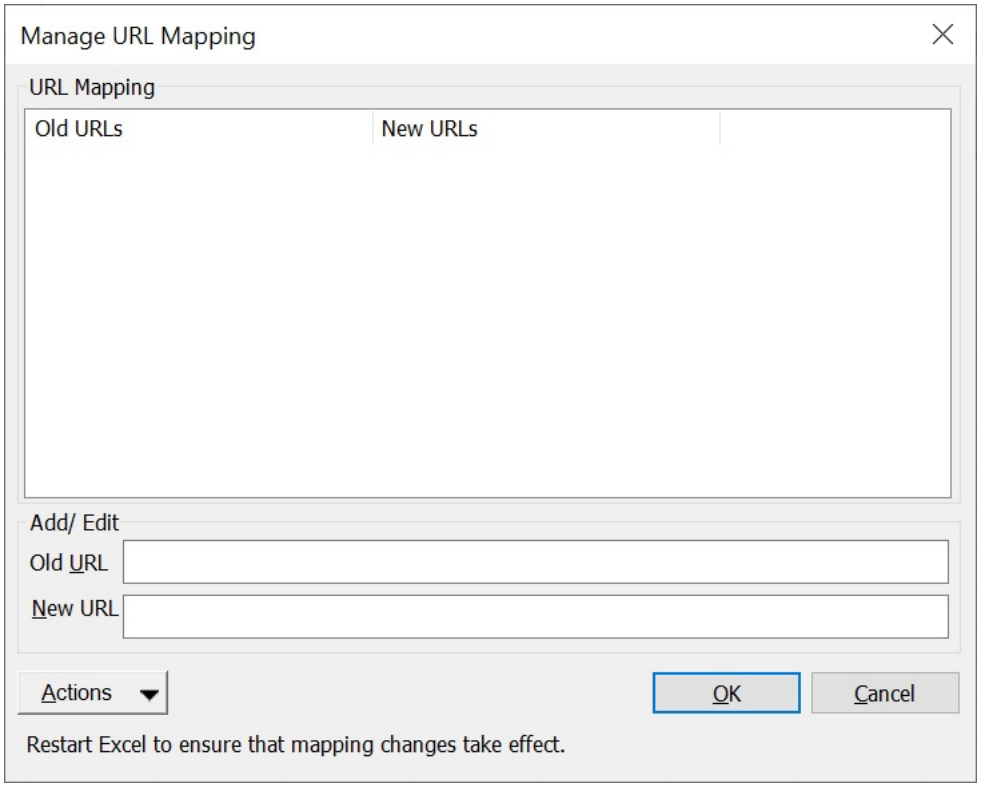
The **Manage URL Mapping** dialog page is displayed.



3. Enter the Old URL in the **Old URL** field.
4. Enter the New URL in the **New URL** field.

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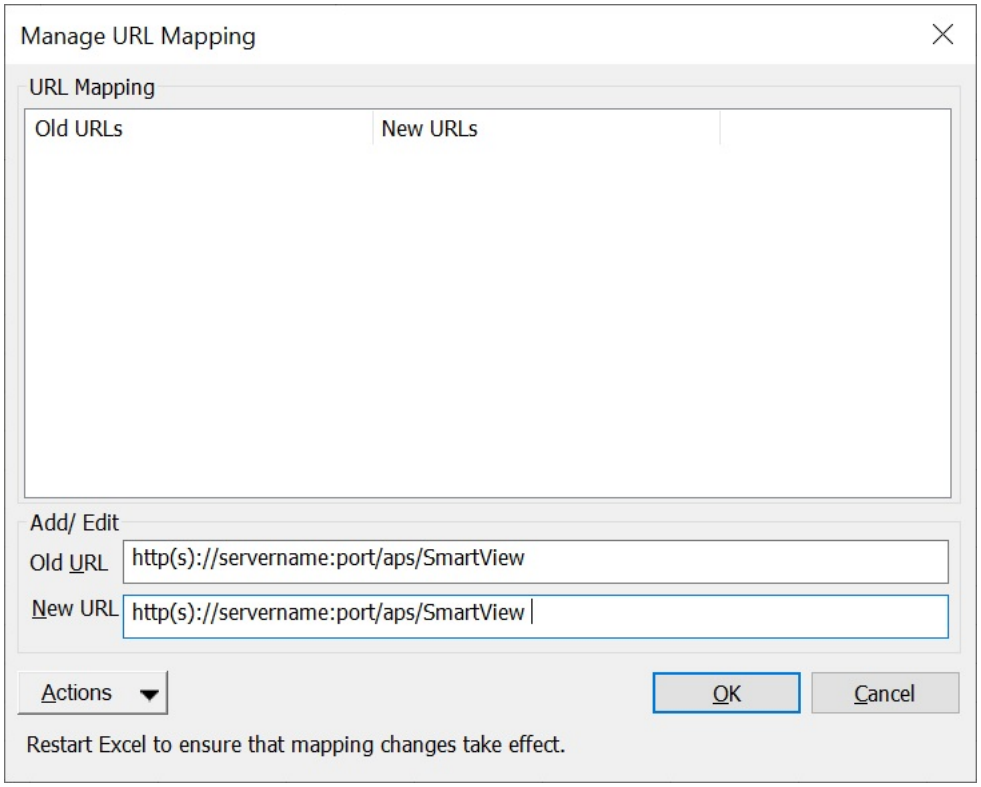

5. Click and select **Add**.

   Alternatively, from the **Actions** drop-down menu, use the up and down arrow keys to navigate to **Add** and press **Enter**.

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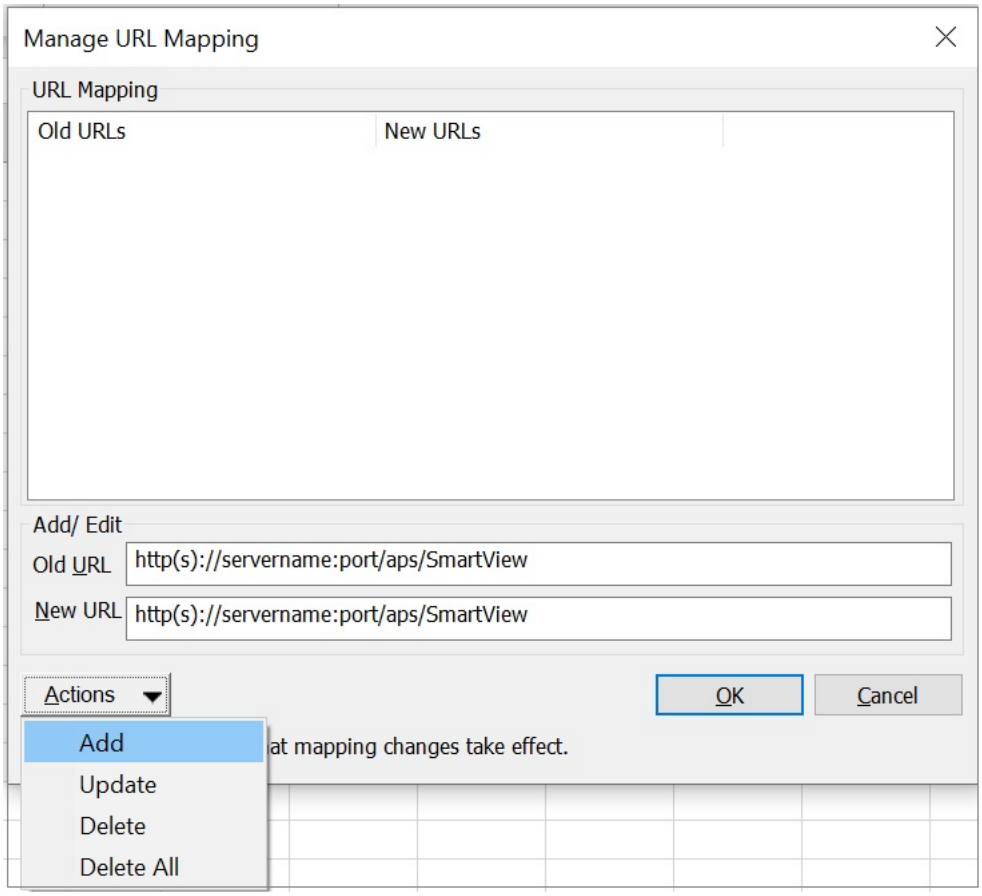

You have successfully added the URL mapping.

6. After adding the URL mapping, restart Microsoft Excel; then, to ensure that the mapping changes take effect:
   a. Open a workbook that will use the new mapping.
   b. Refresh the workbook; if the workbook contains multiple sheets, use the Refresh All Worksheets command.
   c. Save the workbook.

Updating Connection URL Mappings

To update Connection URL Mappings:

1. In the Smart View Panel, select Private Connections.

   You can also select **Private Connections** from the drop-down menu on the Home button, :

2. Click the arrow next to and select **Manage URL Mappings** from the drop-down list.

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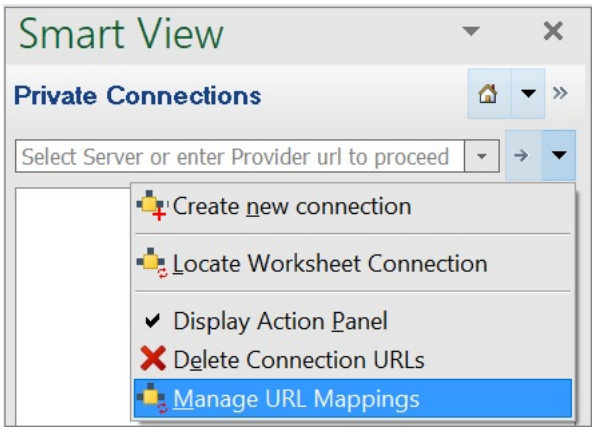
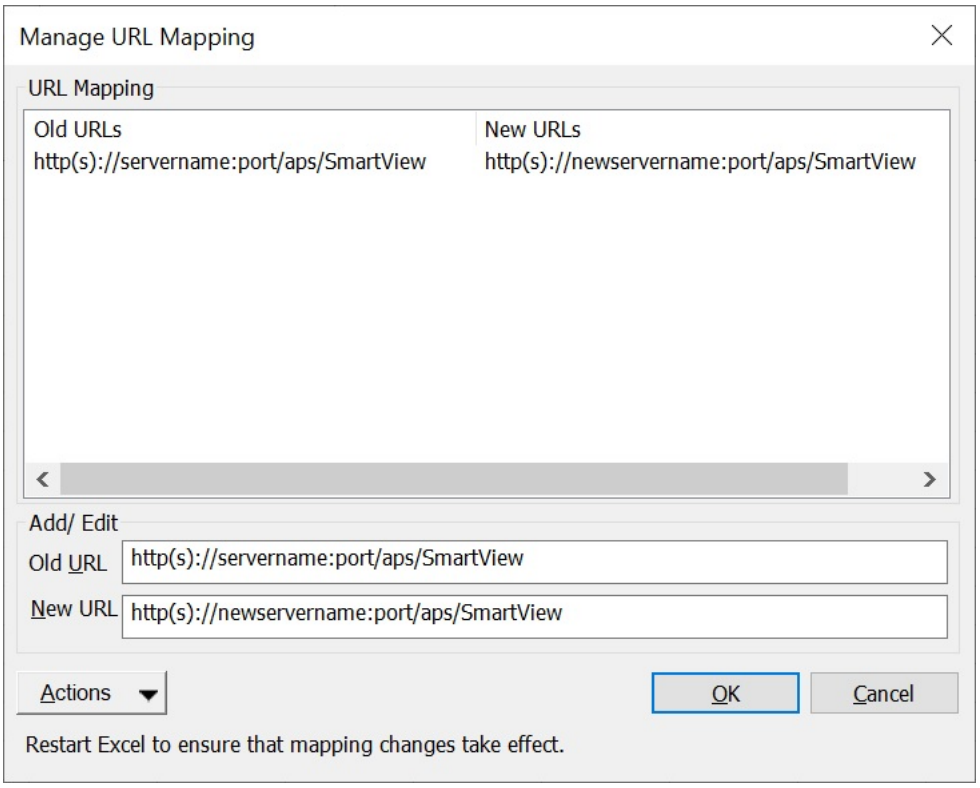


The **Manage URL Mapping** dialog page is displayed with the list of added URL mappings.



3. Select the URL Mapping from the list that you want to update and update as per requirement.

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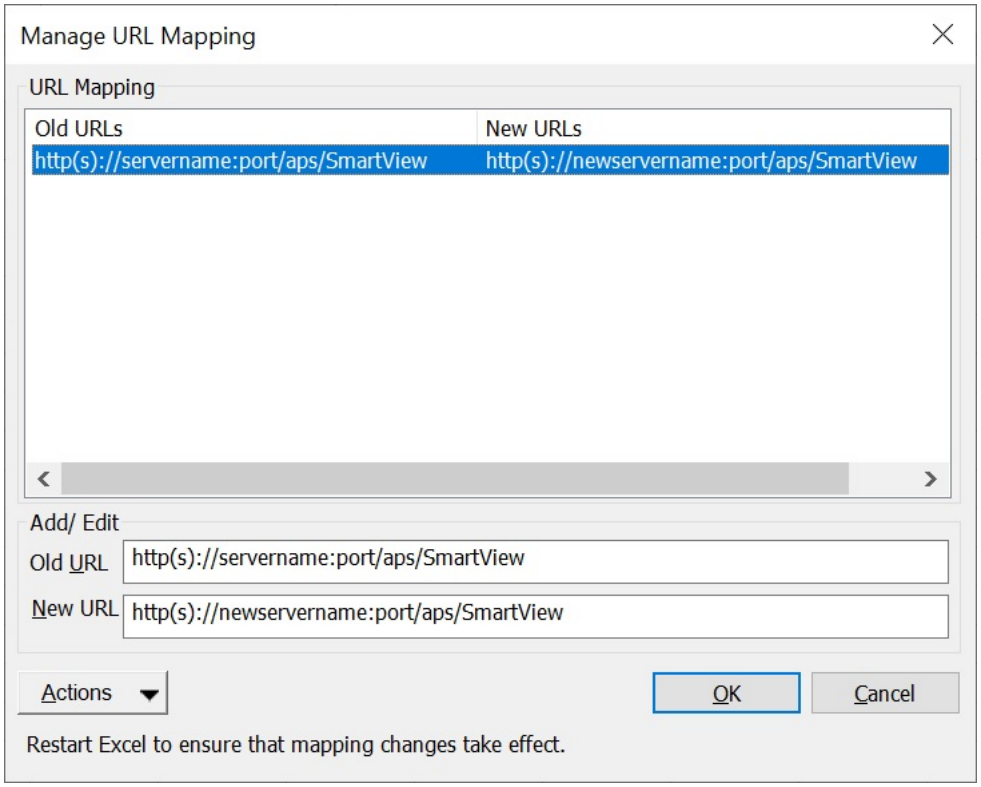

4. Click and select **Update**.

   Alternatively, from the **Actions** drop-down menu, use the up and down arrow keys to navigate to **Update** and press Enter.

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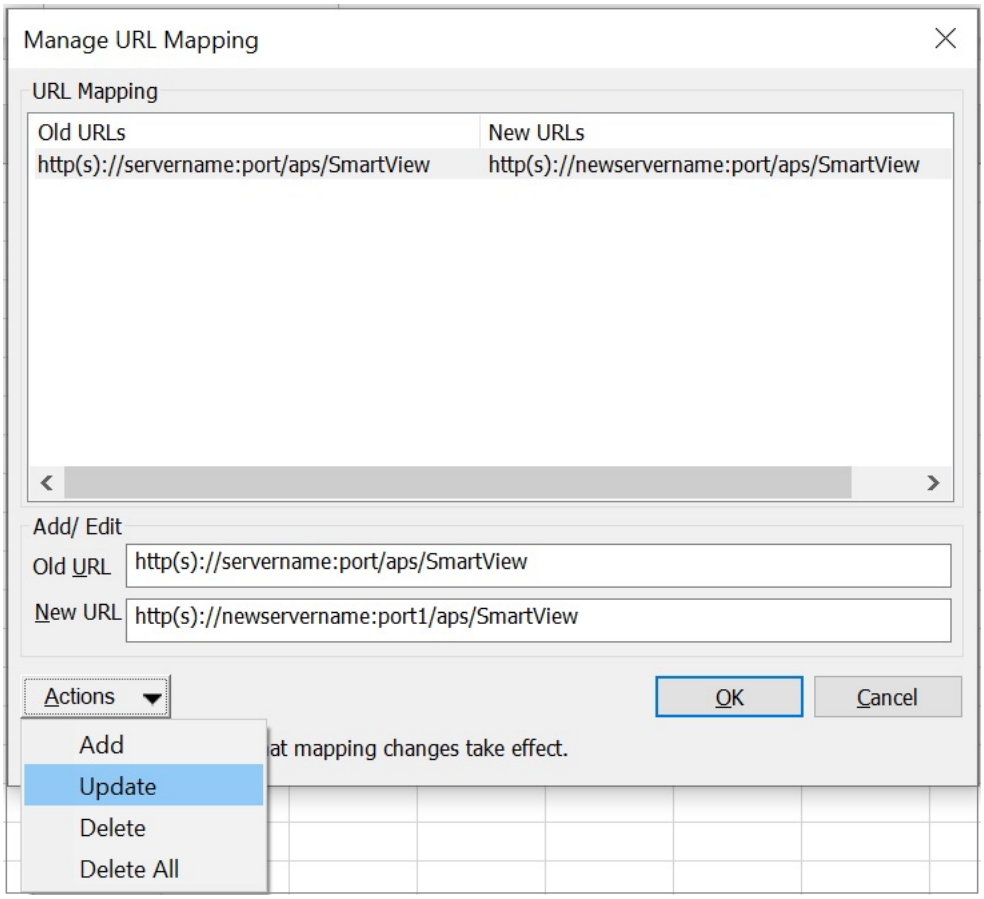

You have successfully updated the URL mapping.

5. After updating the URL mapping, restart Microsoft Excel; then, to ensure that the updated mapping takes effect:
   a. Open a workbook that will use the updated mapping.
   b. Refresh the workbook; if the workbook contains multiple sheets, use the Refresh All Worksheets command.
   c. Save the workbook.

Deleting Connection URL Mappings

To delete Connection URL Mappings:

1. In the Smart View Panel, select Private Connections.

   You can also select **Private Connections** from the drop-down menu on the Home button, :

2. Click the arrow next to and select **Manage URL Mappings** from the drop-down list.

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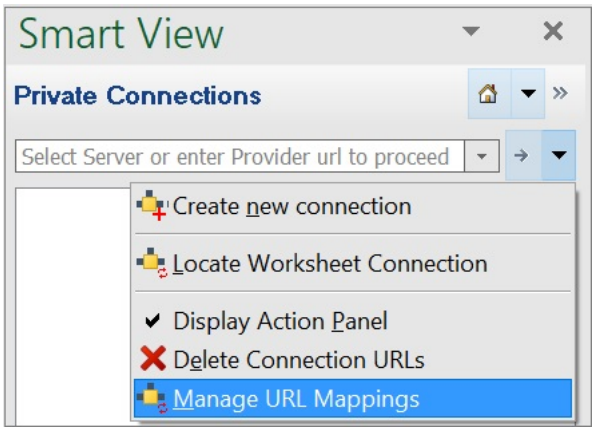
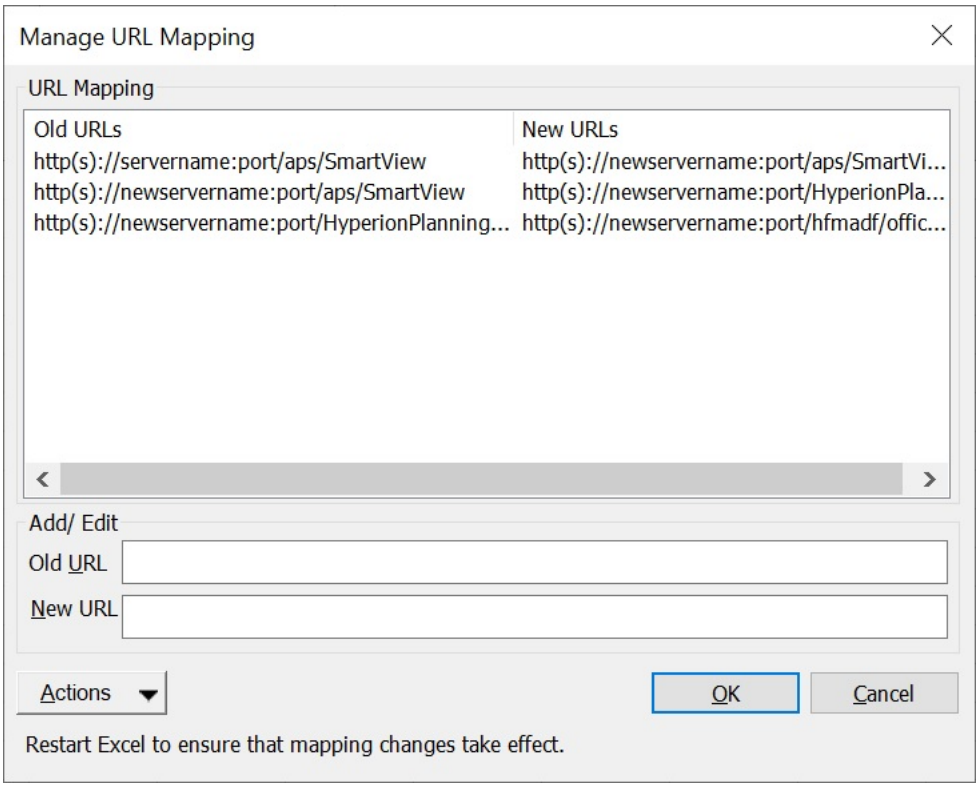


The **Manage URL Mapping** dialog page is displayed with the list of added URL mappings.



3. Select the URL Mapping from the list that you want to delete.

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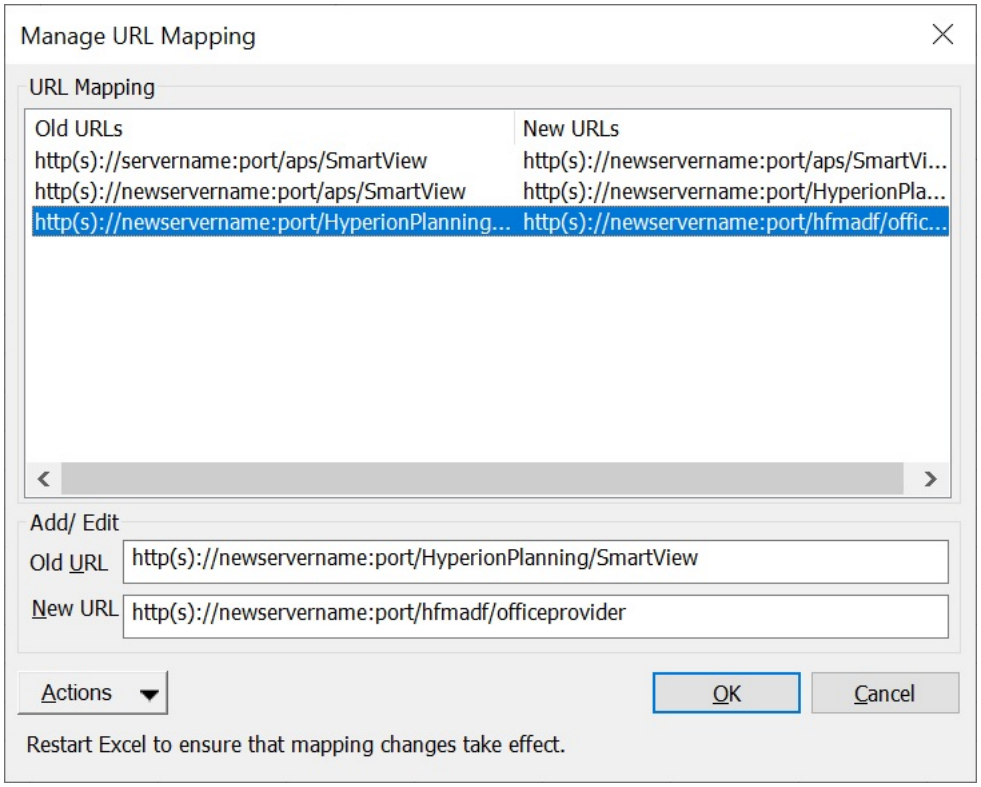

4. Click and select:

   a. **Delete** to delete an URL mapping.

   b. **Delete ALL** to delete all the URL mappings.

   Alternatively, from the **Actions** drop-down menu, use the up and down arrow keys to navigate to **Delete** or **Delete All** and press Enter.

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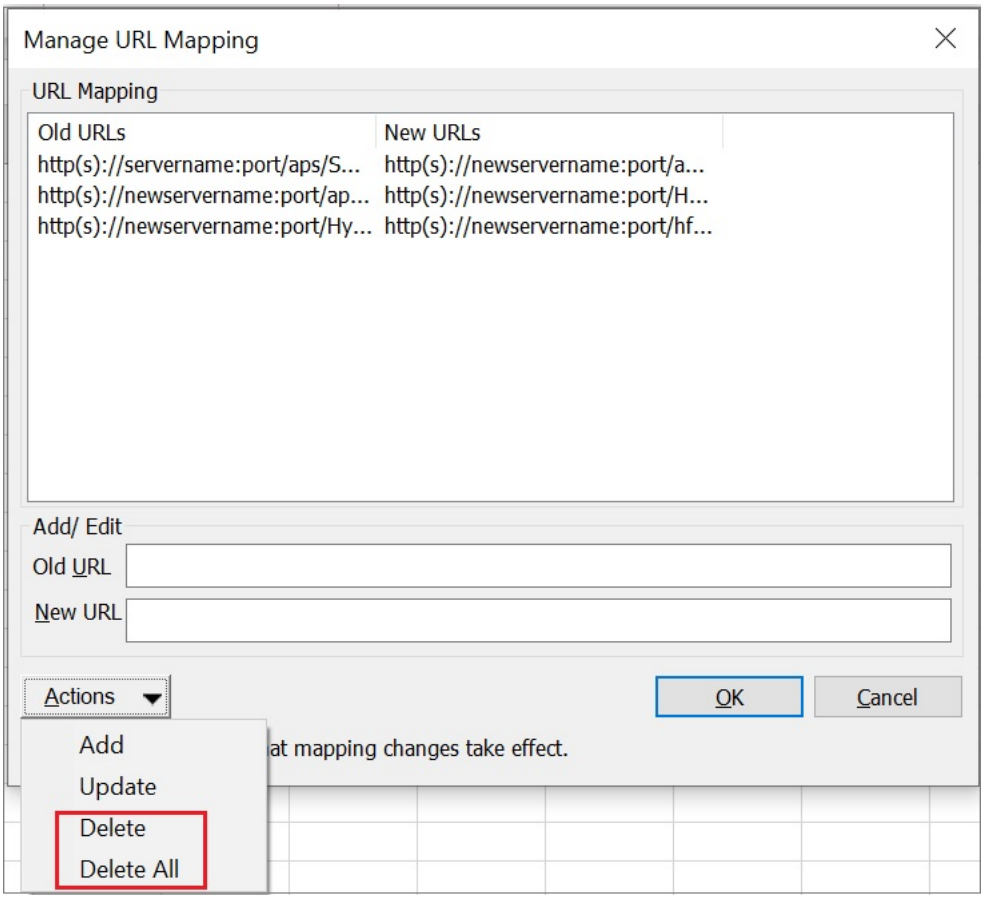

You have successfully deleted the URL mapping.

Deleting Connections

Delete connections in the Delete Connections URL dialog box.

Related Topics

- About Deleting Connection URLs
- Deleting Connection URLS

About Deleting Connection URLs

You can delete connections using the **Delete Connection URLs** dialog box.

You can delete the following connection URL types:

- Private connection URLs that were created using the quick creation method
- Shared connection URLs
- Extension update URLs

Understand these guidelines when deleting connection URLs:

- To delete connections URLs as described in Deleting Connection URLS, Oracle Smart View for Office 11.1.2.5.620+ is required.
- To begin the process, the Smart View Panel must be in private connection mode, no matter the URL type that you're deleting.

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- You cannot delete private connections that were created using the Private Connection Wizard.
- You must first click Delete, and then OK to accept the delete. Clicking Delete only does not fully delete the connection or extension update URLs.
- To cancel a delete operation, you can press the Escape key or clicking the X button in the top right corner of the dialog.
- Clicking the OK button without first clicking the Delete button is the same as cancelling the action; nothing will be deleted.
- When deleting shared connections URLs, the URL that is currently displayed in the Shared Connection URL field of the Options dialog, Advanced tab, will not be deleted.
- If a data source provider gives Smart View the URL from where extension updates can be obtained, this URL gets added to the local user's Smart View properties files. This occurs only when the user creates a private connection.

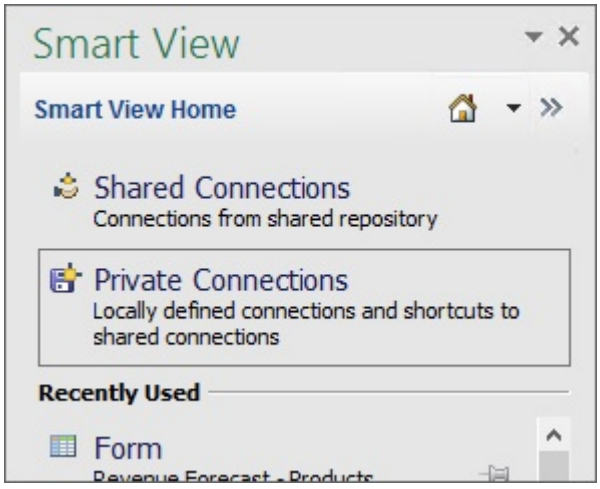
  The user may want to delete URLs that are no longer used or that belong to a server that has been decommissioned to avoid Smart View querying those locations for updates.

  If a URL that is deleted needs to be used again, that URL will be added back to the local user's properties file the next time a private connection is made to that provider.

Deleting Connection URLS

To delete connection URLs:

1. In the Smart View Panel, select Private Connections.



You can also select **Private Connections** from the drop-down menu on the Home button, :

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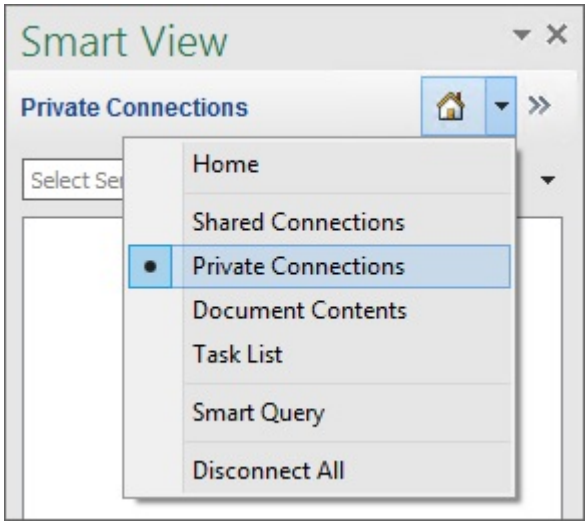
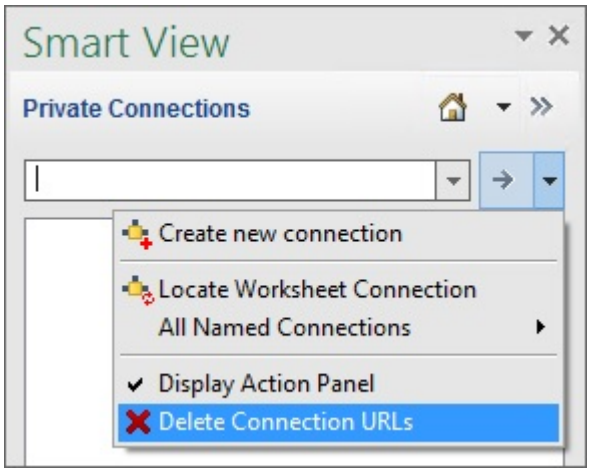


2. Click the arrow next to and select **Delete Connection URLs** from the drop-down list.



The **Delete Connection URLs** dialog box is displayed. Connections that were created using the quick connection method are displayed by default:

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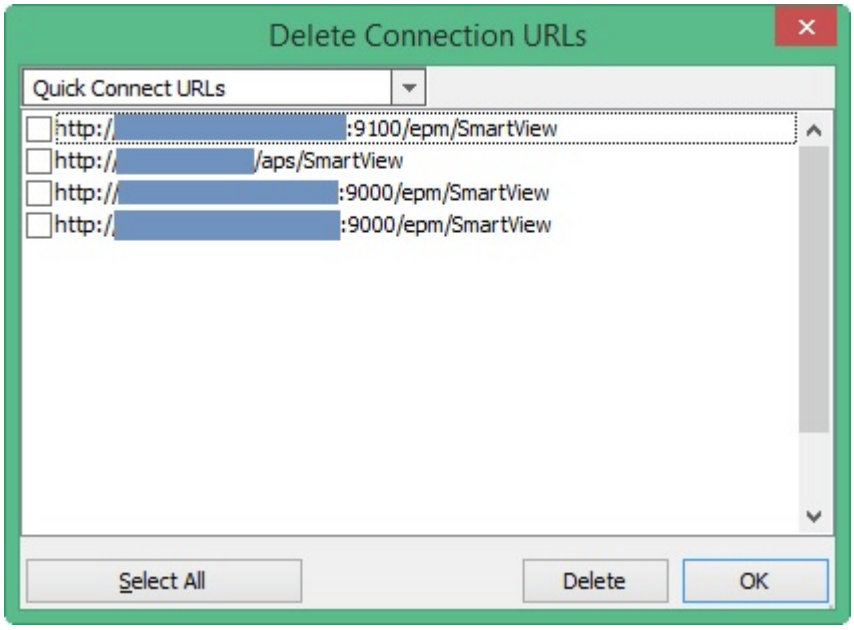
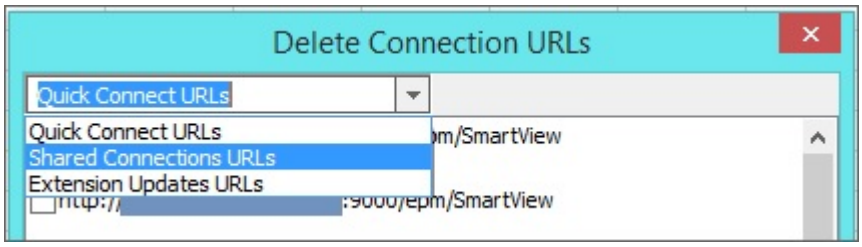
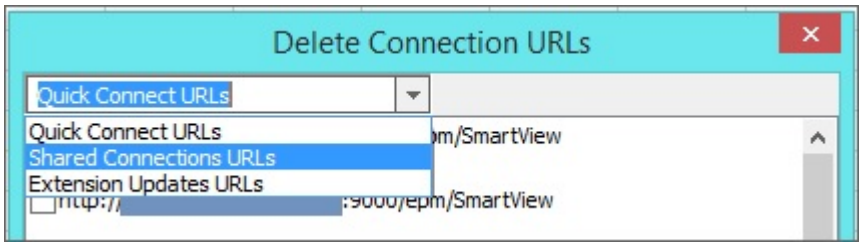


To select shared connection URLs for deletion, click the drop-down arrow and select **Shared Connection URLs**.



To select URLs for extension updates for deletion, click the drop-down arrow and select **Extension Updates URLs**:



3. In the **Delete Connection URLs** dialog box, select the check box next to the URLs to delete, and then click **Delete**.

   To select all URLs of a given type for deletion, click the **Select All** button, and then click **Delete**.

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> **Note**
>
> When deleting all shared connections URLs using the **Select All** button, the URL that is currently displayed in the Shared Connection URL field of the Options dialog, Advanced tab, will not be deleted.
>
> To cancel any selected deletions, do not proceed to the next step, but instead, press **Escape** or click the X button in the top right corner of the dialog.

You can select URLs for deletion and click **Delete**, and then switch between URL types and make more selections and click Delete, before proceeding to the next step, where the deletions will be permanently accepted.

4. To accept the deletions, click **OK**.

   Clicking **Delete** only does not fully delete the connection or extension update URLs. You must click **OK** to accept the deletions.

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5

Smart View Options

Related Topics

- Setting Smart View Options
  Set Oracle Smart View for Office options in the **Options** dialog.
- Global Options and Sheet Level Options
  Oracle Smart View for Office provides two types of options: *global* options and *sheet* options.
- Member Options
  Member Options control the display of member cells.
- Data Options
  Data Options control the display of data cells.
- Advanced Options
  Advanced Options are settings for administrative and other advanced tasks.
- Formatting Options
  Formatting options control the textual display of members and data.
- Cell Styles
  Cell Styles control the display of certain types of member and data cells.
- Extensions
  Extensions lists the extensions that are currently installed on your computer, and provides options for installing, updating, and removing extensions.

Setting Smart View Options

Set Oracle Smart View for Office options in the **Options** dialog.

Click the **Options** button on the Smart View ribbon to open the **Options** dialog.

Figure 5-1 Options Button on the Smart View Ribbon

Video

Your Goal	Watch This Video
Learn about navigating in Smart View, including Smart View options.	Navigating Smart View

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Global Options and Sheet Level Options

Oracle Smart View for Office provides two types of options: *global* options and *sheet* options.

- Global Options
- Sheet Options

Global Options

Global options are options that apply to the entire current workbook, including any *new* worksheets added to the current workbook, and to workbooks that are created later.

Changes to global option settings also affect *existing* worksheets and workbooks, and other Office documents.

The following are global options:

- Advanced Options
- Extensions
- Cell Styles

> **Note**
>
> Use the **OK** button when saving global options. Changes to global options become the default settings for all existing and new worksheets and workbooks so it is not necessary to use **Save as Default Options** or **Apply to All Worksheets** with global options. **Save as Default Options** and **Apply to All Worksheets** are used with the sheet level option settings only.

Sheet Options

Sheet level options are options that are specific to the worksheet for which they are set. Sheet options are applicable only in Excel. You do not set sheet options in Word or PowerPoint.

These options are available for saving sheet level options:

- **OK**—The sheet level option changes apply only to the current sheet in the current workbook. The changes do not apply to existing sheets or to new sheets in the current workbook. They do not affect any existing workbooks or new workbooks.

  In PowerPoint or Word, **OK** only applies to selections made on the **Advanced** tab (which are global options, not sheet options).

  Additionally, **Save as Default Options**, **Apply to All Worksheets**, and **Export Options** are accessed in Excel by clicking the arrow in the **OK** button in the **Options** dialog box.

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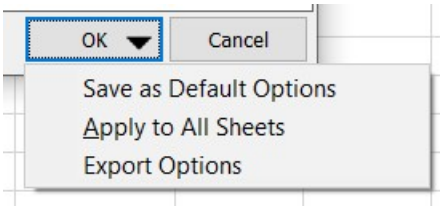
Figure 5-2 Commands Under the OK Button



- **Save as Default Options**—The sheet level options changes are also the default option settings for *new* worksheets in the current workbook and for any *new* workbooks, and any other new Office documents. Changes to sheet level option settings do not affect *existing* worksheets or workbooks.

  For example, in Excel, assume you made changes to member options and selected **Save as Default Options**. You must access each existing worksheet individually, and make those same changes, if you want the changes to be propagated to existing worksheets in the workbook. This allows for different sheet level options on different worksheets. However, the changes are automatically propagated to any new worksheets you create within the current workbook and to any new workbooks.

  > **Note**
  >
  > The **Save as Default Options** option is not available in PowerPoint or Word.

- **Apply to All Worksheets**—The sheet level options changes apply to all *existing* worksheets with Oracle Smart View for Office content within the current workbook. They do not apply to any new worksheets within the current workbook, to other *existing* workbooks, or to *new* workbooks.

  For example, assume you made changes to member options and selected **Apply To All Sheets**. The changes are propagated to all existing worksheets with Smart View content within the current workbook. This allows for quick updating of sheet level options in the current workbook. However, these changes are not propagated to any new worksheets in the current workbook, to existing workbooks, or to new workbooks.

  > **Note**
  >
  > The **Apply to All Worksheets** option is not available in PowerPoint or Word.

- **Export Options**—This option is used by service administrators to set default options and export them to an options.xml file for distributing to users. This is to ensure consistent application of Smart View configurations across users in their organization.

  As a service administrator, you can export options present under the **Member Options**, **Data Options**, **Advanced**, and **Formatting** tabs available in the **Options** dialog. However, the configurations under the **Cell Styles** tab and the **Shared Connection URL** under the **Advanced** tab cannot be exported.

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> **Note**
>
> * The **Export Options** option is not available in PowerPoint or Word.
> * This option is visible only if you have write access to the **cfg** folder.

- **Reset**—Options are reset depending on whether an options.xml file distributed by your service administrator is present in the <SmartView Install>/cfg folder (for example, C:\Oracle\SmartView\cfg):
  - If the options.xml file is not present, then **Reset** reverts Smart View options to their system defaults.
  - If the options.xml file is present, then **Reset** uses the options set by your service administrator.

> **Note**
>
> As a best practice, Oracle recommends that you do not manually modify the options in the options.xml file, as it can result in errors and mismatch. If you make any changes manually to the options.xml file, then when you click **Reset**, you may get the error message, *Option data mismatch. Please check cfg/options.xml*.

After clicking **Reset**, close and reopen the Office application to see the default options.

See also Exporting Default Smart View Options in the *Oracle Smart View for Office Installation and Configuration Guide*.

The following are sheet level options:

- Member Options
- Data Options
- Formatting Options

Member Options

Member Options control the display of member cells.

Member options are sheet level options, which are specific to the worksheet for which they are set.

> **Note**
>
> Not all data providers support all the options listed in Table 1. Refer to the subtopics in this section to find the options supported for a particular provider.

To set options for the display of member cells as described in Table 1, click **Options** on the Smart View ribbon, and then select **Member Options** in the left panel. When you are finished, make a selection for saving the changes:

- **OK**

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- **Save as Default Options**
- **Apply to All Worksheets**

> **Note**
>
> The **Apply to All Worksheets** option is not available in PowerPoint or Word.

See Sheet Options for a complete description of the above options.

Table 5-1 Member Options

Option	Description
General	**General**
Zoom In Level	From the drop-down menu, select one of the following to specify a default zoom level for ad hoc analysis: • **Next Level** to retrieve data for the children of the selected members • **All Levels** to retrieve data for all descendants of the selected members • **Bottom Level** to retrieve data for the lowest level of members in a dimension • **Sibling Level** to retrieve data for all members at the same level as the selected member • **Same Level** to retrieve data for the siblings of the selected members • **Same Generation** to retrieve data for all members of the same generation as the selected members • **Formulas** to retrieve data for all members that are defined by the formula of the selected member. The formula can be a member equation or a consolidation to the parent.
Member Name Display	From the drop-down menu, select one of the following to specify how to display member names in cells: • **Member Name or Alias** to display member names only or, if an alias table is being used, alias names only. **Oracle Essbase and Narrative Reporting:** Note that this is the default when connected to duplicate member databases and launching Query Designer (Essbase only) or an ad hoc grid. This is the default even if you have chosen the **Distinct Member Name Only** option and set it as the default. • **Distinct Member Name Only** to display fully qualified names. • **Member Name and Alias** to display member names and their aliases. • **Member Name and Description Only** to display member names and their aliases in the same cell (applies to Oracle Hyperion Financial Management only). • **Description Only** to display aliases.

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Table 5-1 (Cont.) Member Options

Option	Description
Indentation	From the drop-down menu, select one of the following to specify how hierarchy levels are to be indented: • **None** • **Subitems** to indent descendants. Ancestors are left-justified in the column and aligned to the top in the column headers. • **Totals** to indent ancestors. Descendants are left-justified in the column and aligned to the top in the column headers. **Note** For Cloud EPM 21.02+ Standard mode applications only: If you select the **Subitems** option or the **Totals** option, then you should also select the **Use Excel Indentation (Ad Hoc Standard Mode)** check box.
Ancestor Position	From the drop-down menu, select one of the following to specify ancestor position in hierarchies: • **Top** to display hierarchies in order from highest to lowest level • **Bottom** to display hierarchies in order from lowest to highest level See Specifying Ancestor Position in Ad Hoc Grids. **Note** Oracle Essbase (on-premises) does not support the **Ancestor Position** options.
Use Excel Indentation (Ad Hoc Standard Mode)	For Cloud EPM 21.02+ Standard mode applications only: Preserve native Excel formatting used for indentation in ad hoc grids. This option works in conjunction with the **Indentation** option. When **Indentation** is set to **Subitems** or **Totals**, the blank spaces used for indentation may create issues for some users. By enabling **Use Excel Indentation**, the indentation for subtotals and totals is handled correctly.

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Table 5-1 (Cont.) Member Options

Option	Description
Member Retention	**Member Retention** See Selecting Members to Display when Zooming.
Include Selection	Display the selected member and the members retrieved as a result of the operation.
Within Selected Group	Perform ad hoc operations only on the selected group of cells, leaving unselected cells as is. This setting is meaningful only when there are two or more dimensions down the grid as rows or across the grid as columns. For **Zoom**, **Keep Only**, and **Remove Only**.
Remove Unselected Groups	For **Zoom In** or **Zoom Out**, remove all dimensions and members except the selected member and the members retrieved as a result of zooming.
Comments and Formulas	**Comments and Formulas**
Preserve Formulas and Comments in ad hoc operations (except pivot and undo)	Preserves formulas and comments on the grid during queries. You can clear this option to make queries run faster, but if you do, formulas and comments are removed or ignored. Note that formulas are *not* preserved for pivot or undo operations, regardless of whether or not this option is selected. This option must be selected if you select **Formula Fill** or **Enable Enhanced Comment Handling**. **Note** This option applies to formulas in both member and data cells.
Formula Fill	Propagates formulas associated with member cells to the members retrieved as a result of zooming in. If **Preserve Formulas and Comments in ad hoc operations except pivot** and **Use Excel Formatting** are both selected, propagates cell formatting to the members retrieved as a result of zooming in. **Note** This option applies to formulas in both member and data cells.

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Table 5-1 (Cont.) Member Options

Option	Description
Preserve Comments and Unknown Members	**Essbase only:** Your spreadsheet may contain members that do not match database members. Selecting this option allows you to refresh an ad hoc grid with no warning message about comments or unknown members. To display messages about comments and unknown members, ensure that this option is cleared. Note that when this option is cleared, both the **Enable Enhanced Comment Handling** option in this dialog and the **View Comments** option in the Essbase ribbon will not be available for this ad hoc sheet.
Enable Enhanced Comment Handling	Enables you to review and correct comments and member names in ad hoc grids that contain comments.
Preserve Formula on POV Change	Preserves formulas in cells when you refresh or make changes to the POV. Otherwise, any formulas in the grid are lost. For additional information, see Preserving Formulas After POV Changes.
Flex Forms: Preserve Grid on POV and User Variable Changes	Retains modified members on a flex form after a POV or user variable change. If this option is not selected, any added rows or columns in the flex form will be removed upon a POV or user variable change. For more information, see Retaining Modified Members on Flex Forms After POV or User Variable Change.

The sections that follow list the Member Options supported by provider.

Member Options Supported for Cloud EPM Forms and Ad Hoc

Oracle Fusion Cloud Enterprise Performance Management includes these business processes:Enterprise Profitability and Cost Management, FreeForm, Financial Consolidation and Close, Planning, Planning Modules, Tax Reporting

Table 5-2 Member Options Supported for Cloud EPM Forms and Ad Hoc

Option	Forms	Ad Hoc
Zoom In Level: Next Level	No	Yes
Zoom In Level: All Levels	No	Yes
Zoom In Level: Bottom Level	No	Yes
Zoom In Level: Sibling Level	No	If **Smart View Ad Hoc Behavior** option is set to **Standard**: Yes If **Smart View Ad Hoc Behavior** option is set to **Native**: No

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Table 5-2 (Cont.) Member Options Supported for Cloud EPM Forms and Ad Hoc

Option	Forms	Ad Hoc
Zoom In Level: Same Level	No	If **Smart View Ad Hoc Behavior** option is set to **Standard**: Yes If **Smart View Ad Hoc Behavior** option is set to **Native**: No
Zoom In Level: Same Generation	No	If **Smart View Ad Hoc Behavior** option is set to **Standard**: Yes If **Smart View Ad Hoc Behavior** option is set to **Native**: No
Zoom In Level: Formulas	No	No
Member Name Display: Member Name Only	Yes	Yes
Member Name Display: Distinct Member Name	No	Yes
Member Name Display: Member Name and Alias	If **Smart View Ad Hoc Behavior** option is set to **Standard**: Yes If **Smart View Ad Hoc Behavior** option is set to **Native**: No **Note** **Member Name and Alias** is not supported for flex forms.	If **Smart View Ad Hoc Behavior** option is set to **Standard**: Yes If **Smart View Ad Hoc Behavior** option is set to **Native**: No
Member Name Display: Description Only	No	No
Indentation: None	No	Column members: Yes Row members: No
Indentation: Subitems	No	Yes
Indentation: Totals	No	Yes
Ancestor Position: Top	No	Yes
Ancestor Position: Bottom	No	Yes
Use Excel Indentation (Ad Hoc Standard Mode)	No	Yes
Include Selection	No	Yes
Within Selected Group	No	Yes
Remove Unselected Groups	No	No

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Table 5-2 (Cont.) Member Options Supported for Cloud EPM Forms and Ad Hoc

Option	Forms	Ad Hoc
Preserve Formulas and Comments in ad hoc operations (except pivot and undo)	No	Yes
Formula Fill	No	No
Preserve Comments and Unknown Members	No	No
Enable Enhanced Comment Handling	No	Yes
Preserve Formula on POV Change	Yes	No
Flex Forms: Preserve Grid on POV and User Variable Changes	Yes	Yes

Member Options Supported for Essbase Ad Hoc

Table 5-3 Member Options Supported for Essbase Ad Hoc

Option	Ad Hoc
Zoom In Level: Next Level	Yes
Zoom In Level: All Levels	Yes
Zoom In Level: Bottom Level	Yes
Zoom In Level: Sibling Level	Yes
Zoom In Level: Same Level	Yes
Zoom In Level: Same Generation	Yes
Zoom In Level: Formulas	Yes
Member Name Display: Member Name Only	Yes
Member Name Display: Distinct Member Name	Yes
Member Name Display: Member Name and Alias	Yes
Member Name Display: Description Only	No
Indentation: None	Yes
Indentation: Subitems	Yes
Indentation: Totals	Yes
Ancestor Position: Top	Oracle Essbase cloud: Yes Essbase on-premises: No
Ancestor Position: Bottom	Essbase cloud: Yes Essbase on-premises: No
Use Excel Indentation (Ad Hoc Standard Mode)	No
Include Selection	Yes
Within Selected Group	Yes

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Table 5-3 (Cont.) Member Options Supported for Essbase Ad Hoc

Option	Ad Hoc
Remove Unselected Groups	Yes
Preserve Formulas and Comments in ad hoc operations (except pivot and undo)	Yes
Formula Fill	Yes
Preserve Comments and Unknown Members	Yes
Enable Enhanced Comment Handling	Yes
Preserve Formula on POV Change	No
Flex Forms: Preserve Grid on POV and User Variable Changes	No

> **Note**
>
> This option is enabled only when the **Preserve Formulas Comments in ad hoc operations (except pivot)** and **Formula Fill** options are cleared.

Member Options Supported for Narrative Reporting Ad Hoc

Table 5-4 Member Options Supported for Narrative Reporting Ad Hoc

Option	Ad Hoc
Zoom In Level: Next Level	Yes
Zoom In Level: All Levels	Yes
Zoom In Level: Bottom Level	Yes
Zoom In Level: Sibling Level	No
Zoom In Level: Same Level	No
Zoom In Level: Same Generation	No
Zoom In Level: Formulas	No
Member Name Display: Member Name Only	Yes
Member Name Display: Distinct Member Name	Yes
Member Name Display: Member Name and Alias	No
Member Name Display: Description Only	No
Indentation: None	Yes
Indentation: Subitems	Yes
Indentation: Totals	Yes
Ancestor Position: Top	No
Ancestor Position: Bottom	No
Use Excel Indentation (Ad Hoc Standard Mode)	No
Include Selection	Yes

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Table 5-4 (Cont.) Member Options Supported for Narrative Reporting Ad Hoc

Option	Ad Hoc
Within Selected Group	No
Remove Unselected Groups	No
Preserve Formulas and Comments in ad hoc operations (except pivot and undo)	Yes Supported only for Refresh operations. Not supported for other ad hoc operations, such as Zoom In or Keep Only.
Formula Fill	No
Preserve Comments and Unknown Members	No
Enable Enhanced Comment Handling	No
Preserve Formula on POV Change	No
Flex Forms: Preserve Grid on POV and User Variable Changes	No

Data Options

Data Options control the display of data cells.

Data options are sheet level options, which are specific to the worksheet for which they are set.

> **Note**
>
> Not all data providers support all the options listed in Table 1. Refer to the subtopics listed in this section to find the options supported for a particular provider.

To set options for the display of data cells as described in Table 1, click **Options** on the Smart View ribbon, and then select **Data Options** in the left panel. When you are finished, make a selection for saving the changes:

- **OK**
- **Save as Default Options**
- **Apply to All Worksheets**

> **Note**
>
> The **Apply to All Worksheets** option is not available in PowerPoint or Word.

See Sheet Options for a complete description of the above options.

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Table 5-5 Data Options

Option	Description
Suppress Rows	To streamline the grid, you can suppress rows that contain types of data that you do not need to view. **Note:** • In suppressed rows, cell references to Excel formulas are not updated. • You may select multiple row suppression options. However, if a row contains data of more than one data type, then the row is not suppressed. For example, if the row contains both **No Data / Missing** cells and **Invalid** cells, then the row is not suppressed. • **Oracle Fusion Cloud Enterprise Performance Management:** See Suppression Mode for information on using the **No Data/Missing** and **Zero** row suppression options.
No Data/Missing	Suppress rows that contain only cells for which no data exists in the database (no data is not the same as zero. Zero is a data value.) If you later clear **No Data/Missing**, suppressed values are returned only from that point on. You must zoom out and then zoom in on a member to retrieve values that were suppressed while this option was selected. In multiple-grid sheets, submitting data values '0 and &nd does not work properly when the No Data/Missing is set to '0 or &nd.
Zero	Suppress rows that contain only zeroes.
No Access	Suppress rows that contain data that you do not have the security access to view. **Note** This option is only supported by Oracle Hyperion Financial Management (on-premises) only.
Invalid	Suppress rows that contain only invalid values.
Underscore Characters	Suppress rows that contain underscore characters in member names (not available in Smart Slice operations).
Repeated Members	Suppress rows that contain repeated member names, regardless of grid orientation.
Suppress Columns	To streamline the grid, you can suppress columns that contain types of data that you do not need to view. **Note:** • In suppressed columns, cell references to Excel formulas are not updated. • You may select multiple column suppression options. However, if a column contains data of more than one data type, then the column is not suppressed. For example, if the column contains both **No Data / Missing** cells and **No Access** cells, then the column is not suppressed. • The **Suppress Columns** options are not available when connected to an Oracle Essbase data source. • The **Suppress Columns** options are not supported when performing ad hoc with Financial Management data sources. • **Cloud EPM:** See Suppression Mode for information on using the **No Data / Missing** and **Zero** column suppression options.

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Table 5-5 (Cont.) Data Options

Option	Description
No Data / Missing	Suppress columns that contain cells for which no data exists in the database (no data is not the same as zero. Zero is a data value.) If you later clear **No Data / Missing,** suppressed values are returned only from that point on. You must zoom out and then zoom in on a member to retrieve values that were suppressed while this option was selected.
Zero	Suppress columns that contain only zeroes.
No Access	Suppress columns that contain data that you do not have the security access to view.
Replacement	**Replacement**
#NoData/Missing Label #NoAccess Label #Invalid/Meaningless	Data cells may contain missing or invalid data, or data that you do not have permission to view. In such cells, by default, Oracle Smart View for Office displays #Missing, #Invalid, or #No Access, respectively, but you can change these labels. To do so, in any of these fields, enter one of the following: • Text of your choice (or leave the default). Text labels have the advantage of being descriptive, but they cause Excel functions to fail. • #NumericZero to specify numeric zero (0) replacement labels. With #NumericZero, you can use functions, but you cannot submit zeroes to the database (even if the zeroes are actual zeroes and not replacement labels) unless you select the **Submit Zero** option below. Calculations that are dependent on a cell with a numeric zero label compute correctly and take the value of the cell as zero. **Note:** When you enter #NumericZero, ensure that the **Submit Zero** option is selected to ensure that the parent data is deleted when spreading data for time periods. The #Missing replacement label allows you to clear data values from cell intersections. For example, to clear the sales data for New York, manually type #Missing in the cell where Sales and New York intersect, and click **Submit**. This clears the data value from the database. Subsequent queries on that database will show #Missing at the intersection of Sales and New York.
Submit Zero	If you chose #NumericZero for the **#Missing** label above, select this option if you want to be able to submit zeroes to the database.
Display Invalid Data	Display actual data even if it is invalid, rather than **#Invalid/Meaningless** or other replacement text. If no data exists, the cell is left blank.
Enable Essbase Format String	If the administrator has created specific formatting for the display of numerical data, view data in this formatting.
Use Expense Type	**Oracle Essbase only:** Inverts the signage (positive to negative or negative to positive) for data in columns related to revenue, liability, and owner's equity accounts. Supported for aggregate storage databases only. To use this option, ensure that your Essbase administrator has set up your application to display expense type signage.
Enable Attribute Association Processing	**Essbase only:** Select to display #Invalid or #NumericZero for cells that are empty only because they are not associated with the context attribute or varying attribute. By default, the Enable Attribute Association Processing option is cleared, and the empty cells display as #Missing. See also, Enabling Attribute Association Processing in Ad Hoc Grids.
Mode	**Mode**
Cell Display	Applies to Financial Management (on-premises) only.

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Table 5-5 (Cont.) Data Options

Option	Description
Navigate Without Data	Speeds up operations such as Pivot, Zoom, Keep Only, and Remove Only by preventing the calculation of source data while you are navigating. When you are ready to retrieve data, clear **Navigate Without Data**.
Suppress Missing Blocks	Suppress blocks of cells for which no data exists in the database.

The sections that follow list the Data Options supported by provider.

Data Options Supported for Cloud EPM Forms and Ad Hoc

Oracle Fusion Cloud Enterprise Performance Management includes these business processes:Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

Table 5-6 Data Options Supported for Cloud EPM Forms and Ad Hoc

Option	Forms	Ad Hoc
Suppress Rows - No Data / Missing	Yes	Yes
Suppress Rows - Zero	Yes	Yes
Suppress Rows - No Access	Yes	Yes
Invalid	No	No
Underscore Characters	No	No
Repeated Members	No	Yes
Suppress Columns - No Data / Missing	Yes	Yes
Suppress Columns - Zero	Yes	Yes
Suppress Columns - No Access	Yes	Yes
#NoData/Missing Label - #Missing	Yes	Yes
#NoData/Missing Label - #NumericZero	Yes	Yes
#NoAccess Label - #No Access	Yes	Yes
#NoAccess Label - #NumericZero	Yes	Yes
#Invalid/Meaningless -#Invalid	No	No
#Invalid/Meaningless - #NumericZero	No	No
Submit Zero	No if #NoData/Missing Label is set to #No Access. Yes if #NoData/Missing Label is set to #NumericZero	No if #NoData/Missing Label is set to #No Access. Yes if #NoData/Missing Label is set to #NumericZero
Display Invalid Data	No	No
Enable Essbase Format String	No	No
Use Expense Type	No	No
Enable Attribute Association Processing	No	No
Cell Display	No	No

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Table 5-6 (Cont.) Data Options Supported for Cloud EPM Forms and Ad Hoc

Option	Forms	Ad Hoc
Navigate Without Data	Yes	Yes
Suppress Missing Blocks	Yes	Yes

Data Options Supported for Essbase Ad Hoc

Table 5-7 Data Options Supported for Essbase Ad Hoc

Option	Ad hoc
Suppress Rows - No Data / Missing	Yes
Suppress Rows - Zero	Yes
Suppress Rows - No Access	No
Invalid	No
Underscore Characters	No
Repeated Members	Yes
Suppress Columns - No Data / Missing	No
Suppress Columns - Zero	No
Suppress Columns - No Access	No
#NoData/Missing Label - #Missing	No
#NoData/Missing Label - #NumericZero	No
#NoAccess Label - #No Access	No
#NoAccess Label - #NumericZero	No
#Invalid/Meaningless -#Invalid	No
#Invalid/Meaningless - #NumericZero	No
Submit Zero	No if #NoData/Missing Label is set to #No Access. Yes if #NoData/Missing Label is set to #NumericZero
Display Invalid Data	No
Enable Essbase Format String	Yes
Use Expense Type	Yes
Enable Attribute Association Processing	Yes
Cell Display	No
Navigate Without Data	Yes
Suppress Missing Blocks	No

Data Options Supported for Narrative Reporting Ad Hoc

Table 5-8 Data Options Supported for Narrative Reporting Ad Hoc

Option	Ad hoc
Suppress Rows - No Data / Missing	Yes
Suppress Rows - Zero	Yes
Suppress Rows - No Access	No
Invalid	No

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Table 5-8 (Cont.) Data Options Supported for Narrative Reporting Ad Hoc

Option	Ad hoc
Underscore Characters	No
Repeated Members	Yes
Suppress Columns - No Data / Missing	Yes
Suppress Columns - Zero	Yes
Suppress Columns - No Access	No
#NoData/Missing Label - #Missing	Yes
#NoData/Missing Label - #NumericZero	Yes
#NoAccess Label - #No Access	No
#NoAccess Label - #NumericZero	No
#Invalid/Meaningless -#Invalid	No
#Invalid/Meaningless - #NumericZero	No
Submit Zero	No
Display Invalid Data	No
Enable Essbase Format String	No
Use Expense Type	No
Enable Attribute Association Processing	No
Cell Display	No
Navigate Without Data	Yes
Suppress Missing Blocks	No

Advanced Options

Advanced Options are settings for administrative and other advanced tasks.

Advanced options are global options, which apply to the entire current workbook, including any *new* worksheets added to the current workbook, and to any workbooks and worksheets that are created henceforth. Changes to global option settings become the default for all existing and *new* Microsoft Office documents.

It is not necessary to use **Apply to All Worksheets** or **Save as Default Options** with these options.

> **Note**
>
> Not all data providers support all the options listed in the table.

To set options for the administrative and other advanced tasks as described in Table 1, click **Options** on the Smart View ribbon, and then select **Advanced** in the left panel. When you are finished, click **OK**.

Table 5-9 Advanced Options

Option	Description
General	**General**

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Table 5-9 (Cont.) Advanced Options

Option	Description
Shared Connections URL	Specify a default URL for all connections. Use the following syntax: http(s)://*serviceURL*/workspace/SmartViewProviders See Creating Shared Connections. **Note** For Oracle Smart View for Office online help to be available, this field must contain a valid URL for Oracle Fusion Cloud Enterprise Performance Management service.
Number of Undo Actions	The number of Undo and Redo actions permitted on an operation (0 through 100). See Using Undo and Redo.
Number of Most Recently Used Items	The number, 15 or fewer, of your most recently used connections to be displayed on Smart View Home and the Open menu on the Smart View ribbon.
Delete All MRU Items	Delete all items in your most recently used list, including those that are pinned to the list.
Logging	**Logging**
Log Message Display	All error, warnings, and informational messages from the connected data source are displayed when they occur, but you can choose which of these message levels to record in a log file. Select a message level to display and record: • **Information**: All messages, including warnings and errors — recommended to diagnose problems. May adversely impact performance. • **Warnings**: Warnings and error level messages. May adversely impact performance. • **Errors**: Error messages only — recommended for general use. Has minimal impact on performance. • **None**: Suppress all messages. • **Extended Info**: Information-level messages plus all server responses and requests. Adversely impacts performance.
Route message to files	Save log messages in a file. Click the ellipsis button to change the location of the log file.

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Table 5-9 (Cont.) Advanced Options

Option	Description
Clear Log File on Next Launch	Clear the log file starting with the next log message generation, which will be seen after Excel is closed. **Tip** The log file can quickly grow quite large in size, particularly if the message level is set to "Warnings" or "Information". If **Route message to files** is selected, and **Clear Log File on Next Launch** is not selected, then as a best practice, you should periodically clear the contents of the Smart View log file manually. The large file size can adversely affect performance.
Show Diagnostics Group on Smart View Ribbon	Displays the Diagnostics group options on the Smart View ribbon. See Smart View Diagnostics and Health Check for information on using the diagnostics tools.
Display	**Display**
Language	Select a language in which to display Smart View. You must restart the Office application when you change languages. **Default** is the language specified when Smart View was installed. See Translation Information and Windows, Office, and Smart View Locale Settings.
Display Smart View Short Cut Menus Only	Display only Smart View menu items on shortcut menus. Otherwise, shortcut menus display both Excel and Smart View items.
Disable Smart View in Outlook	Disable Smart View in Outlook if you do not want to use Smart View task lists in Outlook.
Enable Ribbon Context Changing	Display the active data provider ribbon automatically after you use a button on the Smart View ribbon.

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Table 5-9 (Cont.) Advanced Options

Option	Description
Display floating toolbar on forms	Display the floating toolbar when clicking a data cell in Planning forms. The floating toolbar provides quick access to these commands: • Supporting Details • Cell Comments • Drill-through • Attachments The default is to display the floating toolbar (the check box is selected). To suppress the floating toolbar display, clear this check box.
Disable options that are not valid for the active connection	Disable options in the Options dialog box that are not valid for the active connection.
Sort Items in Smart View Panel	Sort items in the Smart View Panel by category first, and then in order within categories. The order is first numerical, then alphabetical. For example, when this option is selected, the Task List folder is sorted below the Root folder. The items in the Task List folder are sorted in order first numerically, then alphabetically. When this option is cleared, items in the Smart View Panel are sorted according to the order returned by the provider.
Display Drill-Through Report ToolTips	Display by default lists of available drill-through reports for cells whenever you mouse over them.
Show Progress Information After (seconds)	Specify the time, in seconds, after which the **Smart View Progress** status bar appears when an operation begins.
Load Pages On Demand If Count Exceeds	Enable loading pages in forms on demand if number of pages in a form exceeds the count of pages set in this field. Enter the count of pages in the range of 100 - 9999. If the form contains more number of pages than the set count, Smart View loads only the selected page, thereby opening the form faster, and you can load more pages on demand. To view all pages in the list, you can click the ellipses (…) and use the search box in the list to search for specific pages faster. When enabled or disabled, the changes in the POV toolbar become effective only after you: • Reopen a saved workbook with Smart View content. • Modify the page selection and click Refresh. Note that a simple refresh without any modifications will not reload the POV toolbar. • Open a form for the first time on a sheet.

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Table 5-9 (Cont.) Advanced Options

Option	Description
Drill-Through Launch	Choose an option for launching drill-through reports: • **In Web Browser**—Always launch in a browser • **In New Sheet**—Always launch on a new Excel sheet • **Prompt Me to Choose Target**—Prompt me to choose browser launch or Excel sheet launch at runtime See Working with Drill-Through Reports. Additionally, ensure that you have installed the browser add-on described in the *Oracle Smart View for Office Installation and Configuration Guide*. In the Help Center, select your Smart View release, and then locate the "Installing Browser Add-ons" topic in the "Installing Smart View" chapter.
Compatibility	**Compatibility**
Reduce Excel File Size	Compress the metadata maintained in Excel files containing Smart View workbooks. **Note** This option pertains to interoperability between different versions of Smart View. If all users in your organization are on Smart View 9.3.1.6 or higher, then this option should always be selected. Clear this option in the following scenarios: • You send an Excel workbook to users on Smart View releases earlier than 9.3.1.6, or to users on Microsoft Office 2002 and earlier regardless of Smart View release. In these workbooks: – Grids that contain functions must be refreshed before data can be displayed. – In ad hoc mode, POV settings are lost; the behavior is similar to that of a fresh ad hoc grid. • You open a workbook sent from users on Smart View release earlier than 9.3.1.6, or on Microsoft Office 2002 and earlier regardless of Smart View release

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Table 5-9 (Cont.) Advanced Options

Option	Description
Improve Metadata Storage	Allow for more efficient storage of internal data structures. When this option is cleared, Smart View maintains two copies of metadata for compatibility purpose, which may result in slower overall performance. **Note** This option pertains to interoperability between different versions of Smart View. If all users in your organization are on Smart View 9.3.1.6 or higher, then this option should always be selected. Clear this option in the following scenarios: • You send an Excel workbook to users on Smart View releases earlier than 9.3.1.6, or to users on Microsoft Office 2002 and earlier, regardless of Smart View release • You open a workbook sent from users on Smart View releases earlier than 9.3.1.6, or from users on Microsoft Office 2002 and earlier, regardless of Smart View release
Refresh Selected Functions and their dependents	Execute dependent functions on the same sheet before executing the selected functions.
Refresh Saved Sheet as is (Ad Hoc Standard Mode)	Retain updates made to ad hoc grids (Standard mode) in saved worksheets and refresh as is in Smart View. Select this option in the following scenarios: • You want to retain the updates made to a saved sheet outside Smart View, that is a sheet updated and saved without installing Smart View. • You want to refresh a dimension sheet without losing updates made using Smart View Admin Extension version 23.210 or earlier. • You want to refresh a saved sheet containing formulas localized in different languages. See Refreshing Ad Hoc Grids in Saved Worksheets.
Mode	**Mode**

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Table 5-9 (Cont.) Advanced Options

Option	Description
Use Double-click for Operations	Double-clicking retrieves the default ad hoc grid in a blank worksheet and thereafter zooms in or out on the cell contents. If not selected, double-clicking retains standard Excel functionality and puts a cell into edit mode. When the **Use Double-click for Operations** option is enabled, double-click is supported for ad hoc grids. Double-click is not supported for forms.

Formatting Options

Formatting options control the textual display of members and data.

Formatting options are sheet level options, which are specific to the worksheet for which they are set.

> **Note**
>
> Not all data providers support all the options listed in Table 1. Refer to the Subtopics listed above to find the options supported for a particular provider.

To set options for cell formatting as described in Table 1, click **Options** on the Smart View ribbon, and then select **Formatting** in the left panel. When you are finished, make a selection for saving the changes:

- **OK**
- **Save as Default Options**
- **Apply to All Worksheets**

> **Note**
>
> The **Apply to All Worksheets** option is not available in PowerPoint or Word.

See Sheet Options for a complete description of the above options.

Table 5-10 Formatting Options

Option	Description
Formatting	**Formatting**
Use Cell Styles	Use formatting that is defined in Cell Styles or by the data provider. Overrides any user formatting. This option is disabled when **Use Excel Formatting** is selected. See Cell Styles.

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Table 5-10 (Cont.) Formatting Options

Option	Description
Use Excel Formatting	Use Excel rather than Oracle Smart View for Office formatting and retain Excel formatting for ad hoc operations. This option is disabled when **Use Cell Styles** is selected. **Note** In ad hoc grids for all providers, Excel formatting is not retained when performing an Undo. See Using Excel Formatting.
Move Formatting on Operations	Copy parent cell formatting to zoomed in cells and retain this formatting even if the cell location changes after an operation. This option is disabled by default, and it is enabled, but not selected, when **Use Excel Formatting** is selected. Formatting can affect performance, especially during ad hoc operations when **Move formatting on operations** is enabled. For this reason, the selection of **Move Formatting on Operations** persists on a per-sheet, per-session basis. The selection cannot be saved. If you plan to use Excel formatting, then you must reselect **Move Formatting on Operations** every time you open a workbook, every time you move to a new sheet within a workbook, and whenever you return to the original sheet, even if you previously selected it on that sheet, and even within the same session. It must also be reselected every time you open a new or existing workbook. You may use **Save As Default** to save the **Use Excel Formatting** selection, but it will not save the **Move Formatting on Operations** selection. The following message is displayed each time you select **Move Formatting on Operations**: Enabling this option may affect performance and will be reset once the sheet is changed. See Using Excel Formatting.

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Table 5-10 (Cont.) Formatting Options

Option	Description
Retain Numeric Formatting	When you drill down in dimensions, retain the Excel formatting you have set when selecting the Excel **Home** ribbon, then **Format**, and then **Format Cells**. For example, if you chose to display negative numbers in red, then negative values will be displayed in red as you drill down on any member. This option is enabled when **Use Cell Styles** is selected. When you select a cell range and apply numeric formatting, the formatting is applied only to the continuous range lying within the selected region. For example, a form has a collapsed hierarchy, and the cell range selected for applying numeric formatting includes a top-level member of the hierarchy. On expansion, the numeric formatting is not extended and applied to the underlying members as they lie outside the selected cell range. Only the top-level member displays the numeric formatting as it is part of the selected region. Note that this option overrides the design-time formatting set for a form by the administrator or form designer. The numeric formatting is retained when you save the sheet and open it again. However, if you change the **Cell Styles** option to **None** in the **Apply** menu within the **Formatting** group on the provider ribbon, then the numeric formatting is lost, even if you change it back to **Cell Styles**, and you have to apply the numeric formatting again.
Adjust Column Width and Row Height	Adjust column widths and row heights to fit cell contents automatically. See Enabling Automatic Cell Width and Height Adjustment.

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Table 5-10 (Cont.) Formatting Options

Option	Description
Freeze Row and Column Headers	Freeze row and column headers in all forms and ad hoc grids dynamically, irrespective of their size and layout. For example, for Form A with 3 header rows, Smart View freezes the first 3 rows if you have selected this option. Now, if you open Form B with 2 header rows, Smart View recognizes the difference in the number of header rows, and freezes only the top 2 rows automatically, without affecting any data rows. When you open new forms, you do not have to do any manual changes. This option saves your efforts in reapplying the freeze every time you open a new form. This option is available in Smart View 23.100+. When you refresh the sheet, perform any ad hoc operations, or make any layout changes, Smart View updates the frozen rows or columns according to the changes. If you click **Undo** in an ad hoc grid, then the freeze is removed, and it is applied back when you click **Refresh**. If you disable this option, the freeze from the rows and columns is removed immediately, so that you can freeze them manually as you require.

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Table 5-10 (Cont.) Formatting Options

Option	Description
Scale	Applies to ad hoc and forms. Overrides the setting defined in the form definition. Choose a positive or negative scaling option, and then click Refresh. **Positive scaling:** Divides original values by factors of 10. For example: • 1—All original values are divided by 10: *cell value*/10 For example, 100/10=10, so 10 will be displayed. • 2—All original values are divided by 100: *cell value*/100 For example, 100/100=1, so 1 will be displayed after refresh. • 3—All original values are divided by 1000: *cell value*/1000 For example, 100/1000=0.1, so 0.1 will be displayed after refresh. The pattern is similar for the remaining positive scaling options. Note that 0 will be displayed if the **Decimal Places** option is set to Default or 0. However, for a value such as 0.1 to display, the **Decimal Places** option must be set to 1. **Negative Scaling:** Multiplies original values by factors of 10. For example: • -1—All original values are multiplied by 10: *cell value**10 For example, 100*10=1000, so 1000 will be displayed. • -2—All original values are multiplied by 100: *cell value**100 For example, 100*100=10000, so 10000 will be displayed after refresh. • -3—All original values are multiplied by 1000: *cell value**1000 For example, 100*1000=100000, so 100000 will be displayed after refresh. The pattern is similar for the remaining negative scaling options. **Note** Work with the **Decimal Places** option to

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Table 5-10 (Cont.) Formatting Options

Option	Description
	achieve the desired display result.
Number Formatting	**Number Formatting**
Use Custom Number Format	Select this check box if you want to apply custom formatting to control the display of numbers. Enter a valid format string. For example, $#,##0.000_); [Blue]($#,##0.000). The custom formatting applies to numbers in Data cells, and does not affect Member cells, Date, and Text content. This option is available in Smart View 23.100+. If selected, this option overrides other number formatting settings and all fields in the Number Formatting section such as **Use Thousands Separator**, **Decimal Places**, and **Negative Number Format** become disabled and cannot be selected. If the format is left blank, Excel applies the General number format, which is helpful in scenarios when you want to see raw decimal places in a number to a certain degree as allowed by Excel. If the format is of Empty or Accounting or Text type, then a data cell with percentage value uses 0% as the default format. **Note** Ensure that you enter a valid format. As the format is not validated, Excel may either revert to the General number format or display random characters and undesired results for invalid formats.
Use Thousands Separator	Use a comma or other thousands separator in numerical data. Do not use # or $ as the thousands separator in Excel International Options.

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Table 5-10 (Cont.) Formatting Options

Option	Description
Decimal Places	Applies to ad hoc and forms. Overrides the setting defined in the form definition. Select the decimal places to be displayed for numeric data values. You can select to display up to 30 decimal places and preview the format. For example, in Smart View, assume the decimal option selected is "1". All values will change one decimal place to the right. If the original value is 50.56, then after refresh the value will be displayed as 50.6. Similarly, if option selected is "3", then the displayed value will be 50.560. Although Excel supports only 15 digit precision for decimal points based on IEEE standard, you can still use up to 30 decimal places using Excel's formatting options. The decimal settings in the form definition are lost when you open the form in Smart View. This is because Excel formatting only accepts a single value fixed decimal length/value for precision and does not support the minimum, maximum value defined in the web application. This is the default behavior of Excel formatting and this is the behavior in Smart View as well. In Smart View, users must set the Decimal Places option (precision length) to be able to view the decimal value in cell. **Note** Work with the **Scale** option to achieve the desired display result.

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Table 5-10 (Cont.) Formatting Options

Option	Description
Negative Number Format	Select the format in which negative numbers must be displayed and preview it. This option is available from Smart View 23.100+. The following formats are available: • **Default:** Displays negative numbers with a minus (-) sign. For example, -125. • **Parenthesis:** Displays negative numbers within parentheses. For example, (125). • **Red Color:** Displays negative numbers in Red font color. • **Parenthesis and Red Color:** Displays negative numbers within parenthesis and in Red font color. **Note** As per Excel's functionality, the negative numbers are not displayed in Red font color while using the high contrast mode.
Form Repeat Member Labels	**Form** Facilitates the readability of Planning and Oracle Hyperion Financial Management forms by allowing member names to appear on each row of data. In forms where repeated members are merged into one cell, member names may be out of the screen view, necessitating much back and forth scrolling between the member names and the row data. Selecting **Repeat Member Labels** helps make forms easier to read and use. **Note** In forms with row dimension drop-down member selectors enabled and in flex forms, the **Repeat Member Labels** option is automatically enabled and cannot be cleared.

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Table 5-10 (Cont.) Formatting Options

Option	Description
Show Distinct Page Member Names	Displays distinct page member names or fully qualified names, instead of descriptions, in the Page list for forms. See Viewing Distinct Page Member Names in Pages for Forms.

The sections that follow list the Formatting Options supported by provider.

Formatting Options Supported for Planning Forms and Ad Hoc

Table 5-11 Formatting Options Supported for Planning Forms and Ad Hoc

Option	Forms	Ad Hoc
Use Cell Styles	Yes	Yes
Use Excel Formatting —Move Formatting on Operations	No	Yes
Retain Numeric Formatting	Yes	Yes
Adjust Column Width and Row Height	Yes	Yes
Freeze Row and Column Headers	Yes	If **Smart View Ad Hoc Behavior** option is set to **Standard**: Yes If **Smart View Ad Hoc Behavior** option is set to **Native**: No
Scale	Yes	Yes
Use Custom Number Format	Yes	Yes
Use Thousands Separator	Yes	Yes
Decimal Places	Yes	Yes
Negative Number Format	Yes	Yes
Repeat Member Labels	Yes	Yes
Show Distinct Page Member Names	Yes	Yes

> **Note**
>
> Planning, Planning Modules, Financial Consolidation and Close, and Tax Reporting: If **Disable formatting** is enabled in the form definition in the web application, then the options you select in the **Formatting** tab in Oracle Smart View for Office are not honored in forms.

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Formatting Options Supported for Essbase Ad Hoc

Table 5-12 Formatting Options Supported for Essbase Ad Hoc

Option	Ad Hoc
Use Cell Styles	Yes
Use Excel Formatting —Move Formatting on Operations	Yes
Retain Numeric Formatting	No
Adjust Column Width and Row Height	Yes
Freeze Row and Column Headers	Yes
Scale	Yes
Use Custom Number Format	Yes
Use Thousands Separator	Yes
Decimal Places	Yes
Negative Number Format	Yes
Repeat Member Labels	No
Show Distinct Page Member Names	No

> **Note**
>
> For Essbase, if the number formatting options are not set or retained as default in Smart View Options, then the existing behavior of using the General format for numbers will continue for Essbase ad hoc grids.

Formatting Options Supported for Narrative Reporting Ad Hoc

Table 5-13 Formatting Options Supported for Narrative Reporting Ad Hoc

Option	Ad Hoc
Use Cell Styles	No
Use Excel Formatting —Move Formatting on Operations	Yes
Retain Numeric Formatting	Yes
Adjust Column Width and Row Height	Yes
Freeze Row and Column Headers	No
Scale	Yes
Use Custom Number Format	No
Use Thousands Separator	No
Decimal Places	No
Negative Number Format	No
Repeat Member Labels	No
Show Distinct Page Member Names	No

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Cell Styles

Cell Styles control the display of certain types of member and data cells.

On the **Cell Styles** page, you can specify formatting to indicate certain types of member and data cells. Because cells may belong to more than one type (for example, a member cell can be both parent and child), you can set separate styles for each type and also set the order of precedence for how cell styles are applied. The Planning Admin Extension also supports cell styles when editing dimensions.

Cell style options are global options, which apply to the entire current workbook, including any *new* worksheets added to the current workbook, and to any workbooks and worksheets that are created henceforth. Changes to global option settings become the default for all existing and *new* Microsoft Office documents.

It is not necessary to use **Apply to All Worksheets** or **Save as Default Options** with these options.

Video

Your Goal	Watch This Video
Learn about basic Oracle Smart View for Office functionality related to Planning, including specifying cell styles.	Entering and Saving Plan Data in Smart View with Oracle Planning and Budgeting Cloud

Guidelines

Consider the following guidelines while using cell styles.

- If a cell belongs to multiple member or data types, then as a best practice, Oracle recommends setting only one property (font, border, or background color) per type. For example, a data cell may contain supporting details and cell text at the same time. If all three style properties are set for each data type, then depending on the precedence of styles specified, properties for cells with higher priority will completely overwrite properties of cells with lower priority. If only one property per cell type is set (for example, a border for supporting details and a font style for cell text), then the cell can more easily be identified as belonging to all the applicable cell types.
- Smart View 20.200+ allows the setting of all three style properties per cell type. For example, you may set a font style, a background color, *and* a border color for parent members.

  Smart View releases earlier than 20.200 allow the setting of only one style property per cell type. For example, you may set a font style *or* a background color *or* a border color for parent members, but you cannot set all three styles for parent members.
- You can indicate parent and child member cells by applying **Parent** and **Child** cell styles, which are separate from the default **Members** cell style. After setting the styles, you can enable them in the following ways:
  - Deselect the check box for **Members** cell type and select the **Parent** and **Child** cell types. This will remove formatting from blank member cells also.
  - Keep the check box for **Members** cell type selected. Move the **Parent** and **Child** cell types above the **Members** cell type to set the priority of cell styles.
- The precedence overrides the conflicting styles but continues to preserve and display non-conflicting styles. For example, you have set the Parent and Child cell types in a higher

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order of precedence, that is moved them above the Member cell type. Now, if you set the border colors for parent and child cell types and the background color for member cell type, the parent and child cells will display the border colors and also the background colors set for member cell type, since these are two different styles that do not conflict with each other.

- If a root level dimension does not have any children or none of its children are enabled in the provider application cube, then it is considered as a child member and the Child cell style is applied to it.
- There is a difference between how parent and child cell styles are displayed in forms and ad hoc grids.
  - In forms, the members for which the Start Expand property is enabled in the provider application are considered as parents and the cells under them are their children. So the Parent cell style is applied to such expandable members. Since forms have a static layout and cannot be zoomed into, the parent cells which are not expandable and do not have any children enabled are not displayed in the Parent cell style. Instead, such cells are indicated with the Member or Child cell style, as they are appear at the lowest level.
  - In ad hoc, the hierarchy set in the outline is followed and you can zoom in and out to see all the parent and child members. So the Parent and Child cell styles appear properly based on the outline. If a member is both a parent and a child, then the Parent cell style is applied to it.

  For example, Expense and Revenue are parent member cells under Account, such that Expense is set as expandable, while Revenue is not. Expense has Utilities and Rent as children, which are enabled in the form. Revenue has Salary and Commission as children, which are not enabled in the form. When you set cell styles and refresh the form, the Parent cell style is applied to Account and Expense but not to Revenue, since only expandable members and members with children enabled are considered as parents. As Revenue is at the lowest level, it is indicated with Child cell style. Now if you open it in ad hoc, both Expense and Revenue members are indicated with Parent cell styles, since both can be zoomed into to reveal their respective children.
- When an invalid member name is entered in an ad hoc grid, the whole row or column is converted into comments, including any numeric data which is converted into numeric comments. To indicate the presence of an invalid member, the member cell styles are removed for all member cells in the invalid member row or column. If you have enabled cell style for comments and set a specific cell style for **Comment Cells** in the **Cell Styles** tab of the **Smart View Options** dialog, then the member cells in the invalid member row or column are displayed in that comment cell style.

Setting Cell Styles

To set a cell style:

1. Expand the list of available cell types.
2. Select a cell type.
3. Select **Properties** and specify any combination of font style, background color, and border color, per your requirements.

   You may apply one, two, or three style types.

   If a check box for a style property is cleared, click the property to define the style. If a check box for a style property is checked, and you want to clear or remove the style, click the property.

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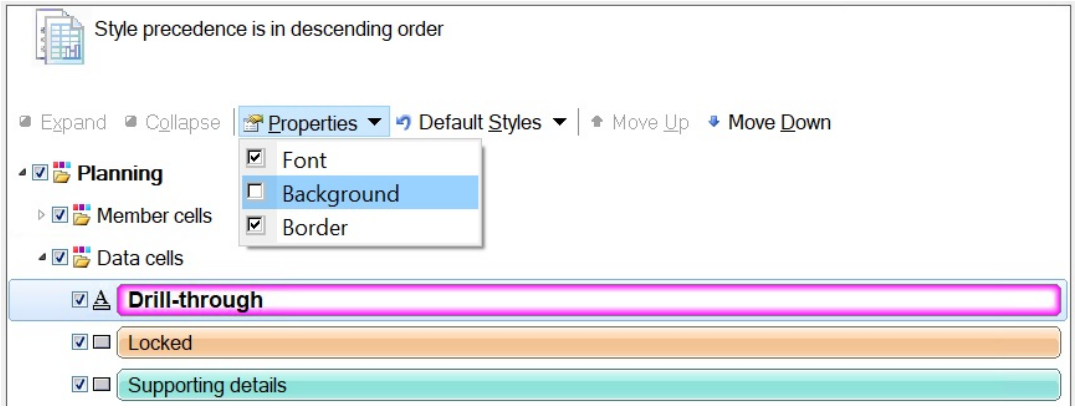
In the following example, to add a background color, click **Background**. To clear the font style, click **Font**. To clear the border style, click **Border**.



4. To re-order precedence of cell styles, use the **Move Up** and **Move Down** buttons or drag and drop the cell styles.
5. Click **OK**. The setting takes effect after you refresh or perform a drill operation.
6. **Optional:** To revert cell styles or precedence to the default styles of the connected Smart View provider, click **Default Styles.**
7. **Optional:** To set your selections on this page as default settings, click the arrow in the **OK** button, and then select **Save as Default Options**.

> **Note**
>
> There are no cell styles defined for Narrative Reporting. For other providers, see the subtopics listed in this section to find the supported options.

Cell Style Options Supported for Cloud EPM Forms and Ad Hoc

Oracle Fusion Cloud Enterprise Performance Management includes these business processes:Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

Table 5-14 Cell Style Options Supported for Cloud EPM Forms and Ad Hoc

Option	Forms	Ad Hoc
Member cells	**Member cells**	**Member cells**
Members	Yes	Yes
Custom Label	Yes	
Formula	Yes	No
Parent	Yes	Yes
Child	Yes	Yes
Data cells	**Data cells**	**Data cells**
Locked	Yes	No
Supporting details	Yes	Yes

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Table 5-14 (Cont.) Cell Style Options Supported for Cloud EPM Forms and Ad Hoc

Option	Forms	Ad Hoc
Read-only	Yes	Yes
Cell text	Yes	Yes
Document Attachment	Yes	Yes
Writable (lowest priority is recommended)	Yes	Yes
Drill-through	Yes	Yes

Cell Style Options Supported for Profitability and Cost Management Ad Hoc

Table 5-15 Cell Style Options Supported for Profitability and Cost Management Ad Hoc

Option	Ad Hoc
Member cells	**Member cells**
Member Drill-through	Yes
Contains Formula	Yes
Attribute	Yes
Duplicate Member	Yes
Shared	Yes
Parent	Yes
Child	Yes
Members	
Dynamic Calculations	Yes
Data cells	**Data cells**
Drill-through	Yes
Linked Objects	Yes
Writable (lowest priority is recommended)	Yes
Read-only	Yes

Cell Style Options Supported for Financial Management Forms and Ad Hoc

Table 5-16 Cell Style Options Supported for Financial Management Forms and Ad Hoc

Option	Forms	Ad Hoc
Member cells	**Member cells**	**Member cells**
Add Member	Yes	No
Linked Form	Yes	No
Members	Yes	Yes
Server Calculated	No	No
Client Calculated	No	No
Data cells	**Data cells**	**Data cells**
Drill-through	Yes	Yes
Derived	No	Yes
Invalid	Yes	Yes

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Table 5-16 (Cont.) Cell Style Options Supported for Financial Management Forms and Ad Hoc

Option	Forms	Ad Hoc
Locked	N/A	N/A
Impacted	Yes	Yes
Read-only	Yes	Yes
Cell text	Yes	Yes
Writable (lowest priority is recommended)	Yes	Yes
Server Calculated	No	No
Client Calculated	No	No
Supports Allocation	No	No

Cell Style Options Supported for Essbase Ad Hoc

Table 5-17 Cell Style Options Supported for Essbase Ad Hoc

Option	Ad Hoc
Member cells	**Member cells**
Attribute	Yes
Dynamic Calculations	Yes
Contains Formula	Yes
Shared	Yes
Child	Yes
Parent	Yes
Duplicate Member	Yes
Member Drill-through	Yes
Data cells	**Data cells**
Drill-through	Yes
Read-only	Yes
Writable (lowest priority is recommended)	Yes
Linked Objects	Yes

Extensions

Extensions lists the extensions that are currently installed on your computer, and provides options for installing, updating, and removing extensions.

From Excel, Word, or PowerPoint, complete these tasks in the **Extensions** tab:

- Working with Extension Alerts
- Initially Checking for Available Extensions
- Installing Extensions
- Updating Extensions
- Enabling Logging for Extension Installations
- Overriding the Default URL for the Extension Download

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- Enabling and Disabling Extensions
- Adjusting Display when Working with Extensions
- Uninstalling Extensions

For the tasks noted above, see the chapter, Smart View Extensions.

In this topic, see the following for more information on extensions:

- About the Extensions Tab of the Options Dialog
- Provider and Per-User Extensions
- Video

About the Extensions Tab of the Options Dialog

Extension options are global options—set from Excel, Word, or PowerPoint—which apply to the entire current document, including any *new* worksheets added to the current workbook, new slides added to the current presentation, or new pages added to the current document, and to all Microsoft Office documents that are created henceforth, including Excel workbooks and worksheets, PowerPoint presentations and slides, and Word documents. Changes to global option settings become the default for all existing and *new* Microsoft Office documents.

The first time users open the **Extensions** tab of the **Options** dialog box, it contains a list of the extensions that are currently installed to leverage Oracle Smart View for Office functionality for other Oracle products. See Supported Smart View Extensions for a complete list of supported extensions. Other extensions that can be downloaded and installed are made visible using the **Check for Updates, New Installs, and Uninstalls** link on the dialog box.

> **Note**
>
> - You can enable and disable extensions, and install, update, and uninstall extensions from Excel, PowerPoint, or Word.
> - It is not necessary to use **Apply to All Worksheets** or **Save as Default Options** with the Extensions options.
> - In some Oracle Fusion Cloud Enterprise Performance Management products, you can download and install certain extensions from the browser. See Downloading and Installing Clients in *Getting Started Guide for Users* for more information.

Provider and Per-User Extensions

- Provider Extensions
- Per-user Extensions

Provider Extensions

Provider extensions are dependent on, or integrated with, Cloud EPM components. Examples are the EPM Books extension and the Planning Admin Extension.

Smart View supports extensions for the providers described in Supported Smart View Extensions.

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> **Note**
>
> The Smart Query extension is packaged with Smart View and gets installed automatically when installing Smart View.
>
> The Oracle BI EE extension and Oracle Journals extension are packaged with Smart View. You can use the extension update procedures in this chapter to install them.

Narrative Reporting, Oracle Business Intelligence Enterprise Edition, Oracle Journals, Smart Query, Reconciliation Compliance, and EPM Books are documented in this guide. Other extensions are documented in the applicable Oracle product guide.

Per-user Extensions

Per-user extensions are not dependent on Oracle Enterprise Performance Management System server components. Per-user extensions may be extensions created in-house by your Smart View administrator or extensions that the administrator has obtained from Oracle or another organization.

All installed extensions, whether packaged with Smart View or not, should be enabled automatically when you start Smart View. See Enabling and Disabling Extensions.

Per-user extensions are not documented in this guide.

Video

Your Goal	Watch This Video
Learn about working with extensions in Smart View.	Overview: Broadening Your Capabilities in Smart View With Extensions

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6

Smart View Extensions

Install, update, and remove extensions from the **Extensions** tab of the **Options** dialog.

Related Topics

- About Smart View Extensions
- Working with Extension Alerts
- Initially Checking for Available Extensions
- Installing Extensions
- Updating Extensions
- Enabling Logging for Extension Installations
- Overriding the Default URL for the Extension Download
- Enabling and Disabling Extensions
- Adjusting Display when Working with Extensions
- Uninstalling Extensions

About Smart View Extensions

Oracle Smart View for Office works with several Cloud EPM extensions, along with Oracle Essbase, and Oracle Analytics Cloud extensions.

The **Extensions** tab of the Smart View **Options** dialog lists the extensions that are currently installed on your computer, and provides options for installing, updating, and removing extensions, described in this chapter.

From Excel, Word, or PowerPoint, complete these tasks in the **Extensions** tab:

- Working with Extension Alerts
- Initially Checking for Available Extensions
- Installing Extensions
- Updating Extensions
- Enabling Logging for Extension Installations
- Overriding the Default URL for the Extension Download
- Enabling and Disabling Extensions
- Adjusting Display when Working with Extensions
- Uninstalling Extensions

Related Topics:

- Extensions
- Supported Smart View Extensions

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Working with Extension Alerts

Data source types: Cloud EPM extensions

The **Extension Alerts** dialog helps you to keep your installed Cloud EPM extensions up-to-date. If you haven't already installed these extensions, the dialog informs you that they're available for install.

If you haven't already installed extensions, the dialog informs you of the extensions available for install. If you have already extensions, the dialog informs you when there are updates available.

To view the **Extension Alerts** dialog:

1. Connect to Narrative Reporting.
   a. Open Office, select the Smart View ribbon, and then click **Panel**.
   b. In the Smart View Panel, select **Private Connections**, then choose your connection from the drop-down list, and then click .

      If any extensions are already installed (for example, Narrative Reporting), then select **Library** in Narrative Reporting Home to view the tree and expand the Library node.

      If no extensions are installed, then in the tree, select the Library node.
   c. In the Action Panel, click **Connect**.

      Upon connection, Oracle Smart View for Office compares the extension versions available on the provider environment with the versions installed on your computer. If there are extensions to install or update, the **Extension Alerts** dialog is displayed. This dialog informs you of the extensions available for installation or update.

      Figure 1

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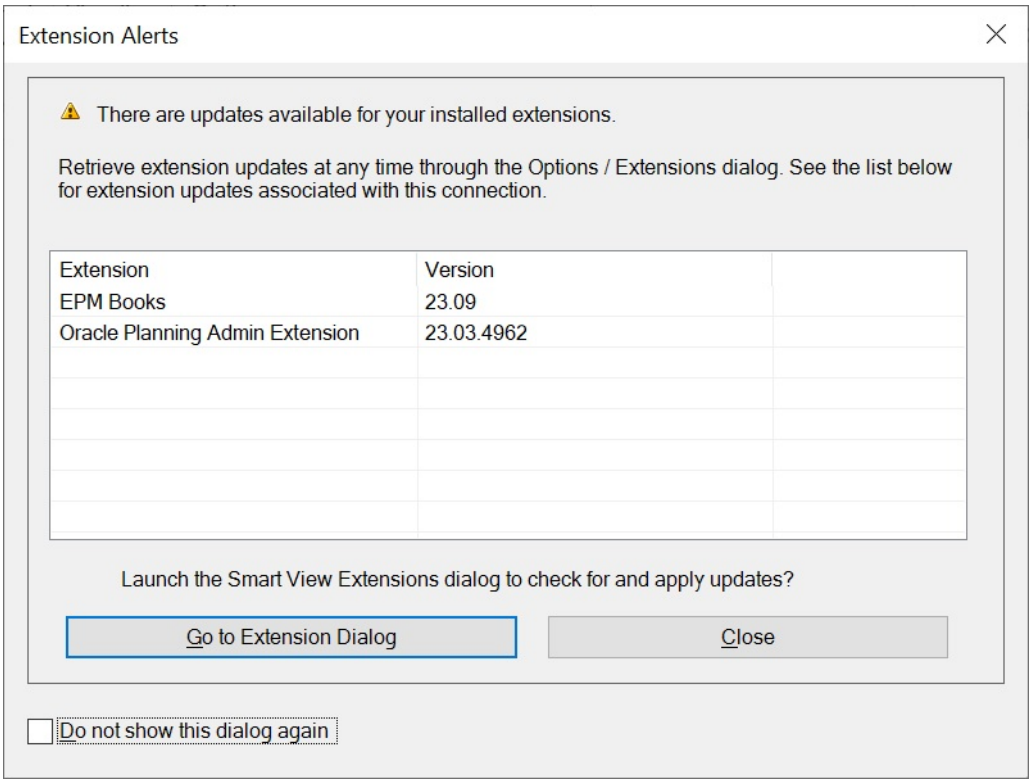
Figure 6-1 Extension Alerts Dialog Showing Extensions Available for Installation



2. Review the list of available extensions and then perform an action:
   - Click **Go to Extension Dialog** to continue with the extension installation and update process.
   - Click **Close** to close this dialog. You can perform the extension installation and update process at any time.

   See Updating Extensions to complete the extension installation and update process.

   If this is a new Smart View installation, see Initially Checking for Available Extensions.
3. **Optional:** To disable the **Extension Alerts** dialog from displaying upon connecting, perform either of the following actions:
   - In the **Extension Alerts** dialog box, select the **Do not show this dialog again** check box.
   - In the **Options** dialog, **Extensions** tab, select the **Suppress extension alerts for updates when connecting** check box.

   To enable **Extension Alerts** to display upon connection, go to the **Options** dialog, **Extensions** tab, and clear the **Suppress extension alerts for updates when connecting** check box.

Initially Checking for Available Extensions

After Oracle Smart View for Office is first installed, complete the procedure in this topic to check for all available extensions.

Complete the procedure in Updating Extensions to check for updates to your installed extensions.

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> **Note**
>
> - Your Smart View system administrator controls the extensions available for you to install, and whether installation is automatic or optional.
> - The extension installation and update command, **Check for Updates, New installs, and Uninstalls**, is not supported when logged in using a vanity URL.

To check for extensions after first installing Smart View:

1. Start Excel, Word, or PowerPoint.
2. From the Smart View ribbon, select **Options**, and then **Extensions**.
3. Click the **Check for Updates, New Installs, and Uninstalls** link.
4. In **Select Location for Extension Updates**, select the data source connections to check for extension updates, and then click **Get Updates**.

   Smart View checks all selected data source connections for extensions that your administrator has made available to you.

   To check for extensions in all your data source connections, check **Select All**.

   The dialog box expands to display a message window providing you with the progress and status of the extension query.

   > **Note**
   >
   > If you have connections to multiple products from Oracle Enterprise Performance Management System, Oracle Fusion Cloud Enterprise Performance Management, Oracle Business Intelligence Enterprise Edition, and Oracle Analytics Cloud, you can select the connection locations for only those extensions that you want to update at this time. For example, you may only want to check for an update for your Narrative Reporting extension. In that case, select only the check box that corresponds to your Narrative Reporting connection.

5. Click **Close** to close the **Select Location for Extension Updates** and return to the **Extensions** tab of the **Options** dialog box.
6. Perform an action:
   - Follow the prompts to close the active Office application. As a best practice, check the Windows Task Manager and close any other Office applications or processes that are running, including Outlook. Then restart Office.

     If your administrator has set up extensions to automatically install after checking for updates, and closing and reopening Office, then you do not need to do anything further.
   - If your administrator has set up optional extension installation, then continue with step 6 in Installing Extensions.

Installing Extensions

If an extension is available for you to install, you can install it from the **Extensions** tab of the **Options** dialog box.

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> **Note**
>
> - Your Oracle Smart View for Office system administrator controls which extensions are available to you, and whether installation is automatic or optional. If installation is automatic, then you need only follow the instructions in Initially Checking for Available Extensions. If installation is optional, follow the instructions in this topic.
> - The Oracle BI EE extension, which is compatible with Oracle Analytics Cloud, installs differently than other extensions. See Installing the Oracle Analytics Cloud Extension for details.
> - The extension installation and update command, **Check for Updates, New installs, and Uninstalls**, is not supported when logged in using a vanity URL.

To install an extension:

1. Start Excel, Word, or PowerPoint.
2. From the Smart View ribbon, select **Options**, and then **Extensions**.
3. Click the **Check for Updates, New Installs, and Uninstalls** link.

   Smart View checks for any new or updated extensions and required extensions.
4. In **Select Location for Extension Updates**, select the data source connections to check for extension updates, and then click **Get Updates**.

   > **Note**
   >
   > Oracle Journals and Oracle BIEE extensions installation package is installed with Smart View locally.

   Smart View checks all selected data source connections for extensions that your administrator has made available to you.

   To check for extensions in all your data source connections, check **Select All**.

   The dialog box expands to display a message window providing you with the progress and status of the extension query.
5. Click **Close** to close the **Select Location for Extension Updates** and return to the **Extensions** tab of the **Options** dialog box.
6. Review the list of extensions and where you see

, click the **Install** link to launch the installer.

   Required per-user extensions are designated as follows:

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> **Note**
>
> In release 25.100+, a message alerts you if a minimum version of Smart View is required and the current Smart View installation is not at the minimum version.
>
> You may continue with the installation; however, some features may not be available in the extension being installed.

7. Follow the prompts to install the extension.

> **Tip**
>
> You will be prompted to close the active Office application. All Office applications must be closed in order to complete the extension installation correctly. As a best practice, check the Windows Task Manager and close any other Office applications or processes that are running, including Outlook.

Updating Extensions

If an extension is available for you to update, you can update it from the **Extensions** tab of the **Options** dialog box.

> **Note**
>
> - The extension installation and update command, **Check for Updates, New installs, and Uninstalls**, is not supported when logged in using a vanity URL.
> - Your Oracle Smart View for Office system administrator controls the extensions available to you and your options for updating extensions. If installation is automatic, then you need only complete the first three steps in this topic. If installation is optional, complete all the steps in this topic.

To check for extension updates and install them:

1. From the Smart View ribbon, select **Options**, and then **Extensions**.
2. To update extensions, perform one of these tasks:
   - Click the **Check for Updates, New Installs, and Uninstalls** link to immediately check for updates to all your available extensions and any new extensions.
   - Select the **Check for updates when Microsoft Office starts** check box.

     Smart View performs a check for extension updates each time you start an Office application.
3. In **Select Location for Extension Updates**, select the data source connections to check for extension updates, and then click **Get Updates**.

   Smart View checks all selected data source connections for extension updates that your administrator has made available to you.

   To check for extension updates in all your data source connections, check **Select All**.

   The dialog box expands to display a message window providing you with the progress and status of the extension update query.

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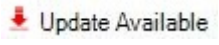
4. Click **Close** to close the **Select Location for Extension Updates** and return to the **Extensions** tab of the **Options** dialog box.
5. Perform an action:
   - Follow the prompts to close the active Office application. Also, check the Windows Task Manager and close any other Office applications or processes that are running, including Outlook. Then restart Office.

     You do not need to do anything further.
   - If your administrator has set up optional extension installation updates, then continue with step 6.
6. Review the list of extensions and where you see 

, click the **Update Available** link to launch the installer.

   > **Note**
   >
   > In release 25.100+, a message alerts you if a minimum version of Smart View is required and the current Smart View installation is not at the minimum version.
   >
   > You may continue with the installation; however, some features may not be available in the extension being installed.

7. Follow the prompts to install the extension.

   When updates are available, you are prompted to download the extension installer, close the Office application, and run the installer.

   > **Tip**
   >
   > All open Office applications must be closed in order to complete the extension installation correctly. As a best practice, check the Windows Task Manager and close any other Office applications or processes that are running, including Outlook.

   After restarting the Office application, the extension appears as **Enabled** in the **Extensions** page of the **Options** dialog box.

Enabling Logging for Extension Installations

To create a log of the extension installation process:

1. From the Smart View ribbon, select **Options**, and then **Extensions**.
2. Select the **Enable logging for extension installations** check box.
3. In the **Advanced** tab of the **Options** dialog box, complete these steps:
   a. Ensure that the **Log Message Display** level is set to at least **Warnings**.
   b. Select the **Route Messages to File** check box and note the location of the log file.
4. Proceed to install or update an extension, as described in Installing Extensions and Updating Extensions.

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Overriding the Default URL for the Extension Download

Your Oracle Smart View for Office administrator may move an extension installer to a non-default location and then notify you of the installer location. If this happens, complete the following procedure.

> **Note**
>
> The non-default location of an extension installer can be a URL, or a local or network folder.

To override the default download URL or folder location:

1. From the Smart View ribbon, select **Options**, and then **Extensions**.
2. Select the **Override default download URL** check box.

   The text box and browse button are activated, as shown in Figure 1.

Figure 6-2 Override Default Download URL Check Box

3. Enter a URL in the text box, or click and navigate to the local folder or the network folder specified by your Smart View administrator.

   The UpdateList.xml file is automatically appended to either the URL or the folder specified.

Enabling and Disabling Extensions

To enable an extension:

1. From the Smart View ribbon, select **Options**, and then **Extensions**.
2. Locate the extension in the list and select the **Enable** check box.

   After you select the check box, the label changes to **Enabled**.
3. **Optional:** To disable an extension, locate the extension in the list and clear the **Enabled** check box.

> **Note**
>
> When extensions are enabled in Oracle Smart View for Office, cascading a report with a large number of members can cause Excel to stop responding. As a best practice to avoid this from happening, disable any extensions that are installed from the Smart View Options dialog box, Extensions page. Then, restart Excel and repeat the cascade operation.

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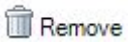
Adjusting Display when Working with Extensions

If the windows associated within an installed extension are not rendering and displaying properly in Oracle Smart View for Office, go to the **Health Check** dialog and ensure that the **Browser Emulation Mode** option is enabled (not set to **Disable**). To do this:

1. From the Smart View ribbon in Excel, click the arrow next to **Help**, and then select **Health Check**.
2. Click **Recommended Settings** at the bottom of the dialog.
3. Click **Yes** in the confirmation dialog.
4. Click **Update Settings**, and then click **Close**.
5. Restart Excel and log in.

For more information, see Performing a Health Check On Your System.

Uninstalling Extensions

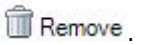
The **Remove** link,  , appears next to any extension names that you are authorized to uninstall.

> **Note**
>
> Your Oracle Smart View for Office administrator determines which extensions you are authorized to uninstall.

To uninstall an extension:

1. From the Smart View ribbon, select **Options**, and then **Extensions**.
2. Click the **Check for Updates, New Installs, and Uninstalls** link.

   Smart View checks for any extensions that can be removed.
3. In the extensions list, locate the extension to uninstall and click the **Remove** link,

    .

   You are prompted that the extension will be uninstalled when the Office application is restarted. All Office applications must be closed to completely remove the extension.
4. Close all Office applications, including Outlook, and restart.

> **Tip**
>
> All open Office applications must be closed in order to complete the uninstallation correctly. As a best practice, check the Windows Task Manager and close any other Office applications or processes that are running, including Outlook.

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7

Dimensions and Members

Related Topics

- About Dimensions and Members
  Dimensions are data categories used to organize business data for retrieval and preservation of values.
- Dimension and Member Naming Limitation
  There are some limitations to consider when naming dimensions and members.
- Best Practices for Numeric Member Names
  Use the best practices noted in this topic when working with numeric member names in Oracle Smart View for Office.
- Selecting Members from the Member Selector
  You select members for a variety of purposes within Oracle Smart View for Office: ad hoc grids, functions, and the POV Manager.
- Selecting Members from the POV Toolbar
  The POV is the default starting point for dimensions in a data source connection.
- Selecting Members Using the Cell-Based POV
  You can select members directly from cells in the page dimension row of a grid rather than using the POV toolbar.
- Entering Members in Free-Form Mode
  If you are familiar with the dimensions and members of your database, you can enter their names directly into cells using *free-form mode*.
- Displaying the POV Toolbar
  You can choose whether to display all members on the grid and hide the POV toolbar or to display the POV toolbar containing the POV members.
- POV Manager
  The Point of View (POV) is the starting point for forms, ad hoc grids, and functions.
- Filtering by Attribute
  In an ad hoc grid, you can filter by attributes in dimensions that contain attribute members.
- Filtering by Subsets
  For dimensions that contain attribute members, you can select attributes and set conditions for them to display only those members that meet these conditions.
- Selecting Period-to-Date Members
  In time dimensions, you can set up period-to-date members, called Dynamic Time Series members, if defined. For example, to see year-to-date data at the end of August, you can set up a Dynamic Time Series member that includes data for January through August.
- Specifying Member Perspective
  Use the Varying Attribute filter to specify member perspective for varying attributes when selecting members.
- Viewing Member Information
  You can view detailed information about any member on an ad hoc grid. The information displayed depends on the data source type to which you are connected.

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- Working with Aliases and Alias Tables
  Aliases are alternate names for database member names.
- Defining Member Name Display in the Member Selector
  You can change how member names are displayed in the Member Selection dialog box by choosing a Member Name Display option.
- Displaying Qualified Names of Duplicate Members
  Different members or member aliases may have identical names.
- Qualified Name Display in Alternate Hierarchies
  Qualified name behavior for alternate hierarchies affects runtime and member selector behavior on forms and ad hoc grids.
- Viewing Distinct Page Member Names in Pages for Forms
  View distinct page member names or fully qualified names, instead of descriptions, in the Page list for forms.
- Viewing Dimension Properties
  Using the **Insert Properties** command in the Essbase ribbon, you can quickly view the properties of a dimension in an ad hoc grid.

About Dimensions and Members

Dimensions are data categories used to organize business data for retrieval and preservation of values.

Dimensions usually contain hierarchies of related *members* grouped within them. For example, a Year dimension often includes members for each time period, such as quarters and months.

You can select members for the grid from the Member Selection dialog box available from the data source ribbon, from the POV toolbar, or by entering the member name using free-form mode.

Related Topics:

Dimension and Member Naming Limitation

Selecting Members from the Member Selector

Selecting Members from the POV Toolbar

Entering Members in Free-Form Mode

Dimension and Member Naming Limitation

There are some limitations to consider when naming dimensions and members.

If you use Oracle Smart View for Office cell functions (described in Functions), then do not use these characters in member names, dimension names, or variable names.

- Hash mark (#)
- Semicolon (;)
- Comma (,)

These characters are reserved for delimiters in Smart View cell functions.

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Best Practices for Numeric Member Names

Use the best practices noted in this topic when working with numeric member names in Oracle Smart View for Office.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

When working with numeric member names in Smart View:

- Prefix numeric member names with an apostrophe (').
- Before entering numeric member names, select the member cells or an entire column, then use Excel to set the format of the selected cells to "Text."
- If you have already entered numeric member names, select the member cells or an entire column, use Excel to set the format of the selected cells to "Text," then press **F2** and **Enter** to trigger Excel to update the cell type.

The best practices noted above also need to be used when working with member names consisting of Boolean or date values.

Selecting Members from the Member Selector

You select members for a variety of purposes within Oracle Smart View for Office: ad hoc grids, functions, and the POV Manager.

The Member Selection dialog boxes in these locations may vary slightly, and not all options are always available. You can select members for one dimension at a time.

Figure 1 shows the **Member Selection** dialog box with the Year dimension and its members as examples.

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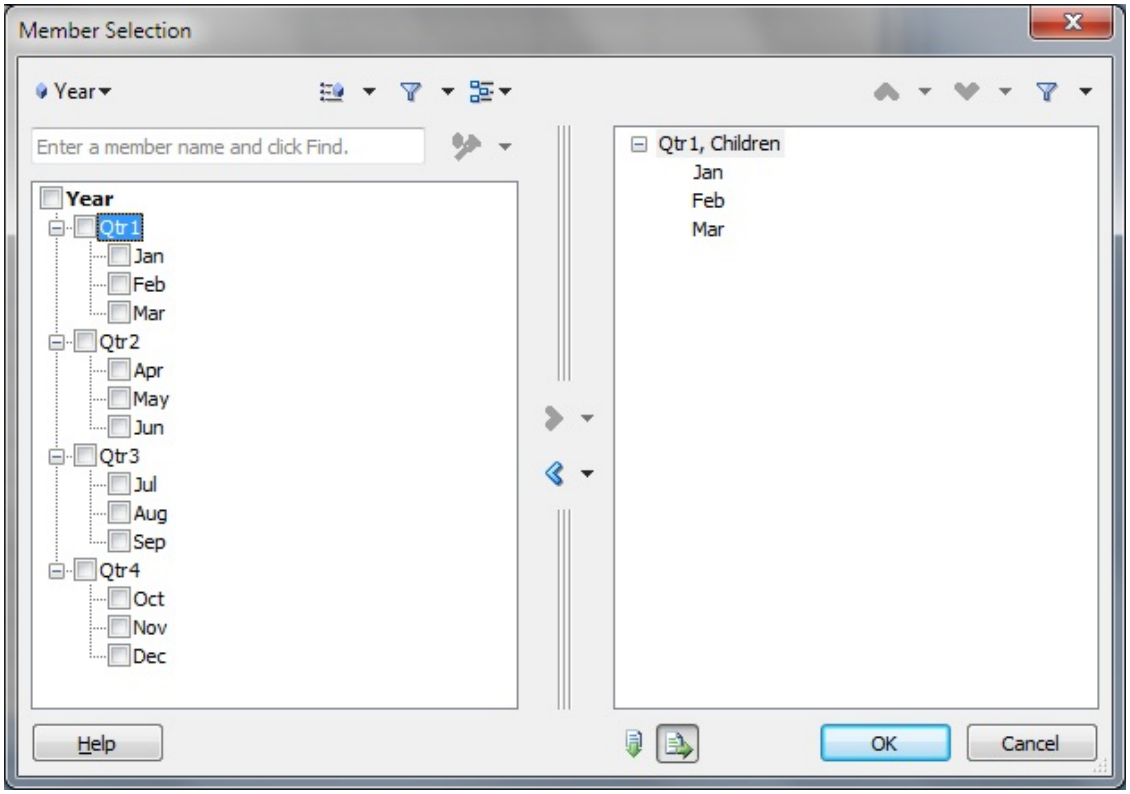
Figure 7-1 The Member Selection Dialog Box



> **Note**
>
> In this topic, Cloud EPM refers to these data source providers: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, and Tax Reporting.
>
> References to Oracle Hyperion Planning refer to on-premises Planning.

Related Topics:

Best Practices for Selecting Members

Selecting Members

Best Practices for Selecting Members

- Oracle Hyperion Financial Management: An error occurs (Unknown error 0x800A139D) when a member list containing double hyphens (--) in the name is selected.
- Cloud EPM: While in "Member Name and Alias" mode:
  - The dimension displayed in the **Member Selection** dialog will show the default dimension, regardless of the dimension or member you selected for an alias column on the grid. Perform step 2 to select the dimension you require.
  - After selecting a member using the **Member Selection** dialog, users will need to manually correct or delete the corresponding member or alias in the adjacent column in the sheet to ensure a successful refresh.

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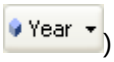
"Member Name and Alias" mode refers to the **Member Name Display** option being set to **Member Name and Alias**, described in Member Options.

> **Tip**
>
> Oracle Essbase and Cloud EPM:
> To quickly add attribute dimensions onto an ad hoc or free-form grid, follow the instructions in Inserting Attribute Dimensions on the Sheet. You can then use the instructions in this topic to select and work with members from attribute dimensions.

Selecting Members

To select members:

1. To display the **Member Selection** dialog box, which contains a tree list of available members for the dimension selected, do one of the following:
   - Select a dimension or member on the grid, and then from a provider ad hoc ribbon, click **Member Selection**. For example, from the Planning Ad Hoc ribbon or the Essbase ribbon, click **Member Selection**.
   - From an open dialog box enabled for member selection, click **Member Selection**.
   - On a blank worksheet, from the Smart View Panel, right-click a cube name and select **Member Selection**. Use this method to select members for functions and references (see Functions).
   - Click on a user variable in a form.
2. From **Member Selection**, to change the dimension, click the **Dimension Selector** button (for example, 

) and select a dimension.
3. **Optional:** To find a specific member in the tree list, enter a member name, or part of a member name, in the search field and click .

   The first result in the member list is highlighted. Click again to locate the next member that contains the search string you entered.

   Alternatively, you can press the F3 key instead of clicking the button.

   > **Tip**
   >
   > For searches on alphabetic characters only, you may also press the **Enter** key after you have typed your search criteria in the search field. After locating a matching member, pressing **Enter** again can result in an error message. You may use the **Enter** key for successive searching, but after locating a matching result, it is a best practice to always place the cursor back in the search field before pressing **Enter** again.

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> **Note**
>
> - If the alias table for the **Member Selection** dialog is set to **None** (see step 6), you may search by member name. If you change the alias table to **Default** or to any other alias table, then you must search according to the corresponding aliases defined for the Default alias table or any other selected alias table.
> - Essbase and Narrative Reporting accept asterisks (*) and question marks (?) as wild cards. The asterisk can be substituted for a group of characters; the question mark can be substituted for only one character.
>
> For example, to search for all member names that start with the word, Total, To* and To?al are valid search strings; however, To? is not.
>
> The search string cannot begin with an asterisk. For example, *Total and *otal are not supported search strings.

4. **Optional:** Click the arrow in and select an option to change the criteria for displaying members in both the right pane of the Member Selection dialog box and on the grid or form:
   - **Essbase:**
     - **Hierarchy**—Displays members in standard hierarchy format.
     - **Attribute**—Display members by attributes. See Filtering by Attribute.
     - **Subset**—Display a subset of members based on a set of conditions. Filtering by Subsets.
     - **Dynamic Time Series**—Display members by the latest period on which to base the to-date calculation. See Selecting Period-to-Date Members.
   - **Hierarchy**—Display members in standard hierarchy format.
     - **Attribute**—Planning only. Display members by attributes in an ad hoc grid. See Filtering by Attribute.
     - **Substitution Variables**—Display members based on selections made in the **User Variables** tab of the **Preferences** dialog box.

       > **Note**
       >
       > The **Substitution Variables** option displays when you access **Member Selection** from a user variable in a form.

     - **Dynamic Time Series**—Display members by the latest period on which to base the to-date calculation. See Selecting Period-to-Date Members.
   - **Narrative Reporting:**
     - **Hierarchy**—Display members in standard hierarchy format.
     - **Dynamic Time Series**—Display members by the latest period on which to base the to-date calculation. See Selecting Period-to-Date Members.

5. **Optional:** To find a specific member or group of members in the tree list, click and select one of these filters (filter options may vary by data source type):

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- **Descendants** to select all descendents of the selected member
- **Descendants Inclusive** to include the selected member and all descendents of the selected member
- **Children** to select only the children of the selected member
- **Children Inclusive** to include the selected member and only the children of the selected member
- **Siblings** to select all siblings of the selected member
- **Siblings Inclusive** to include the selected member and all siblings of the selected member
- **LSiblings** to include only the members that appear before the selected member with the same parent
- **LSiblings Inclusive** to include the selected member and its left siblings
- **RSiblings** to include only the members that appear after the selected member with the same parent
- **RSiblings Inclusive** to include the selected member and its right siblings
- **Parent** to select only the parent of the selected member
- **Parent Inclusive** to include the selected member and only the parent of the selected member
- **Ancestors** to select all the ancestors of the selected member
- **Ancestors Inclusive** to include the selected member and all ancestors of the selected member
- **Level 0 Descendant** to display all descendants of the selected member that have no children
- **Level** to display the Level dialog box, where you select one level in the hierarchy of members
- **Generation** to display the Generation dialog box, where you select one generation in the hierarchy of members
- **UDA** to display the UDA dialog box, where you select a user-defined attribute (available only if defined by the administrator)

> **Note**
>
> Narrative Reporting does not support filters.

6. **Optional:** To choose display and selection options for members in the **Member Selection** dialog box, click and perform an action:
   - To place a check in the check box next to the applicable members, choose from **Check Children**, **Check Descendants**, or **Check Base Members**.
   - To clear all check marks, select **Clear Checks**.
   - To view expanded or collapsed dimensions, select **Expand All** or **Collapse All**.
   - To view information about a member, select the member, then select **Member Information**. Click the **Alias** tab to view alias table information, if available.

     Applies to Essbase, Cloud EPM, Narrative Reporting, .

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- To apply an alias table to the members in the **Member Selection** dialog box, select **Alias Table**, and then select an alias table.

  Note that alias table selections made in the **Member Selection** dialog box apply only to the dialog box and not to the grid in the Office document.

7. Under **Members**, select the members that you want to use.

> **Note**
>
> Financial ManagementAn error occurs (Unknown error 0x800A139D) when a member list containing double hyphens (--) in the name is selected.

8. Click .

   The members are transferred from the member tree list to the selection tree list in the pane on the right.

9. **Optional:** If this is the first member selection that you make in a blank, connected worksheet, then launch the **Member Selection** dialog from the Smart View Panel by choosing **More**, then **Member Selection**; select members, and then choose one of these fill buttons:

   - to fill in the selected members vertically, in a column, starting in the selected cell
   - to fill in the selected members horizontally, in a row, starting in the selected cell

   The fill buttons only appear when launching **Member Selection** from the **More** menu in the Smart View Panel and are helpful in creating a free-form ad hoc grid. The fill buttons are present for all eligible members in the connected data source.

> **Tip**
>
> When using the fill buttons, always check the cell placement of your cursor to ensure that you have selected the desired starting point within the sheet. The fill begins from the selected cell.

   For example, place your cursor in cell A2, launch **Member Selection** from the **More** menu, then select any three members in a dimension and move them to the right side of the dialog. Click the **Fill vertically** button, , and close the dialog. The selected members are filled in to cells A2, A3, and A4.

10. Click **OK** to close the **Member Selection** dialog.

    The members selected are displayed in the grid.

11. From the ribbon, click **Refresh** to update the data on the grid to correspond to the selected members.

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> **Note**
>
> Once the selected members are in the grid, you must perform a **Refresh** before selecting another member in the grid and launching **Member Selection** again. If you do not refresh the grid, then **Member Selection** is launched in the context of the first dimension of your cube outline.

12. **Optional:** Repeat this procedure to select additional members, after you first refresh the grid as instructed in the previous step.

Selecting Members from the POV Toolbar

The POV is the default starting point for dimensions in a data source connection.

From the POV toolbar, you can select members and filters for the dimensions that you want to include in the grid and move members to and from the grid.

The modified POV applies only to the selected sheet. For existing sheets in the workbook, and any new sheets, the modified POV will not be applied.

Each connection is associated with only one POV. However, the same connection to different worksheets within a workbook may have different POVs.

POVs can be managed as described in POV Manager.

> **Note**
>
> For Oracle Essbase and Narrative Reporting connections, see Displaying the POV Toolbar.

Placing Members and Dimensions from the POV Toolbar onto the Grid

To select dimensions and members from the POV toolbar:

1. Do one of the following:
   - Enter the name of a member over its corresponding dimension on the POV toolbar, and then click **Refresh** on the POV toolbar.
   - Click the down arrow next to a dimension on the POV toolbar, then click the ellipsis (...), and then select members as described in Selecting Members from the Member Selector.

   > **Note**
   >
   > In the **Member Selection** dialog box, it is possible to select more than 5000 members for the POV. However, be aware that the POV toolbar can only display the first 5000 selected members.

2. From the POV toolbar, right-click the down arrow next to the member and drag it to the grid.

   To move a member or dimension back to the POV toolbar for editing, right-click its cell and drag it to the POV toolbar.

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3. Repeat as necessary to place all dimension and members that you want to include on the grid.

> **Note**
>
> The modified POV applies only to the selected sheet. For existing sheets in the workbook, and any new sheets, the modified POV will not be applied.

4. To save these POV selections in the worksheet, you must refresh before you save the worksheet.
5. **Optional:** To hide the POV toolbar, click **POV** on the data source ribbon.

   The **POV** button toggles to hide or display the POV toolbar. When you finish working with the POV toolbar, you can hide it until you need to display it again.

> **Note**
>
> Starting with Oracle Smart View for Office 11.1.2.5.520, when connected to duplicate member databases, the member name only should display by default in the POV. However, for workbooks saved in Smart View 11.1.2.5.510 and earlier, the qualified member name displays in the POV. To change the display of member names in the POV, open the **Member Selection** dialog box from the POV, then click **OK**.

Example 7-1 Example POV Usage

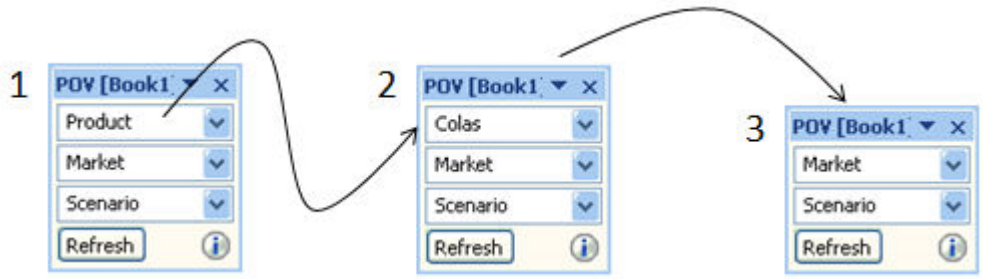
Figure 1 shows, from left to right, a POV in the following conditions:

1. **Product**, **Market**, and **Scenario** are the starting dimensions in the POV.
2. **Colas** is selected as the **Product** member.

   In the **Member Selection** dialog box, it is possible to select more than 5000 members for the POV. However, be aware that the POV toolbar can only display the first 5000 selected members.

   Although only one dimension member at a time can display in the POV, note that in **Member Selection**, up to 5000 members can be selected for the drop-down list for a dimension in the POV. The members you select are accessible in the POV by clicking the drop-down arrow for the dimension.
3. **Colas** has been moved to the grid (and it can be moved back to the POV toolbar), so that only Market and Scenario remain in the POV.

Figure 7-2 The POV — using pov2



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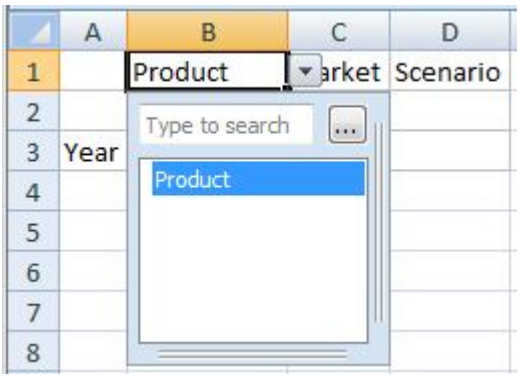
Selecting Members Using the Cell-Based POV

You can select members directly from cells in the page dimension row of a grid rather than using the POV toolbar.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

The cell-based POV is available by clicking a page POV dimension cell, then selecting the down arrow, , that appears to the right of the cell; it works the same as the POV toolbar.

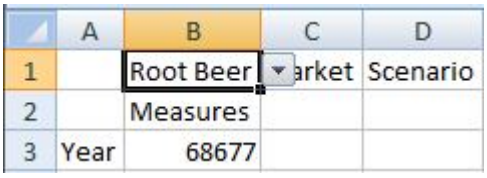
Figure 7-3 Selecting a Dimension Cell and Clicking the Down Arrow



Click the ellipsis button, , that appears in the cell-based POV and select members in the **Member Selection** dialog box, and then click **OK**. Now, look at the dimension cell again. The first member you selected appears in the dimension cell, and the other members are available by clicking the down-arrow in the cell-based POV and selecting them. After each selection, click **Refresh** to view the updated data.

Using the Oracle Essbase Sample Basic application and database as an example, for the Product dimension, if you select Root Beer, Cream Soda, and Fruit Soda in the **Member Selection** dialog box, then "Root Beer" appears in the dimension cell, as shown in Figure 2. Click **Refresh** to view the data for Root Beer.

Figure 7-4 Using Cell-Based POV to Change the Product Dimension POV to Root Beer



Now click the arrow next to the cell, , and make another selection from the cell-based POV; for example, Cream Soda (Figure 3).

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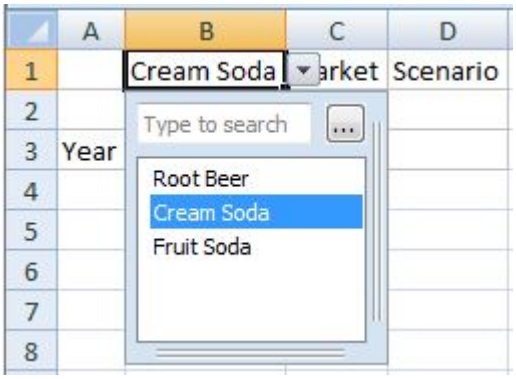
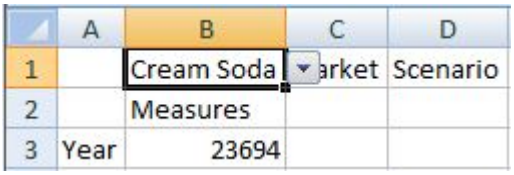
Figure 7-5 Changing the POV to Cream Soda Using the Cell-Based POV



Click **Refresh** to update the data. Notice that the data has changed (Figure 4).

Figure 7-6 Refreshed Data for Cream Soda



You can also directly type a member name in the search field of the cell-based POV drop-down. In this case, you can select only one member at a time. Click **Refresh** to view updated data. Type another member name in the search field each time you want to change the POV.

You can still use the POV toolbar as before by toggling the **POV** button on the provider ribbon. The cell-based POV and the POV toolbar selections are automatically synchronized, regardless of where the selections are made. If you change to a different alias table, the cell-based POV is populated with the proper alias names.

Entering Members in Free-Form Mode

If you are familiar with the dimensions and members of your database, you can enter their names directly into cells using *free-form mode*.

You can use aliases from the alias table associated with the current grid in free-form mode.

> ⓘ **Note**
>
> **Oracle Essbase, Oracle Fusion Cloud Enterprise Performance Management Ad Hoc:**
>
> If you enter an alias from a different alias table, it will revert to the alias from the current alias table.

After connecting to a data source, you can enter member names as follows:

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- By entering a member name in a blank cell
- By replacing a member name in a cell with a different member from the same dimension

You can still use the POV, member selection, and other ad hoc operations in free-form grids. See Free-Form Mode.

Displaying the POV Toolbar

You can choose whether to display all members on the grid and hide the POV toolbar or to display the POV toolbar containing the POV members.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting, Narrative Reporting

By default, all members are displayed on the grid, and the POV toolbar is hidden. The members in the first row of the grid are called "page" dimensions. In this mode, you can format POV member cells the same as you do other member and data cells, and select members using the Member Selection button in the ribbon.

When you display the POV toolbar, the page dimensions move to the POV toolbar. When you hide the POV toolbar, the page dimensions move back to the first row of the grid.

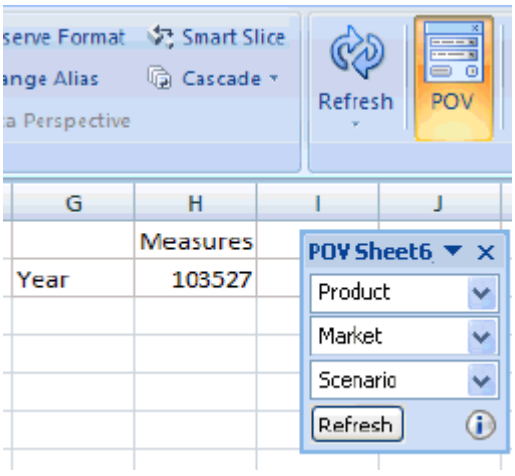
If you choose to display the POV toolbar containing the POV members, you can use the POV toolbar to select members and move them to and from the grid as described in Selecting Members from the POV Toolbar.

To display the POV toolbar:

1. Select the provider ad hoc ribbon. For example, Planning Ad Hoc ribbon.
2. Click the **POV** button.

   Figure 1 shows the POV toolbar on the grid. **Measures** and **Year** are displayed on the grid; POV members **Product**, **Market**, and **Scenario** are displayed on the POV toolbar.

Figure 7-7 POV Toolbar Displayed



To hide the POV toolbar and display all members on the grid:

1. Select the Provider ribbon.
2. Click the **POV** button to toggle it off.

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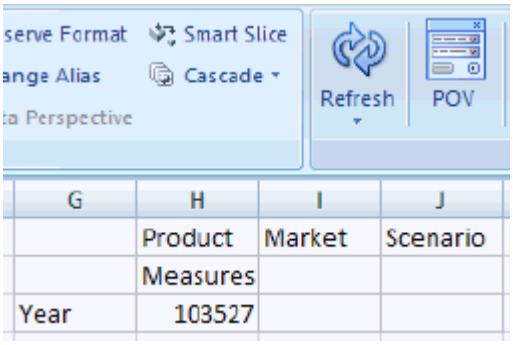
In Figure 2, the **POV** button is toggled off, the POV toolbar is hidden, and all members are on the grid.

Figure 7-8 All Members Displayed on Grid



> **Note**
>
> - In some cases, in workbooks with multiple sheets where each sheet contains a different query or template, if you drag the POV toolbar to the top of a sheet and dock it, you may see two POV toolbars on that sheet. This can occur on any number of sheets where the POV toolbar has been docked. Click the **X** in the right corner of one of the POV toolbars to close it, or refresh the sheet.
> - You should hide the POV toolbar before editing the grid and refreshing, or an error can result upon refresh. For example, before adding a new row to the grid, click the **POV** button to toggle it off so that Page dimensions are displayed in row 1 of the sheet.

POV Manager

The Point of View (POV) is the starting point for forms, ad hoc grids, and functions.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

Using the POV Manager in Oracle Smart View for Office, you can change the default POV for forms and ad hoc grids, and the background POV for functions.

> **Note**
>
> As a best practice, always use a private connection when working with the POV Manager. If you have already connected using a shared connection, use the **Add to Private connections** command to save the current shared connection as private. See Saving Connections as Private Connections.

With the POV Manager, you can perform the following operations:

- Select members for the default POV and edit the default POV
- Select members for the background POV for functions

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- Save a POV to a workbook
- Copy a POV and paste it to a different worksheet or workbook
- Edit a POV
- Delete a POV

Video

Your Goal	Watch This Video
Learn about integrating data in Office applications, including working with the POV Manager.	Integrating Plan Data with Microsoft Office in Oracle Planning and Budgeting Cloud

> **Note**
>
> In Oracle Essbase, if a member linked to a Smart List is in the POV, you may not be able to change some values in the Smart List for some members present in the worksheet.

Related Topics:

Selecting Members for the Default or Background POV

Copying and Pasting a POV

Deleting a POV

Setting Default POV

You can set a default POV directly from an ad hoc grid's POV for private connections.

Data source types: Oracle Essbase, Planning, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

Using this method, you first select the desired POV in an active ad hoc grid and then set it as default. Once you have set the default POV, whenever you connect to the specific connection and open an ad hoc grid, it displays data for the default POV that you have set.

Note the following considerations while setting default POV:

- The default POV is retained only for private connections and named connections that have been assigned a friendly name.
- If you are using a shared connection or a temporary connection, then the default POV is retained only for the active session. If you close and reopen the sheet and connect to the same shared or temporary connection, the ad hoc grid does not appear with the default POV.
- The default POV is applicable only for Standard mode ad hoc grids.
- Default POV can be set only for the POV dimensions present in the title row (usually the first row). It cannot be set for row or column dimensions. For example, if Account and Entity are present in the row dimensions, and Period, Scenario, and Product are the POV dimensions in the first row, then you can set default POV for Period, Scenario, and Product dimensions. For any row or column dimensions, you can first pivot them to POV, that is move it to the title or first row, and then set the default POV for that dimension.

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- To set the default POV using Member Selector, see Selecting Members for the Default or Background POV.

To set the default POV for a specific connection:

1. Open a workbook and connect to the specific private or named connection for which you want to set the default POV.
2. Open an ad hoc grid and select the desired values for the POV dimensions present in the first row of the grid.
3. From the Smart View ribbon, click **Refresh**.
4. Now, from the Smart View ribbon, select **Function**, and then **Manage POV**.

   The **POV Manager** dialog appears.
5. In the **POV Manager** dialog, click **Set Active POV as Default**.

   The default POV that you set in the grid appears in the **POV Manager** dialog.
6. Click **Close** to close the dialog.
7. Now, close the workbook and open it again.
8. Connect to the same named connection and place an ad hoc grid on the sheet.

   Observe that the grid appears with the POV that you had set as default for the connection.

Selecting Members for the Default or Background POV

You can set a default or background POV by selecting members from the Member Selector.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

Using this method, you can select one member per dimension by launching the Member Selector in the POV Manager. You can select members as follows:

- To use as a default POV for the ad hoc grids of a given connection
- For the background POV for dimensions when you use functions

Select members for or edit the POV before starting work on the ad hoc grid.

> **Note**
>
> - As a best practice, Oracle recommends a maximum of 1,000 members for the ad hoc POV.
> - In this procedure, you will work with saved private connections. As a best practice before you begin, ensure that you have created a saved private connection (also referred to as a named connection), as described in Saving Connections as Private Connections.
> - To set default POV from an ad hoc grid's POV for a private connection, see Setting Default POV.

To select members for the default POV:

1. Open a workbook and connect to a named private connection.

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2. Set the active connection for the sheet by selecting **Connections**, then **Active Connections**, and then select the check box next to the connection name.

   If you do not see the connection name in the **Active Connections** list, select **Connections**, then **Named Connections**, and then select the check box next to the connection name.

3. From the Smart View ribbon, select **Function**, and then **Manage POV**.
4. Expand the POV list.
5. From the **Active** POV list, select the active connection for which you are changing the POV.
6. Click **Member Selector**, and then select the members that you want to use for the POV. See Selecting Members from the Member Selector.

   From the POV Manager, you can select only one member per dimension. If you use aliases, the POV Manager loses the selected members.

7. Click **Close**.
8. To refresh the worksheet, select **Refresh**.
9. To save the POV to the workbook, save the workbook.

> **Note**
>
> After you start working on the ad hoc grid, you can select or change members as described in Selecting Members from the Member Selector.

Copying and Pasting a POV

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

You can use the POV Manager to copy and paste a POV to another sheet in a workbook, or from one workbook to another if the data source is exactly the same for both workbooks.

> **Note**
>
> In this procedure, you will work with saved private connections. As a best practice before you begin, ensure that you have created a saved privated connection (also referred to as a named connection), as described in Saving Connections as Private Connections.

To copy and paste a POV:

1. Open all workbooks that you plan to work with.
2. Set the active connection for the sheet by selecting **Connections**, then **Active Connections**, and then select the check box next to the connection name.

   If you do not see the connection name in the **Active Connections** list, then select **Connections**, then **Named Connections** list and then select the check box next to the connection name.

3. From the Smart View ribbon, select **Function**, and then **Manage POV**.

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4. In the left pane of POV Manager, expand the **Active** or **Saved** node, and then select the application connection that you want to copy.

> **Note**
>
> You may copy the POV from the **Active** node and paste it on a blank worksheet under the **Saved** node.
>
> Likewise, you may copy a POV from the **Saved** node and paste it to the **Active** node.

5. **Optional:** From the POV Manager, click **Member Selector**, and then select members for the POV (described in Selecting Members for the Default or Background POV), and then save the workbook.

> **Note**
>
> You may make changes to a POV under the **Saved** node, but the changes will only take effect in the sheet where you paste the changed POV, and not in the sheet where you changed the POV.

6. Select the POV under the **Active** node or any POV under the **Saved** node, and click the **Copy** button.

   The **Copy** button is enabled only when a POV under **Active** or **Saved** is selected.

   Remember, a POV can be copied from the **Active** node and pasted to a blank worksheet on the **Saved** node; or copied from a **Saved** node and pasted on the **Active** node.

7. In the left pane of the POV Manager, expand **Active**, or expand **Saved** to select the workbook and worksheet (which must be blank) that you want to paste the POV into.
8. Click **Paste**.
9. Refresh the worksheet containing the copied POV.

   If the worksheet remains blank after the **Refresh**, see step 2 to set the active connection for the sheet, the click **Refresh** again.

Deleting a POV

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

To delete a POV that is saved in an Office document:

1. From the Smart View ribbon, select **Function,** and then **Manage POV**.
2. Expand the POV list.
3. From the **POV** drop-down list, select the worksheet that contains the POV that you want to delete.
4. Select the POV that you want to delete.
5. Click **Delete**.
6. Click **Close.**
7. To refresh the worksheet, select **Refresh.**

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Filtering by Attribute

In an ad hoc grid, you can filter by attributes in dimensions that contain attribute members.

Data source types: Oracle Essbase, Planning Ad Hoc, Financial Consolidation and Close Ad Hoc

To filter by attribute:

1. Select an attribute dimension on the grid, and then open **Member Selection** as described in Selecting Members from the Member Selector.
2. Click and select **Attribute**.
3. From **Attribute**, click .
4. From **Subset**, in **Dimension**, select a dimension; for example, Ounces.
5. In **Member**, select an attribute member, for example, Ounces_16.
6. Click to display the attribute.
7. Optional: to change the displayed attribute, change the selections in Dimension and Attribute and click **Set**.
8. Click **OK**.

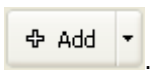
   Your selections are displayed in the tree list in **Member Selection**, where you can select from among them for inclusion in the grid.

Filtering by Subsets

For dimensions that contain attribute members, you can select attributes and set conditions for them to display only those members that meet these conditions.

Data source types: Oracle Essbase

To filter by condition:

1. Select an attribute member on the grid, and then open **Member Selection** as described in Selecting Members from the Member Selector.
2. Click and select **Subset**.
3. From **Subset**, in **Dimension**, select an attribute dimension; for example, Ounces.
4. In **Member**, select an attribute member; for example, True.
5. Click .
6. In **Dimension**, select another attribute dimension; for example, Pkg Type.
7. In **Member**, select another attribute member; for example, Bottle.
8. Click  .

   An AND condition statement is created; for example, [True] AND [Bottle].

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9. **Optional:** To change the condition statement, highlight the AND condition statement and select **Operator**, and then **AND** or **OR**.
10. **Optional:** Nest conditions by selecting more attributes, then **Add**, and then **Root**.
11. Click **OK**.

    Your selections are displayed in the tree list in **Member Selection**, where you can select from among them for inclusion in the grid.

Selecting Period-to-Date Members

In time dimensions, you can set up period-to-date members, called Dynamic Time Series members, if defined. For example, to see year-to-date data at the end of August, you can set up a Dynamic Time Series member that includes data for January through August.

Data source types: Oracle Essbase, Planning, Narrative Reporting

To select a Dynamic Time Series member:

1. Select a time dimension on the grid, and then open **Member Selection** as described in Selecting Members from the Member Selector.
2. Click and select **Dynamic Time Series** to display available Time Series Members in the member tree list.
3. Select a time series member from the member tree list and click .
4. From **Select DTS Member**, select the latest period on which to base the to-date calculation; for example, **Aug**.
5. Click **OK**.
6. **Optional:** Repeat step 3 through step 5 as necessary to add other Dynamic Time Series members.
7. Click **OK**.

   The Time Series Member is displayed on the grid as, in this example, **Y-T-D(Aug)**. After you refresh, the year-to-date data through August is displayed.

Specifying Member Perspective

Use the Varying Attribute filter to specify member perspective for varying attributes when selecting members.

Data source types: Oracle Essbase

> ⓘ **Note**
>
> Member perspective may not be enabled in your Oracle Smart View for Office system. Your options for member perspective are enabled and configured by the Administrator.

To specify member perspective:

1. From **Member Selection**, under **Filter**, select **Varying Attribute**.

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2. In **Filter Arguments**, click .
3. Specify an attribute to set the perspective, and then click **OK**.
4. In **Varying Attribute Args** under **Varying Attribute**, click the ellipsis button.
5. In **Subset**, in **Dimension**, enter an attribute dimension.
6. In **Member**, enter an attribute member, and then click **Set**.
7. Click **OK**.
8. In **Varying Attribute Args**, under **Perspective**, click the ellipsis button.
9. From **Perspective**, select one of the following:
   - **Snapshot.** One set of independent dimension members to identify the members of base dimension associated with the varying attribute. Here the start and end tuple are same.
   - **Range.** A finite range of independent dimension members. A range can be specified only for continuous independent dimensions ("Year" is an example). For discrete independent dimensions, you can make only one selection.
10. Click **OK**.

Viewing Member Information

You can view detailed information about any member on an ad hoc grid. The information displayed depends on the data source type to which you are connected.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

You access the **Member Information** dialog from the provider ad hoc ribbon in Smart View. For example, in Smart View, connect to a Planning data source and create a new ad hoc grid or open a saved one. Select a member cell and then, from the Planning Ad Hoc ribbon, select **Cell Information**.

You can also use these methods to access the **Member Information** dialog:

- In the ad hoc grid, right-click the selected member cell, then select **Smart View**, and then select **Cell Information**.
- In the **Member Selection** dialog, select a member in the right pane, and then from the **Options** button drop-down menu, select **Cell Information**.

To view member information:

1. Select a member in the grid.

   Oracle Essbase only: You can view member information for a member cell or a data cell. For other data providers, you can view information only for a member cell.
2. From the data provider ad hoc ribbon, select **Cell Information**.

   Information is displayed on the following tabs. Only the tabs that are applicable to the member and connection are displayed.
   - **Information:** A list of general information about the member such as dimension, level, generation, and so on. These properties may vary based on the selected member and dimension type.
   - **Aliases:** A list of alias tables and corresponding aliases associated with the member

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- **Attributes:** A table of the dimensions, members, and types of attributes associated with the member
- **Formula:** The formula associated with the member
- **Comments:** A list of comments associated with the member
- **User Defined Attributes:** A list of user defined attributes (attributes of the member defined by the administrator

3. **Optional:** To save the information in an Excel file, select **Save**.
4. Click **Close**.

Working with Aliases and Alias Tables

Aliases are alternate names for database member names.

Data source types: Oracle Essbase, Planning, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Tax Reporting

> **Note**
>
> - Database member names are often stock numbers or product codes; their aliases can be more descriptive. For example, in the Sample Basic database, the alias name for the database member 100 is Colas. Aliases are stored in *alias tables* as part of a database. Dimensions can be associated with multiple alias tables.
> - You can select an alias table for the current worksheet or for a connection.
> - For Essbase, the special characters of Equal To sign (=) and Single Quote sign (') are supported in member names and aliases in Oracle Smart View for Office. For example, =units, 'price.

Selecting Alias Tables

If more than one alias table has been created in the database, you can select an alias table for the current worksheet or for a private connection.

Selecting an Alias Table for the Current Worksheet

Selecting an Alias Table for the Connection

Selecting an Alias Table for the Current Worksheet

The alias table selected here applies only to the current worksheet and not to future connections.

To select an alias table for the current worksheet:

1. From a worksheet, connect to a data source.
2. From the Essbase or ad hoc ribbon, select **Change Alias** to display a list of available alias tables.
3. Select an alias table for the worksheet.

   The new alias table is applied automatically.

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> **Note**
>
> Planning, Financial Consolidation and Close, Tax Reporting: In Native mode, if the floating toolbar had been displayed and then repositioned on the sheet, the position will change after applying the new alias table. If needed, you can reposition the floating toolbar again. (Native mode means that the **Smart View Ad Hoc Behavior** option for your application is set to **Native**.)

Selecting an Alias Table for the Connection

You can select an alias table for private connections only. If you want to select an alias table for a shared connection, first save the shared connection as a private connection. See Saving Connections as Private Connections.

An alias table selected for a private connection is permanent until changed and will be used each time you use this connection. Setting an alias table for your private connection may help prevent the "Member out of place " error that appears after refreshing an ad hoc sheet which has data copied from other sheet using Microsoft Office copy and paste commands.

To select an alias table for the connection:

1. From a worksheet, connect to a data source using a shared connection and then save it as a private connection. For more information, see Saving Connections as Private Connections.
2. Connect to the private connection you created in the previous step.
3. Right-click the connection name and select **Set Alias Table**.

   You can also select the connection, click **More** in the Action panel, and select **Set Alias Table**.
4. Select an alias table for the connection.

   The new alias table is applied the next time you open the connection.

Aliases from Different Alias Tables

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Tax Reporting

Oracle Essbase, Narrative Reporting: If you enter a name from an alias table that is not associated with the current grid, its corresponding alias from the alias table that *is* associated with the current grid is displayed after you refresh. For example, if you enter Qtr1 into a grid that is associated with the Long Names alias, then after you refresh, Quarter1 is displayed.

Planning Ad Hoc, Planning Modules Ad Hoc, Enterprise Profitability and Cost Management Ad Hoc, Financial Consolidation and Close Ad Hoc, FreeForm Ad Hoc, Tax Reporting Ad Hoc: Only one currently active alias table is supported. If you enter a name from an alias table that is not the active table for the current grid, the alias member is considered an unknown member.

Displaying Member Names and Aliases in Grid

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting, Oracle Essbase

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If you are connected to an Oracle Essbase data source, or an Oracle Fusion Cloud Enterprise Performance Management Standard-mode application, you can display member names and their aliases from the currently selected alias table together in the same row.

> **Note**
>
> - This feature applies only to row members and not to column members.
> - To enable the **Member Name and Alias** option for Smart View users working with ad hoc grids, Service Administrators set the application option **Smart View Ad Hoc Behavior**, to **Standard**. All new and recreated applications are automatically set to **Standard**.
> - Member names and their aliases are displayed in rows even when an alias table is not used, that is, when it is set to **None**. When the **Member Name and Alias** option is selected and the alias table is set to **None**, the row dimensions retain the aliases based on the last used alias table, while the POV columns are not impacted and continue to display the member names or aliases based on the last used alias table.

To display both member names and aliases:

1. In Oracle Smart View for Office, log in to a Standard-mode Cloud EPM application or an Essbase application.

   You may establish a connecting by using a saved workbook containing ad hoc grids, or by starting a new ad hoc grid.
2. From the Smart View ribbon, select **Options**, and then **Member Options** in the left panel.
3. Under **General**, for **Member Name Display**, select **Member Name and Alias**.
4. In the Smart View ribbon or provider Ad Hoc ribbon, click **Refresh**.

   For row members, both member names and their corresponding aliases are displayed. In this example, Product database member names are shown in column A, and their aliases in column B.

	A	B	C
1			Year
2			Measures
3	100	Colas	28473
4	200	Root Beer	27954
5	300	Cream Soda	25799
6	400	Fruit Soda	21301
7	Diet	Diet Drinks	28826
8	Product	Product	103527

Displaying Aliases in the Member Selector

Data source types: Planning, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Tax Reporting, Oracle Essbase

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You can display aliases for member names in the **Member Selection** dialog box.

To select alias tables for displaying member names in **Member Selection**:

1. Display the **Member Selection** dialog box, as described in Selecting Members from the Member Selector.
2. To change the dimension, click the **Dimension Selector** button in the top left of the dialog box, and then select a dimension.
3. Click the **Options** button, then select **Alias Table**, and then select an alias table from the list.

   The member names displayed in the Member Selector are changed according to your selection.

Defining Member Name Display in the Member Selector

You can change how member names are displayed in the Member Selection dialog box by choosing a Member Name Display option.

Data source types: Oracle Hyperion Financial Management

Using this option allows you to display members in the **Member Selection** dialog box differently from how they are displayed on the sheet.

The selection you make in the **Member Selection** dialog box does not affect how members are displayed in the worksheet. Members in the sheet are displayed according to the setting you choose in the **Member Name Display** field of the **Options** dialog box, **Member Options** tab.

For example, when connected to Financial Management, using the **Member Name Display** field in the **Options** dialog box, you can choose to display member names *with* their descriptions in the worksheet . Separately, in the **Member Selection** dialog box, you can choose to display member names *without* their descriptions.

> **Note**
>
> **Oracle Essbase, Narrative Reporting:** Use alias tables to change the member name display. See Displaying Aliases in the Member Selector.

To define how member names are displayed:

1. Display the **Member Selection** dialog box, as described in Selecting Members from the Member Selector.
2. In the **Member Selection** dialog, to change the dimension, click the **Dimension Selector** button in the top left of the dialog box and select a dimension.
3. Click the **Options** button, then select **Member Name Display**, and then select an option:
   - **Member Name** to display qualified names.

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> **Note**
>
> If you select **Member Name** in free-form mode, in an ad hoc grid, if you insert a column and type a member name in the new column and want to change the alias table for the sheet, you must first refresh the sheet before changing the alias table.

- **Member Name and Description** to display qualified names and descriptions (aliases) in the same cell.
- **Description Only** to display aliases only.

> **Note**
>
> If you select **Description Only** in free-form mode, qualified names are displayed initially. After you manually add, remove, or edit any comments and refresh, aliases are displayed.

The member names displayed in the **Member Selector** are changed according to your selection.

Displaying Qualified Names of Duplicate Members

Different members or member aliases may have identical names.

Data source types: Oracle Essbase, Narrative Reporting

For example, a database may have two members named "New York," one for New York City and one for New York State. Both members can appear as "New York" in the grid, but if you want to distinguish between them, you can display their qualified names instead. Qualified names include the member name and the names of its ancestors to the level that uniquely defines the member; for example, [Market].[New York].

When you first perform an ad hoc query on a database that supports duplicate member names, the default for the **Member Name Display** display option for members in the both grid and the POV is **Member Name Only**

Perform the procedure in this topic to display qualified member names in the grid and POV.

> **Note**
>
> In Narrative Reporting, duplicate member names are allowed across dimensions, but they are not allowed within dimensions.

To display the qualified names of duplicate members:

1. From the Smart View ribbon, select **Options**, and then select **Member Options** in the left panel.
2. From the **Member Name Display** drop-down menu, select **Distinct Member Name**.
3. Click **OK**.
4. Refresh the grid.

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Duplicate members in the grid are displayed as qualified names. In this example, New York City is displayed as [East].[New York]. New York State is displayed as a sibling of East, West, and South: [Market].[New York]:

	Period
	Stereo
[East].[New York]	15647
Boston	15644
Chicago	15285
East	46576
West	62839
South	24565
[Market].[New York]	22645
Market	133980

Qualified Name Display in Alternate Hierarchies

Qualified name behavior for alternate hierarchies affects runtime and member selector behavior on forms and ad hoc grids.

Data source types: Planning, Planning Modules, Financial Consolidation and Close

About Qualified Member Name Display in Alternate Hierarchies

When connected to Planning, Planning Modules, or Financial Consolidation and Close, alternate hierarchies are supported in the Entity dimension. One entity can have multiple parents, and contribute differently to each parent. These members are referred to as *partially shared* entities, where only a part of input data is shared across all instances of the entities.

In Oracle Smart View for Office, displaying partially shared members requires that member names and aliases are *qualified*, so that users can uniquely reference the specific instance of a member and can then enter appropriate values based on this context. Qualified names include the member name and the names of its ancestors to the level that uniquely defines the member. The most common example is the Percentage Contribution (PCON) metric used for weighted consolidations in Financial Consolidation and Close.

The qualified name behavior for alternate hierarchies is explained in these topics:

Expected Runtime Behavior on Forms

Expected Runtime Behavior for Aliases on Forms

Expected Runtime Behavior on Ad Hoc Grids

Expected Runtime Behavior for Aliases on Ad Hoc Grids

Expected Member Selector Behavior on Ad Hoc Grids

Expected Member Selector Behavior on Forms

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Expected Runtime Behavior on Forms

Starting in 17.01, Planning, Planning Modules support the option to qualify member names as part of form design. This option, **Show Qualified Names**, is only exposed when you have a dimension enabled for Partial Share. This option has three possible values:

- Never
- As Needed
- Always

By default, to maintain backwards compatibility the "Never" option is selected. "Never" is also used when this option is not exposed. Note that this is a runtime option and does not impact design time member selectors. Here is the expected behavior on forms for each option:

- **Never**
  - PBCS, EPBCS: All member names are not qualified.
  - FCCS: All member names are not qualified.
- **As Needed**
  - PBCS, EPBCS: Base members are NOT qualified. Shared members are qualified.
  - FCCS: Both base members WITH SHARES and shared members are qualified. Base member without shares are not qualified.
- **Always**
  - PBCS: All members are qualified.
  - FCCS: All members are qualified.

Expected Runtime Behavior for Aliases on Forms

Alias behavior should behave the same as for member names with these exceptions:

- When showing qualified aliases both components (parent and child) must have aliases otherwise, the member name or qualified member name is returned as per selected option.
- Duplicate aliases are also qualified when "As Needed" or "Always" option is selected.

Expected Runtime Behavior on Ad Hoc Grids

Member names are qualified or not based on the Smart View **Member Name Display** option setting. There are two values to support the partial share feature: **Distinct Member Name Only** and **Member Name Only**. Here is the expected behavior for each option:

- **Member Name Only**
  - PBCS, EPBCS: All members are not qualified.
  - FCCS: All members are not qualified.
- **Distinct Member Name Only**
  - PBCS, EPBCS: Behaves the same as the "As Needed" option for forms above.
  - FCCS: Behaves the same as the "As Needed" option for forms above.

Expected Runtime Behavior for Aliases on Ad Hoc Grids

Alias behavior should be the same as in Expected Runtime Behavior on Forms, but also subject to the Smart View ad hoc alias options.

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- If the "None" alias table option is selected, then you should see same behavior for members in ad hoc grids as in Expected Runtime Behavior on Forms.
- If an alias table is selected, then the aliases from that table should be used and ad hoc options for members apply. Note that alias behavior for aliases on forms applies as well based on Smart View ad hoc settings.

Expected Member Selector Behavior on Ad Hoc Grids

The Member Selector will work based on the setting in the Smart View "Member Name Display" option.

The Member Selector will display the qualified names for shared members by default.

Expected Member Selector Behavior on Forms

The Member Selector will work based on form settings for aliases and behave like the "As Needed" setting on forms.

Viewing Distinct Page Member Names in Pages for Forms

View distinct page member names or fully qualified names, instead of descriptions, in the Page list for forms.

Data source types: Enterprise Profitability and Cost Management, Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Starting Oracle Smart View for Office release 24.100, using the **Show Distinct Page Member Names** check box in **Smart View Options**, you can view distinct page member names or fully qualified names in the Page list for forms. By displaying distinct member names instead of descriptions, you can recognize shared members correctly and avoid confusion with similar descriptions.

Previously, the Page list used to highlight the first occurrence of a shared member, instead of the showing the actual selected member. For example, "North Sales" is a shared member that appears under "International Sales" as well as "Regional Sales", and "International Sales" appears first in the Page list. If "North Sales" under "Regional Sales" is selected, the form showed the values for this selection correctly, but on opening the Page list, it would highlight or point to "North Sales" under "International Sales" since it appeared first in the list. This happened due to the similarity in descriptions of both members.

The **Show Distinct Page Member Names** check box resolves this confusion and helps you identify the selected member correctly in the Page list. When this option is selected, you can view the original or distinct page member names in the Page list, instead of duplicate descriptions. For example, for the shared member "North Sales", the Page list now displays the fully qualified name "[International Sales] . [North Sales]" and "[Regional Sales] . [North Sales]".

This option is disabled by default.

To view distinct page member names:

1. From the Smart View ribbon, select **Options**, and then select **Formatting**.
2. In the **Forms** section, select the **Show Distinct Page Member Names** check box.
3. Click **OK**.
4. Refresh the sheet and expand the Page list to view the distinct page member names.

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Viewing Dimension Properties

Using the **Insert Properties** command in the Essbase ribbon, you can quickly view the properties of a dimension in an ad hoc grid.

Data source types: Oracle Essbase

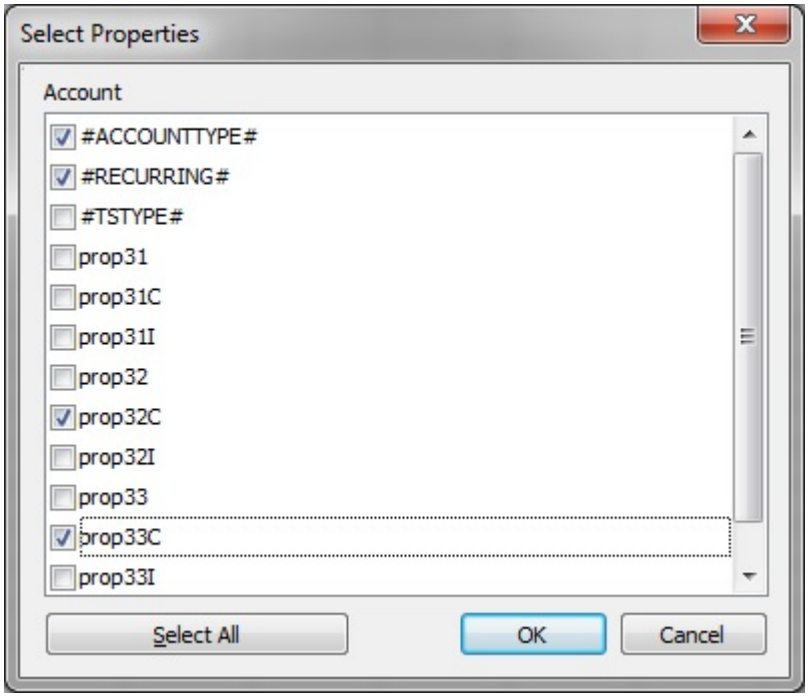
To view the properties of a selected dimension:

1. Ensure that you are working with an ad hoc grid connected to Essbase.
2. In the Essbase ribbon, select **Insert Properties**.

   The **Select Properties** dialog is displayed, listing the available properties for the dimension.
3. Using the check boxes, select the properties to view on the grid, as shown in Figure 1.

   Alternatively, click **Select All** to select all dimension properties.

Figure 7-9 Select Properties Dialog Showing Several Properties Selected



4. Click **OK**.

   The selected dimension properties and their values are displayed in the columns to the left of the selected dimension. In the grid, the dimension properties column headings are designated as follows:

   Dimension Name:Property Name

   For example:

   Account:#ACCOUNTTYPE#

   Account:prop32C

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In an example scenario, in the following grid, we select Account in cell A3:

	A	B
1		Dim1
2		Dim2
3	Account	#Missing

Then click **Insert Properties**, making the selections shown in Figure 1.

The dimension properties are inserted in the columns to the left of the ad hoc grid. The ad hoc grid now starts in column E. Columns A through D contain the dimension property information.

	A	B	C	D	E	F
1						Dim1
2	Account:#ACCOUNTTYPE#	Account:#RECURRING#	Account:prop32C	Account:prop33C		Dim2
3	NONE	FALSE	prop32C	TRUE	Account	#Missing

You may continue working with the grid using ad hoc commands, such as **Zoom In** and **Keep Only**, while the dimension properties are displayed, as long as the properties have been inserted to the left of the grid.

> **Note**
>
> This feature will be supported in an upcoming release of Essbase.
>
> Additionally, administrators must set up the database in Essbase for dimension property viewing in Oracle Smart View for Office.

5. **Optional:** After viewing the dimension properties, you may delete the columns containing the dimension properties and still continue working in the ad hoc grid.

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8

Data and Data Cells

Related Topics

- Refreshing Data
  You can refresh data using the Refresh button on the Smart View ribbon, and you can refresh data in individual reports by using the Refresh link in the Document Contents pane.
- Using the Submit Data Options
  Submit Data options include: submit data, submit data without refresh, and submit data range.
- Calculating Data
  After submitting new or changed data, the data in the database must be calculated to reflect the changes.
- Working with Currencies
  In forms enabled for currency conversion, you can enter data in a currency other than the base currency of a cell.
- Adjusting Values in Data Cells
  You can adjust the value of one or more data cells by a specified number or percentage if the cells contain numerical data.
- Resolving Data Validation Errors
  Administrators can set up data validation rules to ensure that data meets company guidelines. If the data in a form doesn't meet the criteria in the data validation rules, Smart View users can fix the errors directly in the form.
- Specifying Data Perspective
  Data perspective enables you to specify the perspective to use for viewing data of varying attributes, which are dimension attributes that vary with respect to independent continuous and discrete dimensions.
- Working with Smart Lists
  You can enter data using custom drop-down selection lists called Smart Lists, which are accessed from data cells in forms and ad hoc grids.
- Working with Drill-Through Reports
  Predefined by administrators, drill-through reports are available to users from specified individual data cells.
- Working with Linked Reporting Objects
  A *linked reporting object* is a cell note, external file, or URL that is linked to a data cell in an Oracle Essbase database, and which can be retrieved by Oracle Smart View for Office users in Excel.
- Adding Cell Comments in Cloud EPM
  You can add one or more comments per data cell. Each data cell can contain comments from multiple users.
- Adding Attachments
  Documents can be attached to individual data cells by way of URLs or files.
- Viewing Cell History
  You can view the history of changes made to a data cell or range of data cells.

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Refreshing Data

You can refresh data using the Refresh button on the Smart View ribbon, and you can refresh data in individual reports by using the Refresh link in the Document Contents pane.

Data source types: All

> **Note**
>
> Refresh is not supported on protected worksheets.

Related Topics:

- Refreshing from a Ribbon
- Refreshing Individual Reports from Document Contents

Refreshing from a Ribbon

Data source types: All

In Excel, you can retrieve and refresh data for the current worksheet or for all worksheets in the workbook using the **Refresh** icon on the Smart View ribbon, shown in Figure 1.

This type of refresh action applies to entire sheets, documents and slides and includes data in all ad hoc grids and reporting objects, such as function grids, tables, or charts.

Figure 8-1 Refresh Icon

Depending on the data provider to which you are connected, the Refresh icon can either be a split button with Refresh options or a simple, one-function Refresh button.

> **Note**
>
> - On ad hoc sheets, Excel filters are retained after refresh.
> - To refresh individual reporting objects, such as function grids, tables, or charts, see Refreshing Individual Reports from Document Contents.
> - Selected POV members are reverted to dimension members after deleting some columns and refreshing a spreadsheet. To avoid this, click the POV button to hide the POV toolbar. Then ensure that you do not delete the column that contains the Page members.

To use **Refresh**, choose an option:

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- To refresh the entire current worksheet, from any ribbon, click **Refresh**.

  In Word or PowerPoint, when you click **Refresh**, all data points copied into the document or presentation are refreshed.

- **Oracle Business Intelligence Enterprise Edition only:** To clear the contents of the entire current worksheet and replace it with the latest members and data, click the down arrow in **Refresh**, and then select **Replace and Refresh**.

  This option is used by other data providers and does not apply to Oracle Fusion Cloud Enterprise Performance Management.

  > **Note**
  >
  > The **Replace and Refresh** option applies only to reports in Oracle BI EE and Financial Reporting.

- To refresh all worksheets in the current workbook, click the down arrow in **Refresh**, and then select **Refresh All Worksheets**.

  The **Refresh All Worksheets** operation applies only to visible worksheets; it does not apply to hidden worksheets.

Refreshing Individual Reports from Document Contents

Data source types: All

You can refresh data in individual reports by using the **Refresh** link in the **Document Contents** pane.

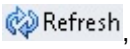
In Oracle Smart View for Office, reports consist of report queries and their associated reporting objects. These are listed in the **Document Contents** pane. From **Document Contents**, you can individually refresh report queries and their associated reporting objects, such as:

- Function grids
- Tables
- Charts
- Dynamic data points

> **Note**
>
> The procedures and examples in this topic discuss refreshing individual reports and reporting objects from the **Document Contents** pane. To refresh all reporting objects in worksheets or workbooks, documents, and slides or presentations, you can use the **Refresh** icon on the Smart View ribbon or a provider ribbon, as described in Refreshing from a Ribbon.

To refresh individual reports in the **Document Contents** pane:

1. Navigate to the individual report query that contains the associated reporting objects to refresh.

   The **Refresh** link, 

, appears in **Document Contents** only after a reporting object has been inserted for an individual report query.

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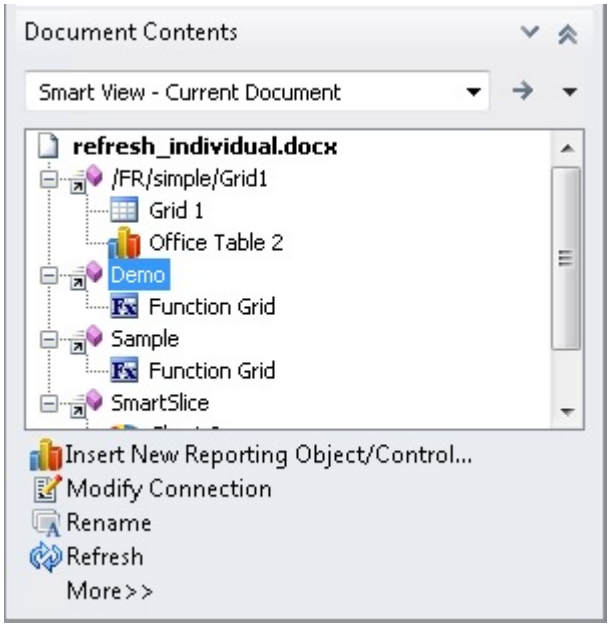
For example, in Figure 1, a function grid is to be refreshed. Note that the "Demo" report query for the function grid is selected, not the function grid itself.

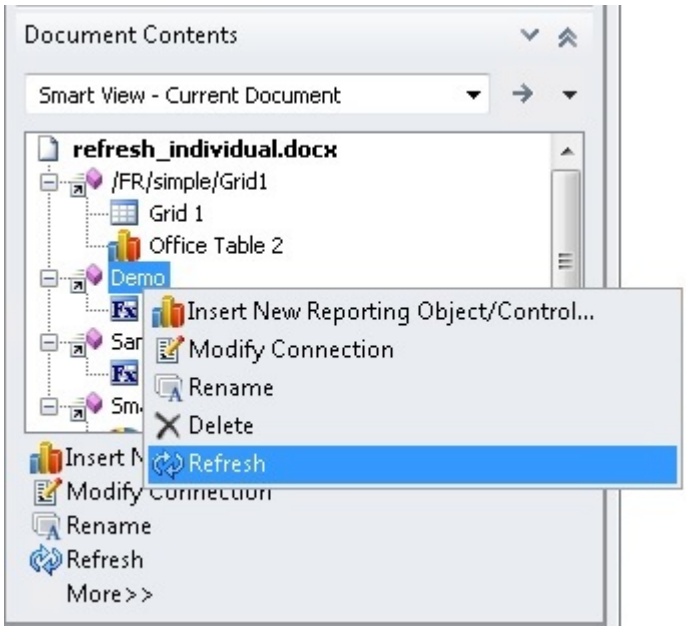
Figure 8-2 Report Query for Function Grid Selected for Refresh



2. In the **Document Contents** pane, click Refresh.

   You can also right-click on the report query and select Refresh from the context menu, as shown in Figure 2.

Figure 8-3 Refresh Using Right-Click Menu



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The reporting objects for the selected report query are refreshed; the rest of the report queries and associated reporting objects remain unrefreshed.

See Other Refresh Examples.

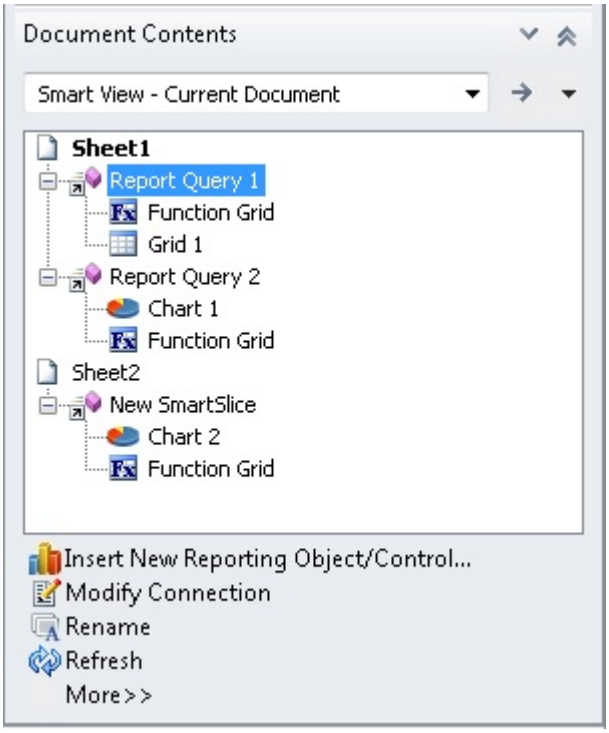
Example 8-1 Notes About Refreshing Individual Reporting Objects in Excel

- You can refresh report queries individually in Excel with the exception of report queries containing function grids.

  For example, if two report queries contain function grids, then refreshing one query will revert the other query's function grid to the #NEED REFRESH (unrefreshed) state. This only occurs with function grids. The other reporting objects, such as tables or charts, will refresh normally.

  For example, on Sheet 1 in Figure 3, refreshing Report Query 1 will refresh the associated grid and function grid; however, the function grid associated with Report Query 2 will convert to the unrefreshed state while the chart refreshes normally. The report query and associated reporting objects on Sheet2 are unaffected.

Figure 8-4 Selecting a Report Query to Refresh in Excel Where Two Report Queries Contain Function Grids



To refresh all items on the sheet, including multiple function grids, select Sheet1 in the **Document Contents**, as shown in Figure 4, and then click Refresh.

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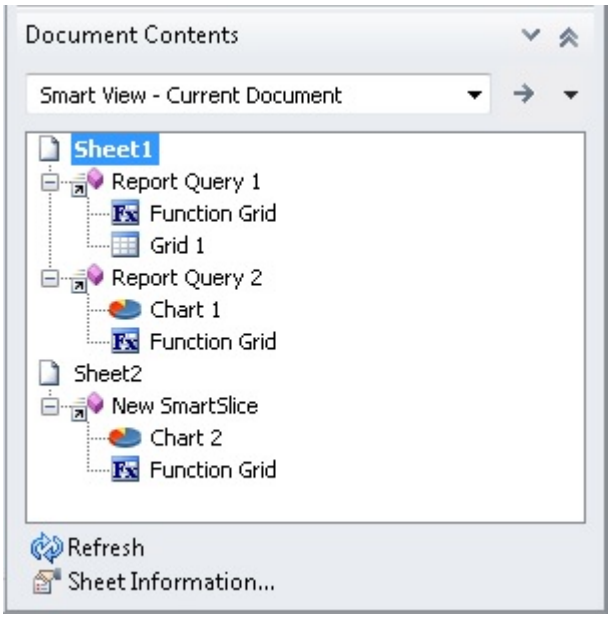
Figure 8-5 Selecting Sheet1 to Refresh All Reporting Objects on a Sheet from Document Contents



- In Excel, if a reporting object from a single report query is inserted on multiple sheets, then selecting the report query and clicking Refresh will refresh the reporting object on each sheet where it appears.

Example 8-2 Other Refresh Examples

The examples in this section use a Word document to describe the refresh options available depending on the selection made in the **Document Contents** pane.

Figure 5 shows a Word document selected in the **Document Contents** pane. Clicking Refresh will refresh all report queries and their associated reporting objects in the document.

Figure 8-6 Word Document Selected for Refresh

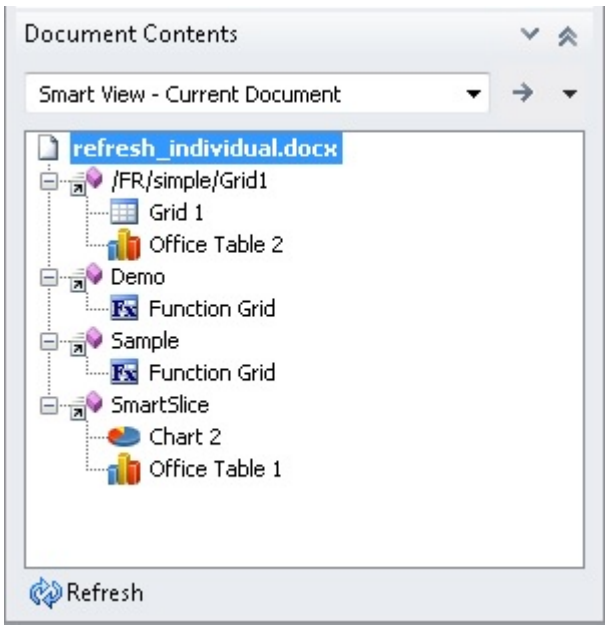


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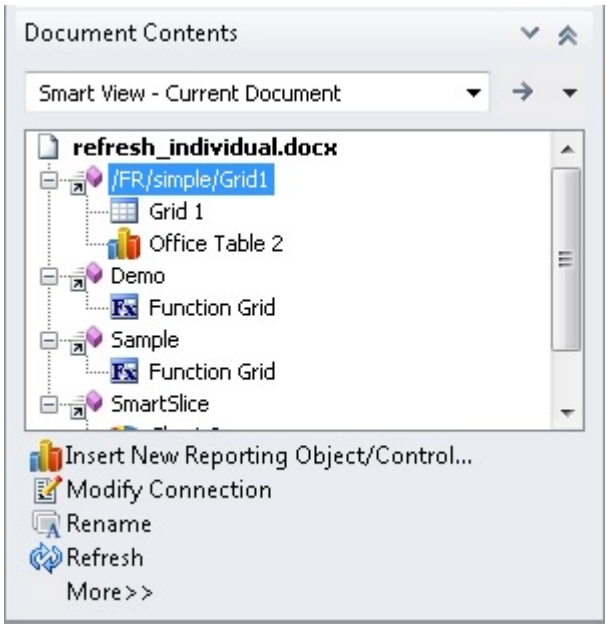
Figure 6 shows a report query selected in the **Document Contents** pane. The report query contains two reporting objects, a grid and an Office table. Clicking Refresh will refresh only the selected report query and its two associated reporting objects; other report queries and their reporting objects in the document remain unrefreshed.

Figure 8-7 Report Query with Two Reporting Objects Selected for Refresh



> **Note**
>
> Refreshing an individual sheet or slide will refresh the report queries and reporting objects associated with the selected sheet or slide. For example, if you select a sheet that contains multiple report queries, all reporting objects associated with the multiple report queries on the selected sheet will be refreshed.
>
> Refreshing an entire document will refresh all the report queries in the document and their associated reporting objects.

In Figure 7, two reporting objects are associated with a report query, one reporting object is selected. Notice that Refresh is not available.

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Figure 8-8 One of Two Reporting Objects Selected - Refresh Not Available

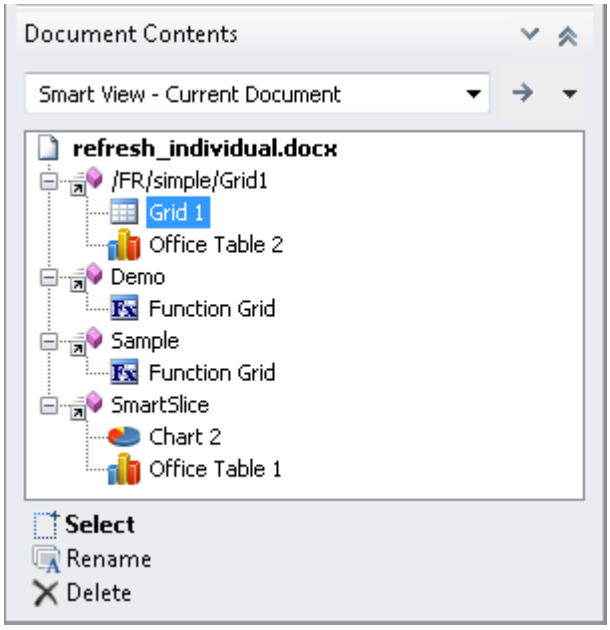
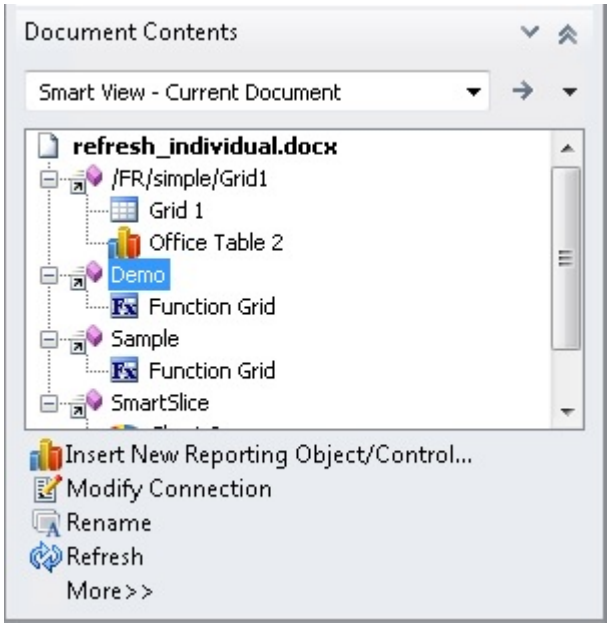


Figure 8 shows a report query selected in the **Document Contents** pane. The report query contains a single reporting object, a function grid. Clicking Refresh will refresh only the selected report query and its associated reporting object; other report queries and their reporting objects in the document remain unrefreshed.

Figure 8-9 Report Query with Single Reporting Object Selected for Refresh



In Figure 9, a single reporting object associated with a report query is selected. Notice that Refresh is not available.

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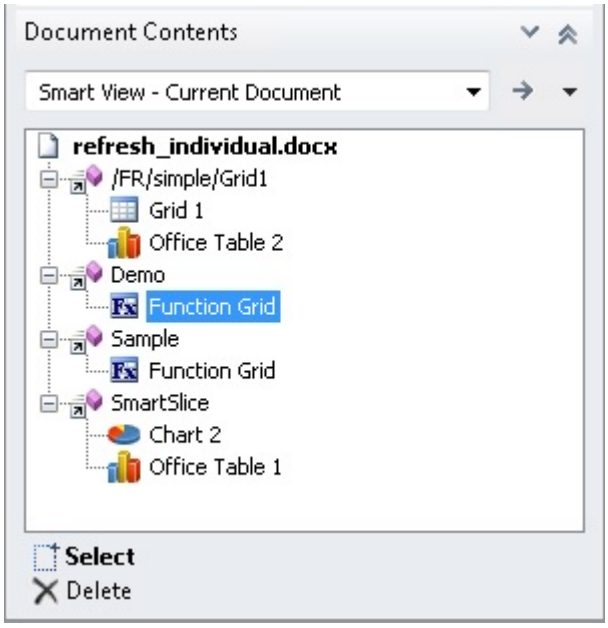
Figure 8-10 Individual Reporting Object Selected - Refresh Not Available



Using the Submit Data Options

Submit Data options include: submit data, submit data without refresh, and submit data range.

Related Topics

- About the Submit Data Options
- Submitting Data
- Submitting Data Without Refreshing
  Submit Data Without Refresh allows users to submit all data from the worksheet.
- Submitting Data Ranges

About the Submit Data Options

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

You can update any type of data in the data source by submitting changed data from forms and ad hoc grids. If you make changes while disconnected, you can submit the changes after you reconnect.

Oracle Smart View for Office offers the following options for submitting data:

- Submit Data
- Submit Data Without Refresh
- Submit Data Range

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> **Note**
>
> Submit Data functionality is generally supported by all data source types. However, refer to the individual Submit Data topics for specific data source support.

Video

Your Goal	Watch This Video
Learn about the options for submitting data.	Overview: Submitting Data With Smart View

Best Practices for Using the Submit Data Options

- When using the **Submit Data** option, you must refresh the grid before modifying the data when you are in free-form mode.
- When working with an aggregate storage database, you can only submit data from the lowest level (level 0) of a hierarchy.
- You can use the **Submit Data Without Refresh** and **Submit Data Range** options to submit cell data from cells that were modified by a user who does not have Smart View installed.
- In worksheets that support multiple grids, you can perform the **Submit Data** commands for only one grid at a time.

  If you try to submit data for more than one grid at a time—that is, if you have selected cell ranges in more than one grid—the first range returned by Excel will be used to determine the selected grid and the submit will be performed only on that grid.
- If you are submitting data from forms:
  - In Planning forms, you can lock any cell or range of cells to protect the data until the data is refreshed or submitted.
  - Some cells may no longer exist in the form definition. This behavior may happen if form definition or access privileges have changed, or if rows or columns are suppressed. In these cases, only writable cells that exist in the new form definition are saved. This behavior applies to both cells and supporting detail changes, and also applies when working with forms while connected to or disconnected from the data provider.
  - When you are working in a form and you click **Submit Data**, you are actually writing data back to the latest POV selected in the POV toolbar. As a best practice, Oracle recommends performing a Refresh whenever you make changes to the POV. The refresh updates the data on the sheet to reflect the latest POV change.

Submitting Data

Data source types: Oracle Essbase, Planning, Financial Consolidation and Close, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

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Video

Your Goal	Watch This Video
Learn about basic Oracle Smart View for Office functionality, including submitting data.	Entering and Saving Plan Data in Smart View with Oracle Planning and Budgeting Cloud

To submit data:

1. Connect to the data source.
2. **Optional:** To help you identify modified cells, set a cell style for dirty cells, as described in Cell Styles.
3. Modify data as needed.
4. From any ribbon, select **Submit Data**.

   All dirty cells on the worksheet are submitted.

> **Note**
>
> If you are working with multiple grids on a worksheet, see Best Practices for Using the Submit Data Options.

Submitting Data Without Refreshing

Submit Data Without Refresh allows users to submit all data from the worksheet.

Data source types: Oracle Essbase, Planning Ad Hoc, Planning Modules Ad Hoc, Enterprise Profitability and Cost Management Ad Hoc, Financial Consolidation and Close Ad Hoc, FreeForm, Tax Reporting Ad Hoc

Submit Data Without Refresh includes all data cells that you have explicitly modified (made dirty) and those that were not modified. All data cells are marked dirty and submitted. Once the submit operation is complete, the entire grid will be refreshed.

To submit data without first refreshing:

1. Connect to the data source.
2. **Optional:** To help you identify modified cells, set a cell style for dirty cells, as described in Cell Styles.
3. Modify data as needed.
4. From the provider ribbon, select **Submit Data**, then **Submit Data Without Refresh**.

   Data for all cells on the sheet is submitted, whether or not the cells are dirty.

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> **Note**
>
> - When updating text datatype values in free-form mode, the **Submit Without Refresh** action should be used. This applies to Standard Ad Hoc mode only (the application setting, **Smart View Ad Hoc Behavior=Standard**.)
> - If you are working with multiple grids on a worksheet, see Best Practices for Using the Submit Data Options.

Submitting Data Ranges

Data source types: Planning Ad Hoc, Planning Modules Ad Hoc, Enterprise Profitability and Cost Management Ad Hoc, Financial Consolidation and Close Ad Hoc, FreeForm, Tax Reporting Ad Hoc

You can submit contiguous and non-contiguous single cells or cell ranges.

To submit data:

1. Connect to the data source.
2. Modify data as needed.

   Alternatively, you may have opened a workbook that you received from a user who does not have Oracle Smart View for Office and modified the worksheet. Smart View cannot detect those cells as dirty, so you will need to be informed by that user which cells were modified or added.
3. **Optional:** To help you identify modified cells, set a cell style for dirty cells, as described in Cell Styles.
4. Select the data ranges you want to submit.

   You can select contiguous and non-contiguous single cells or cell ranges.
5. From the provider context ribbon (for example, the **Planning Ad Hoc** ribbon), select **Submit**, then **Submit Data Range**.

   Only cell data from selected cells is submitted. If there are dirty cells on the sheet outside the range of selected cells, the modified value is not submitted and those cells will revert back to the value that was last stored with the provider.

> **Note**
>
> If you are working with multiple grids on a worksheet, see Best Practices for Using the Submit Data Options.

Calculating Data

After submitting new or changed data, the data in the database must be calculated to reflect the changes.

Related Topics

- About Calculating Data
- Calculating Data in Essbase

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- Changing the Solve Order of a Selected POV

About Calculating Data

After you submit new or changed data, you need to calculate the data in the database to reflect your changes. Your options for calculating data depend on your data source. To calculate data, you must have security access rights to the data.

For information on calculating business rules on forms in Oracle Fusion Cloud Enterprise Performance Management, see Executing the Calculate Form and Calculate Currencies Business Rules.

See also:

Calculating Data in Essbase

Calculating Data in Essbase

Related Topics

- About Calculating Data in Essbase
- Running Essbase Calculations
- Calculating Asymmetric Grids Using Tuples

About Calculating Data in Essbase

Data source types: Oracle Essbase

In Oracle Smart View for Office, you can use a calculation script to calculate a database in Oracle Essbase on-premises or cloud. Calculation script types can be Essbase or MDX.

Additionally:

- Essbase and MDX calculation scripts are created by your Essbase administrator for your specific system.
- When launched, Essbase and MDX calculation scripts can prompt you to enter variable information, called runtime prompts.
- Essbase and MDX calculation scripts are supported for aggregate storage and block storage databases.
- MDX calculation scripts can contain multiple MDX queries.
- To change the solve order of a member POV before running a calculation, see Changing the Solve Order of a Selected POV.
- **Essbase cloud only:**
  - Detailed tracing information can be provided upon execution of an Essbase calculation script. The tracing information is displayed only if your Oracle Essbase administrator has configured the calculation script for tracing.
  - You can run calculations on asymmetric grids. To do this, your administrator must first prepare calculation scripts that specify selected tuples to calculate. See Calculating Asymmetric Grids Using Tuples.
- **Administrators:**

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- Do not use the Smart View **Manage and Execute Queries** dialog to execute multiple MDX queries at once. Instead, select an MDX script and run it from the **Calculation Scripts** dialog.
- Refer to the following guides for information on writing Essbase and MDX calculation scripts:
  - *Using Oracle Essbase*, Calculate Cubes
  - *Using Oracle Essbase*, Analyze and Manage Data with MDX
  - *Calculation and Query Reference for Oracle Essbase*, MDX

  For Essbase 21c and 19c documentation, go to the Oracle Help Center here:

  https://docs.oracle.com/en/database/other-databases/essbase/index.html
- **Essbase cloud:** To define Essbase calculation scripts so that Smart View users can work with runtime prompts, refer to *Database Administrator's Guide for Oracle Essbase*, Using Runtime Substitution Variables in Calculation Scripts Run in Smart View .
- For information on writing scripts to calculate asymmetric regions in a database, see Calculate Selected Tuples in *Using Oracle Essbase*.

Running Essbase Calculations

Data source types: Oracle Essbase

To select and launch a calculation script:

1. Connect to the data source and create an ad hoc query or open an existing report file.
2. Select the data cell on which you plan to run a calculation script.
3. From the Smart View ribbon, select **Calculate**.

   The **Calculation Scripts** dialog box is displayed.
4. At the top of the dialog, under **Cube**, select a database from the list of databases that belong to this application.
5. Under **Calculation Script**, select a script.

   The **Cube** column shows the cube to which the calculation belongs, and the **Type** column shows the calculation type:

   - **Script** signifies an Essbase calculation
   - **MDX Calc** signifies an MDX calculation.
6. If the calculation script includes runtime prompts, enter or select the input type specified by the runtime prompt, summarized in the following table.

> **Note**
>
> Depending on how the runtime prompts have been set up by your Oracle Essbase administrator, information for some prompts can be hand-typed. Ensure that the runtime prompt values that you enter are valid. You cannot launch a calculation script until all runtime prompt values are valid.

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Table 8-1 Runtime Prompt Input Types

Icon	Expected Input Type
	One member selection—One member in the dimension can be selected. Click to choose a single member in the **Member Selection** dialog box. Alternatively, if the field is enabled for editing, you may manually enter the member name, enclosed in quotation marks; for example: "California"
	Multiple member selections—Two or more members in the dimension can be selected. Click to choose multiple members in the **Member Selection** dialog box. Alternatively, if the field is enabled for editing, you may manually enter the member names, enclosed in quotation marks and separated by a comma; for example: "New York", "California"; "West", "Market"
	Text value—A text value; for example: MyGrid Member names must be enclosed in quotation marks, separated by commas, and include a final semicolon (;). For example, type: "New York","California","West","Market"; or "Oklahoma";
	Numeric value—A numeric value; for example, type: 1000 or -2

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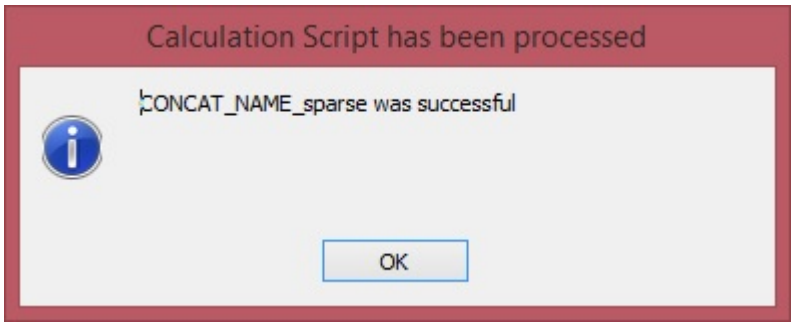
Table 8-1 (Cont.) Runtime Prompt Input Types

Icon	Expected Input Type
	Date value—A date value in the format required by your system; for example: mm/dd/yyyy or dd/mm/yyyy

7. Click **Launch**.

   A status message tells you if the calculation was successful. For example:



   If the calculation was not successful, contact your Essbase administrator.

8. Click **OK** to close the message box

9. **Essbase cloud only:** If the calculation script was configuring for tracing, then view the information in the **Calculation Result** dialog box, and then click **OK** to close the dialog.

   Alternatively, copy and paste the information from the **Calculation Result** dialog and save it in your favorite text editor.

   The **Calculation Result** dialog box contains detailed information on the calculation that was executed when the script was launched. For example:

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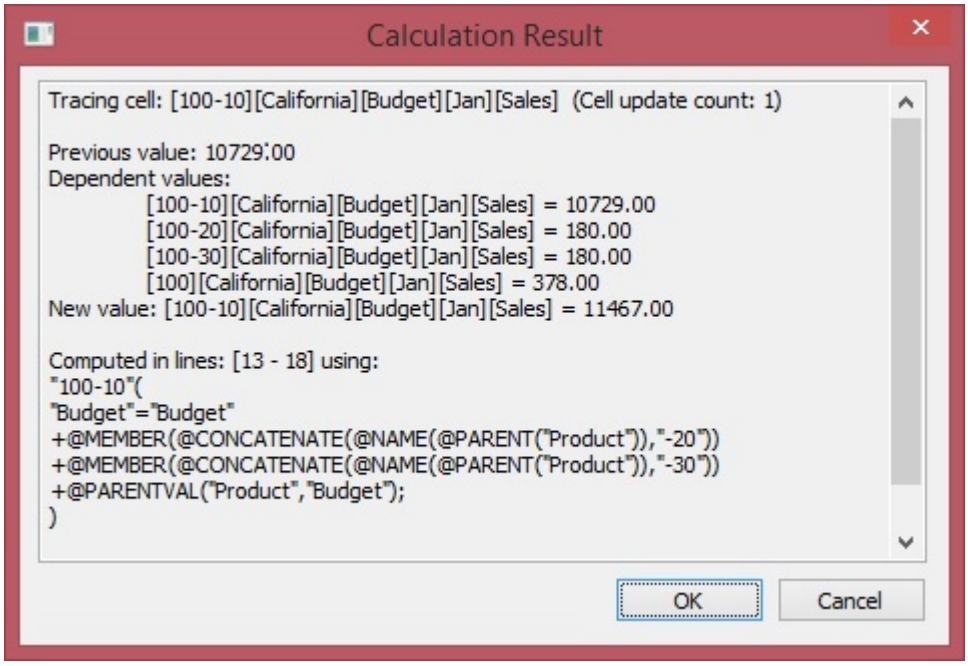

10. Note any changed data cells in the ad hoc grid or report.
11. Click **Submit** to submit the changed data back to the database.

Calculating Asymmetric Grids Using Tuples

Cloud data source types: Oracle Essbase
Tuple calculation for asymmetric grids lets Oracle Smart View for Office users execute calculations for the specific scope of member selections in a grid or calculation script, avoiding over-calculation.

A calculation *tuple* is a way to represent a data slice of members, from one or more sparse dimensions, to be used in a calculation FIX statement.

By default, when multiple members from different dimensions are in a calculation FIX statement, or are part of the grid POV in Smart View, the calculation scope is all possible combinations (a Cartesian-product) of all member combinations from different dimensions. This can result in more calculations than are needed when working with asymmetric grids. With tuple calculations, the scope of calculations can be more precise and efficient.

Administrators set up tuple calculations in Essbase as they do other calculations that they create for users to run from Smart View, based on their specific data set and business needs.

As a Smart View user, you run tuple calculations for asymmetric grids as you would any other calculation. You may be asked to specify runtime prompts, depending on how your administrator set up the tuple calculation.

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> **Note**
>
> - You can run tuple calculations on asymmetric grids starting in Smart View release 11.1.2.5.800. Check that your Essbase data source supports calculation tuples.
> - **Administrators:** Using the tuple calculation feature, you can define calculation scope as selected member tuples in an asymmetric grid. Special syntax in FIX statements helps you specify which tuples to calculate. See Calculate Selected Tuples in *Using Oracle Essbase*, for more information on tuple calculations.

In Smart View, to run a tuple calculation on an asymmetric grid, follow the instructions for running a calculation in Running Essbase Calculations.
Select a script written for tuple calculations on asymmetric grids. Your administrator can advise you which scripts you should run.

Example 8-3 Running Tuple Calculations on an Asymmetric Grid

The examples in this scenario are based on an example gallery template for tuple calculation. The gallery template is available in Essbase versions that support calculation tuples.

Start with the asymmetric grid shown below. The grid is asymmetric because we do not see the same member hierarchies in the row and column dimensions.

Figure 8-11 Starting Asymmetric Grid - All Data Values = 1

	A	B	C	D	E
1			Jan	Actual	Marketing
2			Entity_1011	Entity_1012	
3			Pre-Flight	Sprint1	
4			Houston_Site	Chicago_Site	
5	Cola	New York	1	1	
6	Cola	Massachusetts	1	1	
7	Cola	Florida	1	1	
8	Cola	Connecticut	1	1	
9	Cola	New Hampshire	1	1	
10	Diet Cola	New York	1	1	
11	Diet Cola	Florida	1	1	

The asymmetric grid above is a slice of this symmetric grid, where the hierarchy members are uniform across rows and columns:

Figure 8-12 Starting Symmetric Grid - All Data Values = 1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1			Jan	Actual	Marketing									
2			Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1
3			Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012	Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012
4			Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site
5	Cola	New York	1	1	1	1	1	1	1	1	1	1	1	1
6	Cola	Massachusetts	1	1	1	1	1	1	1	1	1	1	1	1
7	Cola	Florida	1	1	1	1	1	1	1	1	1	1	1	1
8	Cola	Connecticut	1	1	1	1	1	1	1	1	1	1	1	1
9	Cola	New Hampshire	1	1	1	1	1	1	1	1	1	1	1	1
10	Diet Cola	New York	1	1	1	1	1	1	1	1	1	1	1	1
11	Diet Cola	Massachusetts	1	1	1	1	1	1	1	1	1	1	1	1
12	Diet Cola	Florida	1	1	1	1	1	1	1	1	1	1	1	1
13	Diet Cola	Connecticut	1	1	1	1	1	1	1	1	1	1	1	1
14	Diet Cola	New Hampshire	1	1	1	1	1	1	1	1	1	1	1	1

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We'll show the result of running three different types of calculations on the asymmetric grid, and then the effect those calculations have on the symmetric grid.

The scripts are configured to increment the data cells by 1 each time they are run, with different results on the symmetric grid for each type of calculation.

The first script we'll run calculates everything in the grid POV, not only the member combination shown in the grid below. In the asymmetric grid, after a refresh, all data cells now equal 2.

Figure 8-13 Asymmetric Grid After Running Default Calculation

	A	B	C	D	E
1			Jan	Actual	Marketing
2			Entity_1011	Entity_1012	
3			Pre-Flight	Sprint1	
4			Houston_Site	Chicago_Site	
5	Cola	New York	2	2	
6	Cola	Massachusetts	2	2	
7	Cola	Florida	2	2	
8	Cola	Connecticut	2	2	
9	Cola	New Hampshire	2	2	
10	Diet Cola	New York	2	2	
11	Diet Cola	Florida	2	2	
12					

We submit the cells in the asymmetric grid, then go to the symmetric grid and refresh it. Note that on refresh, every Entity, Version, Scenario and Site for the Product/Market combination is calculated, even though they aren't on the asymmetric grid. This is because, by default, absent a tuple calculation,Essbase calculates the Cartesian product of the combinations seen in the grid. The result is that all cells in the POV are incremented by 1, so you will see a value of 2 in all data cells in the symmetric grid:

Figure 8-14 Symmetric Grid After Running Default Calculation on Asymmetric Grid and Refresh

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1			Jan	Actual	Marketing									
2			Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1
3			Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012	Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012
4			Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site
5	Cola	New York	2	2	2	2	2	2	2	2	2	2	2	2
6	Cola	Massachusetts	2	2	2	2	2	2	2	2	2	2	2	2
7	Cola	Florida	2	2	2	2	2	2	2	2	2	2	2	2
8	Cola	Connecticut	2	2	2	2	2	2	2	2	2	2	2	2
9	Cola	New Hampshire	2	2	2	2	2	2	2	2	2	2	2	2
10	Diet Cola	New York	2	2	2	2	2	2	2	2	2	2	2	2
11	Diet Cola	Massachusetts	2	2	2	2	2	2	2	2	2	2	2	2
12	Diet Cola	Florida	2	2	2	2	2	2	2	2	2	2	2	2
13	Diet Cola	Connecticut	2	2	2	2	2	2	2	2	2	2	2	2
14	Diet Cola	New Hampshire	2	2	2	2	2	2	2	2	2	2	2	2

Second, we'll run a more limited calculation on the asymmetric grid, shrinking the calculation scope to Product and Market grid tuples so that fewer intersections are calculated. The **Calculation Result** message shows us the scope of this calculation:

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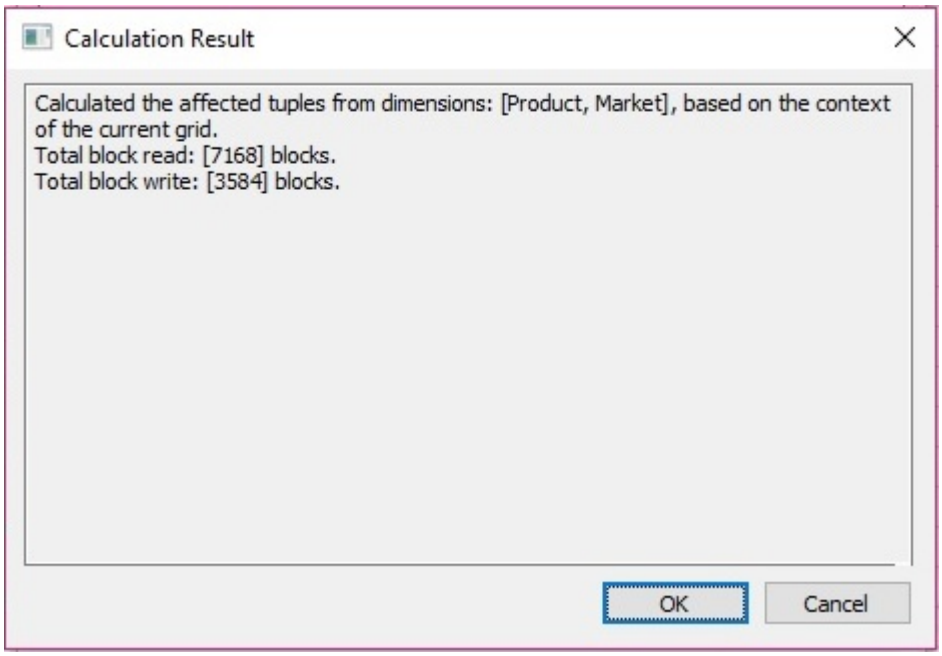
Figure 8-15 Calculation Result Dialog After Running Tuple Calculation on All Product and Market Tuples



Refresh, and all data cells in the asymmetric grid are incremented to 3. Submit the data on the grid.

Figure 8-16 Asymmetric Grid After Running Calculation on All Product and Market Tuples

	A	B	C	D	E
1			Jan	Actual	Marketing
2			Entity_1011	Entity_1012	
3			Pre-Flight	Sprint1	
4			Houston_Site	Chicago_Site	
5	Cola	New York	3	3	
6	Cola	Massachusetts	3	3	
7	Cola	Florida	3	3	
8	Cola	Connecticut	3	3	
9	Cola	New Hampshire	3	3	
10	Diet Cola	New York	3	3	
11	Diet Cola	Florida	3	3	
12					

In the symmetric grid, note on refresh that only the Product/Market tuples already included on the asymmetric grid are calculated, along with all Site/Version/Entity combinations. These are all the columns of rows 5 through 10, and row 12. These cells now show a data value of 3. The Product/Market tuples not shown in our asymmetric grid are not calculated in the symmetric grid; their data cell value is still 2. For this calculation, only Product and Market combinations

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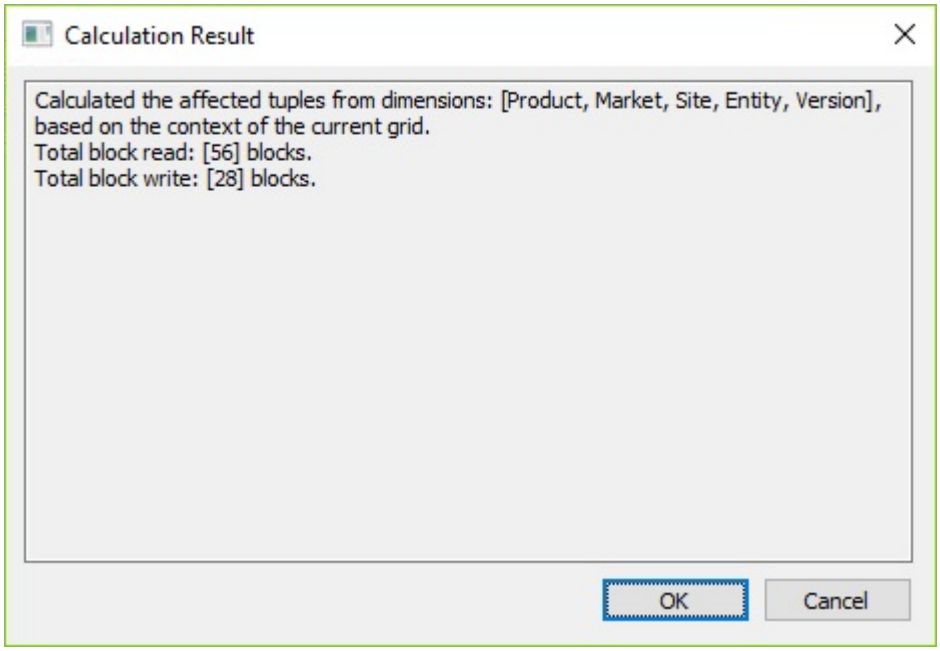
were specified for tuples. The tuples and all members for unspecified dimensions (those not specified in the FIX statement) are calculated.

Figure 8-17 Symmetric Grid After Running Calculation on All Product and Market Tuples on Asymmetric Grid and Refresh

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1			Jan	Actual	Marketing									
2			Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1
3			Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012	Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012
4			Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site
5	Cola	New York	3	3	3	3	3	3	3	3	3	3	3	3
6	Cola	Massachusetts	3	3	3	3	3	3	3	3	3	3	3	3
7	Cola	Florida	3	3	3	3	3	3	3	3	3	3	3	3
8	Cola	Connecticut	3	3	3	3	3	3	3	3	3	3	3	3
9	Cola	New Hampshire	3	3	3	3	3	3	3	3	3	3	3	3
10	Diet Cola	New York	3	3	3	3	3	3	3	3	3	3	3	3
11	Diet Cola	Massachusetts	2	2	2	2	2	2	2	2	2	2	2	2
12	Diet Cola	Florida	3	3	3	3	3	3	3	3	3	3	3	3
13	Diet Cola	Connecticut	2	2	2	2	2	2	2	2	2	2	2	2
14	Diet Cola	New Hampshire	2	2	2	2	2	2	2	2	2	2	2	2

Now run the last calculation, which is written to work only on the tuples shown in our asymmetric grid. The tuple calculation specifies that only the indicated Entity, Site, Market, Product, Version combinations on our asymmetric grid should be calculated. After running the calculation, the **Calculation Result** dialog shows an even smaller calculation scope:

Figure 8-18 Calculation Result Dialog After Running Calculation on Grid Product and Market Tuples



Values in all cells in the asymmetric grid are incremented to 4. Submit the data on this grid.

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Figure 8-19 Asymmetric Grid After Running Calculation on Grid Product and Market Tuples

	A	B	C	D	E
1			Jan	Actual	Marketing
2			Entity_1011	Entity_1012	
3			Pre-Flight	Sprint1	
4			Houston_Site	Chicago_Site	
5	Cola	New York	4	4	
6	Cola	Massachusetts	4	4	
7	Cola	Florida	4	4	
8	Cola	Connecticut	4	4	
9	Cola	New Hampshire	4	4	
10	Diet Cola	New York	4	4	
11	Diet Cola	Florida	4	4	

Move to the symmetric grid and refresh. Remember, the tuple calculation specified that only the Entity, Site, Market, Product, Version combinations indicated on our asymmetric grid should be calculated. On the symmetric grid, you can see that only rows 5 through 10 and row 12 and columns C and M, are incremented to 4. These are the tuples that correspond to the data that was incremented in the asymmetric grid, and are highlighted in yellow below:

Figure 8-20 Symmetric Grid After Running Calculation on Grid Product and Market Tuples on Asymmetric Grid and Refresh

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1			Jan	Actual	Marketing									
2			Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Pre-Flight	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1	Sprint1
3			Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012	Entity_1011	Entity_1011	Entity_1011	Entity_1012	Entity_1012	Entity_1012
4			Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site	Houston_Site	Chicago_Site	Minneapolis_Site
5	Cola	New York	4	3	3	3	3	3	3	3	3	3	4	3
6	Cola	Massachusetts	4	3	3	3	3	3	3	3	3	3	4	3
7	Cola	Florida	4	3	3	3	3	3	3	3	3	3	4	3
8	Cola	Connecticut	4	3	3	3	3	3	3	3	3	3	4	3
9	Cola	New Hampshire	4	3	3	3	3	3	3	3	3	3	4	3
10	Diet Cola	New York	4	3	3	3	3	3	3	3	3	3	4	3
11	Diet Cola	Massachusetts	2	2	2	2	2	2	2	2	2	2	2	2
12	Diet Cola	Florida	4	3	3	3	3	3	3	3	3	3	4	3
13	Diet Cola	Connecticut	2	2	2	2	2	2	2	2	2	2	2	2
14	Diet Cola	New Hampshire	2	2	2	2	2	2	2	2	2	2	2	2

The examples in this section showed you the effects of three calculations on an asymmetric grid and a symmetric grid. We looked at the result of each calculation on each type of grid. We learned that by selecting tuples, you can focus calculations in the active Smart View grid, limiting their scope to specific slices of data in your cube.

Changing the Solve Order of a Selected POV

Data source types: Oracle Essbase

Using the **Cell Information** command on the Essbase ribbon, you can view information about a data cell, such as its POV and data consolidation property. Additionally, you can change the solve order of the data cell at the member intersection, or POV, that you selected.

Solve order is a value that represents the order, or priority, of a member when a calculation is performed. Users can view and change the solve order by editing the solve order value in the **Data Cell Information** dialog box.

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The selected data cell must contain a dynamic member in the POV.

To change the solve order of a data cell:

1. In an ad hoc grid or report, select a data cell.
2. In the Essbase ribbon, click Cell Information to view the **Data Cell Information** dialog box.

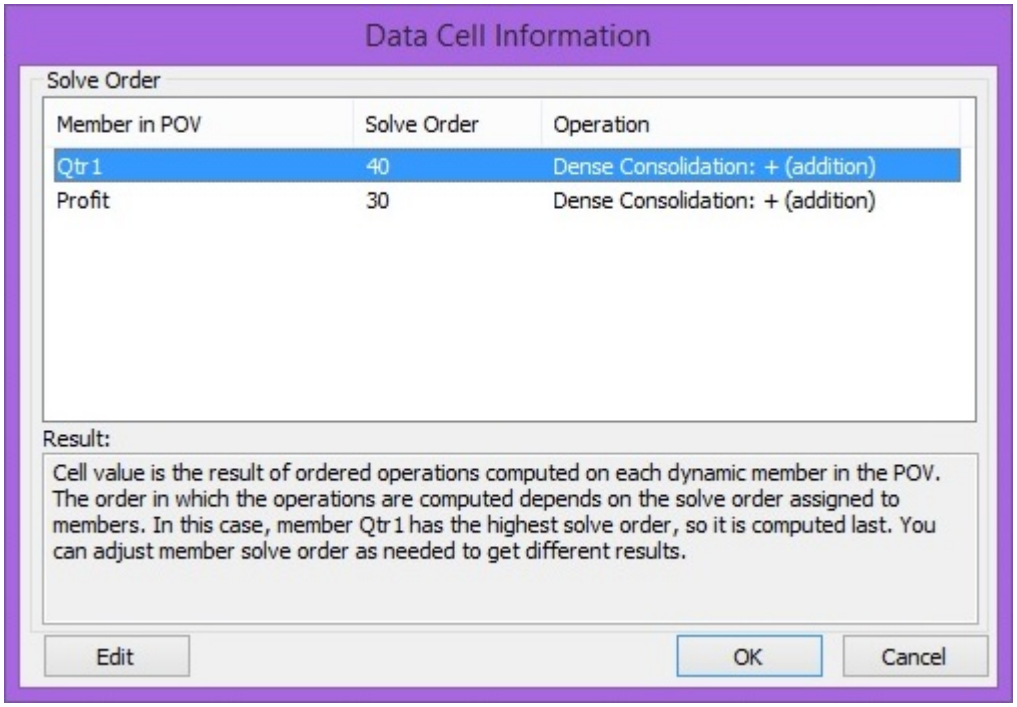
   For example, Figure 1 shows a simple ad hoc query based on the Sample Basic application and database. We select cell B3, at the intersection of Qtr1 and Profit:

Figure 8-21 Simple Ad Hoc Grid Based on Sample Basic

	A	B	C	D	E
1		Product	Market	Scenario	
2		Profit	Inventory	Ratios	Measures
3	Qtr1	8201	117405	34.07707342	8201
4	Qtr2	1895	108026	30.01514991	1895
5	Qtr3	1877	130389	30.05844199	1877
6	Qtr4	1425	128079	29.642067	1425
7	Year	13398	117405	30.97552743	13398

The Data Cell Information dialog is displayed as follows, showing Qtr1 and Profit as the POV members of this intersection, with the operation calculation type for both set to Dense Consolidation: + (addition). Under **Result**, a detailed description of the current calculation result is displayed.

Figure 8-22 Data Cell Information Dialog Box



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3. Select a member row in the **Data Cell Information** dialog and click **Edit**.

   The cursor is placed in the **Solve Order** field, where you can type a new value.

   Alternatively, double-click the value in the **Solve Order** field and type a new value.

   Valid solve order values are between 0 and 127.

   If you enter a value above 127, you will be prompted to enter a value between 0 to 127. Note that members with a solve order of zero, 0, will not be listed in the dialog.
4. **Optional:** To change the solve order value for any other members in the POV, repeat step 3.
5. Click **OK** to commit all solve order changes.
6. Repeat this procedure to change the solve order of any other data cells.
7. Run the calculation you require, following the instructions in Calculating Data in Essbase.

Working with Currencies

In forms enabled for currency conversion, you can enter data in a currency other than the base currency of a cell.

Related Topics:

Changing Currency in Planning

Changing Currency in Planning

In forms enabled for currency conversion, you can enter data in a currency other than the base currency of a cell. Currencies in the drop-down list can be designated as the local currency.

> **Note**
>
> To override the base currency for an entity, the cell must be displayed in the local currency, and its version must be bottom-up. The application must be a multi-currency application and the form should support multi-currency.

To enter cell data in a local currency other than the base currency for the cell:

1. In a form, select a local currency member for the cell.
2. **Optional**: To look up the currency's code, select **View**, then **Currency**.

   Available Currencies shows the application's currencies. Note the Currency Code for the currency you want to work with, and close the window.
3. In the right column, HSP_InputCurrency, type the new Currency Code in the data cell.

   Typing the currency code in the data cell overrides the base currency for the entity.
4. Click **Submit** to submit the new currency code to the Planning server.
5. Enter the currency value in the left column, HSP_InputValue, of the data cell.
6. Click **Rules on Form** and select the Calculate Currencies rule to calculate and save the new currency value.

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If the Calculate Currencies calc script is set to run when the form is saved, and the form is enabled for multiple currencies, the data value is displayed in the currency you selected.

Adjusting Values in Data Cells

You can adjust the value of one or more data cells by a specified number or percentage if the cells contain numerical data.

If you adjust the value of a cell that contains an Excel formula, the adjusted value overwrites the formula.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

To adjust data values:

1. Click the data cell that contains the value to adjust.
2. From the data source ribbon, select **Adjust**.
3. From **Adjust Data**, select an option then enter the number or percentage by which you want to adjust the value of the cell.
4. Click **Adjust Data**.

Resolving Data Validation Errors

Administrators can set up data validation rules to ensure that data meets company guidelines. If the data in a form doesn't meet the criteria in the data validation rules, Smart View users can fix the errors directly in the form.

Data provider types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

For example, your administrator can set:

- Criteria for the data you enter, called *data validation rules*
- Background colors to call your attention to data validation errors
- Messages that tell you what the criteria is

Information on setting the above options are available in your business process administration guide. For example, for Cloud EPM Planning, see Managing Data Validation in *Administering Planning*.

Additionally, using a Windows Registry key, administrators can set the number of cells displayed in the **Data Validation** pane. See Specifying the Maximum Number of Cells Displayed in Data Validation Pane for more information.

The **Data Validation** pane displays in the Smart View Panel, listing the cells containing validation errors, grouped by validation rule.

Figure 1 is an example of these elements.

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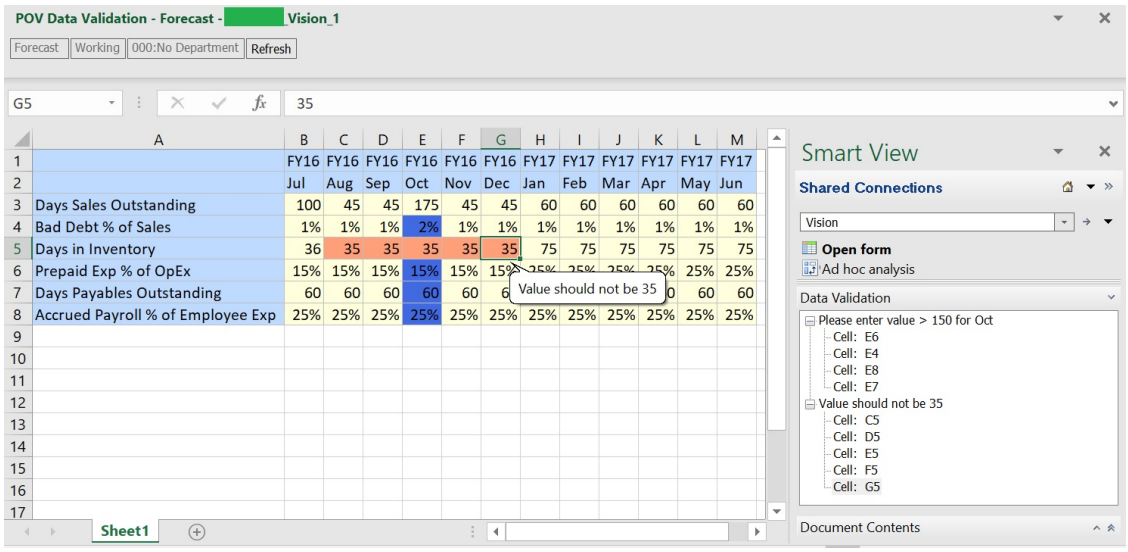
Figure 8-23 Form Showing Invalid Data Cells, a Data Validation Message, and the Data Validation Pane in the Smart View Panel



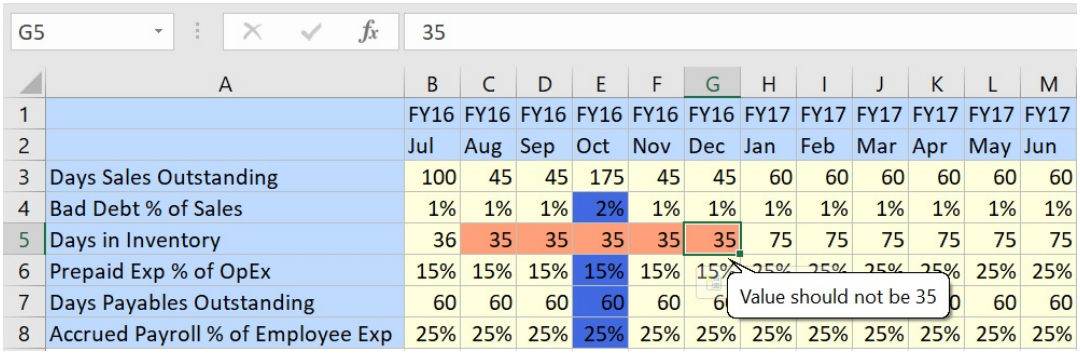
If the data in a form doesn't meet the criteria in the data validation rules, follow the steps in Resolving Data Validation Errors to fix the errors.

Resolving Data Validation Errors

To resolve data validation errors in simple forms and composite forms:

1. In a form with errors, hover your cursor over the cell having a non-default colored background to view the validation message.

   Your administrator typically calls your attention to cells having data validation rule errors by displaying them with a colored background. Pop-up text displays the validation rule.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1		FY16	FY16	FY16	FY16	FY16	FY16	FY17	FY17	FY17	FY17	FY17	FY17
2		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
3	Days Sales Outstanding	100	45	45	175	45	45	60	60	60	60	60	60
4	Bad Debt % of Sales	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%
5	Days in Inventory	36	35	35	35	35	35	75	75	75	75	75	75
6	Prepaid Exp % of OpEx	15%	15%	15%	15%	15%	15%	25%	25%	25%	25%	25%	25%
7	Days Payables Outstanding	60	60	60	60	60	60	60	60	60	60	60	60
8	Accrued Payroll % of Employee Exp	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

2. Click in each data cell that has validation errors and resolve each error based on the instructions in the data validation message.

   You can also locate cells to resolve by reviewing the cells listed in the **Data Validation** pane of the Smart View Panel.

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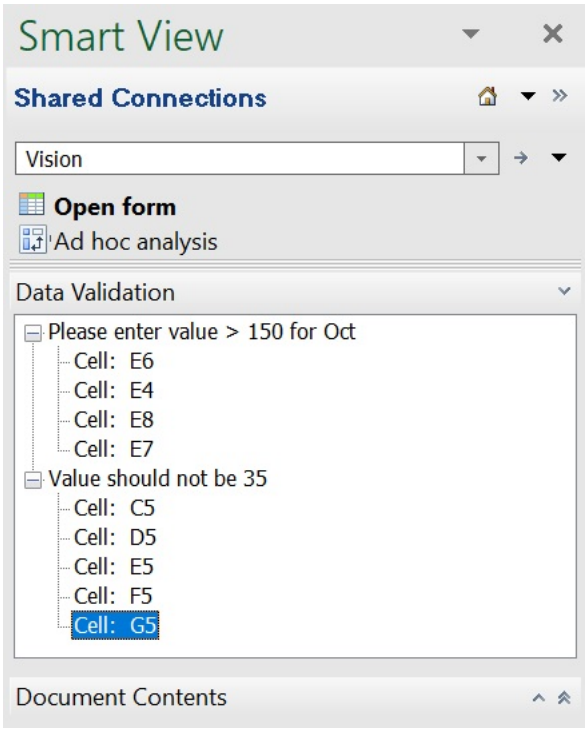

As you resolve errors, those cells are removed the list.

3. In composite forms, repeat this for each form having data validation errors.
4. If there's more than one message in a cell, view the pop-up messages and resolve the errors.
5. When you've resolved all errors, submit the data.

   The cells' colored backgrounds and the data validation messages no longer display in the grid and the **Data Validation** pane no longer displays in the Smart View Panel.

> **Tip**
>
> If your POV doesn't include valid members, you can clear the current members by clicking on the editable dimensions in the POV, and then selecting **<Clear Selection>**. You can then select members from the dimensions that are included in the valid intersection definition.

Specifying the Maximum Number of Cells Displayed in Data Validation Pane

Administrators: Use the registry flag, NumberofValidations, to specify the maximum number of cells displayed in the **Data Validation** pane.

> **Note**
>
> The default maximum number of cells displayed is 200. Be aware that setting the flag higher than 200 can affect performance.

Add the flag to HKCU\Software\Hyperion Solutions\HyperionSmartView\Options.

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And use these values:

Name: NumberofValidations

Value: 200—The default maximum number of cells returned in the **Data Validation** pane. You can set the number higher or lower, as you require, but note that a higher number can affect performance.

Type: REG_DWORD

Specifying Data Perspective

Data perspective enables you to specify the perspective to use for viewing data of varying attributes, which are dimension attributes that vary with respect to independent continuous and discrete dimensions.

For example, suppose a cola product is sold in both cans and bottles in several different geographical markets over the course of a year. If the packaging (cans or bottles) varies depending on the market or changes from one type to the other during the year, the packaging type is a varying attribute. The data associated with the cola would be different depending on the time of year and the market.

Data source types: Oracle Essbase

> **Note**
>
> Data perspective may not be enabled in your Oracle Smart View for Office system. Your options for data perspective are enabled and configured by your Smart View administrator.

To specify data perspective:

1. From the **Essbase** ribbon, select **Data Perspective**.
2. From **Perspective**, under **Selection**, select an option (see Data Perspective Illustration for examples of options).
   - **Reality** to display the data with no perspective.
   - **Last** to display the data for the last level 0 member of each continuous independent dimension. For example, if Year is the continuous dimension and December is the last member of Year, then the data for December is displayed.
   - **Start** to display the data for the first level 0 member of each continuous independent dimension. For example, if Year is the continuous dimension and January is the first member of Year, then the data for January is displayed.
   - **Custom** if you want to specify both continuous and discrete members. For this option, select a **Varying Attribute** from the drop-down list. Then, for the dimensions listed under **Independent Dimension**, select members under **Members**. If you select **Set Dimensions Only**, all independent dimensions across all varying attribute are displayed, enabling you to apply a common perspective to all.
3. Click **OK**, then refresh the grid.

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Example 8-4 Data Perspective Illustration

In our example of cola sold in cans and bottles, suppose the Administrator has specified the following attributes for the cola packaging types to reflect how the cola was sold in Texas and California markets during the year:

- Can: California, January—December year
- Can: Texas, July—December
- Bottle: Texas, January—June

Figure 1 illustrates the Reality perspective. The data shown for California and Texas is data for the entire year. Since bottles were not sold in California, no data is returned (indicated here by #Meaningless).

Figure 8-24 Data Perspective: Reality

	A	B	C	D
1		California	Texas	Market
2	Bottle	#Meaningless	405	405
3	Can	1587	234	1821
4	Pkg Type	1587	639	2226

Figure 2 illustrates the Last perspective and displays data for cans for California and Texas, but none for bottles, because bottles were sold only January through June in Texas.

Figure 8-25 Data Perspective: Last

	A	B	C	D
1		California	Texas	Market
2	Bottle	#Meaningless	#Meaningless	#Meaningless
3	Can	1587	234	1821
4	Pkg Type	1587	234	1821

Figure 3 illustrates the Start perspective and displays data for January. Bottles but not cans were sold in Texas in January, so only data for bottles is displayed. Cans but not bottles were sold in California in January, so only data for bottles is displayed.

Figure 8-26 Data Perspective: Start

	A	B	C	D
1		California	Texas	Market
2	Bottle	#Meaningless	639	639
3	Can	1587	#Meaningless	1587
4	Pkg Type	1587	639	2226

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Working with Smart Lists

You can enter data using custom drop-down selection lists called Smart Lists, which are accessed from data cells in forms and ad hoc grids.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

A Smart List is a drop-down selection list displayed in a form or ad hoc grid cell as an alphanumeric text description, but stored in the database as a number. For example, an integer Smart List for a reporting cycle may have the values 1-5, for Yearly (1), Quarterly (2), Monthly (3), Daily (4), and Hourly (5). The values that are displayed on the form or ad hoc grid are Yearly, Quarterly, Monthly, Daily, and Hourly. When you select one of these values on the form or ad hoc grid, and submit the data, the number associated with it is stored in the database. This means that you do not have to remember the numeric values associated with each time period in the reporting cycle.

In Oracle Smart View for Office, you access Smart Lists from custom drop-down lists in form or ad hoc grid cells. When clicking into cells whose members are associated with a Smart List, you click the down arrow that appears directly to the right of the cell, then select a drop-down list option instead of typing data; in fact, you cannot type in a cell that contains a Smart List.

For example, a data form may contain a Smart List called Justification that provides selections for Research, Customer Feedback, and Expansion. When you click into Account cells named Reason (whose members are associated with the Justification Smart List), a down arrow is displayed. When you click the down arrow, it expands into a drop-down list with the following selections:

- Research
- Customer Feedback
- Expansion

You then select one of the Smart List options as the value for the cell.

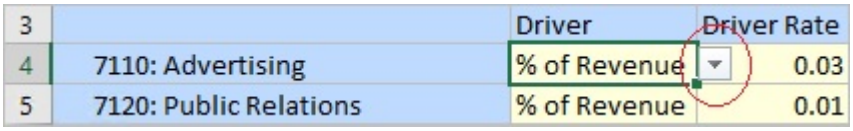
To enter a Smart List value in a form or ad hoc grid cell:

1. Open a form or ad hoc grid in Excel.

   See Opening Forms in Excel or Starting Ad Hoc Analysis.

2. In the form or ad hoc grid, click into the data cell for which you want to select a Smart List option.

   A down arrow is displayed to the right of the cell; for example:



> **Note**
>
> Only cells whose members are associated with Smart Lists contain Smart List drop-down lists.

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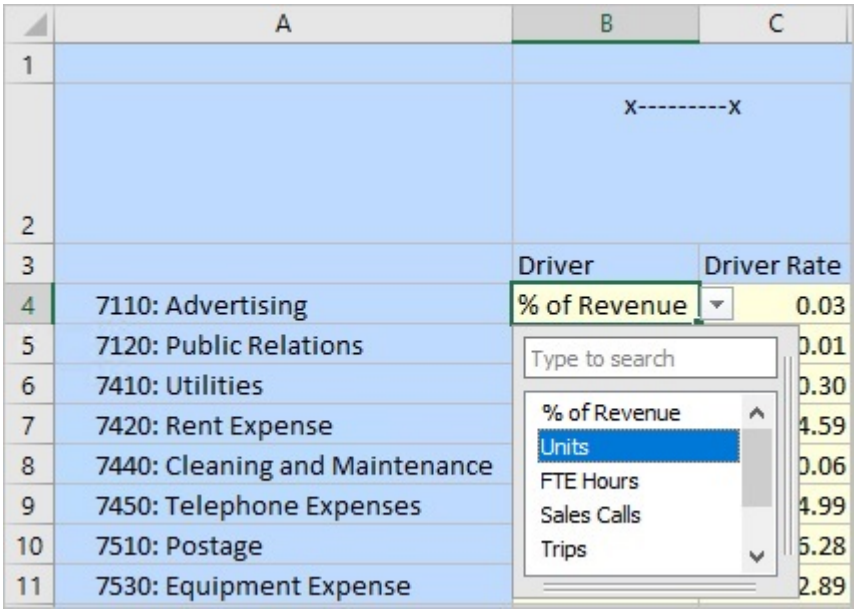
3. Click the down arrow for the cell.

   The down arrow expands into a Smart List drop-down list with options from which you can choose; for example:



4. From the Smart List, select an option.

   The option you select is entered into the data cell.

   After selecting a value, the cell becomes "dirty" and the data is ready to submit; for example:

Guidelines for Working with Smart Lists

- You can hand-type a Smart List value in cells that contain Smart Lists and perform a Submit for both forms and ad hoc grids. However, if you type in an incorrect Smart List value, then you will see this error message, "The value you entered is not valid."
- In forms containing Smart Lists, after deleting all values in a row in order to enter and submit new data, the Smart Lists in that row are empty.

  Workaround: Remove row values, and then perform a **Submit** (that is, you submit #Missing values) or a **Refresh**. The Smart List drop-down arrows are then displayed properly. Now, you can enter new values for the same row.
- Smart Lists are supported with the HsGetValue and HsSetValue functions. However, with functions, you will not see the Smart List drop-down options. Instead:
  - HsGetValue - Simply retrieves the Smart List value as a string value.
  - HsSetValue - Submits the value as a string value.
- While working on Smart Lists in forms and ad hoc grids, if you press the **Delete** key in a Smart List cell, then the cell value is cleared but the Smart List is retained in the cell.

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> **Note**
>
> If you are working on an ad hoc sheet in free-form state, then the Smart List values are not retained on pressing the **Delete** key. As a workaround, you have to refresh the sheet to get the Smart List values back in the drop-down list.

- Smart Lists must be set up and enabled by an administrator before you can use them in Smart View. For more information on enabling Smart Lists for forms and ad hoc grids, see the information Smart Lists in the relevant administration guide; for example:

  Administering Planning, "Accessing More Administrative Tasks" chapter, Administering Smart Lists

Working with Drill-Through Reports

Predefined by administrators, drill-through reports are available to users from specified individual data cells.

Related Topics

- Drill-Through Report Guidelines
  This topic contains guidelines for working with drill-through reports in Oracle Smart View for Office.
- Setting the Drill-Through Launch Option
  Specify your drill-through launch preference: drill-through to a web page, or drill-through to an Excel sheet.
- Defaulting and Disabling the Launch Method for Drill-Through Reports
  The method of launching drill-through reports from Smart View can be set as default and disabled for users.
- Accessing Drill-Through Reports
  Depending on your data source connection, you can drill through to web pages or Excel sheets.
- Drilling Through to Source Data
  With Oracle Fusion Cloud Enterprise Performance Management data providers, you can drill through to web pages or Excel sheets.
- Viewing the Drill-Through Report Source POV
  View information about the source POV of a drill-through report by accessing the **Sheet Information** dialog.

Drill-Through Report Guidelines

This topic contains guidelines for working with drill-through reports in Oracle Smart View for Office.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

From Smart View, you can drill through to the detailed data in a database as follows:

- Before beginning drill-through to a web page, open the default browser and log in to the target web application. For example, launch Planning and log in. You must have the application running in the browser before logging in to Smart View.

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- Supported Oracle Fusion Cloud Enterprise Performance Management data sources: You can drill through from your application to detailed data in Data Management or Oracle Hyperion Financial Data Quality Management data sources.
- Supported Cloud EPM data sources: In Smart View, using the **Drill-Through Launch** option, you can choose to launch drill-through reports in a browser or on a new Excel sheet, or be prompted to make that choice at run time. The **Drill-Through Launch** option is located on the **Advanced** tab of the **Options** dialog. For more information, see Setting the Drill-Through Launch Option.

  Administrators: For more information on configuring drill-through, see these topics in *Administering Data Integration*:

  – Using Direct Drill
  – Quick Mode to Export Data
- Essbase cloud:
  – You can drill through to relational databases or to URLs.
  – You can select multiple cells for drill-through to relational data in Excel sheets.

Consider these guidelines when working with drill-through reports:

- A cell can be associated with multiple drill-through reports.
- Cells that contain drill-through reports can be indicated on the grid by a cell style (see Cell Styles).
- The data displayed in a drill-through report is dynamic.
- You cannot use alias names for drill-through; you must use member names.

From Smart View, when connected to a supported Cloud EPM data source, you can drill through from your application to detailed data in Data Management or FDM data sources. When connected to Essbase, you can drill through to Oracle General Ledger, data in your relational database or to URLs.

> **Note**
>
> - Mozilla Firefox, Google Chrome, and Microsoft Edge require a browser-specific add-on for drill-through. Follow the instructions on installing the add-on for these browsers in the "Installing Browser Add-ons" topic under "Installing Smart View" chapter in *Oracle Smart View for Office Installation and Configuration Guide*.
> - If drill-through fails in Google Chrome, then Service Administrators can try adding Smart View to the allowlist. See Drill-through with Chrome: Blocklist and Allowlist for Native Messaging.

Setting the Drill-Through Launch Option

Specify your drill-through launch preference: drill-through to a web page, or drill-through to an Excel sheet.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

When connected to a supported Oracle Fusion Cloud Enterprise Performance Management service and using Data Integration to load data for drill-through reports, you can launch the reports in a browser or on a new Excel sheet.

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Specify your launch preference using the **Drill-Through Launch** option, located in the **Options** dialog. **Advanced** tab.

To specify your drill-through launch preference:

1. In the Smart View ribbon, select **Options**, and then **Advanced**.
2. For **Drill-Through Launch**, select your preferred launch method:
   - **In Web Browser**—Always launch in a browser
   - **In New Sheet**—Always launch on a new Excel sheet
   - **Prompt Me to Choose Target**—Prompt me to choose browser launch or Excel sheet launch at runtime
3. Click **OK**.

> **Note**
>
> **Advanced** options are global options. Changes to global options become the default settings for all existing and new worksheets and workbooks so it is not necessary to use **Save as Default Options** or **Apply to All Worksheets** with global options.

4. Launch a drill-through report, as described in Accessing Drill-Through Reports

Defaulting and Disabling the Launch Method for Drill-Through Reports

The method of launching drill-through reports from Smart View can be set as default and disabled for users.

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

> **Note**
>
> The task in this topic is for Service Administrators or users who are familiar with editing the properties.xml file located in the <Smart View Install>/cfg folder (for example, C:\Oracle\SmartView\cfg).

Drill-through reports can be launched either in a web browser or in a new Excel sheet. Oracle Fusion Cloud Enterprise Performance Management users can select the preferred method in the **Drill-Through Launch** option in the **Advanced** tab of **Options** dialog.

However, for on-premises Oracle Hyperion Planning data sources, drill-through reports can be launched only in a web browser.

Using the disableDTLaunchType property present in the Smart View properties.xml file, you can disable the selection of **Drill-Through Launch** options for users in the **Advanced** tab and default it to the web browser for supported Cloud EPM data sources.

To default and disable the drill-through launch options:

1. In your Smart View installation, navigate to the SmartView\cfg folder.
2. Make a backup copy of the original properties.xml file.

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3. Open properties.xml for editing.
4. Locate the following entry:

   ```
   <disableDTLaunchType>0</disableDTLaunchType>
   ```

5. Change the disableDTLaunchType value to 1 to make web browser as the default method for launching drill-through reports

   ```
   <disableDTLaunchType>1</disableDTLaunchType>
   ```

6. Save the updated file.
7. Restart the Excel application.

Accessing Drill-Through Reports

Depending on your data source connection, you can drill through to web pages or Excel sheets.

To access a drill-through report:

1. Before you begin: If you plan to perform drill-through to a web page, first open the default browser and log in to the target web application.

   For example, launch Planning and log in. You must have the application running in the browser before logging in to Smart View.

2. Select a data cell associated with a drill-through report.

   Oracle Essbase cloud: You can select multiple cells for drill-through to relational data in Excel sheets.

   > **Tip**
   >
   > If you want to display a list of available drill-through reports whenever you mouse over a cell, select **Display Drill-Through Report ToolTips** on the **Advanced** page of the **Options** dialog box.

3. From the data source ribbon, select **Drill-through**.
4. If there are multiple drill-through reports associated with the cell, select a report from the list and click **Launch**.

   If only one drill-through report is associated with the cell, the drill-through report launches directly.

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> **Note**
>
> **Oracle Fusion Cloud Enterprise Performance Management:**
>
> - If connected to a supported Cloud EPM service and using Data Integration to load data for drill-through reports, the report is launched according to the selection you made in Setting the Drill-Through Launch Option.
> - The first time that you click a drill-through cell and the browser launches, you may be asked to log in to your cloud service and the drill-through report may not be displayed as expected. You can return to the sheet in Oracle Smart View for Office and click the drill-through cell again to launch the drill-through report. Or, to avoid this error, you may sign in to the business process in the browser first, before launching drill-through from Smart View.

Drilling Through to Source Data

With Oracle Fusion Cloud Enterprise Performance Management data providers, you can drill through to web pages or Excel sheets.

When working with Cloud EPM data providers, and performing a drill through from Oracle Smart View for Office to display drill data, the system now supports two ways to display the source data:

- Drill through to the source landing web page using a hyperlink. In this case, when you initiate a source drill, the system launches the source landing page in your default browser.
- Drill through to the source data using an EPM Integration Agent query. In this case, the source data is queried and the data is displayed in a new Excel sheet in Smart View.

This topic focuses on drilling through to source data and displaying it in Excel.

When this drill-through option is enabled, your first drill-through operation takes you from your main worksheet to a staging sheet. From the staging sheet, you can drill further into a data cell to the source data for the selected cell. Drill-through to source is available on any data cell for any dimension/member combination in the staging sheet. From the source sheet, you can navigate back to the staging sheet, and then back to the main sheet.

> **Note**
>
> Service Administrators: To use this feature, you must first execute a SQL query in the source database and display the results in a pop-window inside Data Integration. For more information, see Creating a Drill Down to a Source System Without a Landing Page in *Administering Data Integration*.

To drill-through to source data:

1. Before you begin, perform these tasks:
   - In the **Options** dialog, **Advanced** tab, set the **Drill-Through Launch** option to **In New Sheet** or **Prompt Me to Choose Target**.

     See Setting the Drill-Through Launch Option for information on setting this option.
   - Open the default browser and log in to the target web application.

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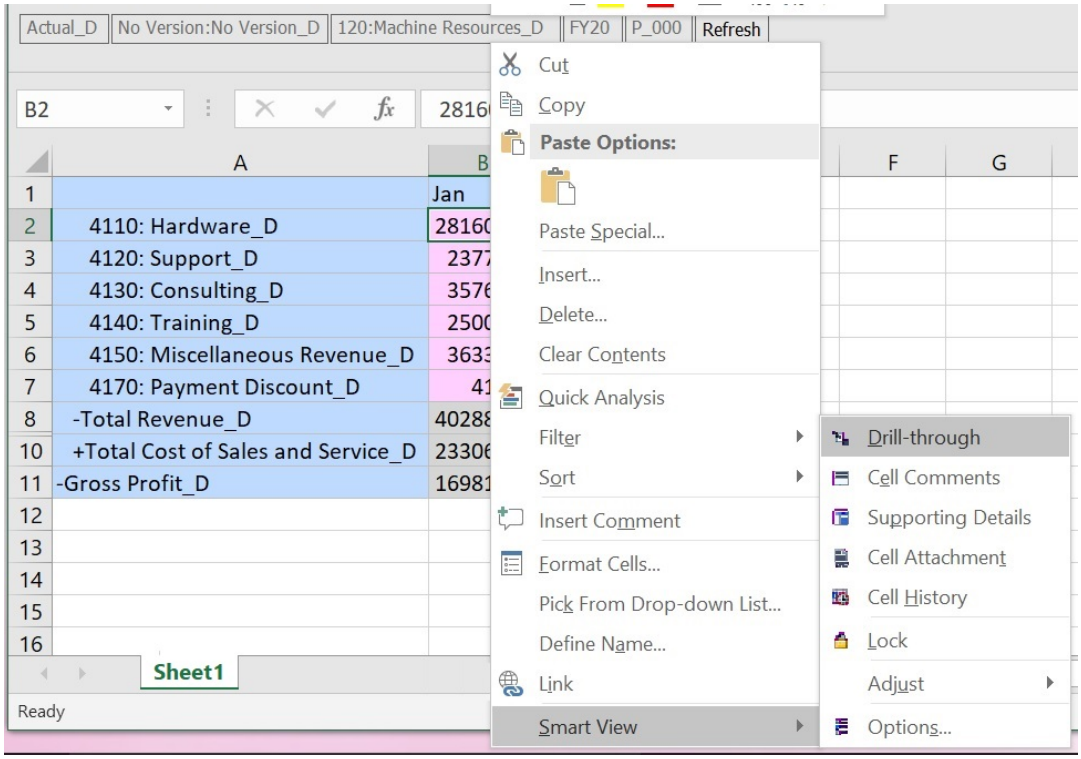
For example, launch Planning and log in. You must have the application running in the browser before logging in to Smart View.

2. Right-click on a drill-through cell, and from the context menu, select **Smart View**, and then **Drill-Through**.

   You can also click the **Drill-Through** option on the provider ribbon.

   If prompted for a drill-through option, select **Open as new sheet**.

   In the following example, we're using cell styles to call out the drill-through cells in a form. The drill-through cells are pink. Right-click on a drill-through cell and select **Smart View** in the context menu to view the submenu, where we'll select **Drill-Through**.



   This action launches the staging sheet.

3. In the staging sheet, to drill through to the source data, right-click a cell and select **Smart View**, and then **Drill-through to Source**.

   Drill-through to source is available on any data cell for any dimension/member combination in the staging sheet.

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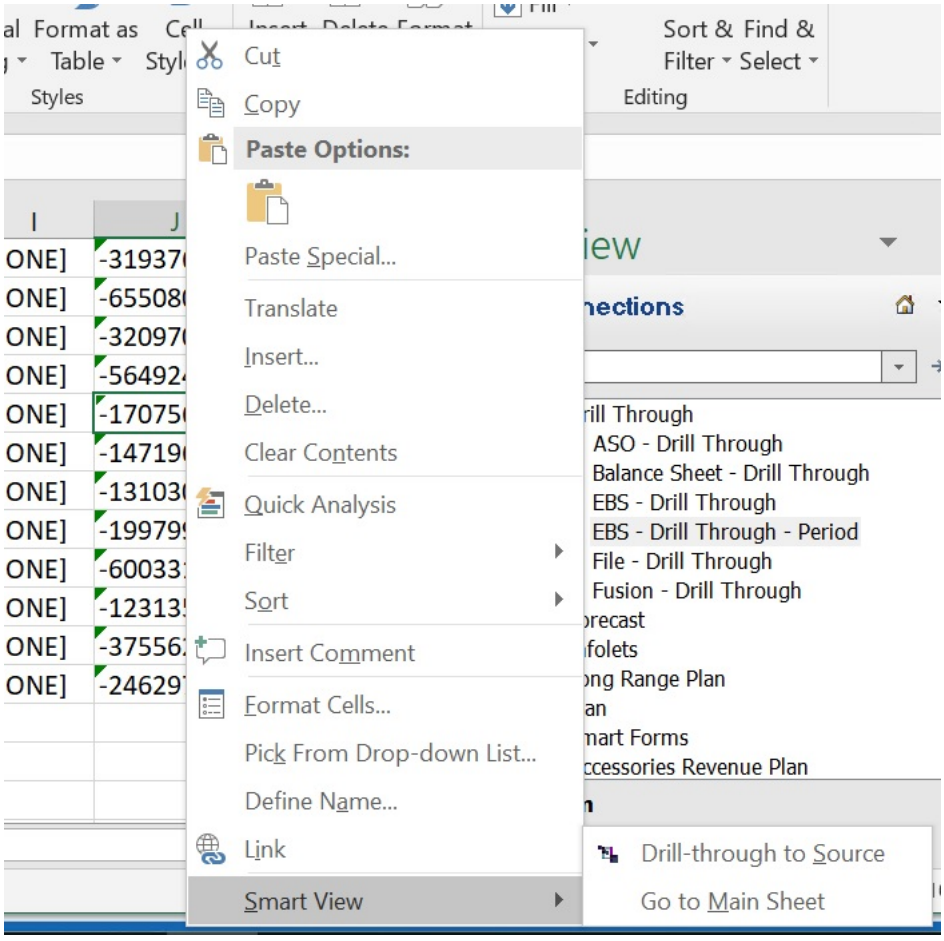

Optionally, from the **Smart View** context menu on the staging sheet, you can select **Go to Main Sheet** to return to the sheet from which you began.

4. **Optional:** In the source sheet, to navigate back to the staging sheet, right-click a cell and select **Smart View**, and then **Go to Staging Sheet**.

> **Note**
>
> - This navigation works even if you rename the staging or main sheet.
> - Be aware that when reusing the main or staging sheet to perform a Smart View action, such as opening a form or starting a new ad hoc grid, the links for the **Go to Main Sheet** and **Go to Staging Sheet** commands still persist. If you rely on those links, and the content on the main or staging sheet is changed, then you may be directed to a cell where there is no drill-through information or the drill-through information is no longer applicable.

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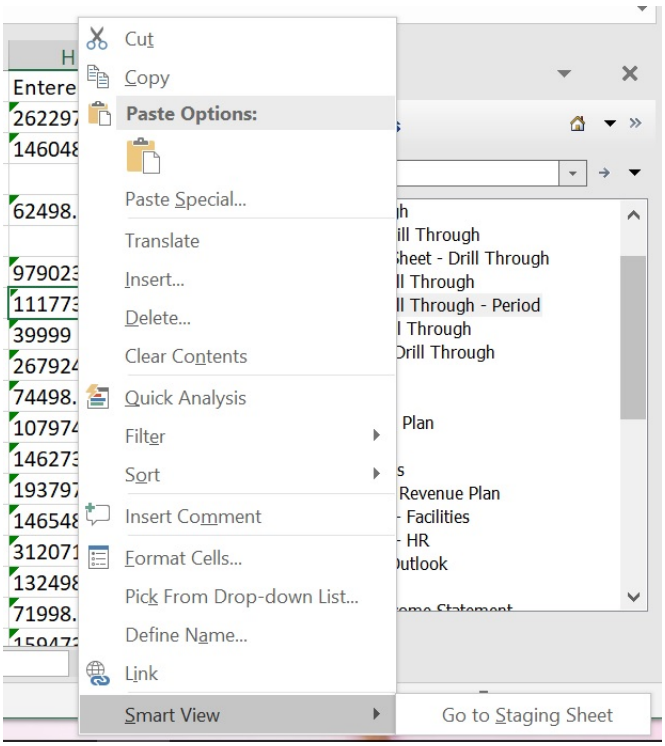


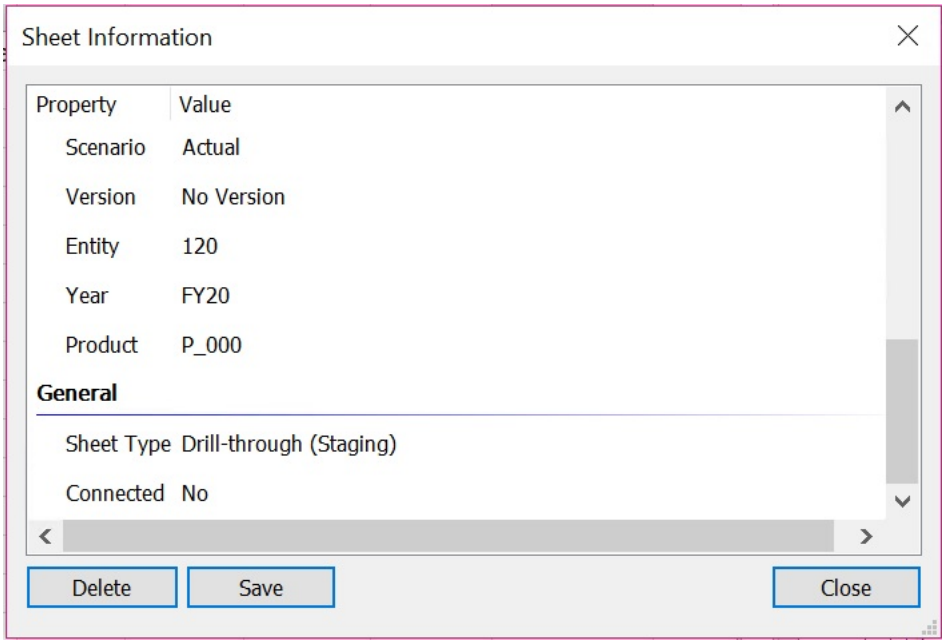
5. **Optional:** In the staging sheet, to navigate back to the main sheet, right-click a cell and select **Smart View**, and then **Go to Main Sheet**.

   See the context menu options in the illustration in step 3

6. **Optional:** To view the **Sheet Type** for the worksheet, staging or source, select the Smart View ribbon, and then **Sheet Info** to display the **Sheet Information** dialog.

   For example:

   Staging Sheet:



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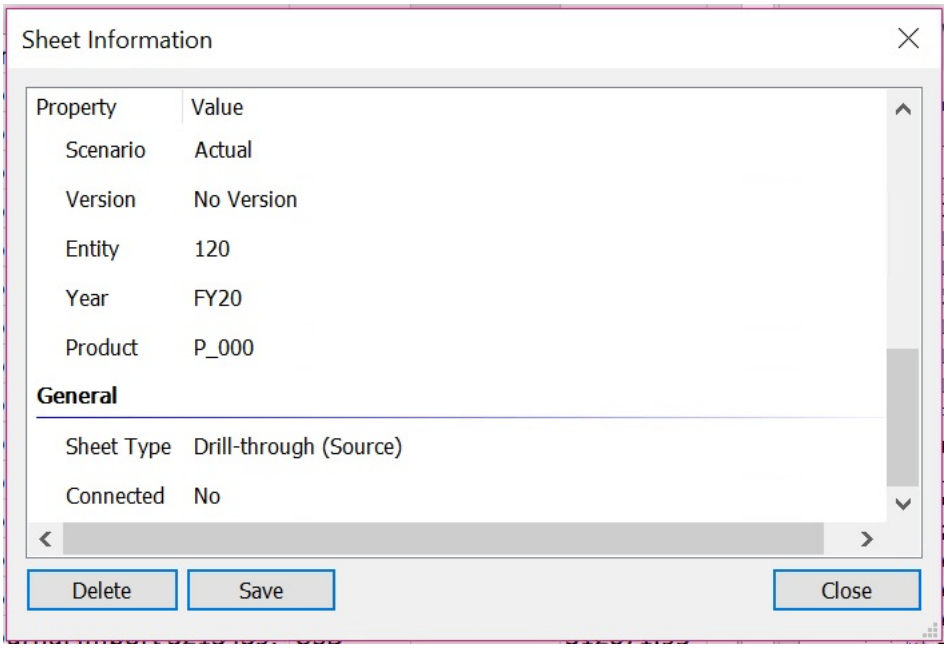
Source Sheet:



Viewing the Drill-Through Report Source POV

View information about the source POV of a drill-through report by accessing the **Sheet Information** dialog.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

Use the **Sheet Info** command in the Smart View ribbon to view details about the cell intersection and POV of the cell from which the drill-through report was launched.

To view the source POV of a drill-through report launch cell:

1. Ensure that you have enabled drill-through launch on to a sheet.

   In the **Options** dialog, **Advanced** tab, you should select either **In New Sheet** or **Prompt Me to Choose Target**. For more information, see Setting the Drill-Through Launch Option.

2. Launch a drill-through report on to a new sheet, as described in Accessing Drill-Through Reports.

3. Select the Smart View ribbon, and then select **Sheet Info**.

   The POV of the intersection of the drill-through launch cell is shown in the **Sheet Information** dialog box. In the example POV shown in Figure 1, we see these information categories related to the cell intersection:

   - Row members
   - Column members
   - POV members
   - Page members

   We also see a **General** section showing that we we're working with a drill-through sheet.

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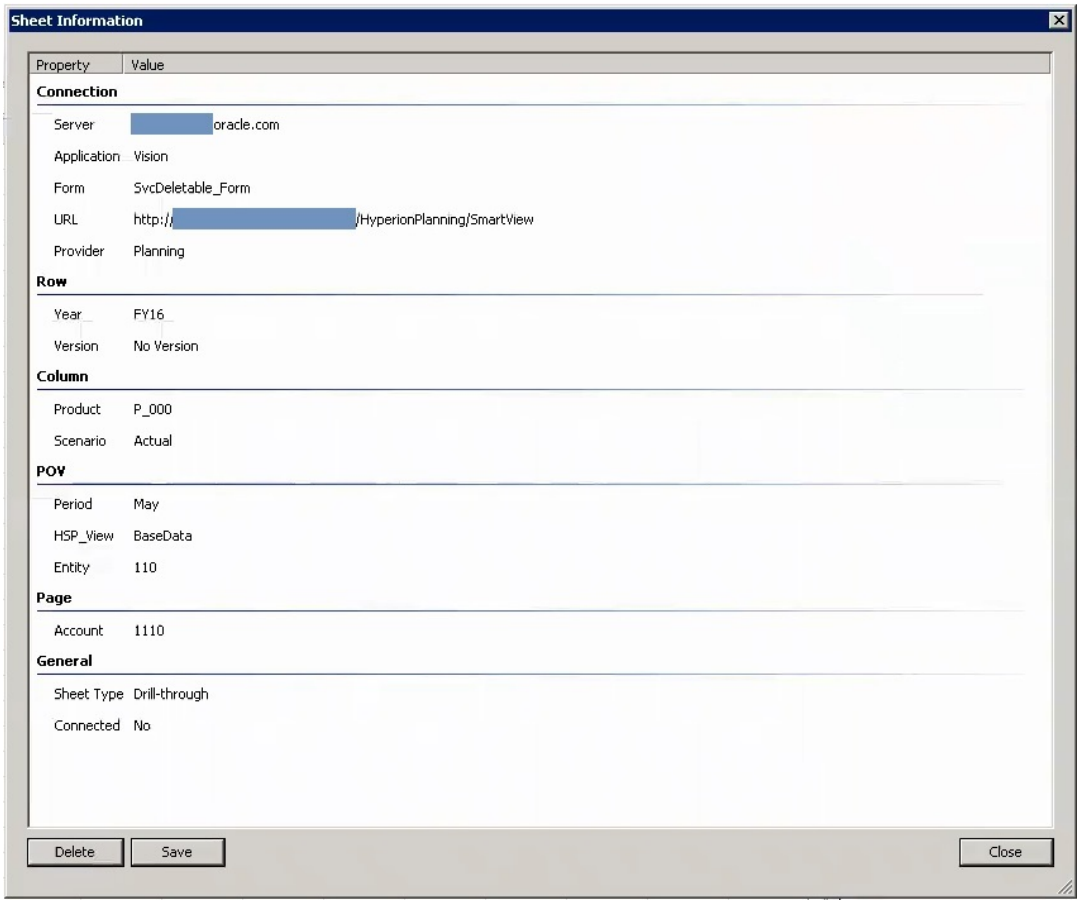
Figure 8-27 Sheet Information Dialog Showing POV for Drill-Through Launch Cell



> **Note**
>
> In Oracle Smart View for Office ad hoc mode, when drill-through is launched, the POV section of **Sheet Information** dialog shows the member names corresponding to the alias table selected on the ad hoc sheet.

4. **Optional:** Click **Save** to save the POV information in a separate sheet in the workbook.

> **Tip**
>
> As a best practice, copy and paste the POV information from the new sheet to a permanent file for your own reference.

Working with Linked Reporting Objects

A *linked reporting object* is a cell note, external file, or URL that is linked to a data cell in an Oracle Essbase database, and which can be retrieved by Oracle Smart View for Office users in Excel.

Data source types: Oracle Essbase

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You can set a cell style to identify cells that are associated with linked reporting objects. See Cell Styles.

See also:

- Attaching a Linked Reporting Object to a Data Cell
- Launching a Linked Reporting Object from a Data Cell
- Launching Linked Partitions

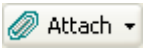
Attaching a Linked Reporting Object to a Data Cell

You can attach one or more linked reporting objects to a data cell.

To attach a linked reporting object to a data cell:

1. Ensure that you're working with a connected worksheet.

   > **Note**
   >
   > If you are working with a saved ad hoc sheet or a grid layout that contains no data yet (for example, a free-form grid), you are not required to refresh the sheet first. Ensure that you are connected to the data provider, then right-click the correct database in the Smart View Panel, and then select **Set Active Connection for this Worksheet**.

2. Select a data cell.
3. From the Essbase ribbon, select **Linked Objects**.
4. From **Linked Reporting Objects**, click 

and select one of the following:
   - **Cell Note** to attach an annotation to the data cell
   - **File** to attach an external file to the data cell
   - **URL** to attach a URL to the data cell

   The dialog box appropriate to your selection is displayed.
5. Enter information as follows:
   - **Cell Note**: Enter text for the note. Then click **Close**. The first few words of the note are displayed in the **Description** column of the **Linked Reporting Objects** list.
   - **File**: Use the **Browse** button to navigate to the file that you want to attach to the data cell. You can add a brief description for the file. Then click **Close**.
   - **URL**: In **URL,** enter a URL for a web site, a network or local directory, or a document in a network or local directory. You can add a brief description for the URL. Then click **Close**.
6. Repeat the procedure to attach other linked reporting objects as needed.

   The objects that you created are displayed in the **Linked Reporting Objects** list as shown here:

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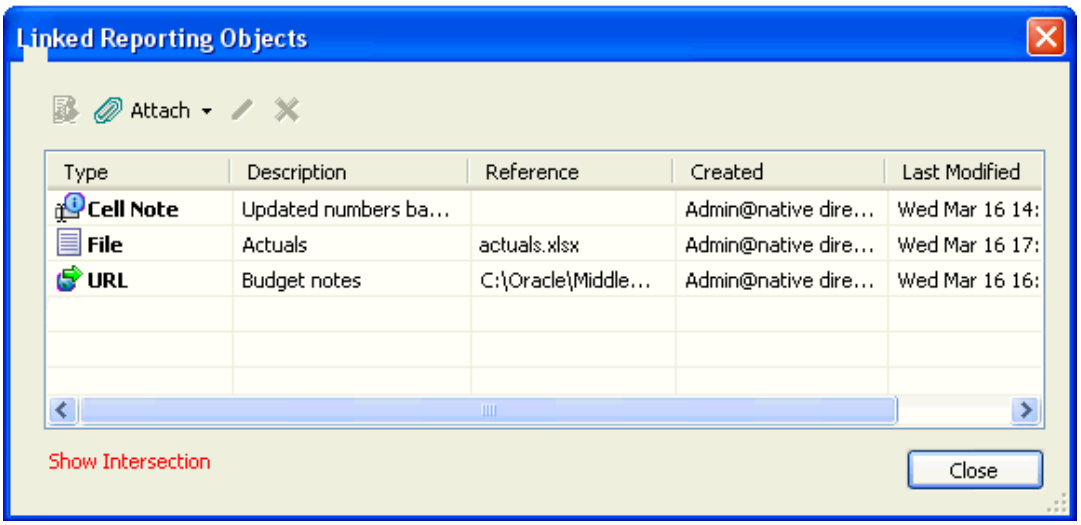

7. Refresh the grid to apply the cell style (if specified) to the cell.

To edit or delete a linked reporting object, use the **Edit** button or **Delete** button. Deleting an object removes it from the database.

Related topics:

- Working with Linked Reporting Objects
- Launching a Linked Reporting Object from a Data Cell

Launching a Linked Reporting Object from a Data Cell

To launch a reporting object from a data cell:

1. Ensure that you're working with a connected worksheet.

> **Note**
>
> If you are working with a saved ad hoc sheet or a grid layout that contains no data yet (for example, a free-form grid), you are not required to refresh the sheet first. Ensure that you are connected to the data provider, then right-click the correct database in the Smart View Panel, and then select **Set Active Connection for this Worksheet**.

2. Select the data cell that is associated with the linked object that you want to launch.
3. From the Essbase ribbon, select **Linked Objects** to display **Linked Reporting Objects**.
4. From **Linked Reporting Objects**, select the linked object to launch.
5. Click . The linked reporting object launches as follows:
   - Cell notes are displayed in the **Cell Note** dialog box.
   - Files are opened.
   - URL objects are opened in the default web browser.
   - Linked partitions—see Launching Linked Partitions.

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Related Topics:

- Working with Linked Reporting Objects
- Attaching a Linked Reporting Object to a Data Cell

Launching Linked Partitions

A *linked partition* connects two databases by means of a data cell.

Using a data cell associated with a linked partition, you can navigate from the database connected to the current grid to a second database. Because the two databases may have different dimensions, you can see the data in different contexts. When you launch a linked partition, a new spreadsheet that displays the dimensions from the linked database opens. From there, you can drill down into the dimensions of the linked database.

Data source types: Oracle Essbase

To launch a linked partition:

1. Select a data cell associated with a linked partition.
2. From the Oracle Essbase ribbon, select **Linked Objects**.
3. From **Linked Reporting Objects**, select the linked partition (displayed as **Linked** in the list).
4. Click .

   The linked partition is launched in a new spreadsheet. From this spreadsheet, you can drill down to data in the linked database.

Adding Cell Comments in Cloud EPM

You can add one or more comments per data cell. Each data cell can contain comments from multiple users.

Data source types: Planning, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

In release 11.1.2.5.620 and later, Oracle Smart View for Office conforms to the character limit set in Oracle Fusion Cloud Enterprise Performance Management. Depending on the permission level assigned to you by the administrator, you may be able to do any of the following in a data cell:

- Add comments.
- View the comments that you and other users have added.
- Delete comments that you have entered. You cannot delete comments added by other users.

You can also add numeric comments, that is enter numbers as comments. Starting release 24.200, numeric comments entered in worksheets with Standard mode ad hoc grids are retained while refreshing the worksheets in Smart View. This also applies to worksheets having multiple ad hoc grids. Numeric comments are saved and processed just like regular text comments in Smart View. The workaround of adding equal to sign (=) or single quotes (') before numbers in a comment is no longer required.

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> **Note**
>
> - Cells that contain comments can be associated with a cell style. See Cell Styles.
> - Forms 2.0 does not support adding comments to formula cells.

Video

Your Goal	Watch This Video
Learn about some basic Smart View functionality, including cell comments.	Entering and Saving Plan Data in Smart View with Oracle Planning and Budgeting Cloud

To add comments to a data cell:

1. Select one data cell or a range of data cells in an ad hoc grid.

   Use the **Shift** key to select a range of data cells. Do not use the **Ctrl** key to select cell ranges.

2. From the provider ribbon or provider ad hoc ribbon, select **Cell Actions** and then **Comments**.

3. From **Comments**, click .

4. If you selected a range of cells in step 1, you can either enter comments for one cell at a time or apply a comment to all selected cells.

   - To enter a comment for one cell, select the cell from the drop-down menu.
   - To enter a comment for all selected cells, select **Apply to all selected cells**.

5. In the field at the right, enter a comment. If you want to format the comment, use HTML tags.

6. Click to save the comment.

   The comment is displayed in the list of comments to the left of the comment field. This list contains comments entered by all users.

7. Click **OK.**

8. **Optional:** To delete a comment, click . You can delete only the comments that you have entered.

Adding Attachments

Documents can be attached to individual data cells by way of URLs or files.

Data source types: Planning, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

Each data cell can contain multiple documents attached by one or more users. In this topic, "documents" can mean both URLs and files.

Depending on the permission level assigned by the administrator, you may be able to do any of the following in a data cell:

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- Attach documents by way of URLs.
- Attach documents as files.
- View the documents that you and other users have attached.
- Edit and delete documents that you have attached. You cannot edit or delete documents attached by other users.

> **Note**
>
> - If you are migrating from an on-premises environment to Oracle Fusion Cloud Enterprise Performance Management, and your forms have Oracle Hyperion Enterprise Performance Management Workspace URL attachments that reference documents uploaded in the EPM Workspace, you cannot access these documents in Oracle Smart View for Office. Instead, you can attach the documents directly to the form.
> - Forms 2.0 does not support adding attachments to formula cells.

Best Practices for Adding Attachments

Consider the following best practices for attaching files and URLs to cells in Smart View

- Each file you attach must have a unique file name, whether you are attaching files to the same cell or to different cells in a range.
- There are restrictions on which characters are allowed in filenames for file attachments. Filenames can only contain letters, digits, underscores (_), hyphens (-), periods (.), and spaces.
- In order for other users to see files that you attach, the files must be selected from a location that is accessible to other users, such as a shared network location.
- There is no size limit enforced on cell attachments, but larger files will impact performance.
- When adding a URL attachment using Smart View, Oracle requires a valid URL using either the HTTP (http://) protocol or the secure HTTPS protocol (https://).
- For cells containing attachments, you can associate a cell style for clear identification. See Cell Styles.

Video

Your Goal	Watch This Video
Learn about using basic Smart View functionality related to Planning, including working with attachments.	Entering and Saving Plan Data in Smart View with Oracle Planning and Budgeting Cloud

Adding Attachments to a Cell

To attach documents to a data cell:

1. Select one data cell or a range of data cells in an ad hoc grid or form.
2. From the provider ribbon or provider ad hoc ribbon, select **Cell Actions**, and then **Attachment**.

   For example, select **Cell Actions**, and then **Attachment** from the Planning ribbon or Planning Ad Hoc ribbon.

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3. In the **Attachments** dialog, click the **Attach** button, , and select **File** or **URL**.
   - **File**—For Cloud EPM data sources only. Continue to step 4.
   - **URL**—For Cloud EPM and Oracle Hyperion Planning data sources. Continue to step 5.
4. If you selected **File** in step 3, then, in the **Select File to Attach to Cell** dialog, navigate to the file that you want to attach, select it, and click **Open**.

   The file is uploaded to the selected cell.

   > **Note**
   >
   > To attach files to cells in a range, select a cell from the drop-down list in the **Attachments** dialog, navigate to the file, select it, and click **Open** to upload the file to the selected cell. Repeat for each different file you want to attach to different cells in the range.

5. If you selected **URL** in step 3, a new row is added where you enter the following information:
   - Click in the cell under **Description** to add a brief description.
   - Click in the cell under **Reference** to enter the URL location of the document or web page that you want to attach.

     When you save the URL attachment in the next step, the **User** and **Date Entered** fields will be automatically populated.

   > **Note**
   >
   > You can attach a URL to a range of cells. If you select a range of cells, you can either attach URLs to one cell at a time or attach the same URL to all selected cells.
   >
   > - To attach a URL to one cell in the range, select the cell from the drop-down menu, select **Attach**, then **URL**, and then enter the **Description** and **Reference**.
   > - To attach one URL to all selected cells in the range, select **Apply to all selected cells**.

6. If you attached only URLs, or attached a combination of URLs and files, then save your attachment selections by clicking .

   If you attached only files, then saving is not required and the **Save** button, , is not enabled.
7. Repeat this procedure to add attachments as you require.
8. **Optional:** For URL attachments, to edit a **Reference** entry, select the attachment row to edit, click , edit the reference, and then click .

   Editing the **Reference** entry for File attachments is not supported. Instead, delete the entry (see the next step) and reattach the file, as described in the above steps.

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9. **Optional:** To delete an attachment, select the attachment in the list, then click Delete, , and then click Save, .
10. Click **Close**.

Launching Attachments

To launch an attached document:

1. Select the cell that contains the attachment.
2. From the provider ribbon or provider Ad Hoc ribbon, select **Cell Actions** and then **Attachment**.

   For example, in the Planning ribbon or Planning Ad Hoc ribbon, select **Cell Actions**, and then **Attachment**.
3. Select an attachment row and, in the left column, click the download link:

   Click to launch a file.

   Click to launch a URL.

Viewing Cell History

You can view the history of changes made to a data cell or range of data cells.

For each change listed, the user who made the change, date, old value, and new value are displayed.

Data source types: Planning

> **Note**
>
> Cell history is available only if data auditing is enabled by the Planning administrator, as described in the *Administering Planning*.

To display cell history:

1. Select one data cell or a range of cells in a Planning ad hoc grid.
2. From the **Planning Ad Hoc** ribbon, select **Cell Actions** and then **Cell History** to display the **Change History** screen.
3. If you selected multiple cells in step 1, select one cell at a time from the drop-down menu in **Change History** to view its history.

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9

Data Forms

Related Topics

- Working with Forms in Excel
  Forms are grid displays in which you can enter data into the database from Excel and view and analyze data or related text.
- Opening Forms in Excel
  You can open forms in Excel.
- Using Excel Formulas in Forms
  You can create Excel formulas in form cells inside or outside the grid if the cells are not read-only or locked.
- Preserving Formulas After POV Changes
- Dynamically Setting User Variables
- Working with User Variables
  You can make user variable selections from the buttons in the POV toolbar in Oracle Smart View for Office.
- Cloud EPM Form Behavior in Smart View
  Forms behave differently in Oracle Smart View for Office than they do in Oracle Fusion Cloud Enterprise Performance Management applications.
- Displaying the Floating Toolbar in Planning Forms
  The floating toolbar is displayed when you click a data cell in a Planning form.
- Saving Ad Hoc Grids
  If you have been assigned the ad hoc grid creator role, you can save ad hoc grids.
- Performing Ad Hoc Analysis in Cloud EPM Forms
  If you have been assigned the user role by the Service Administrator, you can perform ad hoc analysis on Oracle Fusion Cloud Enterprise Performance Management forms that have been enabled for ad hoc by the Service Administrator.
- Using the Drop-down Member Selector on Row Dimensions in Forms
  In forms, service administrators and form designers can set up easy-to-use drop-down member selectors on row dimensions.
- Inserting Charts
  Starting in release 11.1.2.5.700, you can insert forms as charts into Microsoft PowerPoint, giving you a graphical display of the information in the form.
- Cell-Level Security in Smart View
  A cell in a form may be secured according to a cell-level security definition.
- Working with Valid Intersections
  In forms, valid intersections allow you to view or enter data only at predefined "valid" intersections. Your Planning administrator can enable applications for valid intersections.
- Flex Forms
  Flex forms are a form type that provides flexible row management in Oracle Smart View for Office.

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Working with Forms in Excel

Forms are grid displays in which you can enter data into the database from Excel and view and analyze data or related text.

Certain dimension member values are fixed, giving you a specific view into the data.

Using Oracle Smart View for Office, you can work with forms in Excel with these Oracle Fusion Cloud Enterprise Performance Management data sources:

- Enterprise Profitability and Cost Management
- Financial Consolidation and Close
- FreeForm
- Planning
- Tax Reporting

Guidelines for Forms Opened in Smart View

Consider the following guidelines while working with forms opened in Smart View:

- You can modify data values but not the form structure in forms.
- Values submitted to the database from Excel must be non-formatted data.
- If the administrator changes the form definition while you're working with the form in Excel, Oracle recommends that you close the form and reopen it. This action ensures that the newest form definitions are displayed.
- Customizations made to forms are preserved when you save or refresh only if they are made outside the grid or if they are made to thousands and decimal separators.
- Excel worksheets are always protected to prevent entering data for read-only cells. Therefore, some Excel functions, such as AutoSum and F9, are disabled.
- Forms with slashes (/) in their names are not supported in Smart View. If you try to open a form with slashes in the name (for example, Cash In/Out), Smart View considers it as invalid and does not open the form. So, as a best practice, avoid using slashes in form names if you want to work on them in Smart View.
- Starting Smart View Release 21.110, Excel no longer terminates intermittently after entering data in a form and clicking outside the modified cell.
- When opening forms in Excel, the maximum number of worksheets in a workbook is limited to 100. For larger workbooks with over 100 sheets, Oracle recommends splitting the workbook into smaller workbooks.

Cloud EPM users: See also Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM.

Unless otherwise noted, in this chapter:

- "Planning forms" refers to forms in Cloud EPM (Cloud EPM).
- Cloud EPM refers to these services:
  - Enterprise Profitability and Cost Management
  - Financial Consolidation and Close
  - FreeForm

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- Planning
- Tax Reporting

Video

Your Goal	Watch This Video
Learn about navigating in Smart View, including opening forms.	Navigating Smart View

Opening Forms in Excel

You can open forms in Excel.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Tax Reporting

To open a form:

1. Connect to a data source.
2. In the Smart View Panel, perform an action:
   - To open one form, expand the tree list and select the form you want to open. Then click **Open form** on the Action Panel.
   - To open multiple forms, expand the tree list and select a forms folder. Then click **Open forms** on the Action Panel. In **Select Form**, follow the instructions to open one or more forms.
   - To search for a specific form, use the search box on top of the tree list. For more information, see Searching for Forms and Other Artifacts.

   In the Smart View Panel, simple forms are indicated with the icon.

   Depending on data source provider, other form types that you can open from the Smart View Panel are:

   - — Smart Forms (see Smart Forms)
   - — Flex forms (see Flex Forms)
   - — Saved ad hoc grids (see Saving Ad Hoc Grids)
   - — Dashboards (see Dashboards)

   Check the documentation links above for provider support for each form type.
3. To view any instructions that may be associated with the form, from the provider ribbon, (for example, the Planning ribbon), select **More** and then **Instructions**.

Using Excel Formulas in Forms

You can create Excel formulas in form cells inside or outside the grid if the cells are not read-only or locked.

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Tax Reporting

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Consider the following guidelines when using Excel formulas in forms:

- Cells that contain cell text can contain Excel formulas, but cells containing supporting detail cannot.
- Formulas are preserved in forms when you refresh the form, even without saving (submitting) the data, then later open the saved worksheet, and then expand or collapse rows and columns.
- Select the **Preserve Formula on POV Change** option to preserve formulas after you change the POV. Upon refresh, formulas that have been entered into data forms are maintained; only the point of view of the formula changes. See Preserving Formulas After POV Changes for more information.
- If you move a referential formula, its cell references are updated to reflect the new location.
- In forms, you are prompted to save the workbook as an Excel file if you do any of the following (but you temporarily lose access):
  - Change the current page
  - Select a different form
  - Connect to a different data source
- Forms 2.0 does not support adding comments, attachments, and supporting details to formula cells.

Video

Your Goal	Watch This Video
Learn about working with Excel formulas in Oracle Fusion Cloud Enterprise Performance Management.	Adding Excel Formulas in Cloud EPM

Preserving Formulas After POV Changes

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Tax Reporting

Select the **Preserve Formula on POV Change** option to preserve formulas after you change the POV. Upon refresh, formulas that have been entered into data forms are maintained; only the point of view of the formula changes.

> **Note**
>
> The **Preserve Formula on POV Change** option applies only to data forms in Oracle Fusion Cloud Enterprise Performance Management.
>
> For general guidelines regarding Excel formulas in forms, see Using Excel Formulas in Forms.

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For example, suppose you inserted a formula into a data form grid, with a reference to cell B4 on Sheet 2 of the workbook. The entity dimension is currently set to "Fairfield" within the page POV:

```
=Sheet2!B4
```

Now suppose you want to apply the same formulas to the "Hartford" entity. Change the entity dimension within the page POV from Fairfield to Hartford and refresh the data form. This preserves the existing formula:

```
=Sheet2!B4
```

The data for Hartford is retrieved onto the data form.

Using the **Preserve Formula on POV Change** option has no impact on formulas in the data form; it simply retains the existing formulas within the data grid.

However, formulas will be lost under these circumstances:

- If they reside on intersections that are invalidated due to suppression options set at the data source level.
- If a cell changes from input level to Read Only, Invalid, and so on.

  For example, a valid cell reference made on one data form may reference a Read Only cell on another data form.

Note that when a formula is lost, it does not reappear on the data form. You must reenter it.

To enable formula preservation after changes have been made to the POV:

1. From the Smart View ribbon, select **Options**, and then select the **Member Options** tab.
2. Select **Preserve Formula on POV Change**.
3. Click **OK**.

   The setting takes effect after you refresh or perform a drill operation.

Dynamically Setting User Variables

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

If your administrator set up a form with at least one user variable and enabled dynamic user variables, then you can select and change user variable values directly in the form.

For example, in Planning, for a variable called Department, you can select Sales members to plan sales expenses and then select Marketing members to plan marketing expenses. You can also set values for user variables in user preferences.

If the form was defined with the **Use Context** option, then user variables can be used in the POV. With this setting, the value of the user variable changes dynamically based on the context of the form.

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> **Note**
>
> - Starting in 25.08, for Forms 2.0 and dashboards, Cloud EPM automatically sets default values for dynamic and context-sensitive user variables based on the highest level of the user's access the first time the form is opened.
>
> Users won't need to select values for dynamic and context-sensitive user variables before working in a form. Users can then change the values, if needed, after opening the form using the procedure in this topic.
>
> Specifically, for missing dynamic user variables or context-sensitive user variables on a given form, Cloud EPM checks if the variable has any limit defined:
>
> – If a limit is defined, then the limit is evaluated, and the first accessible member is chosen as the default value for the user variable.
>
> – If a limit is not defined, then we retrieve the level 0 members for the dimension associated with the user variable and fill in the first accessible member.
>
> In cases where Cloud EPM is not able to pick a default value because of security reasons (for example, no access or no any allowable members), then the form is not loaded and a message informs users that the variables must be set in User Preferences.
>
> - Standard user variables, if undefined, will still need user intervention to define missing values in preferences, described in Setting User Preferences.

To dynamically change values for user variables:

1. In the Smart View Panel, connect to a data source and open a form.

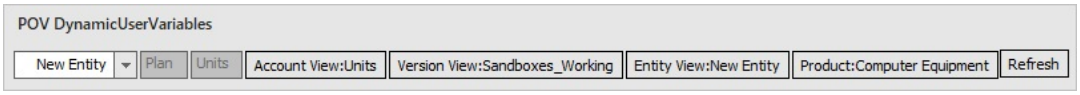
   Notice the available user variables in the POV toolbar across the top of the sheet. Selectable buttons are enabled, non-selectable buttons are grayed out.

2. In the POV toolbar, click a user variable button to display the **Member Selection** dialog box.

   In Figure 1, Account View, Version View, Entity View, and Product are all dynamic user variables that can be modified to change the POV of the form.

   The last user variable that was changed is shown in the text box at the left of the POV toolbar. In Figure 1, Entity View was the last user variable changed.

Figure 9-1 Example of Dynamic User Variables in a Form



3. From the **Member Selection** dialog, select a member to replace the currently displayed member in the user variable button.

   Alternatively:

   - Click the arrow in and select **Substitution Variables** to select a member as a substitution variable.
   - In the **Filter**, , drop-down list, select an applicable filter, and then select a member in the **Member Selection** dialog.

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4. Click **OK** to close **Member Selection**.
5. Repeat step 2 through step 4 for each user variable that you want to change.
6. Click **Refresh** to view the updated form.

Working with User Variables

You can make user variable selections from the buttons in the POV toolbar in Oracle Smart View for Office.

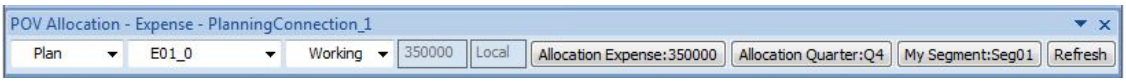
Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

When an Cloud EPM form contains user variables, you can modify them in Smart View.

When you click on the user variable buttons in the POV toolbar, the **Member Selection** dialog box is displayed. You then select members applicable for the user variable. Any filters that apply to the selected user variable are loaded and viewable from the filter drop-down list. Once selections are made, you can easily change one or more of the user variable buttons, thus changing the POV of a form in Smart View.

Figure 1 shows an example of user variables in a Planning form, where Allocation Expense, Allocation Quarter, and My Segment are user variables that can be modified to change the POV of the form.

Figure 9-2 Example of User Variables in a Planning Form



To work with user variables for forms:

1. In the Smart View Panel, connect to a data source and open a form.

   Notice the available user variables in the POV toolbar across the top of the sheet. Selectable buttons are enabled, non-selectable buttons are grayed out.
2. Click a user variable button to display the **Member Selection** dialog box.
3. From **Member Selection**, select one or members to add to the selected user variable button.

   Oracle Fusion Cloud Enterprise Performance Management: Alternatively, click the arrow in and select **Substitution Variables** to select members as substitution variables.
4. In the **Filter** drop-down list, select an applicable filter (if filters are available).
5. Click **OK**.
6. Repeat step 3 through step 5 for all user variables buttons for which you want to select members and apply filters.
7. To use the user variable buttons, click each button for which you want to apply selected members, and make a selection from the drop-down list.
8. Click **Refresh** to view the updated form.

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Cloud EPM Form Behavior in Smart View

Forms behave differently in Oracle Smart View for Office than they do in Oracle Fusion Cloud Enterprise Performance Management applications.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, FreeForm, Financial Consolidation and Close, Tax Reporting

- Attributes in Cloud EPMforms are not displayed in Smart View.
- Saving ad hoc grids as forms is not supported for grids containing attributes.
- In forms containing custom attributes:
  - Smart View does not support using custom attributes as filters for base (regular) dimension members. The web interface supports this and displays custom attributes at runtime in the format:

    base/regular dimension member name(small rectangle symbol).associated attribute dimension member name
  - Both the web interface and Smart View support using custom attribute dimensions as independent dimensions; for example, placing them on rows, columns, or the page POV, as with regular dimensions.
- Multiple levels in an outline are displayed differently in Smart View than pages on the web application. Smart View displays up to four levels, while the web application displays up to two levels.
- Excluding members does not affect totals on a form. When a member is excluded in the form definition (layout), the member is only excluded from displaying on the form; the member is not excluded from calculation.
- If an administrator hides a dimension in the row axis of a form, this dimension does not display in the row header of the form in Smart View.
- If an administrator has set up a form to use formatting from the web application, and not from Smart View, then no Smart View formatting options (from the **Options** dialog, **Formatting** tab) will be applied. This is true whether the **Use Cell Styles** or **Use Excel Formatting** option is selected in Smart View.
- In composite forms, sections that display as charts in the web application will display as grids in Smart View.
- In forms, the handling of decimal place settings between Excel, Smart View, and Oracle Hyperion Planning may, at times, cause rounding issues in submitted data. This can occur even when the decimal precision is set to two decimal places in both Excel and Oracle Hyperion Planning. For example, in a form, you may enter 68.68, but Smart View sends the data to Oracle Hyperion Planning as 68.67999999999, instead of 68.68.
- If row drop-down menus are enabled on a form, then Smart Push (which pushes data from different cubes into one form) cannot be used.
- When connected to a Cloud EPM provider, dynamic members, or "members on-the-fly," can be added in forms (and ad hoc grids) in the using business rules. See Launching Business Rules in Excel.
- When you create a formula on members that calculates the value for a Summary Time Period and then you modify the data for the Summary Time Period member, sometimes Smart View considers that cell to be a dirty cell.
- In Smart View, the display order of business rules attached to a form differs from the display order in Oracle Hyperion Planning.

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- When two forms are on two separate worksheets, the rule variable on the first form changes to the default value after refreshing the page dimension on the second form. This may cause the business rule to invoke an incorrect value for a runtime prompt variable. If this happens, display the runtime prompt to see its value before submitting the rule for execution.
- In Smart View, the currency symbol in a cell is displayed differently from the Oracle Hyperion Planning web interface when the Oracle Hyperion Planning option, "Allow multiple currencies per entity," is set to true.
- When the application Page preference, Indentation of Members, is set to "Indent level 0 members only," the indentation of dimensions in a form may be displayed incorrectly.
- Excel grouping is expanded when **Adjust Column Width and Row Height** is checked (**Options** dialog, **Formatting** tab). If you want to preserve Excel grouping, do not use the **Adjust Column Width and Row Height** option. The Excel grouping expanded/collapsed state cannot be restored programmatically, and Excel automatically expands everything if the row height/column width is automatically adjusted.

See also: Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM.

Displaying the Floating Toolbar in Planning Forms

The floating toolbar is displayed when you click a data cell in a Planning form.

The floating toolbar provides quick access to these commands:

- Supporting Details
- Cell Comments
- Drill-through
- Attachments

To display or suppress the floating toolbar in Planning forms:

1. In the Smart View ribbon, click **Options**, and then select the **Advanced** tab.

   You do not need to be logged in to set this option.
2. Perform an action:
   - To display the floating toolbar, select the **Display floating toolbar on forms** check box.

     This check box is selected by default.
   - To suppress the floating toolbar display, clear the **Display floating toolbar on forms** check box.
3. Click **OK** to save your selection.

Saving Ad Hoc Grids

If you have been assigned the ad hoc grid creator role, you can save ad hoc grids.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, FreeForm, Financial Consolidation and Close, Tax Reporting

To save an ad hoc grid:

1. With the ad hoc grid active, from the provider ad hoc ribbon, click **Save Ad Hoc Grid**.

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Saving ad hoc grids is not supported for grids containing attributes.

2. In **Save Grid As**, enter a name, path to the location where you want to save the grid, and optional description for the grid.
3. **Optional:** Select **Submit Formatting** to save any Excel formatting or cell style changes that have been applied to the grid.

   See About Working with Native Excel Formatting in Cloud EPM Forms for additional notes and guidelines about saving formatting in ad hoc grids and forms.

   > **Note**
   >
   > If your Service Administrator has set the **Smart View Ad Hoc Behavior** option to **Standard** in your application, then the **Submit Formatting** option is not available.

4. Click **OK**.

   The saved grid is displayed in the Smart View Panel tree list in the location that you selected in step 2.

5. To open a saved grid as an ad hoc grid (indicated by):
   - In Oracle Smart View for Office 21.100+, double-click the grid in the tree list. When double-clicking a saved ad hoc grid in the tree, the default is to open it as an ad hoc grid.
   - In Smart View 20.200 and earlier, right-click the grid in the tree list and select **Ad hoc analysis**.

   Alternatively, you can right-click the ad hoc grid in the tree and choose to open it as a form.

Performing Ad Hoc Analysis in Cloud EPM Forms

If you have been assigned the user role by the Service Administrator, you can perform ad hoc analysis on Oracle Fusion Cloud Enterprise Performance Management forms that have been enabled for ad hoc by the Service Administrator.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, FreeForm, Financial Consolidation and Close, Tax Reporting

> **Note**
>
> - For users with the Ad Hoc - Read Only role, all cells in the ad hoc grid are read-only on opening the form as an ad hoc grid, and on refreshing the grid.
> - For Service Administrators, write access is available for all cells in the grid on opening the form as an ad hoc grid, and on refreshing the grid.

To perform ad hoc analysis in Cloud EPM forms:

1. Do one of the following:
   - From the Smart View ribbon, click **Analyze**. This button is enabled only if the current form has been enabled for ad hoc analysis.
   - Select the form in the Smart View Panel and click **Ad hoc analysis** in the Action Panel.

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> **Note**
>
> You may see a difference in the grid POV depending on which method you used to launch ad hoc.

2. See Ad Hoc Analysis for information about performing ad hoc analysis.

Using the Drop-down Member Selector on Row Dimensions in Forms

In forms, service administrators and form designers can set up easy-to-use drop-down member selectors on row dimensions.

Data source types: Planning, Financial Consolidation and Close, Tax Reporting

When drop-down selectors are enabled, the form users can directly select a member from the drop-down list on the row dimension in the form.

The drop-down member selector allows users to add data to member rows that may have otherwise been suppressed.

In forms where members have been excluded, drop-down member selectors can be configured to display or hide the excluded members.

When using the drop-down member selector, keep in mind the following:

- There is no visual notification as to which members have drop-downs enabled; you must click a dimension cell and, if a down arrow appears next to the cell, then there is a drop-down list enabled.
- The drop-down content (list of members) is controlled by the form definition for the corresponding segment.
- Selections are not retained. The drop-down selection will be lost on refresh. If you perform a Refresh after selecting a member from the drop-down, the selection is lost and the form returns to its original state.
- The drop-down selection will be lost on saving data. Modifying data cells and saving the Excel worksheet will not retain modified drop-down selections.
- When selecting and working with shared members or members associated with duplicate alias names, the drop-down member selector displays member names for shared members and duplicate aliases, not their qualified or distinct alias names. You can enter and submit data without encountering a "member out of place" error.
- Composite forms: Using the drop-down member selector with row dimensions is not supported.

This feature in Oracle Smart View for Office requires configuration in the Form Designer in the web interface. The service administrator or form designer specifies the drop-down selectors as segment properties for particular dimensions. For example, suppose there are two dimensions placed on row axes, Entities and Line item; the member selector drop-down may be enabled for the Entity dimension members, for the Line item dimension members, or for both. Configuration is described in *Administering Planning*.

In Smart View, to use the drop-down selector in a form, click on row dimension or member names in a form. If a drop-down arrow appears, click it to view and select members from the drop-down list, as shown in following illustration:

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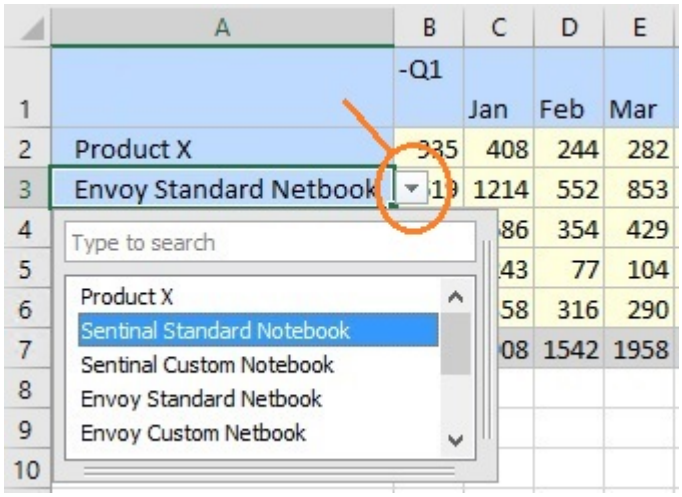
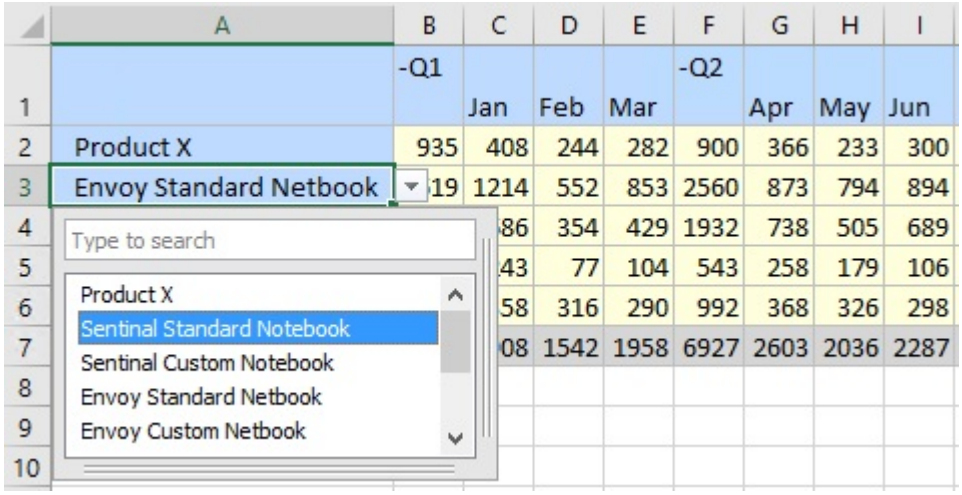


Example

In this example from Planning, rows with #Missing values are suppressed, and you were tasked with inputting the values for the Sentinal Standard Notebook. It happens that in the database, the values for the Sentinal Standard Notebook for January through June are all #Missing. When you open the form, there is no row for Sentinel Standard Notebook.

	A	B	C	D	E	F	G	H	I
1		-Q1	Jan	Feb	Mar	-Q2	Apr	May	Jun
2	Product X	935	408	244	282	900	366	233	300
3	Envoy Standard Netbook	2619	1214	552	853	2560	873	794	894
4	Envoy Custom Netbook	1469	686	354	429	1932	738	505	689
5	Other Computer	423	243	77	104	543	258	179	106
6	Tablet Computer	964	358	316	290	992	368	326	298
7	-Computer Equipment	6409	2908	1542	1958	6927	2603	2036	2287

Use the drop-down member selector on a row and choose Sentinal Standard Notebook from the list.



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Sentinal Standard Notebook now appears in place of Envoy Standard Netbook. Note that the data values in the row have not changed. You can type over the existing values to input the values you require. In this example, you would type 500 in each month column, January through June.

	A	B	C	D	E	F	G	H	I
1		-Q1	Jan	Feb	Mar	-Q2	Apr	May	Jun
2	Product X	935	408	244	282	900	366	233	300
3	Sentinal Standard Notebo	2619	500	500	500	2560	500	500	500
4	Envoy Custom Netbook	1469	686	354	429	1932	738	505	689
5	Other Computer	423	243	77	104	543	258	179	106
6	Tablet Computer	964	358	316	290	992	368	326	298
7	-Computer Equipment	6409	2908	1542	1958	6927	2603	2036	2287

In the Planning ribbon, click **Submit**. Note that the row for Sentinal Standard Notebook is added to the form as this row now contains values. Also, the values in the row for Computer Equipment are recalculated. Only the modified values are saved for the drop-down member that was changed. No inherited values from other members are changed.

	A	B	C	D	E	F	G	H	I
1		-Q1	Jan	Feb	Mar	-Q2	Apr	May	Jun
2	Product X	935	408	244	282	900	366	233	300
3	Sentinal Standard Notebook	1500	500	500	500	1500	500	500	500
4	Envoy Standard Netbook	2619	1214	552	853	2560	873	794	894
5	Envoy Custom Netbook	1469	686	354	429	1932	738	505	689
6	Other Computer	423	243	77	104	543	258	179	106
7	Tablet Computer	964	358	316	290	992	368	326	298
8	-Computer Equipment	7909	3408	2042	2458	8427	3103	2536	2787

Inserting Charts

Starting in release 11.1.2.5.700, you can insert forms as charts into Microsoft PowerPoint, giving you a graphical display of the information in the form.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Oracle Smart View for Office renders the form information as a chart in PowerPoint. You can use the chart tools in PowerPoint to change the chart design and format. You can insert a Smart View POV reporting object to change the POV of the chart.

Certain forms may or may not make ideal charts. Some form data may not present itself well in chart format. For example, a balance sheet form may not make a useful chart. However, a monthly revenue form may be a good candidate for the chart format. Oracle recommends

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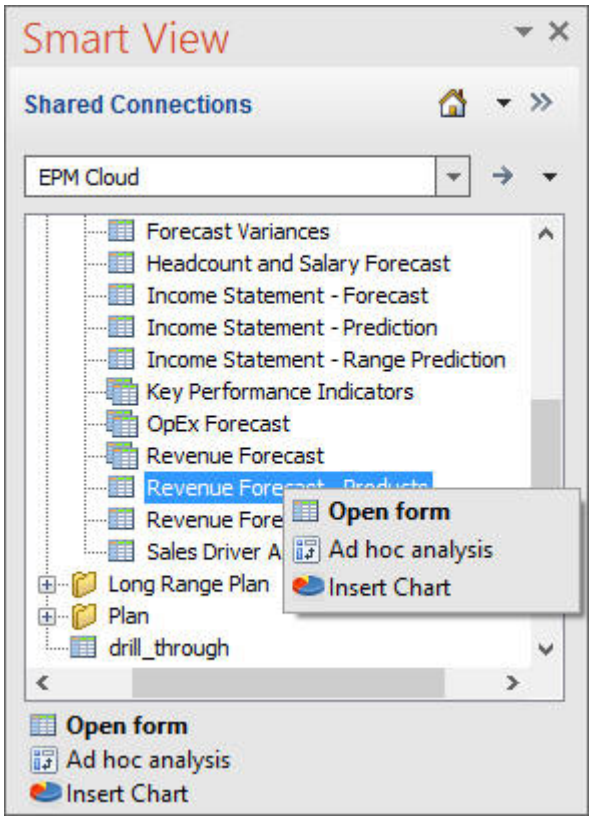
investigating with the forms available to you and working with the forms designers to meet your requirements for charts.

> **Note**
>
> - The Insert Chart functionality is not available in Word or Excel.
> - Smart View does not support directly inserting stepped and curved line charts. When inserting a stepped or curved line chart, Smart View will substitute the closest match, a default line chart.

To insert and edit a chart in PowerPoint:

1. Launch PowerPoint and connect to the data source.
2. Navigate to the form and select it.
3. In the Action Panel, select **Insert Chart**.

   Alternatively, right-click the form name and select **Insert Chart**; for example:



   The chart is inserted on the slide, where it can be selected and edited; in the following example, the slide width has been stretched from its initial state:

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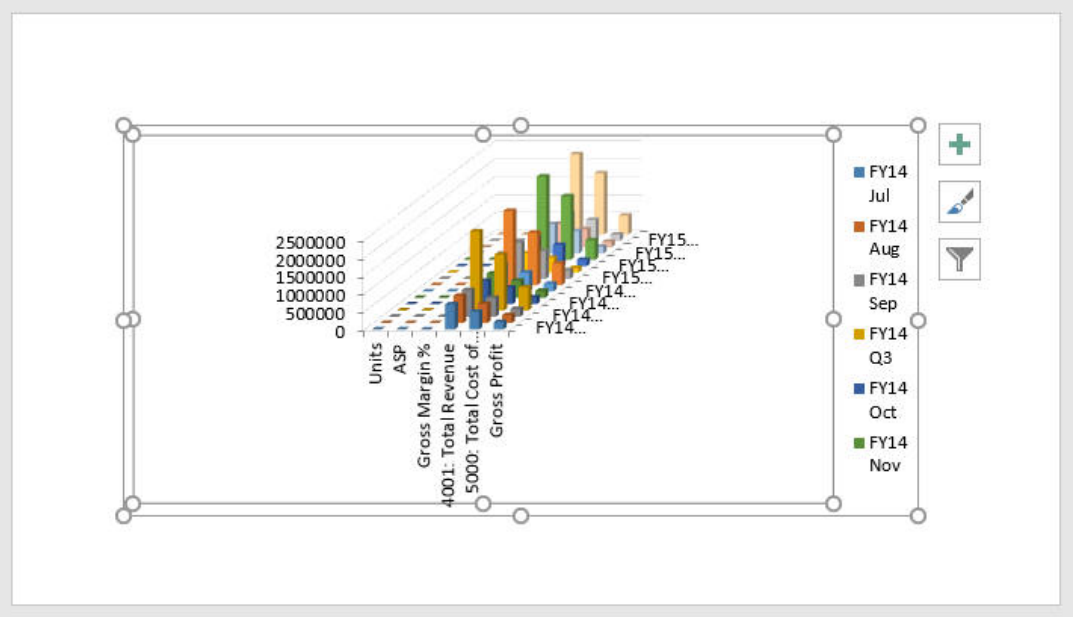
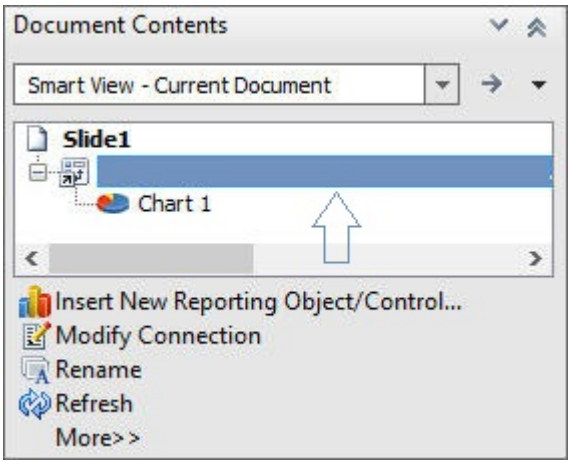


4. **Optional:** To change the POV of the chart, insert the POV control and modify the POV.
   a. In the Document Contents pane, select the data source for the chart, then select **Insert New Reporting Object/Control**.

      In the following example, the data source is signified by the blue bar:



   b. In the **Insert New Reporting Object/Control** dialog box, click **POV**.

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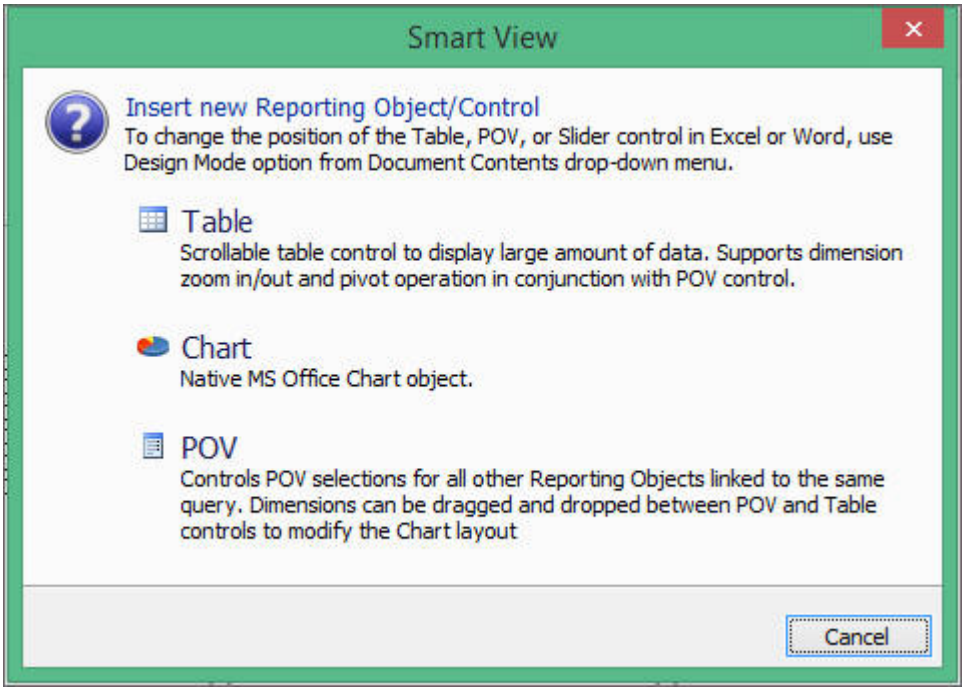
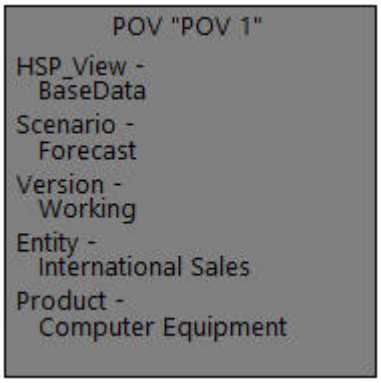


A read-only POV is placed on the slide; for example:



c. Click the **Slide Show** icon in the task bar at the bottom right of the PowerPoint window to enter slide show mode where you can modify the POV.

d. In slide show mode, use the drop-down lists in the POV toolbar to make the required changes.

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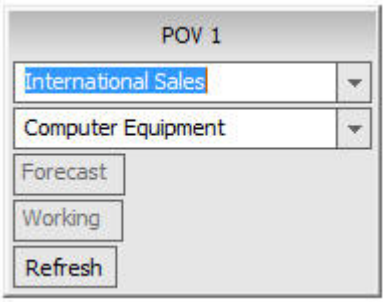

e. In the POV toolbar, click **Refresh**.

f. Repeat the steps to change the POV as needed; when finished, exit slide show mode.

   You can press the **Esc** key to exit slide show mode.

5. Continue with any further chart design and format edits, and then save the PowerPoint presentation as needed.

Cell-Level Security in Smart View

A cell in a form may be secured according to a cell-level security definition.

Applies to: Planning, Planning Modules, Tax Reporting

Cell-level security enables Service Administrators to restrict who can view data in the application by defining rules that remove read or write access to cells that a user would normally have access to due to their regular security.

Cell-level security is defined as an exception to the existing member security. For example, a Department Manager requires access to all accounts in their own department, but only a certain account in all other departments. With the usual metadata security the Manager would have access to all accounts across all departments; using cell-level security enables the Service Administrator to control the intersection of all accounts with the Manager's department and only the specific account in all other departments.

Cell-level security uses rules, similar to valid intersection rules, to deny read or write access to users viewing certain cell intersections anywhere a cell is shown (for example, forms, runtime prompts, ad hoc reports, dashboards, and so on). When cell-level security rules are applied, users with read access can see the data value in a cell but the cell is not editable. If users are denied read access to a cell, the value displayed in the cell is #noaccess.

Cell-level Security provides the ability to restrict or remove user security at the lowest level of dimensional granularity, which provides more flexibility and access control than metadata security alone. This feature allows for cross-dimensional security, which means the same dimension member from one dimension may have different access based on combinations of other dimension members.

Note the following when working with cell-level security in Oracle Smart View for Office:

- If a user does not have access to a cell, cell styles are not applied to cells for Comments and Attachments. However, these styles are applied when using the same form or grid in the web.
- Ribbon commands, right-click menu commands, and floating toolbar commands in Smart View will still be enabled, even if cell-level security has resulted in the cell containing #NoAccess. For example, if the cell contains #NoAccess, the user can attempt to perform a cell-level command, such as Supporting Detail, Attachments, Cell History, or Cell Comments, but these commands are not valid for #NoAccess.

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Service Administrators define cell-level security in the web application. For more information, see Defining Cell-Level Security in *Administering Planning*.

Working with Valid Intersections

In forms, valid intersections allow you to view or enter data only at predefined "valid" intersections. Your Planning administrator can enable applications for valid intersections.

Related Topics

- About Valid Intersections
- Working with Valid Intersections in Page Drop-down Lists
- Working with Valid Intersections in Forms

About Valid Intersections

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Enterprise Profitability and Cost Management

Your Oracle Fusion Cloud Enterprise Performance Management administrator can enable applications for valid intersections. In forms, valid intersections allow you to view or enter data only at predefined "valid" intersections.

For example, valid intersections might consist of a subset of Segment members which are valid only with a limited list of departments, or specific programs which are valid only for certain time periods.

Forms that are enabled for valid intersections can provide faster data entry and simplified plan validation resulting in higher quality data, as well as easier maintenance of data entry forms. Data integrity is still maintained at "invalid" intersections.

When valid intersections are defined in an application, then cell intersections considered "invalid" are read-only.

Tip

In Oracle Smart View for Office, when an invalid intersection in POV is observed or selected, this message is displayed:

"Data form cannot be displayed due to invalid intersection in Page and POV. Please choose a different intersection."

Select a valid intersection member in the POV to clear the message.

Note

Administrators: In this guide, the topics on valid intersections are primarily intended for Smart View end users. For more information on setting up valid intersections in forms, see the information on valid intersections in your administration guide; for example, for Planning, see Defining Valid Intersections in *Administering Planning*.

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Working with Valid Intersections in Page Drop-down Lists

Data source type: Planning

See also:

- Working with Valid Intersections in Page Drop-down Lists
- Working with No Members in Page Drop-down Lists

To select members when valid intersections are enabled in a form:

1. Open a form.

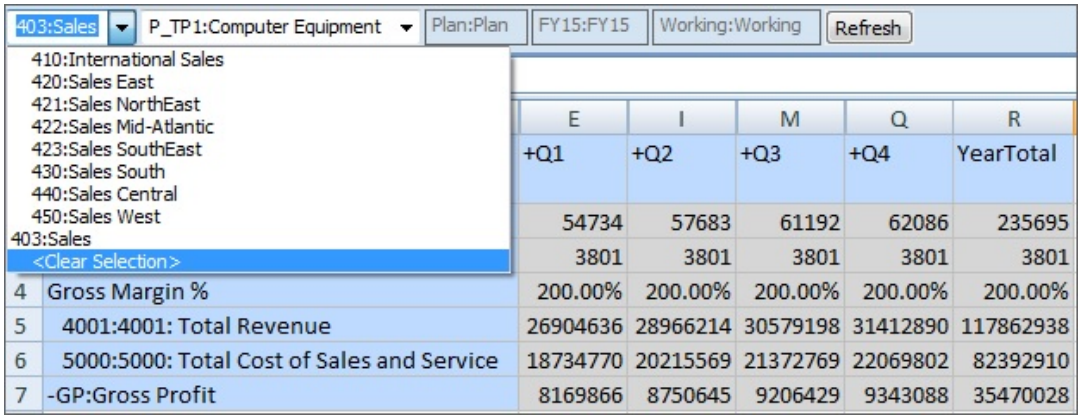
   The form renders with member selections as specified in the form definition, adhering to your access rights for dimensions, and applies valid intersection groups with the most recently used as current selections.

2. Verify that the form is enabled for valid intersections by looking for the **<Clear Selection>** option at the bottom of the Page drop-down member selectors.

   If an application is enabled for valid intersections, the **<Clear Selection>** option appears at the bottom of the Page drop-down member selectors.

   For example, in Option in the POV Drop-Down Member Selector, the **<Clear Selection>** option is highlighted in the Page drop-down list for the Entity dimension.

Figure 9-3 The <Clear Selection> Option in the Page Drop-Down Member Selector



3. **Optional:** Select **<Clear Selection>** in all selectable Page drop-down lists and note that **<Select Member>** now appears in the Page member selectors.

   For example, in Option in the POV Drop-Down Member Selectors, the **<Select Member>** option is displayed in the Page selector for both the Entity and Product dimensions.

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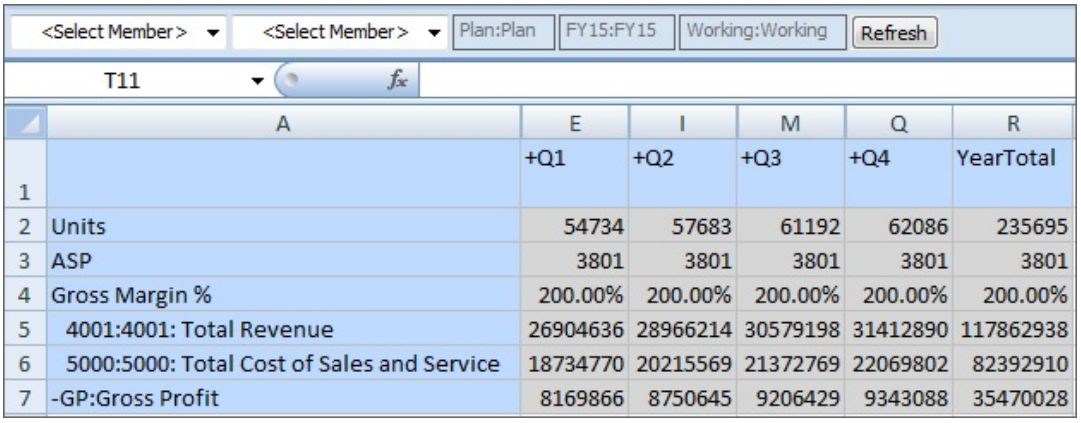
Figure 9-4 The <Select Member> Option in the Page Drop-Down Member Selectors



	A	E	I	M	Q	R
1		+Q1	+Q2	+Q3	+Q4	YearTotal
2	Units	54734	57683	61192	62086	235695
3	ASP	3801	3801	3801	3801	3801
4	Gross Margin %	200.00%	200.00%	200.00%	200.00%	200.00%
5	4001:4001: Total Revenue	26904636	28966214	30579198	31412890	117862938
6	5000:5000: Total Cost of Sales and Service	18734770	20215569	21372769	22069802	82392910
7	-GP:Gross Profit	8169866	8750645	9206429	9343088	35470028

4. Make selections in each Page drop-down list, and then click **Refresh**.

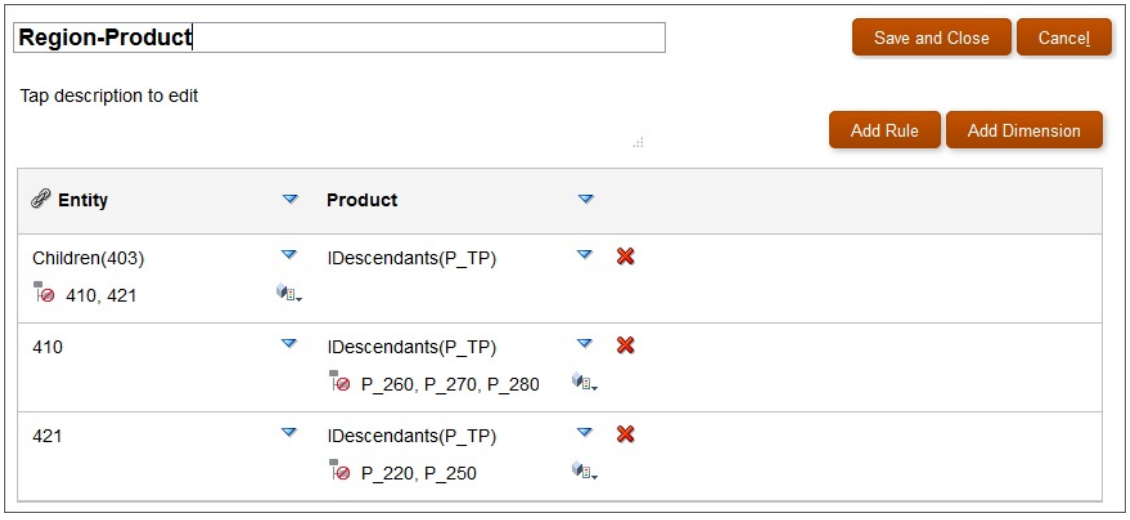
   The form generally behaves as any simple Planning form; however, when working with valid intersections, the selections available to you in the Page selector for a dimension may depend on the member you chose in the Page selector for a different dimension.

Example 9-1 Working with Valid Intersections in Page Drop-down Lists

Valid intersection rules are set up by Planning administrators in the Planning web application. In Figure 3, valid intersection rules are set up as follows.

- When the 403:Sales member is selected in the Entity dimension, all products in the Product dimension are available for selection.
- When the 410:International Sales member is selected in the Entity dimension, then the members P_260:Game, P_270:Camera, and P_280:Television are not available for selection. All other members are available for selection.
- When the 421:Sales NorthEast member is selected in the Entity dimension, then the members P_220:Software Suite and P_250:Network Card are not available for selection. All other members are available for selection.

Figure 9-5 Valid Intersections Rules Constructed in Planning Web Application



Now let's see how the rules set up in Figure 3 are exposed in Oracle Smart View for Office.

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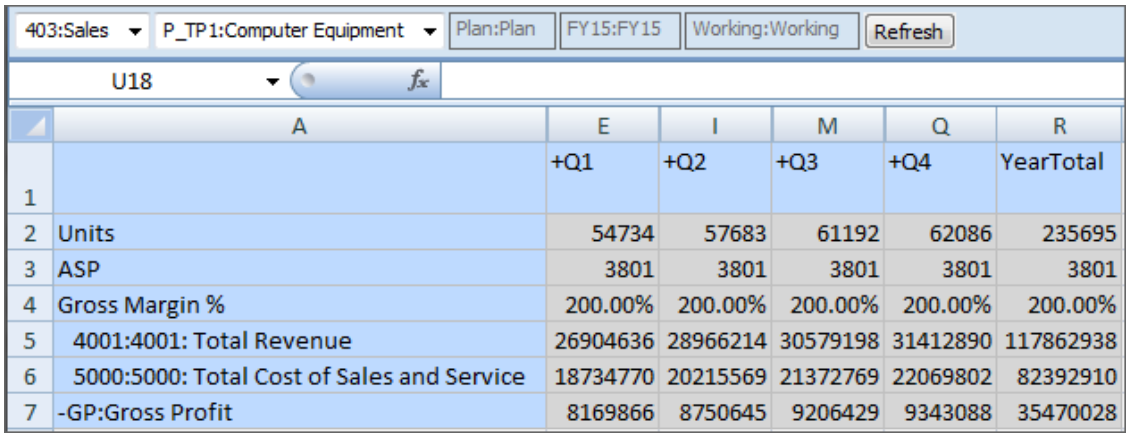
In the following examples, we'll demonstrate the valid intersection rules noted above. We'll select members in Entity and Product to change the point of view of the form, within the scope of the valid intersection rules.

0 shows a newly opened form. The form has five dimensions. We can change the Page member on two of the dimensions.

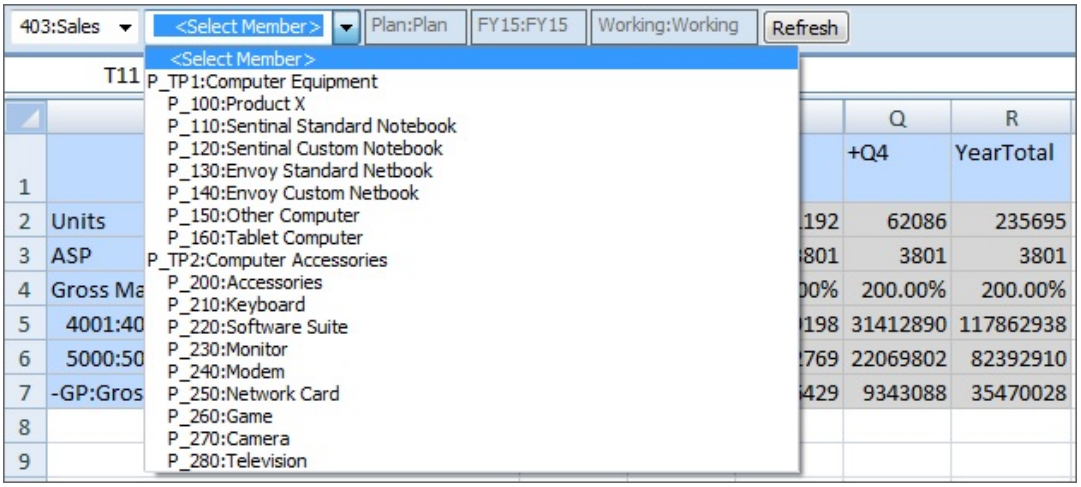
Figure 9-6 Planning Form with Access to Member Selection on Two Dimensions



	A	E	I	M	Q	R
1		+Q1	+Q2	+Q3	+Q4	YearTotal
2	Units	54734	57683	61192	62086	235695
3	ASP	3801	3801	3801	3801	3801
4	Gross Margin %	200.00%	200.00%	200.00%	200.00%	200.00%
5	4001:4001: Total Revenue	26904636	28966214	30579198	31412890	117862938
6	5000:5000: Total Cost of Sales and Service	18734770	20215569	21372769	22069802	82392910
7	-GP:Gross Profit	8169866	8750645	9206429	9343088	35470028

According to the valid intersection rules:

- When the 403:Sales member is selected in the Entity dimension, all products in the Product dimension are available for selection. For example:



- When the 410:International Sales member is selected in the Entity dimension, then the members P_260:Game, P_270:Camera, and P_280:Television are not available for selection. All other members are available for selection. For example:

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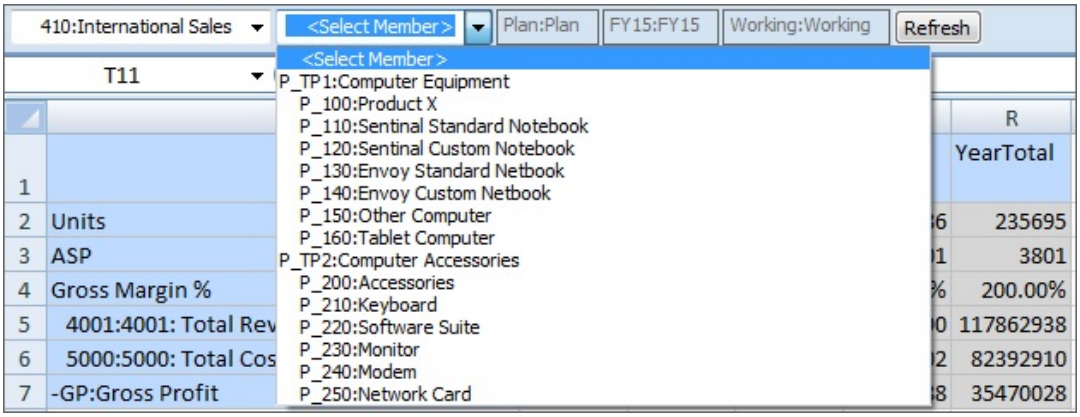
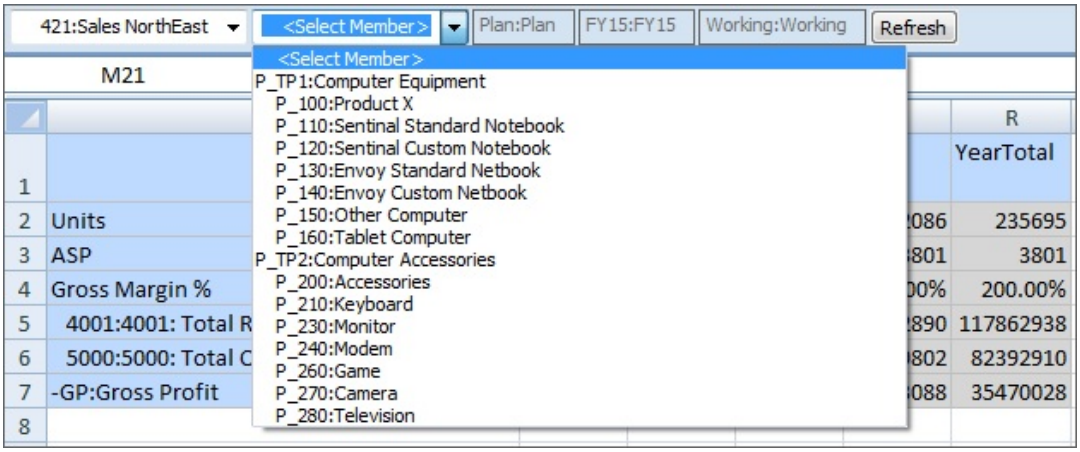


- When the 421:Sales NorthEast member is selected in the Entity dimension, then the members P_220:Software Suite and P_250:Network Card are not available for selection. All other members are available for selection. For example:



Example 9-2 Working with No Members in Page Drop-down Lists

The scenario shown in Figure 5, where there are no members to select from in the Product dimension Page drop-down list, might come about in at least a couple of different ways. For example, the Planning administrator may have configured any of the following:

- Defined a valid intersection rule that excludes members of the Product dimension when 440:Sales Central is selected for the Entity dimension.
- Defined a valid intersection rule that excludes P_260:Game, P_270:Camera, and P_280:Television when 440:Sales Central is selected for the Entity dimension, but the form is designed for only those three members.

In either case, when 440:Sales Central is selected for Entity, there are no Product members to select from in the Page drop-down list, and only **<Select Member>** is displayed.

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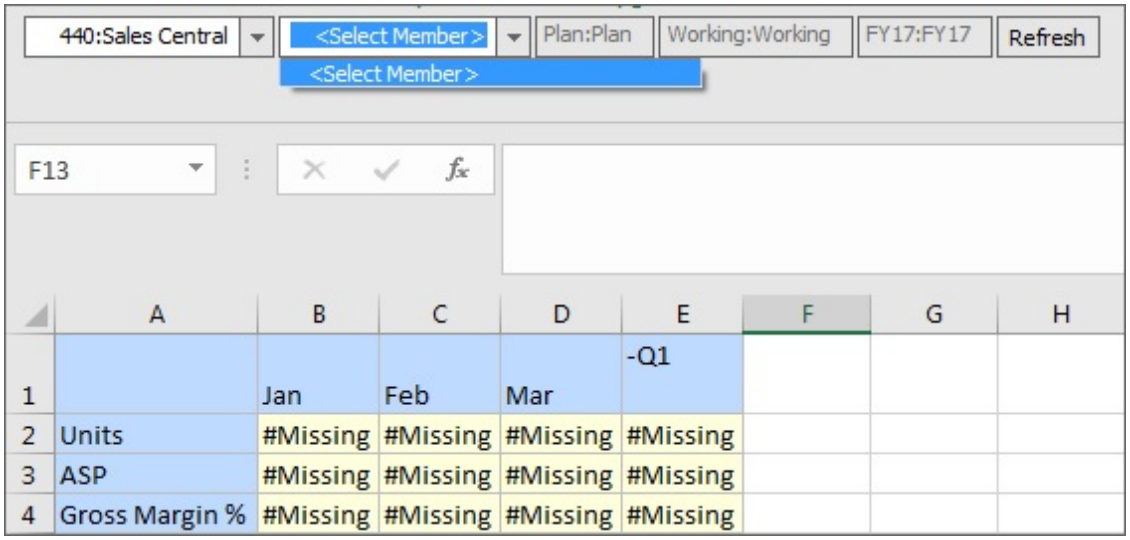
Figure 9-7 Page Drop-down List with No Available Members to Select



Working with Valid Intersections in Forms

Data source type: Planning

See also:

Working with Valid Intersections in Forms

1. Open a form.

   The form renders with member selections as specified in the form definition, adhering to your access rights for dimensions, and applies valid intersection groups with the most recently used as current selections.

2. Verify that the form is enabled for valid intersections by looking for the **<Clear Selection>** option at the bottom of a Page drop-down list.

   See Working with Valid Intersections in Page Drop-down Lists.

3. Enter and submit data in writable cells at valid intersections.

   In Figure 1, with the member 420:Sales East selected for the Entity dimension, cells for each product are writable. The cells for P_TP1:Computer Equipment and P_TP2:Computer Accessories are not writable as these cells roll up the total of the data in the product cells.

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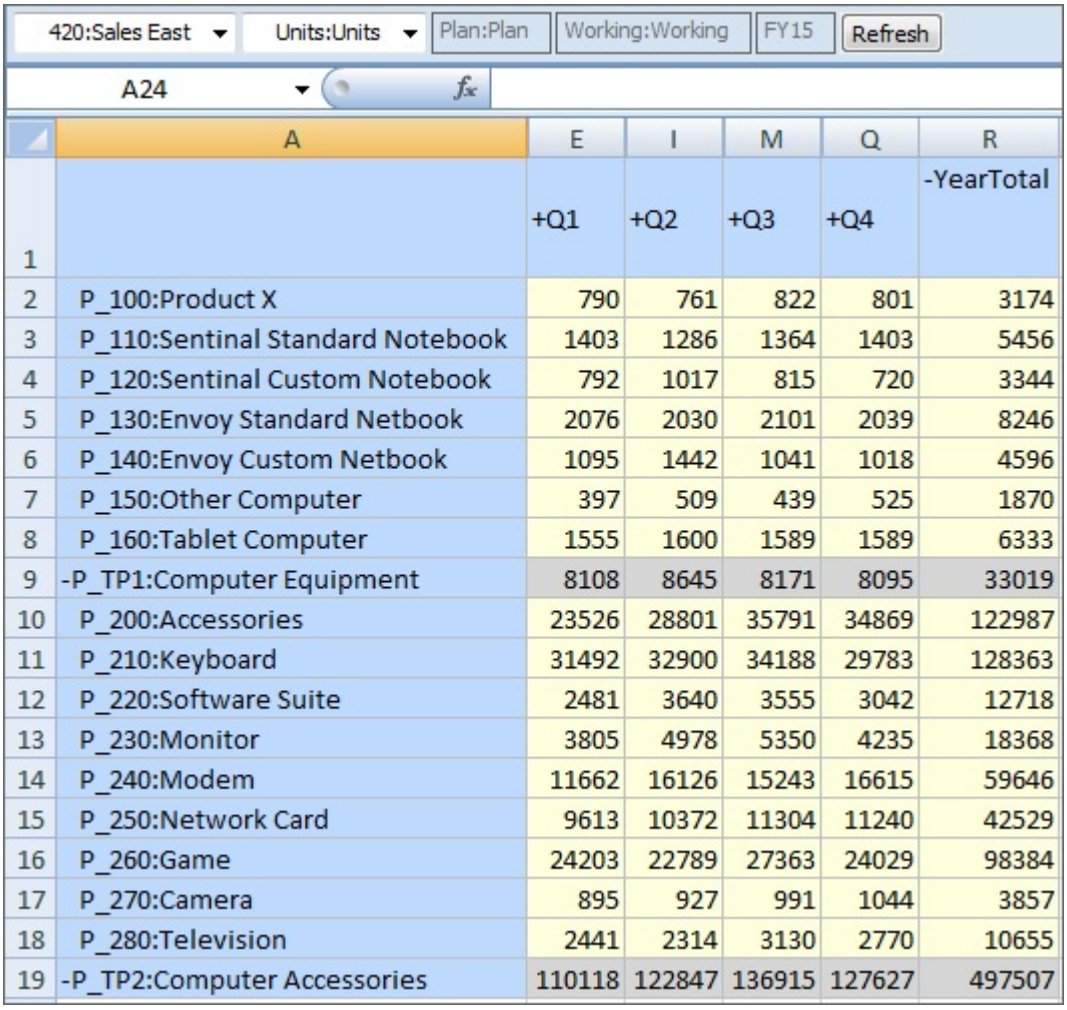
Figure 9-8 Form with Writable Cells, No Invalid Intersections



	A	E	I	M	Q	R
1		+Q1	+Q2	+Q3	+Q4	-YearTotal
2	P_100:Product X	790	761	822	801	3174
3	P_110:Sentinal Standard Notebook	1403	1286	1364	1403	5456
4	P_120:Sentinal Custom Notebook	792	1017	815	720	3344
5	P_130:Envoy Standard Netbook	2076	2030	2101	2039	8246
6	P_140:Envoy Custom Netbook	1095	1442	1041	1018	4596
7	P_150:Other Computer	397	509	439	525	1870
8	P_160:Tablet Computer	1555	1600	1589	1589	6333
9	-P_TP1:Computer Equipment	8108	8645	8171	8095	33019
10	P_200:Accessories	23526	28801	35791	34869	122987
11	P_210:Keyboard	31492	32900	34188	29783	128363
12	P_220:Software Suite	2481	3640	3555	3042	12718
13	P_230:Monitor	3805	4978	5350	4235	18368
14	P_240:Modem	11662	16126	15243	16615	59646
15	P_250:Network Card	9613	10372	11304	11240	42529
16	P_260:Game	24203	22789	27363	24029	98384
17	P_270:Camera	895	927	991	1044	3857
18	P_280:Television	2441	2314	3130	2770	10655
19	-P_TP2:Computer Accessories	110118	122847	136915	127627	497507

Example 9-3 Working with Valid Intersections in Forms

- Similar to the examples shown in Working with Valid Intersections in Page Drop-down Lists, when the 410:International Sales member is selected in the Entity dimension, the Product dimension members, P_260:Game, P_270:Camera, and P_280:Television are not available for editing. In Figure 2, cells at those intersections are signified as not editable by #Missing.

  Other cells in the form are editable and considered valid intersections.

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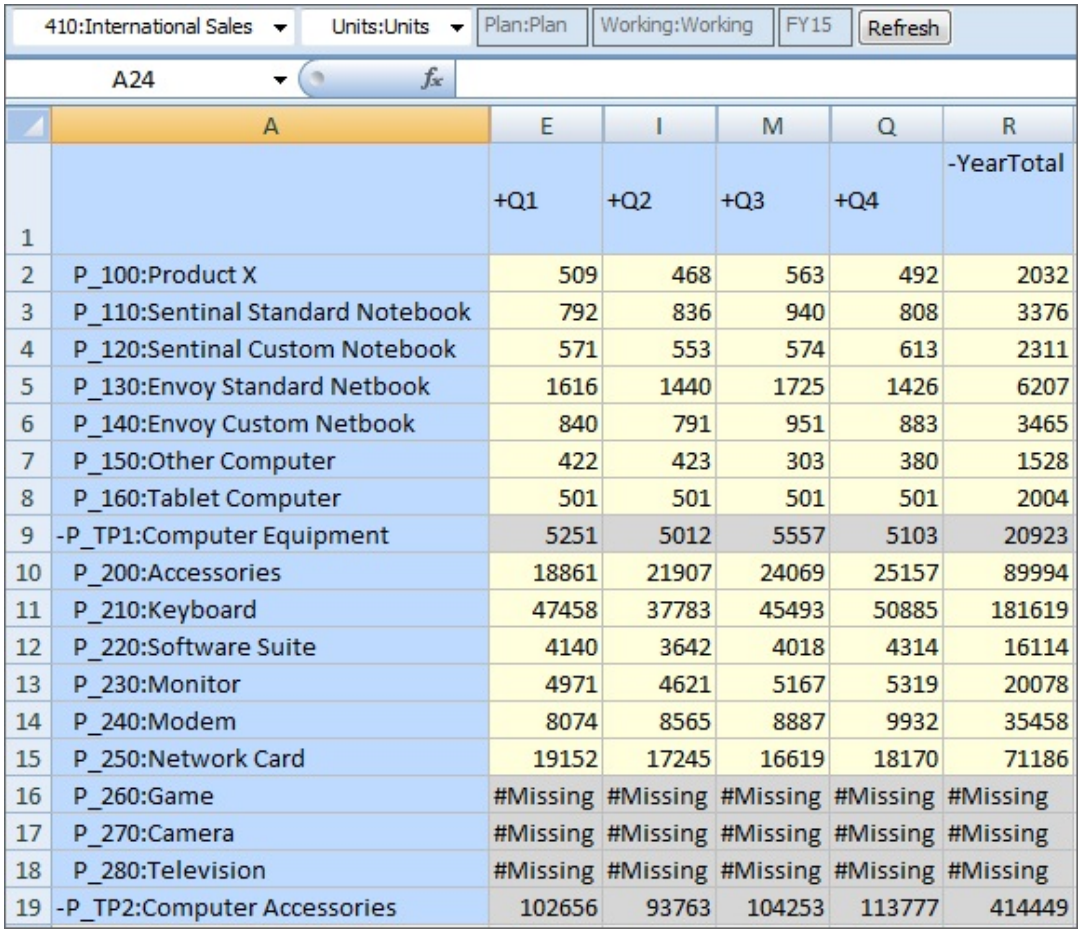
Figure 9-9 Form Showing Non-Editable Cells for Three Products



410:International Sales | Units:Units | Plan:Plan | Working:Working | FY15 | Refresh

A24

	A	E	I	M	Q	R
1		+Q1	+Q2	+Q3	+Q4	-YearTotal
2	P_100:Product X	509	468	563	492	2032
3	P_110:Sentinal Standard Notebook	792	836	940	808	3376
4	P_120:Sentinal Custom Notebook	571	553	574	613	2311
5	P_130:Envoy Standard Netbook	1616	1440	1725	1426	6207
6	P_140:Envoy Custom Netbook	840	791	951	883	3465
7	P_150:Other Computer	422	423	303	380	1528
8	P_160:Tablet Computer	501	501	501	501	2004
9	-P_TP1:Computer Equipment	5251	5012	5557	5103	20923
10	P_200:Accessories	18861	21907	24069	25157	89994
11	P_210:Keyboard	47458	37783	45493	50885	181619
12	P_220:Software Suite	4140	3642	4018	4314	16114
13	P_230:Monitor	4971	4621	5167	5319	20078
14	P_240:Modem	8074	8565	8887	9932	35458
15	P_250:Network Card	19152	17245	16619	18170	71186
16	P_260:Game	#Missing	#Missing	#Missing	#Missing	#Missing
17	P_270:Camera	#Missing	#Missing	#Missing	#Missing	#Missing
18	P_280:Television	#Missing	#Missing	#Missing	#Missing	#Missing
19	-P_TP2:Computer Accessories	102656	93763	104253	113777	414449

- Again, similar to the examples shown in Working with Valid Intersections in Page Drop-down Lists, when the 421:Sales NorthEast member is selected in the Entity dimension, the Product dimension members, P_220:Software Suite and P_250:Network Card are not available for editing. In Figure 2, cells at those intersections are signified as not editable by #Missing.

  Other cells in the form are editable and considered valid intersections.

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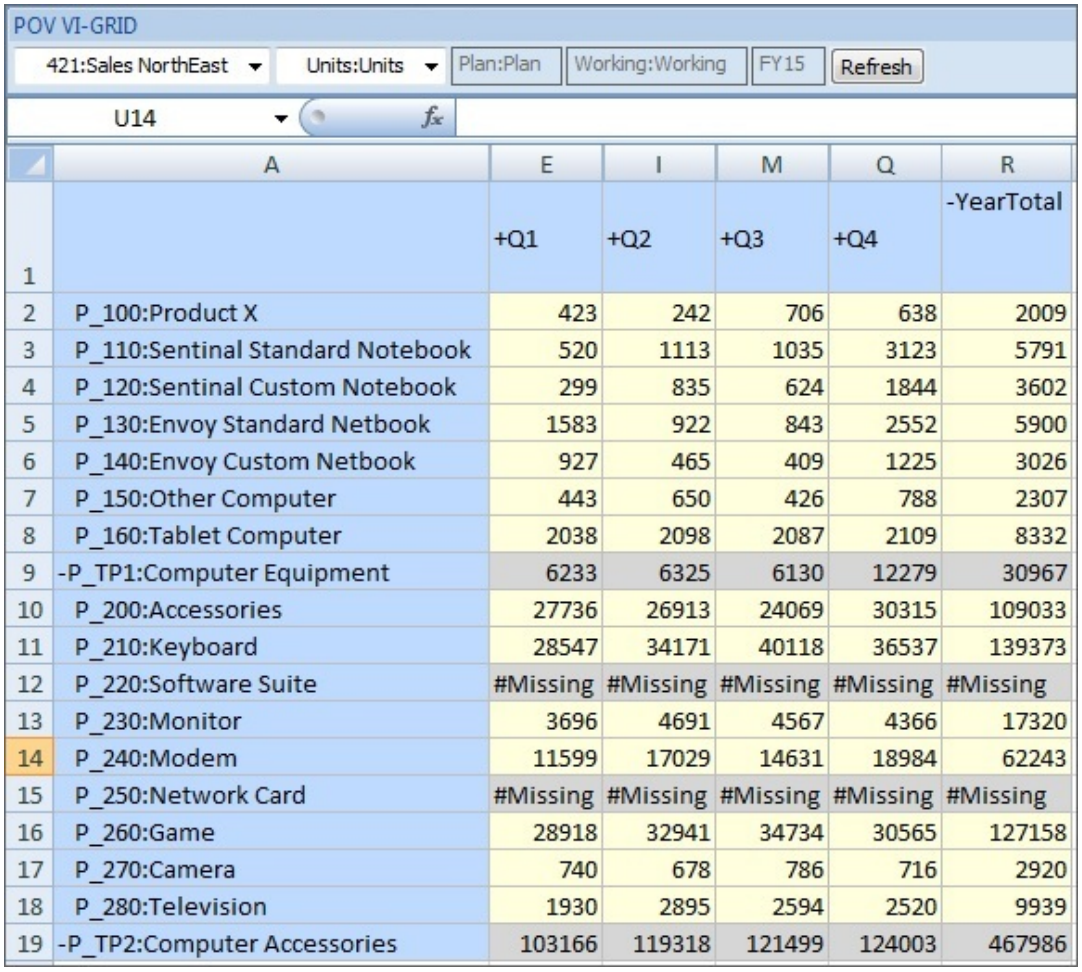
Figure 9-10 Form Showing Non-Editable Cells for Two Products



	A	E	I	M	Q	R
1		+Q1	+Q2	+Q3	+Q4	-YearTotal
2	P_100:Product X	423	242	706	638	2009
3	P_110:Sentinal Standard Notebook	520	1113	1035	3123	5791
4	P_120:Sentinal Custom Notebook	299	835	624	1844	3602
5	P_130:Envoy Standard Netbook	1583	922	843	2552	5900
6	P_140:Envoy Custom Netbook	927	465	409	1225	3026
7	P_150:Other Computer	443	650	426	788	2307
8	P_160:Tablet Computer	2038	2098	2087	2109	8332
9	-P_TP1:Computer Equipment	6233	6325	6130	12279	30967
10	P_200:Accessories	27736	26913	24069	30315	109033
11	P_210:Keyboard	28547	34171	40118	36537	139373
12	P_220:Software Suite	#Missing	#Missing	#Missing	#Missing	#Missing
13	P_230:Monitor	3696	4691	4567	4366	17320
14	P_240:Modem	11599	17029	14631	18984	62243
15	P_250:Network Card	#Missing	#Missing	#Missing	#Missing	#Missing
16	P_260:Game	28918	32941	34734	30565	127158
17	P_270:Camera	740	678	786	716	2920
18	P_280:Television	1930	2895	2594	2520	9939
19	-P_TP2:Computer Accessories	103166	119318	121499	124003	467986

Flex Forms

Flex forms are a form type that provides flexible row management in Oracle Smart View for Office.

Related Topics

- About Flex Forms
  Flex forms are a form type that provides flexible row and column management in Oracle Smart View for Office.
- Best Practices for Working with Flex Forms
  Contains best practices and guidelines for working with flex forms.
- Working with Flex Forms in Smart View
  With flex forms, you can rearrange row and column dimensions, sort them, and insert valid members or aliases from corresponding dimensions.
- Opening a Flex Form in Ad Hoc Mode and Submitting Data
  You can open a flex form in ad hoc mode, just like any regular form, use ad hoc analysis to modify the grid layout, and submit data.

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About Flex Forms

Flex forms are a form type that provides flexible row and column management in Oracle Smart View for Office.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Flex forms retain all regular form properties and features, such as running business rules attached to the flex form. However, using flex forms, you can rearrange row and column members, and sort or move rows or columns. Modified row or column order is maintained on refresh and during submit. You can also filter data using Excel's filtering functionality. Dimension and member row cells and all data cells in a flex form are unprotected. Only the top left blank cells of a flex form are protected.

In the web interface, during form definition, administrators select **Enable flex form on rows**, **Enable flex forms on columns**, or both, under **Smart View Options** in the **Layout** tab to enable flex form-specific features.

In Smart View, the **Sheet Info** dialog displays the **Sheet type** for flex forms as "Flex form." Flex forms can be part of task lists and you can open them as flex forms from a task list.

> **Note**
>
> Flex forms are used only in Smart View and not in the web interface.

Related Topics:

- Requirements
- Video
- Best Practices for Working with Flex Forms

Requirements

- Oracle Fusion Cloud Enterprise Performance Management 20.04 or later
- Smart View 11.1.2.5.910 or later
- To modify both row and column members:
  - Cloud EPM 21.12 or later
  - Smart View 21.200 or later

Video

Your Goal	Watch This Video
Learn about how to enable and work with flex forms in Cloud EPM	Working with Flex Forms in Fusion Cloud EPM

Best Practices for Working with Flex Forms

Contains best practices and guidelines for working with flex forms.

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Related Topics

- General Guidelines for Flex Forms
- Selecting Members in Flex Forms
- Filtering and Sorting in Flex Forms
- Using Suppression Options in Flex Forms
- Working with Shared Members and Suppression Options in Flex Forms
- Flexing Beyond the Form Definition
- Retaining Invalid Members on Flex Forms
- Submitting Data when Flex Forms Contain Invalid Members
- Retaining Formula, Label, and Comment Rows and Columns on Flex Forms
- Retaining Modified Members on Flex Forms After POV or User Variable Change
- Smart Push with Flex Forms
- Unsupported Features on Flex Forms

General Guidelines for Flex Forms

- You can modify both row and column members in flex forms.
- Any modification to a flex form will not be persisted between sessions.
  When a user modifies a flex form, the modified grid layout will only be persisted in the context of the current session. Reopening a flex form reverts the flex form layout to its original state.
- You may insert and delete rows and columns in a flex form using the **Insert** and **Delete** options on the right-click menu in Excel.
- Access permission settings are honored in flex forms.
- Valid intersections are honored in flex forms.
- Business rules may be run on flex forms.
- When a flex form with a business rule or Groovy rule to add a new dimension member (member on-the-fly) is executed from the form, the new member will not appear on the flex form after a refresh. To see the new member on the flex form, you must relaunch the flex form from the Smart View Panel.
- Flex forms can be opened as flex forms from a Task List.
- There is limited support for spreading in flex forms.
  Spreading is supported only in cases where the Account dimension is on rows and the Period is a column dimension and the Period column is not a flex dimension.

> **Note**
>
> During form design, the Smart View option, **Show invalid members for flex form**, must be disabled.

- You may delete rows and columns using the **Delete** key. However, when deleting rows or columns containing multiple dimensions, be sure to select all the dimension members in the row or column before pressing **Delete**.

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In the following example, there are three row dimensions on a flex form, Accounts, Market, and Year:

D-Acc US Market FY18

D-Acc US Market FY19

D-Acc US Market FY20

To remove the row for FY18 using the Delete key, be sure to select all three dimension members, D-Acc, US Market, and FY18 using the Ctrl key or Shift key, then press Delete.

- Copy and paste is limited to the scope of the form definition. Flex forms must adhere to the hierarchies as defined in the form. Therefore, you cannot have any flex form members that are not part of the defined row or column members of the form.
- Subtotaling calculation scripts and currency conversion calculation scripts will be generated and executed based on the original form definition.
- In the form definition, if **Enable flex form for rows**, **Enable flex form for columns**, or both, are selected, a flex form opened as a simple form can preserve comments in cells outside the form after refresh.
  However, when opened as a flex form:
  - If both the **Enable flex form for rows** and **Enable flex form for columns** options are selected, then comments are not preserved.
  - If only the **Enable flex form for rows** option is selected, then comments entered to the right of the form are preserved after refresh. Comments are not preserved if they are entered directly below the form.
  - If only the **Enable flex form for columns** option is selected, then comments entered below the form are preserved after refresh. Comments are not preserved if they are entered to the right of the form.
- Both member and alias display is not supported for flex forms:
  - In the Application Settings for the business process, in **Display Member Label as**, neither the **Member Name:Alias** or the **Alias:Member Name** options are supported.
  - During form definition, in **Dimension Properties**, selecting both the **Member name** and **Alias** options is not supported for flex forms. Select either **Member name** or **Alias**.
- When working with flex forms with multiple dimensions on rows or columns (when two or more dimensions with multiple members are placed on a row or columns):
  - By design, **+** and **-** for expand/collapse are not supported for flex forms. Instead, use the Expand/Collapse command on the right-click Smart View context menu.
  - During form definition, to place dimensions members on separate rows or columns, in **Member Selection** on the flex form, choose **Place selection in separate rows** or **Place Selection in Separate Columns**. See Selecting Members for Forms in *Administering Planning*.
- When a user adds a member that is a parent or child of a member already present on a flex form and refreshes, the child member will be collapsed, even in cases where the Dimension property, **Start expanded**, is selected during form design. To the user, it may look like the child member was removed, but the child member can be viewed by expanding the parent using the Expand/Collapse commands on the Smart View context menu.
- When entering numeric member names or shared members on a flex form, enter a single quotation mark (') before the member name.

  For example, for a numeric member name, such as 4077, enter:

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'4077

For shared members, enter member names in the format:

'[Parent].[Shared Member]

For example:

'[Sales Director 2].[410]

'[Default_Sales Director 2].[Default_International Sales]

- When a flex-enabled form is opened in an ad hoc mode, the row dimension indentation is lost on submitting data. Refreshing the data restores the indentation to normal.
- User variables, dynamic user variables, dynamic user variables with attributes, and substitution variables are supported on flex form rows and columns. Users should change variables on the POV and perform a refresh for the rows and columns to update them to the new members.
- Excluded members may be entered on flex form rows or columns. Members that are excluded in the form definition can be entered on flex form rows and users are able to enter values and submit.
- In the form definition, when **Enable flex form for rows**, **Enable flex form for columns** or both are enabled, then the Segment properties **Hide** and **Read-only** are not supported for either rows or columns. **Hide** and **Read-only** are supported only in simple forms.
- An administrator can configure action menus to run business rules or open a flex form or simple form from a flex form (or simple form). The action menu items are accessed from the right-click Smart View context menu. The action menu items may be defined to appear on the right-click menu anywhere on the flex form or when right-clicking, for example, in specific dimensions, members, rows, columns, or cells.

  Right-click menus that are available in the web application for the POV and Page dimensions are not available on flex forms in Oracle Smart View for Office.

  In *Administering Planning*, for information on setting up action menu items for flex forms, see Administering Action Menus; for additional information on flex forms, see Designing Flex Forms.

Selecting Members in Flex Forms

Users can select row or column members to add to a flex form using the **Member Selection** dialog box, available from the provider ribbon; for example, from the Planning ribbon. The **Member Selection** option is available only on flex forms, not on simple forms.

> **Note**
>
> The **Member Selection** option is available in Oracle Smart View for Office 21.100+.

Use the **Member Selection** dialog to add row or column members to a flex form, similar to adding members to an ad hoc grid. The members you can add depend on the underlying form definition for the row or column dimensions:

- If the **Dimension Properties** setting, **Flex beyond form definition**, is selected, users may select members outside those specified in the form definition. For example, suppose a form includes only the Computer Accessories members from the Product dimension. If **Flex beyond form definition** is selected for the Product dimension, then users may add other members from Product, such as Notebooks or Tablets, to the flex form. These

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members will be retained upon refresh. For more information, see Flexing Beyond the Form Definition.

- In the form definition of a flex form, if specific members are not part of a dimension, then, even though you may be able to select and add those members in the **Member Selection** dialog, those members will be removed upon refresh.

> **Note**
>
> To add members outside the form definition, enable **Flex beyond form definition** on the applicable dimensions.

Member Selection uses the default alias table defined at the application level. When members are inserted on the grid, the members are displayed as member names until a Refresh is performed, and then aliases are displayed corresponding to the application setting.

Filtering and Sorting in Flex Forms

- Filtering does not disable **Submit Data** as it is only hiding certain rows.
- Sorting disables **Submit Data** as it changes member order in the column. After sorting you must refresh to submit data.
- To avoid undesirable sorting results, do not apply sorting to an entire column. Instead, select the grid members to sort, and then use Excel's Sort commands, Sort A to Z or Sort Z to A, or perform a custom sort.
- After applying a filter to a row or column dimension, and then applying a sort within the filter drop-down dialog, the sort indicator arrow appears on the filter button within the grid. However, after a Refresh, the sort indicator arrow on the filter button is no longer displayed.
- Excel grouping is expanded in two cases:
  - Filters are used. In this case, grouping is expanded on rows.
  - **Adjust Column Width and Row Height** is checked (**Options** dialog, **Formatting** tab)

  If you want to preserve Excel grouping, do not use filters or the **Adjust Column Width and Row Height** option. The Excel grouping expanded/collapsed state cannot be restored programmatically, and Excel automatically expands everything if filtering is applied or the row height/column width is automatically adjusted.
- In a flex form with only the **Enable flex form on columns** option enabled, Excel's Sort and Filter actions are enabled. However, as rows are not flex enabled, then sorting results in the "Invalid selection" error.

Using Suppression Options in Flex Forms

- In the form designer, the **Use database suppression** option is not supported; however, the **Suppress missing blocks**, **Suppress missing data - Rows**, and **Suppress missing data - Columns** options are supported.

> **Note**
>
> Groovy rules are not supported in flex forms when suppression options are enabled.

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- The **Suppress missing blocks**, **Suppress missing data - Rows**, and **Suppress missing data - Columns** options defined in the web for a flex form are applied only when first opening the flex form in Oracle Smart View for Office. Depending on the form definition, flex form users can enter members on columns or rows even though the suppression options are enabled in web form. Users can also enter data and submit data for the suppressed members.
  If the suppression options in the Smart View **Options** dialog, **Data Options** tab, for **Suppress Missing Blocks**, **Suppress Missing Rows**, and **Suppress Missing Columns** are selected, they are applied to the flex form. Users can uncheck these options in Smart View and then add members (by typing them on the sheet or using **Member Selection**), enter data, submit data, and refresh the flex form.

Working with Shared Members and Suppression Options in Flex Forms

Consider the following scenario in form design:

1. Shared members are on the row, column, or both
2. **Drill on shared members** is enabled
3. **Suppress missing blocks** and **Suppress missing data** are enabled

When opening the form, shared members are converted to base member, and query is based on the base members.

When opened as a flex form (**Enable flex form for rows**, **Enable flex form for columns**, or both are selected), since the base member is beyond the form definition, if it is the only member in the flex form row or column, this error is shown:

"Flex form cannot be refreshed or saved without valid members on Account dimension."

If there are other valid members on the row or column, and the **Show invalid members for flex form** option is enabled, then the base members will become comments.

Workarounds: To avoid this error, use one or both of the following workarounds:

- Enable the **Flex beyond form definition** option.
- Clear the **Drill on shared members** option.

Flexing Beyond the Form Definition

During form definition, when the **Flex beyond form definition** property is applied to row or column dimensions in flex forms, Oracle Smart View for Office users may enter members outside the form definition for dimensions within the row or column axis of the form. This allows flex form users to enter data for members that are not displayed on the flex form. Users must have access to the valid members that they enter.

For example, using the Vision application, suppose the Product dimension is placed as a row dimension in a flex form. During form definition, only the Sentinal Standard Notebook and Sentinal Custom Notebook members in the Product dimension have been selected for display on the form. By enabling the **Flex beyond form definition** option for the Product dimension, Smart View users may enter other products from the Product dimension, such as Mouse or Keyboard, in the rows in the flex form. As long as they have access to those members, users can either add rows for additional members to the existing flex form or replace existing Product members with the Product members they require. To illustrate, note the following hierarchy:

```
Product
  Notebooks  <<this hierarchy is displayed in flex form)
    Sentinal Standard Notebook
```


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Sentinal Custom Notebook
Computer Accessories <<this hierarchy is not displayed in flex form)
Keyboard
Mouse

In a flex form with **Flex beyond form definition** disabled (not selected), users cannot add Computer Accessories or its descendants. Users can add Notebooks and its descendants.

In a flex form with **Flex beyond form definition** enabled (selected), users can add Computer Accessories and its descendants as well as Notebooks and its descendants.

During form definition, note the following when enabling the **Flex beyond form definition** property:

- In **Dimension Properties**, the **Flex beyond form definition** option will only be visible if either the **Enable flex form for rows** or **Enable flex form for columns** option, or both, is selected in **Smart View Options**.
- When there are multiple dimensions on the form rows, Oracle recommends that you select the **Flex beyond form definition** property for each applicable row or column dimension individually. You may use the **Dimension Properties** option, **Apply to all row | column | page dimensions**, to apply the **Flex beyond form definition** property to all dimensions; however, use with care as all other dimension property selections will also be applied to all other dimensions.

See Designing Flex Forms in *Administering Planning*.

Retaining Invalid Members on Flex Forms

In flex forms, you can retain invalid members on the sheet after a refresh.

When entering member names in a flex form, errors may occur; for example, you may:

- Mistype or misspell a name, creating an invalid member in the cell
  See Example of Misspelled Member Name.
- Make an error when copying and pasting member names from one sheet to another, or within the same sheet, resulting in invalid members
  See Example of Missing Member Name on Multi-Dimension Row
- Enter a member name that is beyond the form definition, resulting in an invalid member
  See Example of Member Name Entered that is Outside of Form Definition

Before the 23.07 update, when these situations occurred, the rows or columns with invalid members were removed from the sheet upon refresh, making it difficult to know what the issue was, and forcing you to reenter member names.

Starting in the 23.07 update, the flex form can retain any invalid members on the form after refresh. To accomplish this, the Cloud EPM Service Administrator enables the **Show invalid members for flex form** check box under **Smart View Options** in the **Layout** tab of the form definition, described in Enabling the Invalid Member Option.

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> **Note**
>
> - The **Show invalid members for flex form** check box is enabled only when **Enable flex form for rows** or **Enable flex form for columns**, or both, are enabled.
> - In rows and columns containing multiple dimensions, if even a single member is invalid, all members on the row or column are highlighted as invalid. For example, if a row contains the *Tablet* and *Current* members, and you type *Tablet* correctly, but type *Currnt* in error, both the Tablet and Currnt members will be highlighted as invalid. You should examine all the highlighted member names and correct those that are typed incorrectly.
> - After inserting a blank row or column into the flex form and clicking **Refresh**, if no member names were entered, then the inserted row or column is highlighted as an invalid member row or column and remains on the flex form as a blank row or column.
> - Attempting to delete an entire row or column by selecting the invalid member cells of a row or column and pressing the **Delete** key will result in invalid members in the member cells upon refresh. To delete entire rows or columns on a flex form, use the **delete entire row** or **delete entire column** operations in Excel.

Following are some example scenarios that show you how to work with invalid members on the sheet.

Example of Misspelled Member Name

For example, based on the Vision application form, HR Expenses, you open the form as a flex form. The Service Administrator has enabled the Smart View options, "Enable flex form for rows" and "Show invalid members for flex form."

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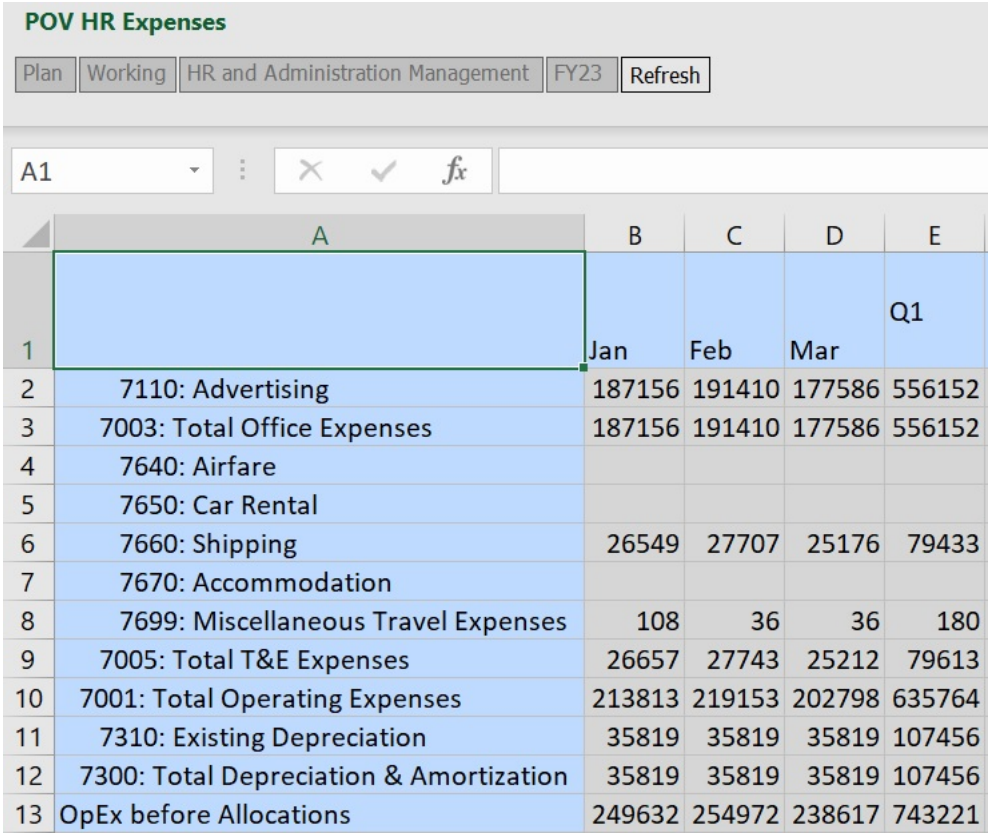
Figure 9-11 Flex Form Containing No "7690: Meals" Member



	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	7110: Advertising	187156	191410	177586	556152
3	7003: Total Office Expenses	187156	191410	177586	556152
4	7640: Airfare				
5	7650: Car Rental				
6	7660: Shipping	26549	27707	25176	79433
7	7670: Accommodation				
8	7699: Miscellaneous Travel Expenses	108	36	36	180
9	7005: Total T&E Expenses	26657	27743	25212	79613
10	7001: Total Operating Expenses	213813	219153	202798	635764
11	7310: Existing Depreciation	35819	35819	35819	107456
12	7300: Total Depreciation & Amortization	35819	35819	35819	107456
13	OpEx before Allocations	249632	254972	238617	743221

You notice that the "7690: Meals" member is not present on the form so you set out to add it. You insert a row on the grid and begin typing, but make a spelling error. After clicking Refresh, Smart View calls out the row for you with the member cells highlighted and the data cells displaying #InvalidMember.

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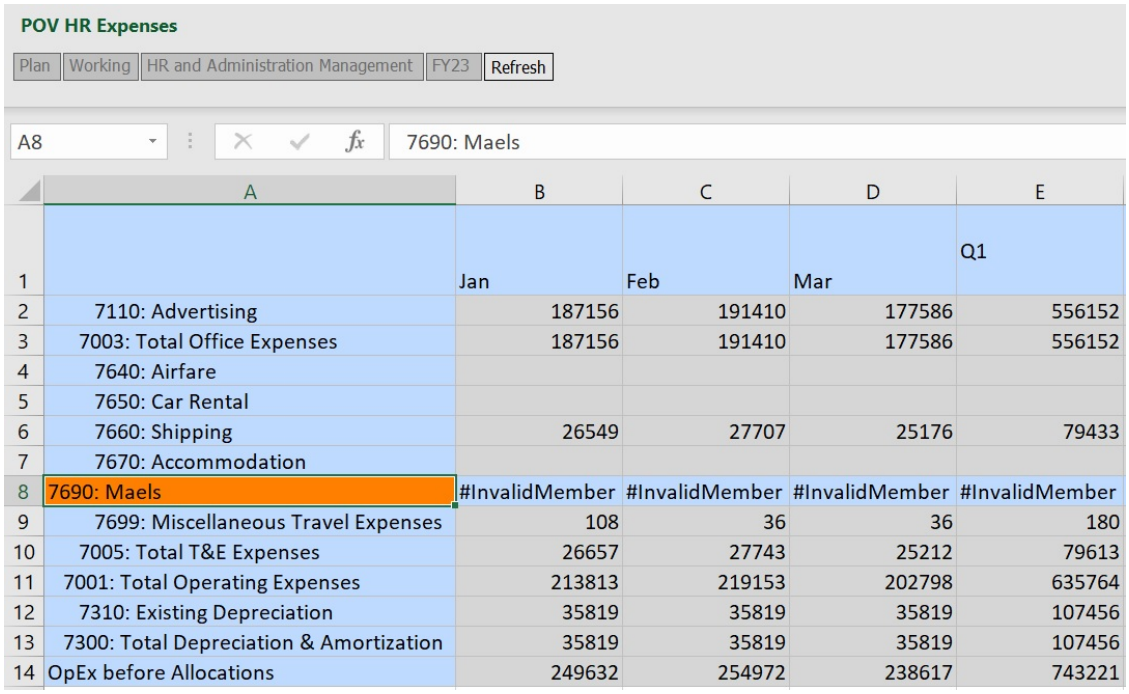
Figure 9-12 Flex Form with Invalid Member Row Highlighted



	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	7110: Advertising	187156	191410	177586	556152
3	7003: Total Office Expenses	187156	191410	177586	556152
4	7640: Airfare				
5	7650: Car Rental				
6	7660: Shipping	26549	27707	25176	79433
7	7670: Accommodation				
8	7690: Maels	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
9	7699: Miscellaneous Travel Expenses	108	36	36	180
10	7005: Total T&E Expenses	26657	27743	25212	79613
11	7001: Total Operating Expenses	213813	219153	202798	635764
12	7310: Existing Depreciation	35819	35819	35819	107456
13	7300: Total Depreciation & Amortization	35819	35819	35819	107456
14	OpEx before Allocations	249632	254972	238617	743221

After fixing the spelling error, click Refresh and note that the flex form is displayed correctly, with the valid member names and data.

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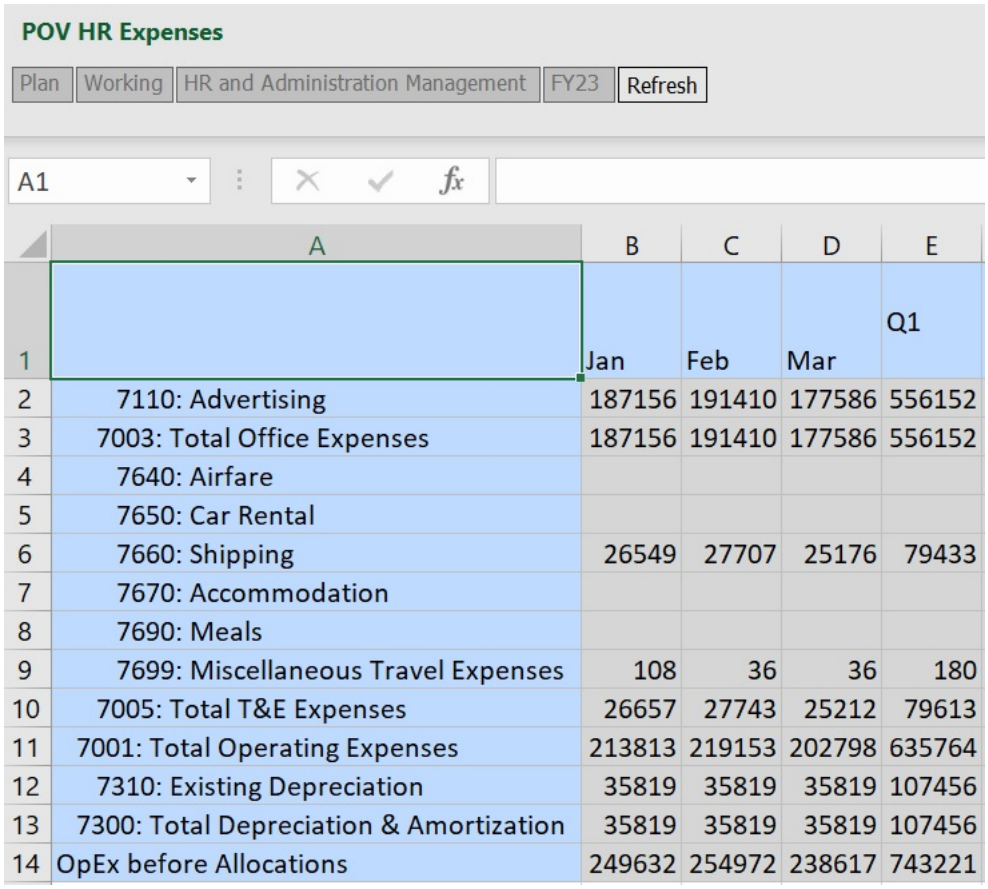
Figure 9-13 Flex Form with Error Corrected and Valid Members Displayed



	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	7110: Advertising	187156	191410	177586	556152
3	7003: Total Office Expenses	187156	191410	177586	556152
4	7640: Airfare				
5	7650: Car Rental				
6	7660: Shipping	26549	27707	25176	79433
7	7670: Accommodation				
8	7690: Meals				
9	7699: Miscellaneous Travel Expenses	108	36	36	180
10	7005: Total T&E Expenses	26657	27743	25212	79613
11	7001: Total Operating Expenses	213813	219153	202798	635764
12	7310: Existing Depreciation	35819	35819	35819	107456
13	7300: Total Depreciation & Amortization	35819	35819	35819	107456
14	OpEx before Allocations	249632	254972	238617	743221

Example of Missing Member Name on Multi-Dimension Row

#InvalidMember is displayed on the flex form in Smart View when a row or column has multiple members and you miss entering a member on a member cell in that row or column. In the following example, there are two dimensions on the rows. You added three rows after row 17. The members from the Product dimension in Column A, rows 18, 19, and 20, were typed correctly. But you did not type any entries in the same rows in Column B. Those cells are missing the member name from the Scenario dimension. This is the result after clicking **Refresh**.

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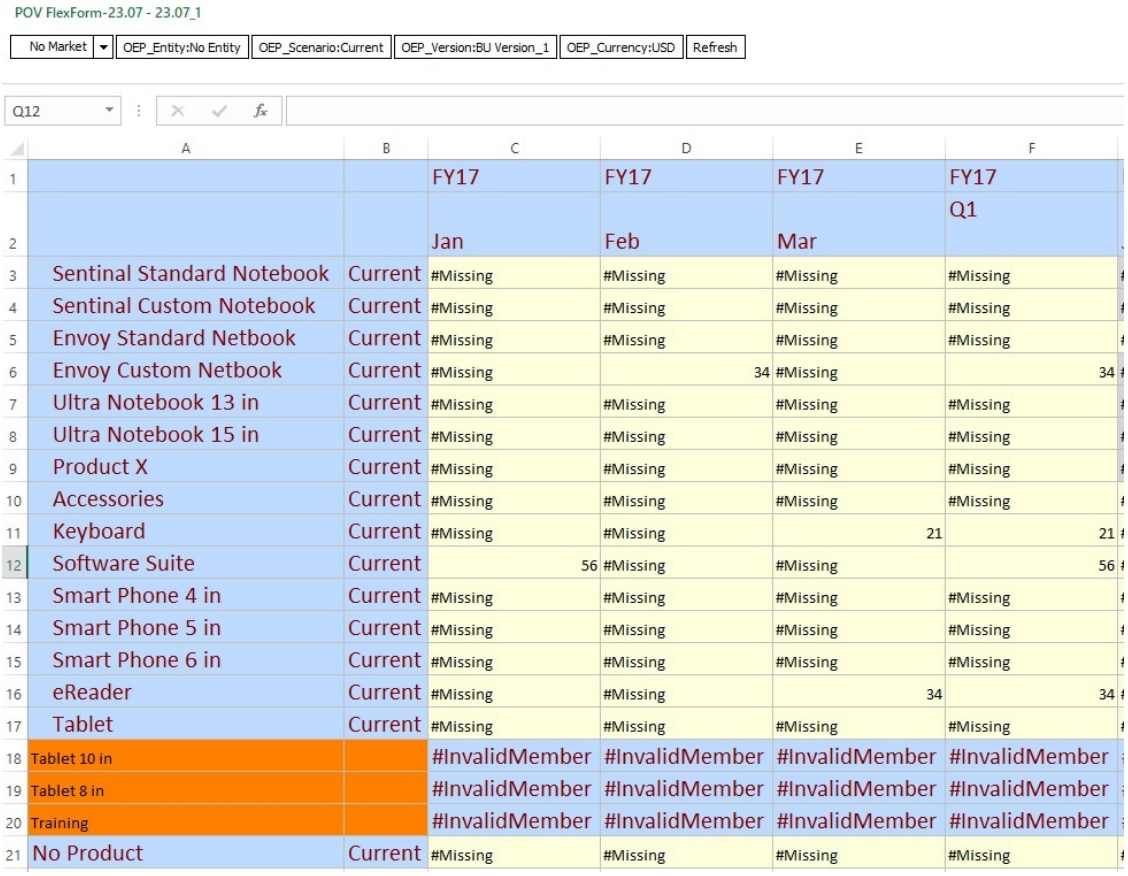
Figure 9-14 Flex Form with Missing Member Names in Column B, Rows 18, 19, and 20



	A	B	C	D	E	F
1			FY17	FY17	FY17	FY17
2			Jan	Feb	Mar	Q1
3	Sentinal Standard Notebook	Current	#Missing	#Missing	#Missing	#Missing
4	Sentinal Custom Notebook	Current	#Missing	#Missing	#Missing	#Missing
5	Envoy Standard Netbook	Current	#Missing	#Missing	#Missing	#Missing
6	Envoy Custom Netbook	Current	#Missing	34	#Missing	34
7	Ultra Notebook 13 in	Current	#Missing	#Missing	#Missing	#Missing
8	Ultra Notebook 15 in	Current	#Missing	#Missing	#Missing	#Missing
9	Product X	Current	#Missing	#Missing	#Missing	#Missing
10	Accessories	Current	#Missing	#Missing	#Missing	#Missing
11	Keyboard	Current	#Missing	#Missing	21	21
12	Software Suite	Current	56	#Missing	#Missing	56
13	Smart Phone 4 in	Current	#Missing	#Missing	#Missing	#Missing
14	Smart Phone 5 in	Current	#Missing	#Missing	#Missing	#Missing
15	Smart Phone 6 in	Current	#Missing	#Missing	#Missing	#Missing
16	eReader	Current	#Missing	#Missing	34	34
17	Tablet	Current	#Missing	#Missing	#Missing	#Missing
18	Tablet 10 in		#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
19	Tablet 8 in		#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
20	Training		#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
21	No Product	Current	#Missing	#Missing	#Missing	#Missing

To correct this issue, add the "Current" member in Column B, rows 18, 19, and 20, and then **Refresh**.

Example of Member Name Entered that is Outside of Form Definition

#Invalidmember is displayed on the flex form in Smart View when you enter a member that is beyond the form definition.

For example, suppose that in the form, the Year dimension is limited to FY17, FY18, and FY19. But in the application outline, the dimension contains many more members, such as FY20, FY21, FY22, and FY23.

When designing a flex form, if the Service Administrator has selected the "Flex beyond form definition" option for the Year dimension, then you may add members that are outside of the form definition, such as FY20. If the "Flex beyond form definition" option is not selected, then adding a member that is outside of the form definition will result in invalid members, even though the members exist in the outline.

In the following case, the "Flex beyond form definition" option was not selected for the Year dimension on the column. You add a column and enter FY20, and then click Refresh. Note below that column I now contains invalid members.

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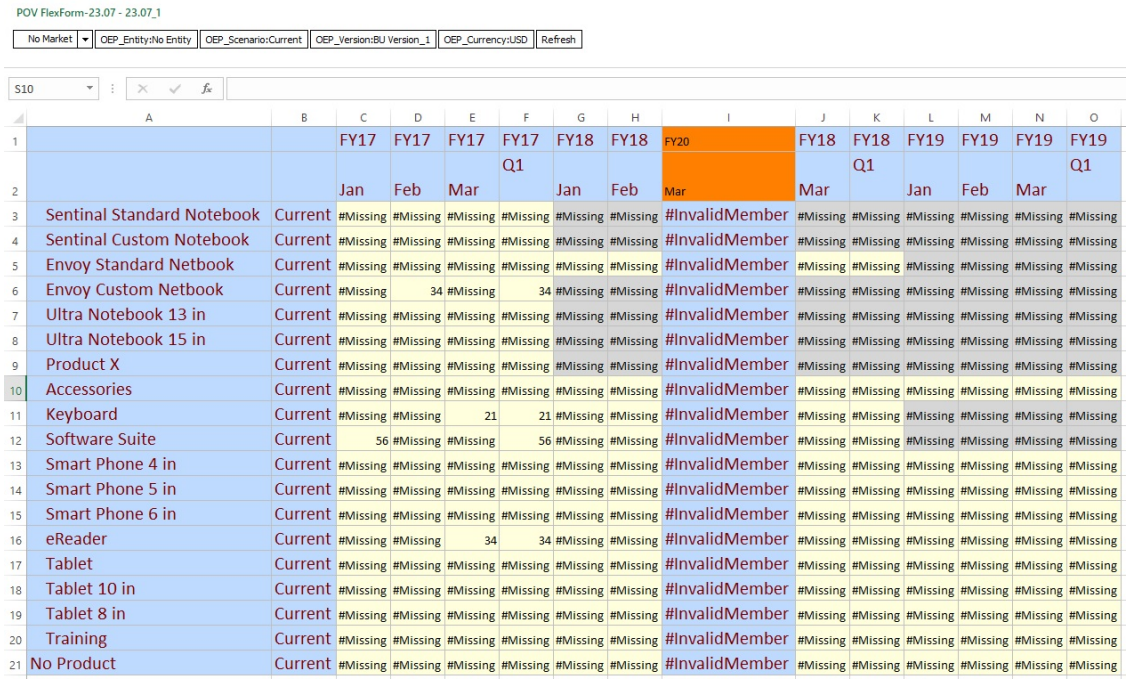
Figure 9-15 "Flex beyond form definition" Is Not Selected and Member Is Outside of Form Definition



POV FlexForm-23.07 - 23.07_1

No Market | OEP_Entity:No Entity | OEP_Scenario:Current | OEP_Version:BU Version_1 | OEP_Currency:USD | Refresh

S10

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1			FY17	FY17	FY17	FY17	FY18	FY18	FY20	FY18	FY18	FY19	FY19	FY19	FY19
2			Jan	Feb	Mar	Q1	Jan	Feb	Mar	Mar	Q1	Jan	Feb	Mar	Q1
3	Sentinal Standard Notebook	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
4	Sentinal Custom Notebook	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
5	Envoy Standard Netbook	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
6	Envoy Custom Netbook	Current	#Missing	34	#Missing	34	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
7	Ultra Notebook 13 in	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
8	Ultra Notebook 15 in	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
9	Product X	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
10	Accessories	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
11	Keyboard	Current	#Missing	#Missing	21	21	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
12	Software Suite	Current	56	#Missing	#Missing	56	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
13	Smart Phone 4 in	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
14	Smart Phone 5 in	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
15	Smart Phone 6 in	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
16	eReader	Current	#Missing	#Missing	34	34	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
17	Tablet	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
18	Tablet 10 in	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
19	Tablet 8 in	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
20	Training	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing
21	No Product	Current	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing

To remedy this, your Service Administrator should select the **Flex beyond form definition** option for the Year dimension. With this option selected, you may enter the members that are outside of the form definition, click **Refresh**, and retain the members on the flex form.

Enabling the Invalid Member Option

Enabling the new **Show invalid members for flex form** check box lets users easily, see, understand, and correct any error they may have made in entering member names in flex forms.

To retain invalid members on a flex form, a Service Administrator performs these steps from the Oracle Fusion Cloud Enterprise Performance Management web interface:

1. From the Navigator, under **Create and Manage**, click **Forms**.
2. Select an existing form to edit or, in the **Form and Ad Hoc Grid Management** page, click the **Actions** drop-down menu and click **Create Simple form**.
3. In the form definition page, under **Smart View Options** in the **Layout** tab, select the **Enable flex form for rows** and **Enable flex form for columns** check boxes, as you require. You may select one or both of these options.
4. Select the **Show invalid members for flex form** check box. This option is displayed only when a row or column flex option is selected, as described in the previous step.
5. Optionally, for individual rows or columns, in **Dimension Properties**, enable the **Flex beyond form definition** option, as you require.
6. Save the form.

For more information on setting this option, see:

- *Administering FreeForm*

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  - Designing Flex Forms
  - Setting Smart View Form Options
  - Setting Dimension Properties
- *Administering Planning*
  - Designing Flex Forms
  - Setting Smart View Form Options
  - Setting Dimension Properties

Submitting Data when Flex Forms Contain Invalid Members

In flex forms, you can submit data even when there are invalid members on the sheet by using the **Submit Data Without Refresh** action on the provider ribbon (for example, the Planning ribbon).

> **Note**
>
> To use the **Submit Data Without Refresh** option on flex forms containing invalid members, the Service Administrator or form designer must select the **Show invalid members for flex form** option during form design, as described in Enabling the Invalid Member Option.
>
> Support for using **Submit Data Without Refresh** to submit data on a flex form containing invalid members requires Oracle Smart View for Office 24.200 and Oracle Fusion Cloud Enterprise Performance Management 24.10.

To submit data on a flex form containing invalid members:

1. Ensure that the **Show invalid members for flex form** is enabled for the flex form.
2. From the provider ribbon, select **Submit Data**, then **Submit Data Without Refresh**.

> **Note**
>
> The **Submit Data** action will appear grayed out or disabled. But you can select the down arrow next to **Submit Data** to view the drop-down menu and see that the **Submit Data Without Refresh** option is enabled

For more information on using **Submit Data Without Refresh**, see the following:

- Example with Show Invalid Members for Flex Form Enabled
- Example with Show Invalid Members for Flex Form Unchecked

For information on working with invalid members, see Retaining Invalid Members on Flex Forms.

Example with Show Invalid Members for Flex Form Enabled

In this example, the **Show invalid members for flex form** option is enabled for the form.

In Figure 1, row 8, for the member, "Trips," we entered data for July, August, and September in cells B8, C8, and D8. The cells are dirty and ready to be submitted.

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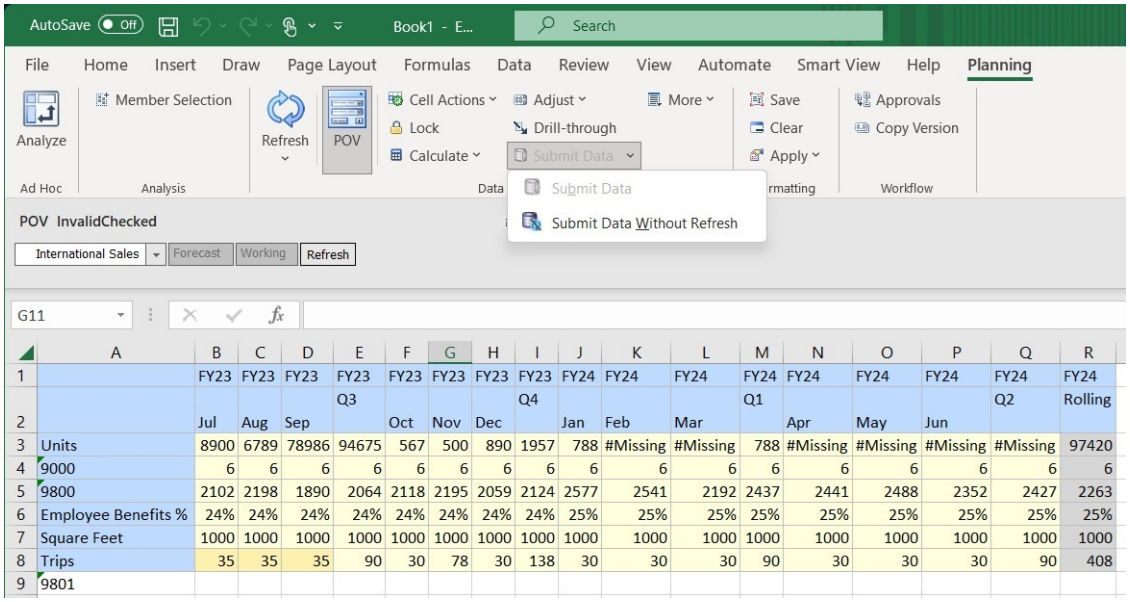
In row 9, we entered a member; we're not sure about the member name and entered "9801."

The **Submit Data** option appears grayed out, but clicking the down arrow, note that the **Submit Data Without Refresh** option is enabled.

Figure 9-16 Flex Form Showing Dirty Cells and a Member Added

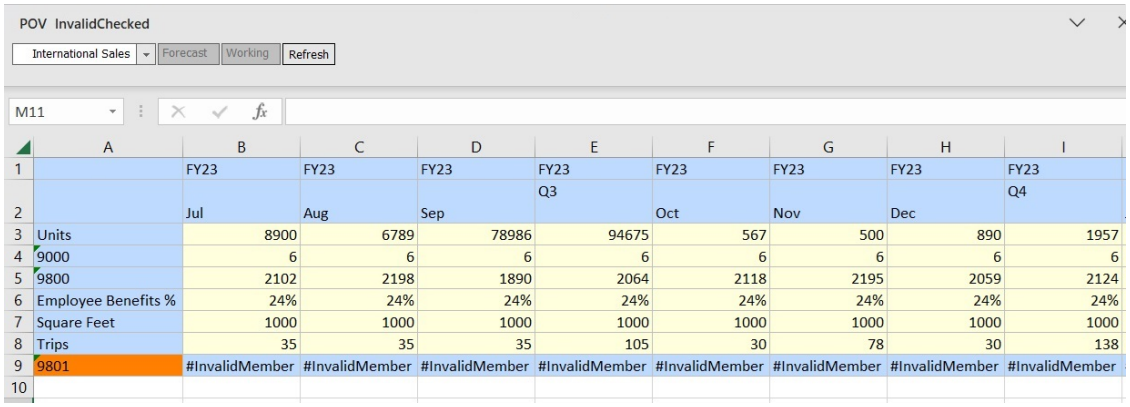


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1		FY23	FY23	FY23	FY23	FY23	FY23	FY23	FY23	FY24	FY24	FY24	FY24	FY24	FY24	FY24	FY24	FY24
2		Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Rolling
3	Units	8900	6789	78986	94675	567	500	890	1957	788	#Missing	#Missing	788	#Missing	#Missing	#Missing	#Missing	97420
4	9000	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
5	9800	2102	2198	1890	2064	2118	2195	2059	2124	2577	2541	2192	2437	2441	2488	2352	2427	2263
6	Employee Benefits %	24%	24%	24%	24%	24%	24%	24%	24%	25%	25%	25%	25%	25%	25%	25%	25%	25%
7	Square Feet	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
8	Trips	35	35	35	90	30	78	30	138	30	30	30	90	30	30	30	90	408
9	9801																	

By selecting the **Submit Data Without Refresh** option, we are able to submit the dirty cells and verify whether the member 9801 is correct. Figure 2 shows the result. The data values in row 8 for the "Trips" member show the changed values. The member "9801" in row 9 is highlighted in orange, and the data cells for the row contain the #InvalidMember notation.

The invalid member can be corrected by retyping the member name in cell A9 or using the **Member Selection** dialog to locate the correct member.

Figure 9-17 Flex Form After Submit Data Without Refresh Showing Updated Data Values and Invalid Member and Data Cells



	A	B	C	D	E	F	G	H	I
1		FY23	FY23	FY23	FY23	FY23	FY23	FY23	FY23
2		Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4
3	Units	8900	6789	78986	94675	567	500	890	1957
4	9000	6	6	6	6	6	6	6	6
5	9800	2102	2198	1890	2064	2118	2195	2059	2124
6	Employee Benefits %	24%	24%	24%	24%	24%	24%	24%	24%
7	Square Feet	1000	1000	1000	1000	1000	1000	1000	1000
8	Trips	35	35	35	105	30	78	30	138
9	9801	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
10									

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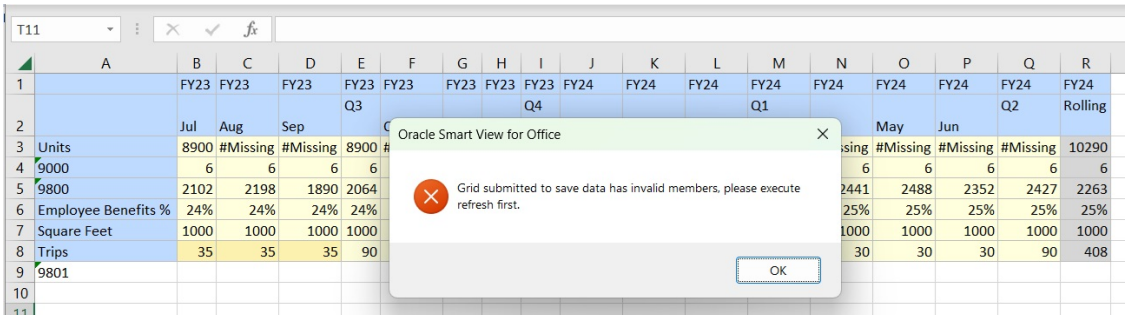
Example with Show Invalid Members for Flex Form Unchecked

In this example, the **Show invalid members for flex form** option is unchecked for the form.

In Figure 3, we made the same changes to the sheet that were made in Figure 1.

Now, when attempting to use the **Submit Data Without Refresh** action, a message informs us that the sheet contains invalid members and must be refreshed.

Figure 9-18 Message that Displays when Show Invalid Members for Flex Form Option is Not Enabled for Form



Refreshing the sheet, however, causes us to lose the data changes made in cells B8, C8, and D8, and the member we added in cell A9, as shown in Figure 4.

Figure 9-19 Flex Form Cleared of All Updates After Refreshing the Sheet

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1		FY23	FY23	FY23	FY23	FY23	FY23	FY23	FY23	FY24	FY24	FY24	FY24	FY24	FY24	FY24	FY24	FY24
2		Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Rolling
3	Units	8900	#Missing	#Missing	8900	#Missing	500	890	1390	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	10290
4	9000	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
5	9800	2102	2198	1890	2064	2118	2195	2059	2124	2577	2541	2192	2437	2441	2488	2352	2427	2263
6	Employee Benefits %	24%	24%	24%	24%	24%	24%	24%	24%	25%	25%	25%	25%	25%	25%	25%	25%	25%
7	Square Feet	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
8	Trips	30	30	30	90	30	78	30	138	30	30	30	90	30	30	30	90	408
9																		
10																		

You may reenter data and use the **Member Selection** dialog to choose the correct members, rather than hand-typing. But enabling the **Show invalid members for flex form** will save you steps and alert you to the invalid members you may have typed on the sheet.

Retaining Formula, Label, and Comment Rows and Columns on Flex Forms

In Oracle Smart View for Office 23.200+, you can retain formula rows and columns on flex forms by enabling the "Show invalid members for flex form" option during form definition. When a Service Administrator enables this option, formula rows and columns are retained on the flex form after a refresh or a submit.

> **Note**
>
> Formula rows and columns are also referred to as *label* or *comment* rows and columns.

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After a refresh or submit operation, all members and data on a formula row or column are highlighted using the same cell style as used for invalid members, described in Retaining Invalid Members on Flex Forms.

In earlier Smart View releases, formula rows and columns were not supported in flex forms. Upon submit, a message noted that a refresh must first be performed; and upon refresh, the formula rows and columns were removed from the flex form.

> **Note**
>
> Attempting to delete an entire row or column by using the **Delete** key to delete only the member cells of a row or column will result in invalid members in the member cells upon refresh. To delete entire rows or columns on a flex form, select the entire row or column, right-click, and then select **Delete** from the Excel context menu.

Enabling the **Show invalid members for flex form** option gives users the versatility of flex forms when working with forms containing formula rows and columns.

Retaining Modified Members on Flex Forms After POV or User Variable Change

To retain modified members on a flex form after a POV or user variable change, you enable the **Flex Forms: Preserve Grid on POV and User Variable Changes** option.

In the Smart View ribbon, click **Options**, then select the **Member Options** tab, and then select the option, **Flex Forms: Preserve Grid on POV and User Variable Changes**.

If this option is not selected, any added rows or columns in the flex form will be removed upon a POV or user variable change.

After selecting the **Flex Forms: Preserve Grid on POV and User Variable Changes** option, add or delete members on the flex form grid, and click **Refresh**. Then change a POV member and click **Refresh**; or change a user variable and the flex form refreshes automatically. Your modified members are retained. You can now enter and submit data against the modified POV and user variables in any of the members in the flex form, including any newly-added members. Optionally, change the POV or any user variable again and refresh, and then continue entering data against the updated POV and user variables.

See also:

- Step 4 in Working with Flex Forms in Smart View
- Member Options

Smart Push with Flex Forms

- Smart Push is supported on flex forms.
- On a filtered flex form, Smart Push does not honor the context of the selected form.

Unsupported Features on Flex Forms

- These form features are not supported for flex forms:
  - Segment Properties:
    - Hide
    - Read-only

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* Enable drop-down for dimensions (row dimension drop-down member selectors)
* Suppress hierarchy

> **Note**
>
> After rows are rearranged or sorted, Segment properties will not be retained.

  - Validation Rules
  - Row or column formulas
  - The **Member Name and Alias** option
  - Using flex forms inside composite forms
  - Enabling **Show Currency** for the Entity dimension.
  - Data validation rules within forms are not supported when using flex forms. Instead, convert data validation rules to Groovy rules.
- Flex forms are not supported for:
  - Dashboards
  - Smart Forms
  - Use with the Task Manager extension

Working with Flex Forms in Smart View

With flex forms, you can rearrange row and column dimensions, sort them, and insert valid members or aliases from corresponding dimensions.

Perform a refresh prior to submitting data in the modified form in Smart View. Upon refresh, invalid members, comments, and empty rows or columns are removed and the Submit Data button is enabled.

To work with a flex form:

1. Connect to a data source.
2. In the Smart View Panel, double-click a flex form (indicated by).

   You can also right-click the flex form you want to open, and then select **Open flex form**.
3. Modify the data as per your requirements.

   For example, some actions you may perform are:

   - Rearrange or move row and column members
   - Insert rows and columns
   - Add members. You can add members using **Member Selection** (on the provider ribbon) or hand-typing member names.
   - Sort rows and columns using the **Sort** button on the Excel **Data** ribbon
   - Filter on row and column members or data using the **Sort & Filter** on the Excel Home ribbon or the **Filter** button on the Excel **Data** ribbon
   - Sort row and column members using the **Sort & Filter** button on the Excel **Home** ribbon, the **Sort** button on the Excel **Data** ribbon, or the filter on the form

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- Run a business rule from the provider ribbon or from an action menu
- Right-click a member or data cell to access the **Smart View** context menu; applicable commands for the cell are available on the menu
- Delete rows and columns

> **Note**
>
> - The **Submit Data** button is disabled when you edit row members. Filtering is not considered editing; if you only add filters, you may still submit data.
> - In the Smart View **Options** dialog, **Formatting** tab, the **Repeat Member Labels** is required to be enabled for flex forms. You may attempt to clear the check box, but upon refresh, the check box will again be selected and the **Repeat Member Labels** option will be enabled.
> - The operations you can perform on rows and columns depend on the selections made during form definition. To perform operations on rows, the **Enable flex form on rows** option must be selected. To perform actions on columns, the **Enable flex forms on columns** option must be selected. These options are described in Setting Smart View Form Options in *Administering Planning*.

4. **Optional:** To retain added members on a flex form after a POV or user variable change:
   a. In the Smart View ribbon, click **Options**.
   b. In the **Options** dialog, select the **Member Options** tab.
   c. Select **Flex Forms: Preserve Grid on POV and User Variable Changes**.

   > **Note**
   >
   > If this option is not selected, any added rows or columns in the flex form will be removed upon a POV or user variable change.

   d. **Optional:** Add or delete members in the flex form, and click **Refresh**.
   e. Perform these tasks as you require:
      - Change a POV member and click **Refresh**
      - Change a user variable; the flex form refreshes automatically.

      Your modified members are retained. You can now enter and submit data against the modified POV and user variables in any of the members in the flex form, including any newly-added members.
   f. **Optional:** Change the POV or any user variable again and refresh, and then continue entering data against the updated POV and user variables.

   For additional information, see Retaining Modified Members on Flex Forms After POV or User Variable Change.
5. **Optional:** If your Service Administrator has enabled the **Show invalid members for flex form** option when designing the form:
   a. Add the rows, columns, or both, as you require.
   b. Type or copy member names into the new rows, columns, or both.

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c. Click **Refresh**.
Any invalid member cells are highlighted and #InvalidMember is displayed in the corresponding data cells.

d. Review the invalid member cells and correct any mistyped or missing members, and then click **Refresh**.

e. Repeat the previous step until all invalid members are corrected.

For more information, see Retaining Invalid Members on Flex Forms.

6. **Optional:** Right-click a cell in the form and, from the context menu, select **Smart View**, and then select a provider action menu item:

- To run a business rule, select the name of the busines rule.
- To open a flex form or simple form, select the form to open.

In flex forms, only the above actions are supported on action menus.

> **Note**
>
> Action menu options may differ depending on the member or data cell you select. The selections available depend on the form definition.

7. Click **Refresh**.

On refresh, Oracle Smart View for Office maintains modifications and removes invalid members from the form.

> **Note**
>
> The **Submit Data** button is enabled only after the refresh. However, the modified form layout is not stored on the server; it is maintained only in the context of the current session.

8. To submit changed data, in the provider ribbon, click **Submit Data.**

> **Note**
>
> The **Submit Data** button is enabled only after refresh.

9. To revert to the original flex form layout, reopen the flex form.

The modified form is not stored on the server; it is maintained only in the context of the current session. Reopening the flex form reverts the flex form layout to its original state.

Opening a Flex Form in Ad Hoc Mode and Submitting Data

You can open a flex form in ad hoc mode, just like any regular form, use ad hoc analysis to modify the grid layout, and submit data.

To open a flex form in ad hoc mode and submit data:

1. Connect to a data source.

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2. In the Smart View Panel, expand the tree list and select the flex form you want to open in ad hoc mode.
3. Click **Analyze.**

   The form opens in a new sheet in the ad hoc mode.
4. Modify data and grid layout per your requirements.
5. Click **Submit Data**.
6. Go back to the sheet with the flex form.
7. Click **Refresh**.

   The original layout and modified data appears in the flex form.

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10

Ad Hoc Analysis

Related Topics

- About Ad Hoc Analysis
  In ad hoc analysis, you use Oracle Smart View for Office functionality with Excel spreadsheets to retrieve and analyze data.
- Starting Ad Hoc Analysis
  Connect to a provider and select Ad Hoc Analysis to display the Ad Hoc ribbon for that provider and enable the ad hoc functionality.
- Inserting Attribute Dimensions on the Sheet
  When performing ad hoc analysis, you can use the Insert Attributes command to insert attribute dimensions or members on the worksheet.
- Preserving Excel Formulas in Ad Hoc Grids
  You can associate Excel formulas with member and data cells in ad hoc grids and set cell styles to identify such cells.
- Formatting Ad Hoc Grids
  You can use either Oracle Smart View for Office or Excel to control grid formatting.
- Enabling Attribute Association Processing in Ad Hoc Grids
  Attribute association processing allows Essbase cells at intersections associated with attributes to display the value specified for the **#Invalid/Meaningless** option.
- Zooming In and Out
  Zoom in on members in the grid to display data for their children and descendants.
- Specifying Ancestor Position in Ad Hoc Grids
  Use the **Ancestor Position** option to specify the ancestor position for hierarchies as **Top** or **Bottom**. The **Ancestor Position** option is located in the **Member Options** tab of the **Options** dialog.
- Working with Excel Filters on Ad Hoc Sheets
  Excel filters are retained when performing ad hoc in cases where the ad hoc operation results in the same set of column dimensions.
- Pivoting
  Pivoting changes the orientation of the data on the worksheet. You can move dimensions between rows and columns and between the grid and the POV.
- Removing Selected Members From the Grid
  You can remove members and their associated data from the grid.
- Refreshing Ad Hoc Grids in Saved Worksheets
  You can refresh saved worksheets or workbooks while retaining the updates done to ad hoc grids outside Oracle Smart View for Office or by using Smart View Admin Extension version 23.210 or earlier.
- Inserting Rows and Columns
  In ad hoc grids, you can insert calculating and non-calculating columns and rows within or outside the grid.

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- Displaying and Suppressing Repeated Members
  If you have stacked dimensions in an ad hoc grid, you can display or suppress repeated members.
- Working with Multiple Grids on a Worksheet
  In Oracle Essbase, you can create multiple ad hoc grids on one worksheet.
- Cascading Reports and Ad Hoc Grids
  You can create separate reports for any or all of the members of one or more dimensions in a report based on an ad hoc grid or Smart Slice query.
- Using Substitution Variables
  Substitution variables are global or per-application placeholders that represent variable values.
- Retaining Invalid Members and Comments After Refresh
  You can retain invalid members in an ad hoc grid after refresh when your Service Administrator enables the **Keep Invalid Members/Comments** option in the application settings of your business process.
- Detecting Comments and Unknown Members on Essbase Sheets
  You can set options in Oracle Smart View for Office to detect comments and unknown members on Oracle Essbase sheets.

About Ad Hoc Analysis

In ad hoc analysis, you use Oracle Smart View for Office functionality with Excel spreadsheets to retrieve and analyze data.

You do this by selecting members, using functions, and performing a variety of operations, including formatting, to design and build your reports.

> **Note**
>
> Ad hoc operations are not supported on protected worksheets.

Tutorials

Your Goal	Learn How
Get an introduction to: • Connecting to Planning • Starting ad hoc analysis • Formatting ad hoc grids • Performing ad hoc analysis This tutorial is designed for a Planning user in Oracle Fusion Cloud Enterprise Performance Management, but many of the concepts presented are applicable to other data providers.	Analyzing Plan Data using Smart View

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Starting Ad Hoc Analysis

Connect to a provider and select Ad Hoc Analysis to display the Ad Hoc ribbon for that provider and enable the ad hoc functionality.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting, Narrative Reporting, Profitability and Cost Management

> **Note**
>
> When you start ad hoc analysis with Oracle Essbase, Profitability and Cost Management, or Narrative Reporting, the alias table named "Default" is selected by default.

Video

Your Goal	Watch This Video
Learn about analyzing data using ad hoc analysis.	Creating Basic Ad Hoc Reports in Smart View
Learn about analyzing data using ad hoc analysis.	Creating Advanced Ad Hoc Reports in Smart View

To start ad hoc analysis:

1. From **Recently Used**, **Shared Connections**, or **Private Connections** on the Smart View Panel, select one of the following:
   - Smart Slice
   - Form
   - Cube or model

   > **Note**
   >
   > You can also start ad hoc analysis from a supported web application or business process. For instructions, see Opening Forms and Ad Hoc Grids from Web Applications (Web Launch).

2. From the Action Panel, select **Ad hoc analysis**.

   Alternatively, right-click the object in the Smart View Panel and select **Ad hoc analysis**.

   An ad hoc grid is placed on the sheet and the data provider ribbon is displayed.

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> **Tip**
>
> If an error appears similar to "Ad hoc grid cannot be opened as there are no valid rows of data," then, as a best practice, you should clear the suppression options in the **Data Options** tab of the Smart View **Options** dialog box. Ensure that all **Suppress Rows** and **Suppress Columns** options are cleared.
>
> - **Oracle Fusion Cloud Enterprise Performance Management:** Ensure that the **Suppress missing blocks** option is cleared.
> - **Cloud EPM Administrators:** You can enable a form option, **Remove Form Suppressions in Ad Hoc**, that allows Oracle Smart View for Office users to perform ad hoc on forms that have row and column suppression options selected in the form definition. See the administration documentation for your Cloud EPM business process for more information.

3. Use the ribbon buttons to perform ad hoc analysis on the current worksheet.

   You can also right-click on a member or data cell to open the context menu and gain quick access to cell-specific operations and defined business rules.

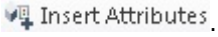
If you are familiar with the dimensions and members of your database, you can use *free-form mode* by entering dimension and member names directly into cell to design and create an ad hoc grid. See Free-Form Mode.

Inserting Attribute Dimensions on the Sheet

When performing ad hoc analysis, you can use the Insert Attributes command to insert attribute dimensions or members on the worksheet.

Data source types: Oracle Essbase, Planning Ad Hoc, Planning Modules Ad Hoc, FreeForm Ad Hoc, Enterprise Profitability and Cost Management Ad Hoc, Financial Consolidation and Close Ad Hoc, Tax Reporting Ad Hoc

To insert attribute dimensions or members on a worksheet:

1. Connect to your data provider and perform an ad hoc analysis by either selecting the **Ad hoc analysis** option in the Action Panel, or typing members in free-form format on the worksheet.
2. In the provider ad hoc ribbon, click the **Insert Attributes** button,  .
3. In the **Insert Attributes** dialog box, select the attribute dimensions to add to the sheet, and then click **OK**.

   Optional: All attribute dimensions are selected by default. To add only a subset of attribute dimensions, perform one of the following tasks:

   - Clear the check boxes next to the attribute dimensions to omit from the sheet.
   - Click **Deselect All**, and then select the check boxes next to the attribute dimensions to add to the sheet.
4. **Optional:** To select a single attribute member to add to the sheet (rather than the entire attribute dimension):

   a. Click , next to an attribute dimension text box.

   b. In the **Member Selection** dialog box, select the check box next to the attribute member to add and click .

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You can select only one attribute member per dimension.

c. Click **OK**.

d. Repeat these substeps for each attribute member to add to the sheet.

Note that you can also hand type an attribute member name in the attribute dimension text box; however, attribute member names must be correctly capitalized and spelled in order to be recognized by Oracle Smart View for Office. If you capitalize a member name incorrectly or otherwise misspell it, an error occurs.

Now you can work with the attribute dimensions in the same way you would if you had used the **Member Selection** dialog box or free-form to place attributes on the sheet. Along with the other dimensions, you can pivot the attribute dimensions between rows and columns on the grid, and pivot them between the POV and the grid.

Related Topics:

- Inserting Attribute Dimensions on the Sheet--Example
- Guidelines on Inserting Attributes

Inserting Attribute Dimensions on the Sheet--Example

Data source types: Oracle Essbase, Planning Ad Hoc

Using Essbase Sample Basic, from the Action Panel, select **Ad hoc analysis** to place dimensions, including page dimensions, on the worksheet, as shown in Figure 1.

Figure 10-1 Initial Ad Hoc Grid

	A	B	C	D
1		Product	Market	Scenario
2		Measures		
3	Year	105522		

Now click **Insert Attributes**,

.

In the **Insert Attributes** dialog box, note that all attribute dimensions are selected by default:

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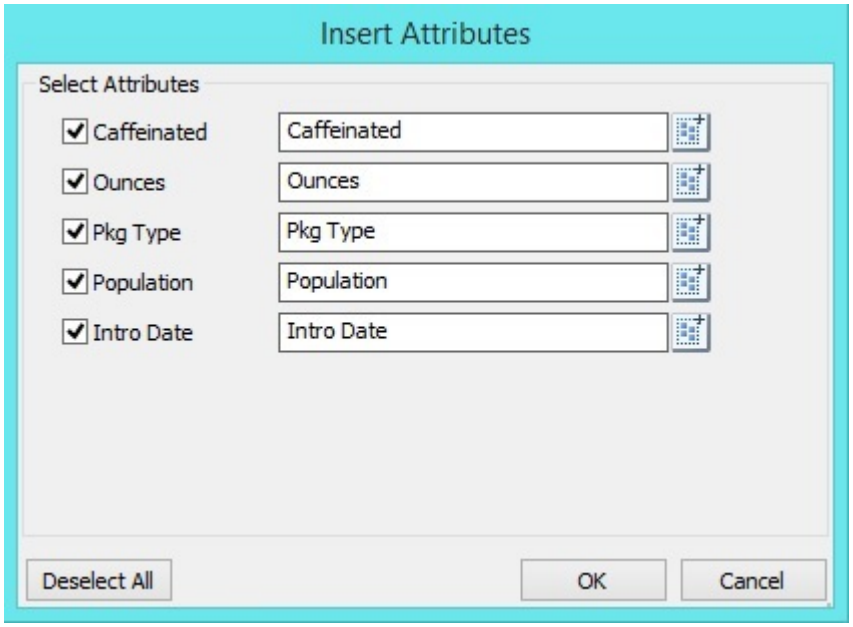

Click **OK** and you can see, as shown in Figure 2, that the attribute dimensions Caffeinated, Ounces, Pkg Type, Population, and Intro Date have been added to the worksheet as page dimensions.

Figure 10-2 Ad Hoc Grid After Adding Attribute Dimensions

	A	B	C	D	E	F	G	H	I
1		Product	Market	Scenario	Caffeinated	Ounces	Pkg Type	Population	Intro Date
2		Measures							
3	Year	104745							

You can also choose to add attribute members, instead of attribute dimensions, to the sheet. In the **Insert Attributes** dialog box, click for an attribute dimension and select an attribute member to use.

In the **Insert Attributes** dialog box, notice that the attribute dimensions Caffeinated, Pkg Type, and Populations, the attribute members Caffeinated_True, Bottle, and Medium are selected:

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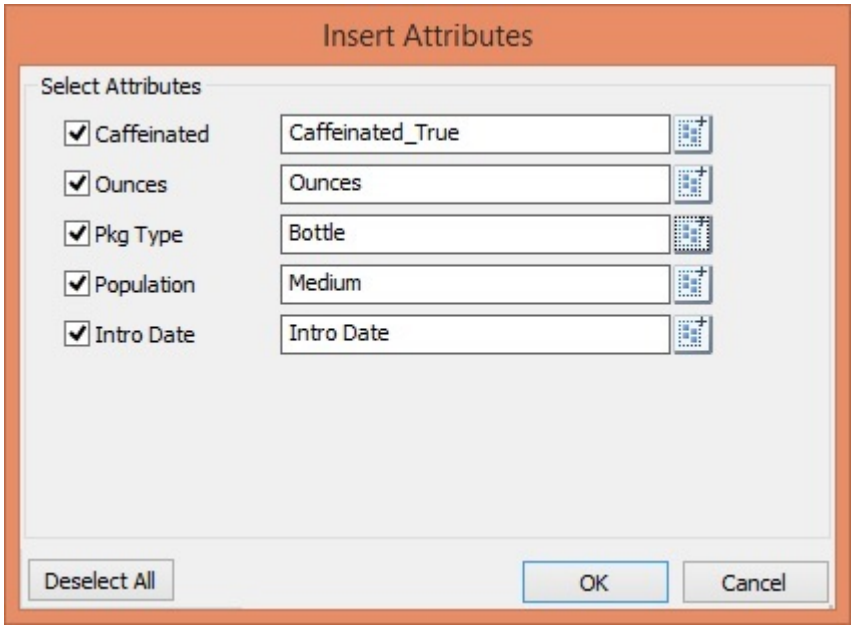

In Figure 3, notice that the attribute members Caffeinated_True, Bottle, and Medium, along with the Ounces and Intro Date attribute dimensions, have been added to the worksheet as page dimensions.

Figure 10-3 Ad Hoc Grid After Adding Attribute Members and Dimensions

	A	B	C	D	E	F	G	H	I
1		Product	Market	Scenario	Caffeinated_True	Ounces	Bottle	Medium	Intro Date
2		Measures							
3	Year	9758							

See also Guidelines on Inserting Attributes.

Guidelines on Inserting Attributes

Keep in mind the following guidelines when inserting attributes:

- If an attribute is already present on the grid, then it will not be available for selection in the **Insert Attributes** dialog box.
- The grid must be in refreshed state. If the grid is in free-form state prior to refresh, then Oracle Smart View for Office prompts you to manually refresh.
- When the attributes are inserted on the grid, the grid is automatically refreshed.
- **Oracle Essbase only:** If the POV toolbar is toggled off, and there is no page dimension row present in the sheet, then a page dimension row will be added to the top of the sheet when inserting the attribute dimensions.
- In the **Insert Attributes** dialog box:
  - You can select to insert the entire attribute dimension, or one attribute member from a dimension.
  - If a member name is left blank in the attribute text box, then that dimension is in a deselected state and will not be inserted.

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- If you have inserted a single attribute member using the **Insert Attributes** command and dialog box, you can use **Member Selection** to add other members from the same attribute dimension to the grid.
- The **Insert Attributes** operation is not supported for Query Designer or Smart Slice design sheets.
- **Insert Attributes** is not supported for multiple grid sheets.
- When filtering on attributes at the Generation 3 level in an attribute dimension, Smart View only displays members up to the Generation 2 level.

See also Inserting Attribute Dimensions on the Sheet--Example.

Preserving Excel Formulas in Ad Hoc Grids

You can associate Excel formulas with member and data cells in ad hoc grids and set cell styles to identify such cells.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting, Narrative Reporting

By default, formulas are preserved when you perform ad hoc operations, except for **Pivot** and **Undo**.

> **Note**
>
> - To achieve faster execution of queries, you can disable the preservation of formulas and comments. However, if you disable this option, formulas are overwritten when you perform ad hoc operations.
> - **Narrative Reporting:** Only **Refresh** operations are supported when **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)** is selected. Other ad hoc operations, such as **Zoom In** or **Keep Only**, are not supported.

See also:

- Cell Styles for information on setting cell styles for cells containing formulas
- Oracle Essbase: Preserving Excel Formulas Within and Outside of Essbase Ad Hoc Grids

To specify preservation of formulas in ad hoc grids:

1. From the Smart View ribbon, click **Options**, and then **Member Options** in the left panel.
2. Do one of the following:
   - To preserve formulas in ad hoc grids, select **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)**.
   - To disable preservation of formulas, clear **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)**. Do this only if you do not need to preserve formulas and you want faster execution of queries.

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> **Note**
>
> Although the **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)** option appears in **Member Options**, the selection you make applies to formulas in both member and data cells.

3. Click **OK**.

Preserving Excel Formulas Within and Outside of Essbase Ad Hoc Grids

Data source types: Oracle Essbase

Formulas Within the Grid

Starting in Oracle Smart View for Office 11.1.2.5.810, formulas will be retained in Oracle Essbase grids after performing **Undo** or **Redo**.

> **Note**
>
> Ensure that you have selected the **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)** option in the **Options** dialog, **Member Options** tab.

To retain the formulas, you must first perform a **Refresh** operation on the grid that contains formulas. The **Refresh** action adds the formulas to the undo buffer.

In some cases, an **Undo** doesn't work as expected after a zoom operation when formulas are outside of the grid. In this case, for more reliable formula preservation when performing **Undo** or **Redo** after a zoom operation, set up your grid as shown in Formulas Outside the Grid.

Formulas Outside the Grid

For smoother functioning of Essbase ad hoc analysis when formulas are present outside of the grid, as a best practice, Oracle recommends that you add a simple comment in any blank cell of the last column. The formula will be retained when you refresh the grid. The formula will be lost on pivots and undo.

> **Note**
>
> Ensure that you have selected the **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)** option in the **Options** dialog, **Member Options** tab.

In the example below, a formula is added to cell E4, outside of the grid. In order to preserve this formula during refreshes, a comment should be added to a blank cell in column E. In the example, the word "comment" is added to cell E1.

-	A	B	C	D	E	F
1			East		comment	

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-	A	B	C	D	E	F
2			Scenario			
3			Profit			
4	Cola	Qtr1	5789		=C4	
5						

The comment is needed especially if you are performing an active ad hoc analysis This helps Essbase and Smart View to keep the content lying outside the grid intact during refresh and other ad hoc operations such as **Zoom In** and **Zoom Out** or **Keep Only** and **Remove Only**. Without the comment, you may lose the formulas outside the grid when performing these ad hoc operations.

Formatting Ad Hoc Grids

You can use either Oracle Smart View for Office or Excel to control grid formatting.

Related Topics

- Using Smart View Formatting
  Oracle Smart View for Office formatting consists of formatting selections made in the **Cell Styles** and **Formatting** tabs of the **Options** dialog box.
- Using Excel Formatting

Using Smart View Formatting

Oracle Smart View for Office formatting consists of formatting selections made in the **Cell Styles** and **Formatting** tabs of the **Options** dialog box.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting, Profitability and Cost Management

To set Smart View formatting options:

1. From the Smart View ribbon, click **Options**.
2. From **Options**, to set cell styles, select **Cell Styles** in the left pane.

   Cell styles indicate certain types of member and data cells.

   See Cell Styles for more information.
3. To set other Smart View formatting options, select **Formatting** from the left pane (**Use Excel Formatting** on this page is not a Smart View formatting option).

   See Smart View Options for descriptions of options.
4. Click **OK.**

To apply Smart View formatting selections to data cells created by zooming:

1. From the grid, select a formatted data cell.
2. From the Essbase or Planning Ad Hoc ribbon, select **Preserve Format**.

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Using Excel Formatting

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Tax Reporting

If you use Excel formatting, your formatting selections, including conditional formatting, are applied and retained on the grid when you refresh or perform ad hoc operations.

When you use Excel formatting, Oracle Smart View for Office does not reformat cells based on your grid operations, and it does not mark cells as dirty when you change data values. Smart View does preserve the formatting on the worksheet between operations.

Using Excel formatting is generally preferable for highly formatted reports, and you must use Excel formatting for data sources whose application-specific colors are not supported by the Excel color palette.

To use Excel formatting on ad hoc grids:

1. From the Smart View ribbon, select **Options**.
2. From **Options**, select **Formatting** from the left pane.
3. Select **Use Excel Formatting.**
4. **Optional:** To copy parent cell formatting to zoomed-in cells, select **Move Formatting on Operations**.

   With this option selected, formatting also stays with members when you pivot.

   > **Note**
   >
   > Formatting can affect performance, especially during ad hoc operations when **Move formatting on operations** is enabled. For this reason, selection of this option does not persist when moving between sheets in a workbook or between sessions, and its selection cannot be saved. See the description of **Move formatting on operations** in Formatting Options for more information on using this option.

5. Click **OK.**

Example 10-1 Excel Formatting and Merged Cells

To *preserve* the merged cell formatting during ad hoc operations (except Pivot and Undo), you must select both **Use Excel Formatting** and **Preserve Formulas and Comments in ad hoc operations** options.

To *replicate* merged cell formatting during ad hoc operations (except Pivot), you must select all of **Use Excel Formatting**, **Preserve Formulas and Comments in ad hoc operations**, and **Formula Fill** options.

Example 10-2 Excel Formatting and Member Indentation

With the **Use Excel Formatting** option selected, and the **Member Indentation** option set to **None**, row members retain their indentation. The loss of indentation applies only to column members.

Note that the **Indentation** option applies only to ad hoc sheets; it does not apply to forms. See "Indentation" in the table in Member Options.

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Enabling Attribute Association Processing in Ad Hoc Grids

Attribute association processing allows Essbase cells at intersections associated with attributes to display the value specified for the **#Invalid/Meaningless** option.

When you select **Enable Attribute Association Processing**, the attribute intersection cells that are called out have no association with the base dimension. In some cases, these cells may be varying attributes.

By default, the **Enable Attribute Association Processing** option is cleared. When cleared, the data values of attribute cells having no association to the base dimension are displayed as #Missing, instead of displaying the value specified in **#Invalid/Meaningless**.

> **Note**
>
> When the **Enable Attribute Association Processing** option is selected, ad hoc query performance may be slower.

For example, suppose you create an ad hoc grid showing sales in bottles for all products in the Product dimension. For Cola and Diet Cola, bottles are not available, but bottles are available for all the other products in the Product dimension. In this case, the attribute Bottle has no association with Cola or Diet Cola.

With the **Enable Attribute Association Processing** option selected, cells for Cola and Diet Cola sales in bottles would display #Invalid by default, as shown in Figure 1. Note that you could define your own label for these cells.

Figure 10-4 Ad Hoc Grid with Enable Attribute Association Processing Selected

	A	B	C	D	E
1			Jan	New York	Actual
2			Sales		
3	Cola	Bottle	#Invalid		
4	Diet Cola	Bottle	#Invalid		
5	Caffeine Free Cola	Bottle	1		
6	Old Fashioned	Bottle	1		
7	Diet Root Beer	Bottle	#Missing		
8	Sasparilla	Bottle	#Missing		
9	Birch Beer	Bottle	1		
10					

Clear the **Enable Attribute Association Processing** option, and cells at those same intersections, where the attribute is not associated with the base dimension, would display as #Missing, as shown in Figure 2. In this case, you do not know which attribute cells are actually missing data, and which attribute cells have no association with the base dimension and, therefore, would never contain data.

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Figure 10-5 Ad Hoc Grid with Enable Attribute Association Processing Option Cleared

	A	B	C	D	E
1			Jan	New York	Actual
2			Sales		
3	Cola	Bottle	#Missing		
4	Diet Cola	Bottle	#Missing		
5	Caffeine Free Cola	Bottle	1		
6	Old Fashioned	Bottle	1		
7	Diet Root Beer	Bottle	#Missing		
8	Sasparilla	Bottle	#Missing		
9	Birch Beer	Bottle	1		

To enable attribute data cells that have no association with the base dimension to display the label defined in **#Invalid/Meaningless**:

1. From the Smart View ribbon, select **Options**, and then select **Data Options**.
2. In the **Replacement** section:
   - Select **Enable Attribute Association Processing**.
   - For the **#Invalid/Meaningless** option, select **#Invalid** or specify a label to display in attribute cells that are not associated with the base dimension.
3. Run the ad hoc query and note the cells containing the value you specified for **#Invalid/Meaningless**; these are the attribute cells that are not associated with the base dimension.

Zooming In and Out

Zoom in on members in the grid to display data for their children and descendants.

Related Topics

- About Zooming In and Out
- Zooming In
- Zooming Out
- Setting a Default Zoom Level
- Selecting Members to Display when Zooming
- Enabling Zoom on Double-Click
- Zooming and Formatting
- Zooming Operations in Cells that Contain Formulas

About Zooming In and Out

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Profitability and Cost Management, Tax Reporting

You can zoom in on members in the grid to display data for their children and descendents.

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> **Note**
>
> Zoom In and Zoom Out operations are not supported in these cases:
>
> - On member formula cells when connected to an aggregate storage database.
>
> Zoom operations on member formula cells are supported only when connected to a block storage database.
> - On views inserted from Oracle Analytics Cloud data sources.

Oracle Essbase; and Oracle Fusion Cloud Enterprise Performance Management Standard-mode applications, such as Planning: You can zoom in to display data for members of the same level, same generation, or sibling level as the selected member.

Essbase: You can zoom in to display data for members that are defined by the formula of the selected member when connected to block storage databases.

> **Note**
>
> In the Zooming In and Out topics, references to Cloud EPM Standard-mode applications apply to these business processes: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, and Tax Reporting. In a Cloud EPM Standard-mode application, the business process application setting, **Smart View Ad Hoc Behavior**, has been set to **Standard**.

Related Topics:

Zooming In

Zooming Out

Setting a Default Zoom Level

Selecting Members to Display when Zooming

Zooming and Formatting

Enabling Zoom on Double-Click

Zooming In

You can zoom in on one cell at a time.

You can also zoom in on a range of cells when connected to these data sources: Oracle Essbase, Narrative Reporting, and Oracle Fusion Cloud Enterprise Performance Management Standard-mode applications.

Zooming in on multiple cells, especially on all levels, results in a large number of cells being selected. If the data suppression options like suppress rows with no data or missing values are not enabled, it may lead to insufficient memory and failure to load worksheets while zooming in. To prevent this issue, a governor limit for the number of selected cells is set. It works in the following ways:

- If the number of selected cells is within the threshold, then the zoom in operation happens successfully, without any performance issues like out of memory and worksheet loading failures.

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- If the number of selected cells exceeds the threshold, then a warning message informs users about the inability to load data as the number of cells before suppression exceeded the threshold. You can reduce your cell selection range to proceed with the zoom in operation.

Related Topics

- Zooming in to a Selected Level
- Zooming in to the Default Level
- Zooming in on Shared Members in Cloud EPM

Zooming in to a Selected Level

To zoom in to a selected level:

1. Select a member.

   You can select a range of members when connected to these data sources: Oracle Essbase, Narrative Reporting, and Oracle Fusion Cloud Enterprise Performance Management Standard-mode applications, such as Planning.

2. From the data source ribbon, click the down arrow next to **Zoom In**, and then select one of the following options.

   - **Next Level**—To retrieve data for the children of the selected members
   - **All Levels**—To retrieve data for all descendants of the selected members
   - **Bottom Level**—To retrieve data for the lowest level of members in a dimension

   These Zoom In options are available for Essbase; and Cloud EPM Standard-mode applications, such as Planning, only:

   - **Same Level**—To retrieve data for all members at the same level as the selected member
   - **Sibling Level**—To retrieve data for the siblings of the selected members
   - **Same Generation**—To retrieve data for all members of the same generation as the selected members
   - **Formulas**—To retrieve data for all members that are defined by the formula of the selected member. The formula can be a member equation or a consolidation to the parent.

     Formulas applies to Essbase only.

   > **Note**
   >
   > When you zoom in on a page dimension, the page dimension is pivoted to a row dimension.

Related Topics:

- Zooming Out
- Setting a Default Zoom Level
- Enabling Zoom on Double-Click
- Zooming Operations in Cells that Contain Formulas

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Zooming in to the Default Level

To zoom in to the default zoom level, do one of the following:

- Select a member, and then click **Zoom In** on the data source ribbon.

  You can select a range of members when connected to these data sources: Oracle Essbase, Narrative Reporting, and Oracle Fusion Cloud Enterprise Performance Management Standard-mode applications, such as Planning.

  To specify a default zoom level, see Setting a Default Zoom Level.

- Double-click a member.

  Double-click zooming must be enabled; see Enabling Zoom on Double-Click.

Zooming in on Shared Members in Cloud EPM

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Tax Reporting

In 16.12 and earlier, Oracle Fusion Cloud Enterprise Performance Management did not support shared members. When a member was placed on an ad hoc grid, it was always considered a base member, even if it was supposed to be a shared member.

Cloud EPM 17.01+ supports shared members in ad hoc grids and recognizes whether a member is a base member or a shared member. If your administrator enables the application setting, **Allow drill down on shared members in ad hoc**, then zooming in on shared members is supported in Oracle Smart View for Office (17.04+). In this case, zooming in on shared members is effectively the same as zooming in on the corresponding base members. You can zoom in on shared members one level at time.

If your administrator enables the application setting, **Drill to All Levels in Base** (21.09+), and you're working with a Standard mode application, you can zoom in beyond just the shared members into all levels or only the bottoms levels within the base hierarchy using the Zoom In options, **All Levels** and **Bottom Level**.

> **Note**
>
> When the **Drill to All Levels in Base** check box is enabled in the application, then the multi-member zoom feature is not supported.

See these topics for shared member zoom example scenarios:

- Example: Shared Member Zoom In and Suppression
- Example: Shared Member Zoom In to All Levels or to Bottom Level

Example: Shared Member Zoom In and Suppression

This example describes the results you will see when your application is set to Standard mode, **Allow drill down on shared members in ad hoc** is set to **Yes**, and **Drill to All Levels in Base** is enabled, and what happens when you enable and disable the suppression options in Smart View,

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In Smart View, users are not able to zoom in to the bottom member of a hierarchy when the **No Data / Missing** option in **Suppress Rows** and **Suppress Columns** is selected, and there is data in the level zero member combination for shared members.

For example:

Entity 10 (base member)
  Entity_10.1

Entity 14
  [entity_14].[entity_10] (shared member)

When suppression options are disabled in Smart View, zoom in works as expected.

When suppression options are enabled in Smart View, zoom in is not supported because recursively querying the database is not supported. Entity_10.1 is missing. The result is shown below:

Entity_14
  [entity_14].[entity_10]

Cloud EPM business processes require that the Smart View suppression options are disabled in order to work correctly when zooming in to a shared member at level 0 of a hierarchy.

Example: Shared Member Zoom In to All Levels or to Bottom Level

This example describes the results you will see when your application is set to Standard mode, **Allow drill down on shared members in ad hoc** is set to **Yes**, and **Drill to All Levels in Base** is enabled.

Figure 1 shows three hierarchies under the Entity dimension. In the entity_10 hierarchy, all members descend from entity_10. In the entity_12 hierarchy, all members descend from entity_12. In the entity_14 hierarchy, there are descendent members of entity_14 as well as the shared members, entity_10 and entity_12. The shared members include their descendents.

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Figure 10-6 Entity Dimension Showing Its Hierarchies

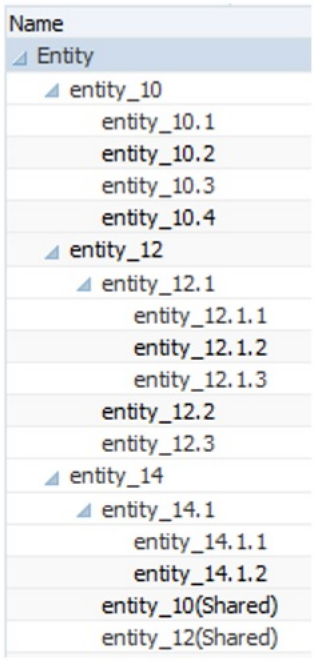
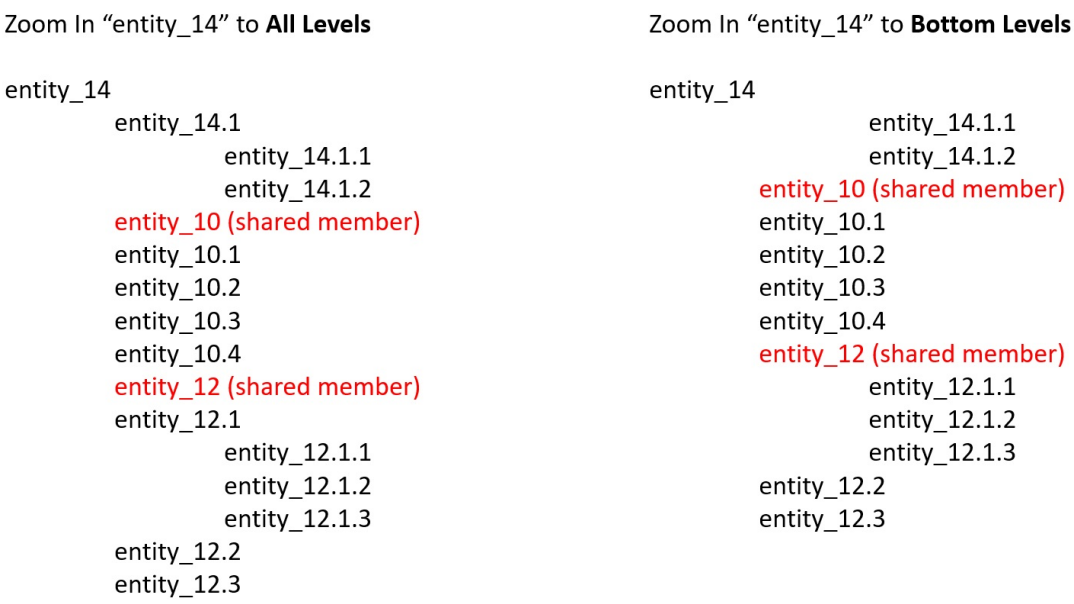


Figure 2 shows the difference between zooming in on entity_14:

- Using the **Zoom In to All Levels** command
- Using the **Zoom In to Bottom Levels** command

In both cases, in Smart View, **Member Options**, **Ancestor Position** is set to **Top**.

Figure 10-7 Results of Zooming in on entity_14, with Ancestor Position=Top



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> **Note**
>
> In a Native mode application, you can achieve the results shown in the **Zoom In to All Levels** example, if **Allow drill down on shared members in ad hoc** set to **Yes**, and **Drill to All Levels in Base** disabled; however, you will need to zoom in one level at a time on the shared members till you reach the bottom level of each hierarchy. You will not be able to zoom in directly to the bottom level of the shared members.

Zooming Out

Zooming out collapses the view to the next upper level.

To zoom out:

1. Select a member.

   You can select a range of members when connected to these data sources: Oracle Essbase, Narrative Reporting, and Oracle Fusion Cloud Enterprise Performance Management Standard-mode applications, such as Planning.

2. From the data source ribbon, click **Zoom Out**.

Related Topics:

- Zooming In
- Setting a Default Zoom Level
- Enabling Zoom on Double-Click
- Zooming Operations in Cells that Contain Formulas

Setting a Default Zoom Level

You can specify a default level for zooming operations. This setting applies to the **Zoom In** button and to double-click zooming if it is enabled (see Enabling Zoom on Double-Click).

To set a **Zoom In** default level:

1. From the Smart View ribbon, select **Options**, and then select **Member Options** in the left panel.
2. From the **Zoom In Level** drop-down menu, select one of the following levels:
   - **Next Level** to retrieve data for the children of the selected members
   - **All Levels** to retrieve data for all descendants of the selected members
   - **Bottom Level** to retrieve data for the lowest level of members in a dimension

   These Zoom In options are available for Oracle Essbase; and Oracle Fusion Cloud Enterprise Performance Management Standard-mode applications, such as Planning:

   - **Same Level** to retrieve data for all members at the same level as the selected member
   - **Sibling Level** to retrieve data for the siblings of the selected members
   - **Same Generation** to retrieve data for all members of the same generation as the selected members

   This Zoom In option is available for Essbase:

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Formulas to retrieve data for all members that are defined by the formula of the selected member. The formula can be a member equation or a consolidation to the parent.

3. Click **OK**.

Related Topics:

- Zooming In
- Zooming Out
- Enabling Zoom on Double-Click

Selecting Members to Display when Zooming

You can set options to specify which members are retained and displayed as you zoom in and out.

To set member display options for zooming:

1. From the Smart View ribbon, select **Options**, and then select **Member Options** in the left panel.
2. Under **Member Retention**, select:
   - **Include Selection** to display both the selected member and the members retrieved as a result of zooming. For example, zooming in on the selected member Qtr1 retrieves data for Jan, Feb, Mar, and Qtr1. If not selected, only the members retrieved as a result of the zoom are displayed: Jan, Feb, and Mar.
   - **Within Selected Group** to zoom in only on the selected group of cells, leaving the unselected cells as is. This setting is meaningful only when there are two or more dimensions down the grid as rows or across the grid as columns. (This setting also applies to **Keep Only** and **Remove Only**.)
   - **Remove Unselected Groups** to remove all dimensions and members *except* the selected member and the members retrieved as a result of zooming.
3. Click **OK**.

Enabling Zoom on Double-Click

In Oracle Smart View for Office, if double-clicking for ad hoc operations is enabled, you can zoom in to the default zoom level and zoom out by double-clicking in a member cell.

To enable double-clicking for zooming:

1. From the Smart View ribbon, select **Options**, and then select **Advanced** in the left panel.
2. Under **Mode**, select **Double-click for Operations**.

   If you do not select **Double-click for Operations**, then double-clicking retains Excel functionality and puts the cell into edit mode.
3. Click **OK**.

> **Note**
>
> In blank worksheets, double-clicking the first time retrieves the default grid and thereafter zooms in or out.

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Related Topics:

- Zooming In
- Zooming Out
- Setting a Default Zoom Level
- Zooming Operations in Cells that Contain Formulas

Zooming and Formatting

You can apply the formatting of the cell that you zoom in on to the cells that are created by zooming. For Oracle Smart View for Office formatting, this ability applies to data cells. For Excel formatting, this ability applies to member cells.

Excel Formatting

To apply Excel formatting selections to member cells created by zooming, from the Smart View ribbon, select **Options**. Then select all these options:

- From the **Formatting** page, select these options:
  - **Use Excel Formatting**
  - **Move Formatting on Operations**
- From the **Member Options** page, select **Preserve Formulas and Comments in ad hoc operations (except Pivot)**

Zooming Operations in Cells that Contain Formulas

Data source types: Oracle Essbase

If member or data cells are associated with formulas, you can propagate these formulas to the cells retrieved as a result of zooming in. For example, if member Qtr1 is associated with a formula, then the formula can be propagated to Jan, Feb, and Mar when you zoom in on Qtr1.

To propagate formulas:

1. From the Smart View ribbon, click **Options**, and then select **Member Options** in the left panel.
2. Under **Comments and Formulas**, ensure that **Preserve Formulas and Comments in ad hoc operations (except pivot)** is selected.
3. Select **Formula Fill**.

> **Note**
>
> - With the **Formula Fill** option enabled, some zoom operations may be time consuming. For example, a zoom in to the bottom level of a large hierarchy (described in Zooming in to a Selected Level) may take a long time to complete.
> - Although these options—**Preserve Formulas and Comments in ad hoc operations (except pivot)** and **Formula Fill**—appear in **Member Options**, they apply to formulas in both member and data cells.

4. Click **OK**.

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Related Topics:

- Zooming In
- Zooming Out
- Setting a Default Zoom Level
- Enabling Zoom on Double-Click

Specifying Ancestor Position in Ad Hoc Grids

Use the **Ancestor Position** option to specify the ancestor position for hierarchies as **Top** or **Bottom**. The **Ancestor Position** option is located in the **Member Options** tab of the **Options** dialog.

Data source types: Oracle Essbase, Planning Ad Hoc, Planning Modules Ad Hoc, Enterprise Profitability and Cost Management, Financial Consolidation and Close Ad Hoc, FreeForm, Tax Reporting Ad Hoc

> **Note**
>
> Essbase only: The ancestor position is set in the application by your Essbase administrator. By default, the ancestor position is set to **Bottom**. To set the ancestor position to **Top**, an administrator must set the application config setting, SSANCESTORONTOP, to True.
>
> - Users: See the example grids in Zoom in Results Selecting Ancestor Position - Top and Zoom in Results Selecting Ancestor Position - Bottom.
> - Administrators: To set this option, see SSANCESTORONTOP.

To specify the ancestor position for hierarchies in ad hoc grids:

1. Connect to your database.

   For example, in Planning, you may connect to a cube or a form that is enabled for ad hoc. In Essbase, you connect to an application and database.
2. In the Smart View ribbon, select **Options**, and then select **Member Options**.
3. In **Ancestor Position**, select **Top** or **Bottom**.

   The default is **Bottom**.
4. Click **OK** to close the **Options** dialog.
5. Perform an ad hoc analysis by selecting the **Ad hoc analysis** option in the Action Panel.
6. Perform a zoom-in on a dimension or member and check the result.

   For example:

   - If you select **Top**, the resulting hierarchy layout should resemble the layout shown in Figure 1.
   - If you select **Bottom**, the resulting hierarchy layout should resemble the layout shown in Figure 2.
7. Continue ad hoc operations, such as zoom-in and pivoting.

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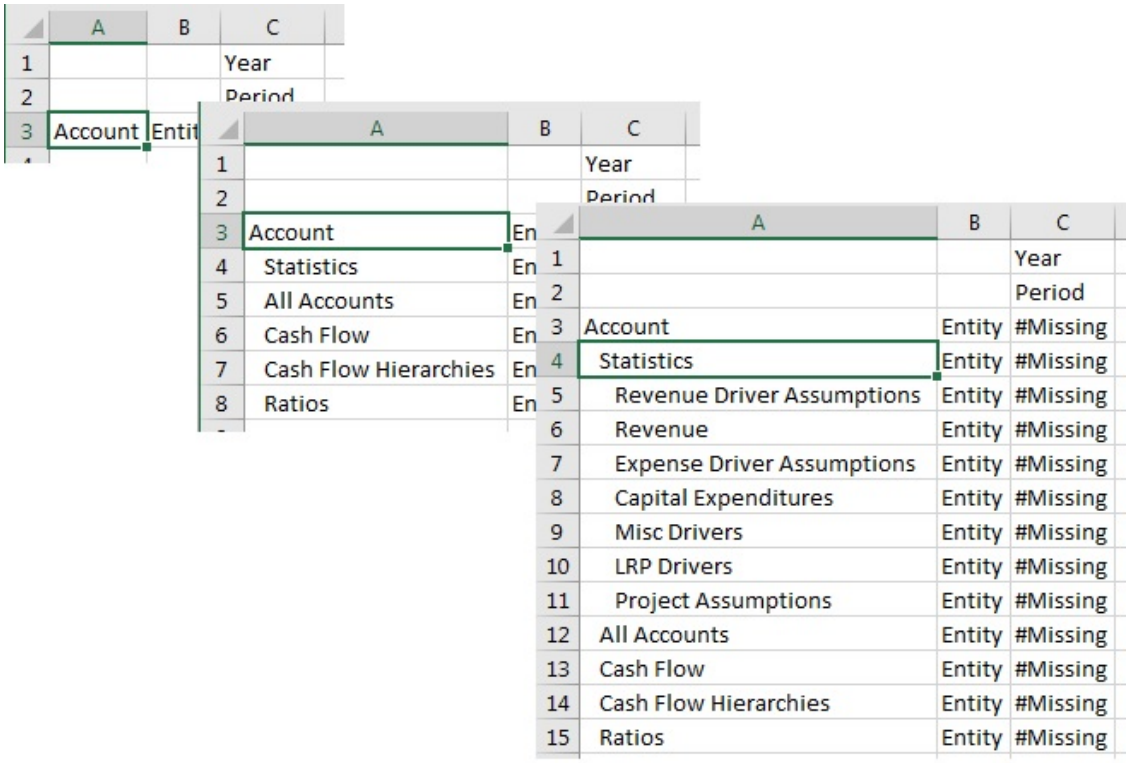
> **Note**
>
> - Changing the **Ancestor Position** setting has no effect on the dimension and member layout in an existing grid. You will only see the change when you perform a zoom-in operation.
> - In an existing grid, or in the middle of a series of ad hoc analysis operations, changing **Ancestor Position** option (from **Bottom** to **Top** or from **Top** to **Bottom**) can result in non-uniform hierarchy display in the grid.

Example 10-3 Zoom in Results Selecting Ancestor Position - Top

In this example, we zoom in on the Account dimension. After zooming in, the Account ancestor is shown at the top of its children members. Next, we zoom in on Statistics. After zooming in, the Statistics ancestor is shown at the top of its children members.

Figure 10-8 Zooming In with Ancestor Position Set to Top



Example 10-4 Zoom in Results Selecting Ancestor Position - Bottom

In this example, we zoom in on the Account dimension. After zooming in, the Account ancestor is shown at the bottom of its children members. Next, we zoom in on Statistics. After zooming in, the Statistics ancestor is shown at the bottom of its children members.

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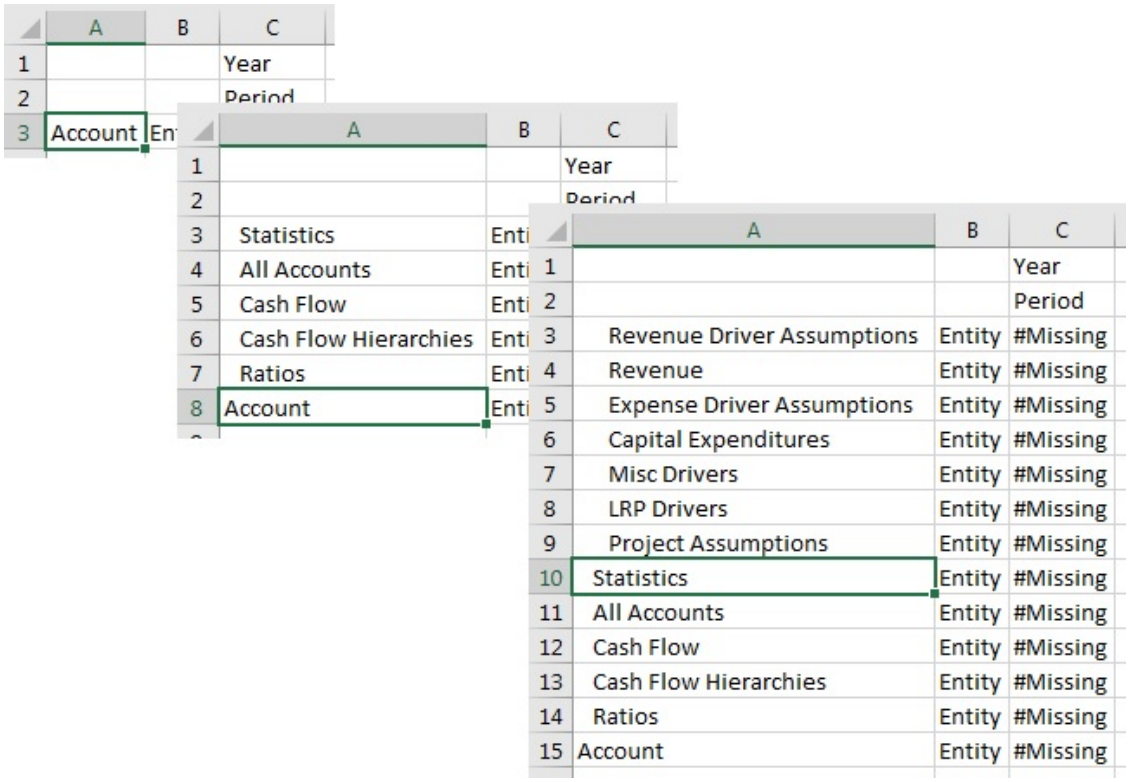
Figure 10-9 Zooming In with Ancestor Position Set to Bottom



Working with Excel Filters on Ad Hoc Sheets

Excel filters are retained when performing ad hoc in cases where the ad hoc operation results in the same set of column dimensions.

Data source types: All supported Oracle Smart View for Office providers, cloud and on-premises, ad hoc only

For example, set filters on the members of the Measures dimension as follows:

	A	B	C	D	E	F
1		Product	Market	Scenario		
2		Profit | Lo	Profi	Invento	Ratios	Measur
3	Year	8002	69896	115304	54.41338754	8002

If you zoom in on the row dimension, Year, the result set retains the Excel filters that were set in the column dimensions because the column dimensions and members didn't change.

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	A	B	C	D	E	F
1		Product	Market	Scenario		
2		Profit|Lo	Profi	Invento	Ratios	Measur
3	Qtr1	8002	16549	115304	54.53095513	8002
4	Qtr2	0	17945	130727	54.4949209	0
5	Qtr3	0	17927	170190	53.91647995	0
6	Qtr4	#Missing	17475	184980	54.73926891	#Missing
7	Year	8002	69896	115304	54.41338754	8002

However, if you zoom in on a column dimension member, such as Inventory, the set of columns in the result set changes, causing you to lose the Excel filters.

	A	B	C	D	E	F	G	H	I
1		Product	Market	Scenario					
2		Profit|Loss	Profit	Opening Inventory	Additions	Ending Inventory	Inventory	Ratios	Measures
3	Year	8002	69896	115304	429774	203447	115304	54.41338754	8002

Guidelines

- Excel filters are retained for most ad hoc operations, such as Zoom In, Zoom Out, Remove Only, and Keep Only, Undo, and Redo, as long as the same set of column dimensions appear in the result set.
- Excel filters are also retained after a Submit or a Refresh.
- Excel filters are not retained for Pivot or Pivot to POV operations.
- Excel filter retention is not supported on multiple-grid sheets. For example, after creating filters in one grid, then moving to a second grid and creating filters on it, the filters on the first grid will be lost.

  However, there may be some cases where the filters are retained. For example, if two adjacent grids both start on the same row, then the filters may be retained. Because of these variations, Oracle cannot assure that Excel filters will be retained on multiple-grid sheets.
- Excel grouping is expanded in two cases:
  - Filters are used. In this case, grouping is expanded on rows.
  - **Adjust Column Width and Row Height** is checked (**Options** dialog, **Formatting** tab)

  To preserve Excel grouping, do not use filters or the **Adjust Column Width and Row Height** option. The Excel grouping expanded/collapsed state cannot be restored programmatically, and Excel automatically expands everything if filtering is applied or the row height/column width is automatically adjusted.

Pivoting

Pivoting changes the orientation of the data on the worksheet. You can move dimensions between rows and columns and between the grid and the POV.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Tax Reporting

Additionally:

- One or more dimensions can be pivoted from the grid to the POV toolbar.

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- One dimension at a time can be pivoted from the POV toolbar to the grid.
- A single dimension, and even zero dimensions, can remain on the POV toolbar.
- You can select only one dimension or one member at a time to pivot between rows and columns on the sheet. In cases where multiple members from the same dimension are on the grid, then all members in the dimension will be pivoted.
- When you pivot a member from the grid to the POV, the member selected on the grid becomes the POV for that dimension. For example, if pivot Qtr2 of the Year dimension from the grid to the POV, then Qtr2 becomes the POV for the Year dimension.

Pivoting Dimensions Between Rows and Columns

You can pivot a dimension or members between rows and columns. There must be two or more dimensions, or members from two or more dimensions, in the row or column that contains the dimension that you want to pivot. That is, you cannot pivot the last row dimension or the last column dimension on a grid.

When you pivot a member, the other members in its dimension are also pivoted.

When you pivot between rows and columns, Oracle Smart View for Office moves the selected dimension to the outermost row or column on the opposite axis. For example, when you select to pivot a dimension to a row, the system moves the dimension to the top of the grid.

> **Note**
>
> When the **Use Excel Formatting** option is selected (as described in Using Excel Formatting), member and numeric formats may unexpectedly change after pivot operations. For example, member names may be centered and numeric values may be left justified. You can reset the grid to the proper format using the Excel formatting options.

To pivot a dimension or member:

1. Select a dimension or member.
2. From the data source ribbon, click **Pivot**.

   Alternatively, you can drag a dimension from the row or column and drop it on the target row or column.

   Row dimensions are pivoted to the topmost column dimension.

   Column dimensions are pivoted to the left-most row dimension.

> **Note**
>
> You pivot members by selecting them from the POV, as described in Selecting Members from the POV Toolbar.

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Pivoting Dimensions Between the Grid and the POV Toolbar

You can select to pivot a dimension out of the ad hoc grid to the Point of View (POV), or out of the POV to the grid. You can also pivot a member; if you do so, the other members in its dimension are also pivoted.

To pivot a dimension or members between the POV toolbar and the grid, perform one of the following tasks:

- To pivot a dimension *to* the POV, select the dimension in the grid. In the provider ribbon, click the arrow in the **Pivot** button,

, and then select **Pivot to POV**.

  Alternatively, right-click a dimension and drag it from the grid and drop it on the POV toolbar.

  You can also pivot a member. Select one member only; you do not need to select multiple members. Selecting one member pivots all members in the dimension.
- To pivot a dimension *from* the POV to the grid, right click the arrow next to the dimension name in the POV toolbar, then drag the dimension and drop it on the grid.

Example 10-5 Pivoting Notes

- You can leave any number of dimensions on the POV; for example, 0, 1, or more dimensions can be left on the POV.
- After pivoting the last dimension from the POV toolbar to the grid, the POV toolbar is hidden. You can always bring it back by clicking the POV button in the provider ribbon.
- The grid must always contain at least two dimensions: one row dimension and one column dimensions. When there is only one row dimension and one column dimension on a grid, you must first pivot the replacement dimension on to the grid before you can pivot a dimension out of the grid.

  For example, if you want to pivot the row dimension off of the grid, then you must first pivot the replacement row dimension on to the grid, and then pivot the unwanted row dimension off of the grid.
- You can manually type a dimension or member name to replace a dimension or member name in the grid or the POV toolbar.

  Similarly, you can delete a dimension or member from the grid, refresh the grid, and the deleted dimension or member is moved from the grid and will display on the POV toolbar.
- You can pivot members by selecting them from the POV, as described in Selecting Members from the POV Toolbar.

Removing Selected Members From the Grid

You can remove members and their associated data from the grid.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Tax Reporting

Keep Only and **Remove Only** operate on all instances of the selected members in the grid within the selected group.

To remove members from the grid, use the **Remove Only** or **Keep Only** command:

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- Select the member cells that you want to remove. Then, from the data source ribbon, click **Remove Only**. All selected members in the dimension are removed.
- Select the member cells that you want to keep. Then, from the data source ribbon, click **Keep Only**. All other members in the dimension are removed.

Example of Keep Only and Remove Only

The results of **Keep Only** and **Remove Only** depend on how the selected group is evaluated within the grid. A group consists of two or more dimensions down the grid as rows or across the grid as columns.

To use the **Keep Only** or **Remove Only** command, the selected member must have a group of members associated with it. Members do not have to be from the same dimension to be considered a group. The selected member shouldn't be the lowest or last member of the group.

For example, in Figure 1, you could think of New York, Florida, Connecticut, and New Hampshire as individual groups that all contain the January member. We want to keep the data for January for those four states. Yet, when we select Jan, and then click **Keep Only**, the grid doesn't change. This is because Jan is not its own group, it's actually a member of a group originating with the Market dimension, and also belongs to the New York, Florida, Connecticut, and New Hampshire groups.

Figure 10-10 Grid with Market Members in Column A, Year Members in Column B

	A	B	C	D
1			Product	Scenario
2			Measures	
3	New York	Jan	8722	
4	Florida	Jan	336	
5	Connecticut	Jan	321	
6	New Hampshire	Jan	44	
7	West	Feb	2394	
8	South	Year	13238	
9	Central	Year	38262	
10	Market	Year	213522	
11				

Try moving Jan to reposition it so that Jan is now a group, and the members New York, Florida, Connecticut, and New Hampshire belong to the Jan group, as shown in Figure 2

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Figure 10-11 Grid with Year Members in Column A, Market Members in Column B

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	
11	Feb	New York	99955	
12	Feb	Florida	361	
13	Feb	Connecticut	309	
14	Feb	New Hampshire	74	
15	Feb	West	2394	
16	Feb	South	1046	
17	Feb	Central	3063	
18	Feb	Market	107700	
19	Year	New York	116202	
20	Year	Florida	5029	
21	Year	Connecticut	3093	
22	Year	New Hampshire	1125	
23	Year	West	29861	
24	Year	South	13238	
25	Year	Central	38262	
26	Year	Market	213522	

Now select a Jan cell and click **Keep Only**. The resulting layout shows only the Market dimension members grouped under Jan.

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Figure 10-12 Grid with Only Jan Group Members

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	

You can further refine the report to show only the New York, Florida, Connecticut, and New Hampshire members. Select those members in the grid (see Figure 4).

Figure 10-13 Members Selected for Keep Only

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	

And then click **Keep Only**. The result is shown in Figure 5.

Figure 10-14 Grid with Only Jan Group Members New York, Florida, Connecticut, and New Hampshire

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	

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Note that you can also achieve the result in Figure 5 in another way. Select the West, South and Central members, and the Market dimension, as shown in Figure 6.

Figure 10-15 Members Selected for Remove Only

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	

And then click **Remove Only**.

Figure 10-16 Grid with Only Jan Group Members New York, Florida, Connecticut, and New Hampshire

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	

Remember that the **Keep Only** and **Remove Only** commands are always performed on the selected groups, evaluated within the grid.

Refreshing Ad Hoc Grids in Saved Worksheets

You can refresh saved worksheets or workbooks while retaining the updates done to ad hoc grids outside Oracle Smart View for Office or by using Smart View Admin Extension version 23.210 or earlier.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

In Smart View Options, the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box, when selected, helps retain data when ad hoc grids (Cloud EPM Standard mode or Essbase) in saved worksheets are refreshed in Smart View.

This option is useful in the following scenarios:

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- **Data modified outside Smart View:**

  Often, users who do not have Smart View installed in their Office applications, update data in saved sheets and send them to users having Smart View, who then refresh and submit the updated data back in their data sources. When a sheet containing ad hoc grid (Cloud EPM Standard mode or Essbase) is modified outside Smart View, that is updated and saved in Microsoft Excel without installing Smart View, and then refreshed in Smart View, the updates are retained as is if the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box is selected in Smart View Options.

  For example, a non-Smart View user modifies the year from 2020 to 2023 in the saved sheet. When you, as a Smart View user, open the saved sheet in Smart View and refresh it, the sheet is refreshed with the data values of 2023, instead of reverting back to 2020.

- **Dimension sheets updated using Smart View Admin Extension version 23.210 or earlier:**

  When dimension sheets or workbooks, that were updated using the older versions of Smart View Admin Extension version 23.210 and earlier, were refreshed in the later versions, the updates would be lost and certain display issues were observed. Selecting the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box before refreshing such saved dimension workbooks ensures that the updated data is retained without any issues.

- **Formulas localized in different languages:**

  Excel automatically translates localized formulas as per the locale of the Office where the Excel sheet is opened. For example, VLOOKUP in English is translated as BUSCARV in Spanish. When a saved ad hoc sheet containing formulas in different languages is refreshed in Smart View, the translated formula may not resolve properly sometimes. Selecting the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box before refreshing such sheets helps in resolving localized formulas correctly.

The **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box is present in the Smart View Options dialog, in the **Advanced** tab under the **Compatibility** section. It is selected by default. So the updates in your saved sheets will be retained on refresh.

> **Note**
>
> When the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box is selected, sheets with very large ad hoc grids may sometimes display performance issues or slowness during refresh. To improve performance of such large grids, deselect the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box.

Inserting Rows and Columns

In ad hoc grids, you can insert calculating and non-calculating columns and rows within or outside the grid.

Data source types: Oracle Essbase

Inserted rows and columns, which may contain formulas, text, or Excel comments, are retained when you refresh or zoom in.

Always refresh the grid before inserting rows or columns.

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Displaying and Suppressing Repeated Members

If you have stacked dimensions in an ad hoc grid, you can display or suppress repeated members.

Data source types: Oracle Essbase

This topic describes using the **Repeated Members** option in the **Options** dialog box, **Data Options** tab, **Suppress Rows** group. This option only applies to Oracle Essbase data sources. To use the other data suppress options in the **Suppress Rows** and the **Suppress Columns** group, see Data Options.

When working with stacked dimensions in an ad hoc grid, and the **Suppress Repeated Members** option is selected, Essbase positions the suppressed member label above the labels in the next row, up to the first column dimension, using the "proximity rule". With the proximity rule, when repeated members are suppressed, Essbase compares the stacked dimensions row by row. It groups the non-repeating, unsuppressed members under the closest suppressed member in the previous row. Essbase can then determine which member is being queried and retrieves the data accordingly.

The scenario that follows shows the proximity rule in action.

Using the Sample Basic database, select the **Ad hoc analysis** option. The Measures, Product, Market, Scenario, and Year dimensions are retrieved on the worksheet as shown in Figure 1.

Figure 10-17 Sample Basic Initial Ad Hoc Analysis Grid

	A	B	C	D
1		Product	Market	Scenario
2		Measures		
3	Year	105522		

Arrange the dimensions so that there are three "stacked" dimensions and two dimensions side by side, according to Figure 2.

Figure 10-18 Sample Basic Grid with Dimensions Arranged in a Stacked Configuration

	A	B	C
1			Measures
2			Market
3			Scenario
4	Product	Year	105522

By default, in the **Data** tab of the **Options** dialog box, the **Repeated Members** option in the **Suppress Rows** group is cleared. Zoom in on the Product and Year members, then zoom in on the Market and Scenario dimensions. The resulting grid looks similar to Figure 3.

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Figure 10-19 Zooming in on the Dimensions in the Grid Before Selecting the Repeated Members Option

	A	B	C	D	E	F	G	H	I	J	K	L
1			Measures	Measures	Measures	Measures	Measures	Measures	Measures	Measures	Measures	Measures
2			East	East	East	East	East	West	West	West	West	West
3			Actual	Budget	Variance	Variance %	Scenario	Actual	Budget	Variance	Variance %	Scenario
4	Colas	Year	12656	13150	-494	-3.756653992	12656	3549	8890	-5341	-60.07874016	3549
5	Root Beer	Year	2534	4360	-1826	-41.88073394	2534	9727	10950	-1223	-11.16894977	9727
6	Cream Soda	Year	2627	2970	-343	-11.54882155	2627	10731	11670	-939	-8.046272494	10731
7	Fruit Soda	Year	6344	7910	-1566	-19.7977244	6344	5854	5670	184	3.245149912	5854
8	Diet Drinks	Year	2408	2730	-322	-11.79487179	2408	8087	10570	-2483	-23.4910123	8087
9	Product	Year	24161	28390	-4229	-14.89609017	24161	29861	37180	-7319	-19.68531469	29861

> **Note**
>
> For ease of reading, the South and Central members were removed from the grid in Figure 3 and Figure 4.

Now, from the Smart View ribbon, select **Options**, then select the **Data** tab. In the **Suppress Rows** group, select the **Repeated Members** options. Then refresh the sheet. The resulting grid looks similar to Figure 4. For each of the column dimensions in rows 1 and 2, where there were suppressed repeated members, the member label is centered above the labels in the next row.

The data in columns C, D, E, F, and G belong to the East member; the data in columns H, I, J, K, and L belong to West. Using the proximity rule, Scenario in column G belongs to East because it is only two columns from the East member, but three columns from the West member.

The Measures dimension label applies to the entire grid.

Figure 10-20 Refresh the Grid After Selecting the Repeated Members Option

	A	B	C	D	E	F	G	H	I	J	K	L
1							Measures					
2					East					West		
3			Actual	Budget	Variance	Variance %	Scenario	Actual	Budget	Variance	Variance %	Scenario
4	Colas	Year	12656	13150	-494	-3.756653992	12656	3549	8890	-5341	-60.07874016	3549
5	Root Beer	Year	2534	4360	-1826	-41.88073394	2534	9727	10950	-1223	-11.16894977	9727
6	Cream Soda	Year	2627	2970	-343	-11.54882155	2627	10731	11670	-939	-8.046272494	10731
7	Fruit Soda	Year	6344	7910	-1566	-19.7977244	6344	5854	5670	184	3.245149912	5854
8	Diet Drinks	Year	2408	2730	-322	-11.79487179	2408	8087	10570	-2483	-23.4910123	8087
9	Product	Year	24161	28390	-4229	-14.89609017	24161	29861	37180	-7319	-19.68531469	29861

Working with Multiple Grids on a Worksheet

In Oracle Essbase, you can create multiple ad hoc grids on one worksheet.

Related Topics

- About Multiple Grids on a Worksheet
- Creating Multiple-Grid Worksheets

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- Converting Ad Hoc Worksheets to Multiple-Grid Worksheets
- Renaming Ranges on Multiple-Grid Worksheets
- Changing Connections in Multiple-Grid Worksheets
- POV on Essbase Multiple-Grid Worksheets
- Multiple-Grid Example: Butterfly Report

About Multiple Grids on a Worksheet

Data source types: Oracle Essbase

In Oracle Essbase, you can create multiple grids on one worksheet. These grids can be connected to the same data source or to different Essbase data sources. You can retrieve data in these grids and shift them on the worksheet.

> **Note**
>
> If you are using an Oracle Fusion Cloud Enterprise Performance Management data source to create multiple ad hoc grids on a sheet, see Working with Multiple-Grid Worksheets in Cloud EPM.

Guidelines and Best Practices

Note the following guidelines, best practices, and limitations while working in worksheets that support multiple grids:

- You can submit data for only one grid at a time.

  If you try to submit data for more than one grid at a time—that is, if you have selected cell ranges in more than one grid—the first range returned by Excel will be used to determine the selected grid and the submit will be performed only on that grid.
- If **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)** is selected, you can preserve formulas on the sheet using the **Undo** option on the right-click **Smart View** context menu from within the grid. This option is only supported after a refresh has been performed once formulas are added to the sheet, and only for one undo action. This option is only supported for one undo action. The **Undo** option on the Smart View ribbon is not enabled for multiple-grid sheets. See Preserving Excel Formulas Within and Outside of Essbase Ad Hoc Grids.
- Multiple-grid worksheets are not supported for Smart Slices.
- As a best practice, do not use Microsoft Excel's Name Manager or Name Box to rename named ranges. Instead, use one of the following methods to rename named ranges:
  - Use the **Rename Range** command in the Document Contents pane of the Smart View Panel. See Renaming Ranges on Multiple-Grid Worksheets
  - Use the VBA function, HypModifyRangeGridName, described in *Developing Applications for Smart View for Office*.
- On multiple-connection multiple grid worksheets, as a best practice, ensure that there is enough space between grids to accommodate pivot and zoom operations on the individual grids. A loss of metadata may occur on sheets with three or more database connections and where grids are placed too close together.

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- As a best practice to ensure that you are refreshing the desired range, use the **Document Contents** pane to first select the range, and then click the **Refresh** link in the pane. After refresh, select the range again from **Document Contents** to highlight the updated range.
- These items on the Smart View ribbon are disabled:
  - **Undo**
  - **Redo**

  Instead, to access the **Undo** and **Redo** commands when working with a multiple-grid sheet, ensure that your cursor is in the affected grid. As a best practice, use the **Document Contents** pane to ensure that you have selected the correct grid. Then, right-click and select **Smart View** from the context menu, and then select **Undo** or **Redo**, as required.
- These items on the Essbase ribbon are disabled:
  - **Pivot to POV**
  - **POV**
  - **Preserve Format**
  - **Data Perspective**
  - **View Comments**

Creating Multiple-Grid Worksheets

Data source types: Oracle Essbase

To create a multiple-grid worksheet:

1. In Excel, connect to an Oracle Essbase data source.
2. From any location in the worksheet, select a range of cells.

   You must select a range rather than only one cell.
3. From the Smart View Panel, right-click an application, and then select **Ad Hoc Analysis**.

   > **Note**
   >
   > Multiple-grid worksheets are not supported for Smart Slices.

4. When prompted to change the worksheet to support multiple grids, select **Yes**.

   > **Note**
   >
   > If you started with an ordinary single-grid worksheet, and want to add other grids to the sheet, see Converting Ad Hoc Worksheets to Multiple-Grid Worksheets.

5. To create another grid on the worksheet:
   a. Select a different range of cells.
   b. From the Smart View Panel, right click an application, and then select **Ad Hoc Analysis**.
6. Repeat step step 5 as necessary to add grids to the worksheet.

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> **Note**
>
> Starting in Oracle Smart View for Office 11.1.2.5.400, the creation of multiple-grid worksheets using refresh is no longer supported.

Converting Ad Hoc Worksheets to Multiple-Grid Worksheets

Data source types: Oracle Essbase

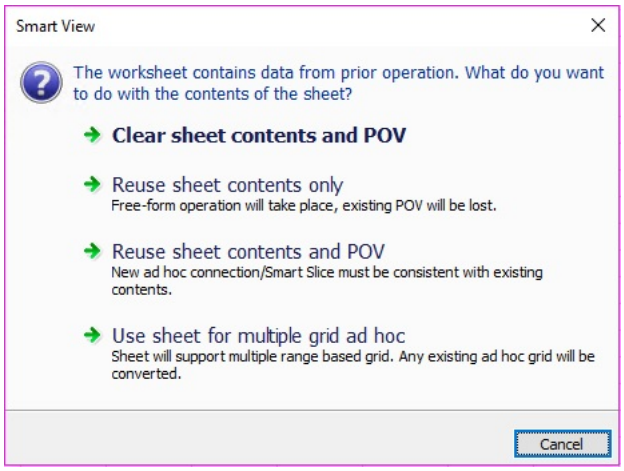
To convert an existing ad hoc worksheet to a worksheet that supports multiple grids:

1. From any location in the worksheet, select a range of cells.

   You must select a range rather than only one cell.

2. From the Smart View Panel, right click the application, and then select **Ad hoc analysis**.

   The sheet already contained a grid, so the following dialog is displayed:



   Available options are:

   - **Clear sheet contents and POV**
   - **Reuse sheet contents only** to reuse sheet contents only. In this case, the sheet content is converted to free-form and the existing POV will be lost.
   - **Reuse sheet contents and POV**. Use this option if the POV of the new ad hoc connection or Smart Slice is consistent with the existing contents.
   - **Use sheet for multiple grid ad hoc** to convert the sheet to one that supports multiple range-based grids, retaining any existing ad hoc grid on the sheet.

3. In the dialog, select **Use sheet for multiple grid ad hoc**.

   The second grid is added to the worksheet. The sheet now supports multiple grids.

4. **Optional:** Repeat step 1 and step 2 to add more grids to the sheet.

Renaming Ranges on Multiple-Grid Worksheets

Data source types: Oracle Essbase

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When you place ranges on a multiple-grid worksheet, Excel assigns each range a name by default. The strings used in the name ranges may not be particularly user friendly. For example, a range based on the Oracle Essbase Demo Basic database might look like this:

Demo_Basic_C2034305_D2AC_449B_B4AE_56EA047EDF05_1

A more user-friendly name would be helpful for all users of the workbook, but changing the name using the Excel Name Manager could cause a loss of metadata in Oracle Smart View for Office.

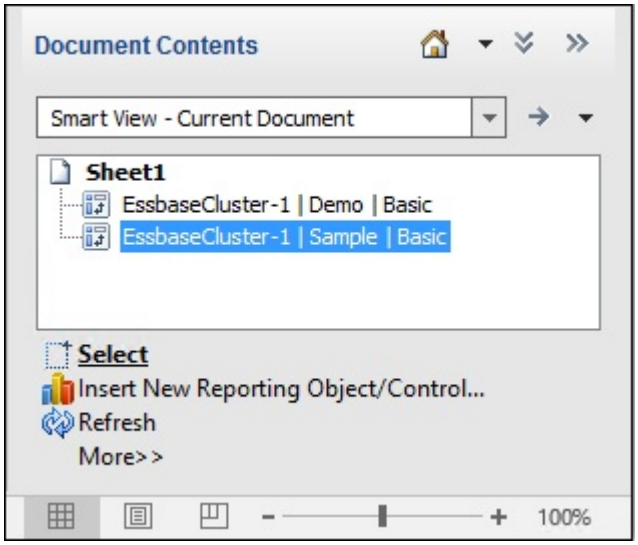
Use the **Rename Range** command in the Smart View Document Contents pane to change the name to a more descriptive or user-friendly name.

> **Note**
>
> To change range names in multiple-grid worksheets, you *must* use the **Rename Range** command in the Document Contents pane.

To rename ranges on a multiple-grid worksheet:

1. In the Document Contents pane, highlight the range to rename in the tree, and then click **Select**.

   In the following example, EssbaseCluster-1 | Sample | Basic is highlighted in the tree.



   Use the **Select** command to verify that you are working with the correct grid on the sheet. For example, after highlighting EssbaseCluster-1 | Sample | Basic and clicking **Select**, the Sample Basic grid on the worksheet is highlighted.

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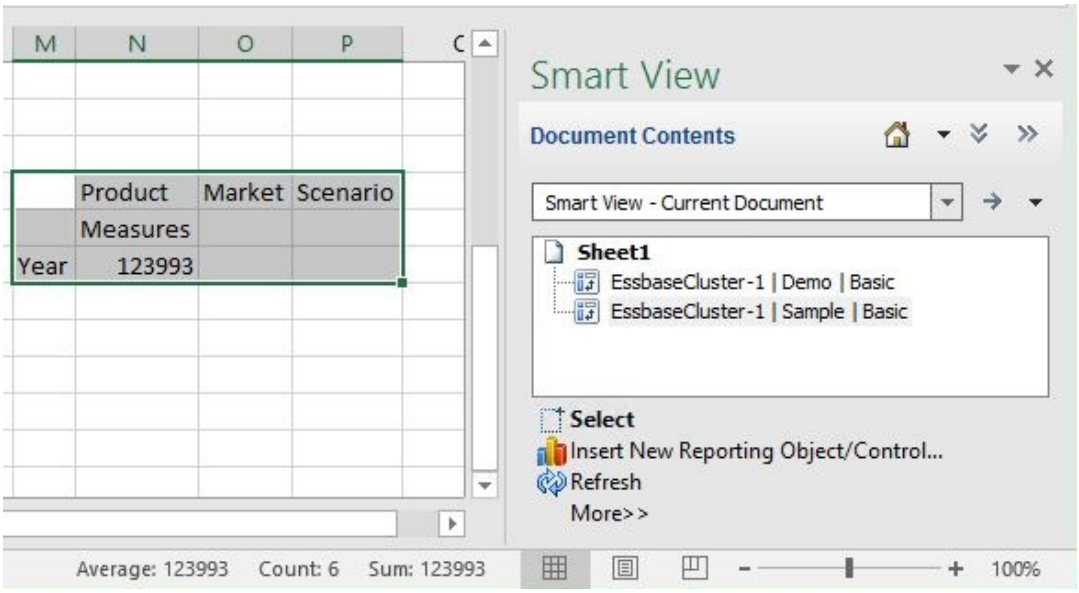
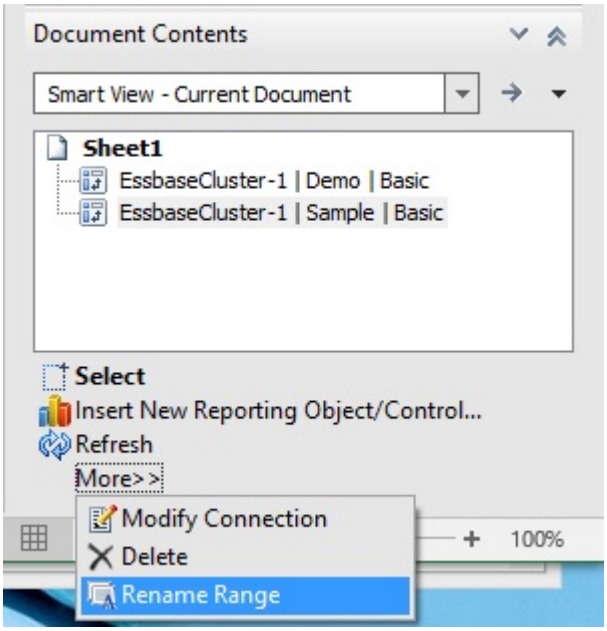
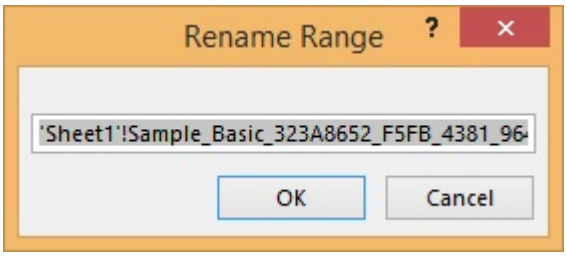


2. In the Action Panel, click **More**, and then select **Rename Range**.



The **Rename Range** dialog box is displayed, showing the default name that was assigned to the range by Excel.



3. In **Rename Range**, type a new range name, and then click **OK**.

   We're renaming the range MySampleBasic.

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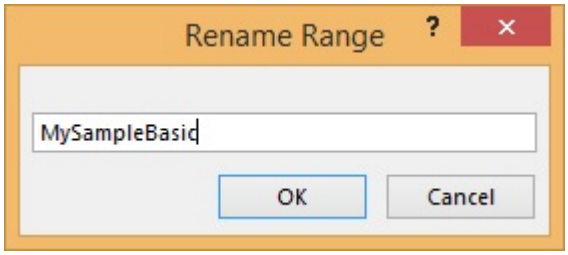
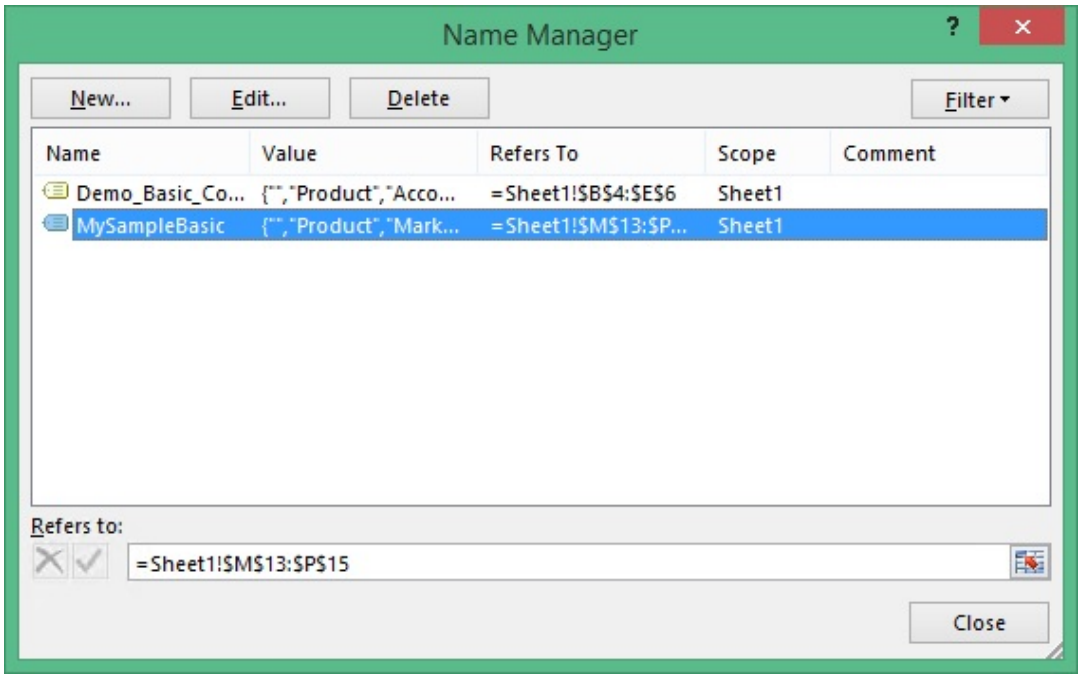
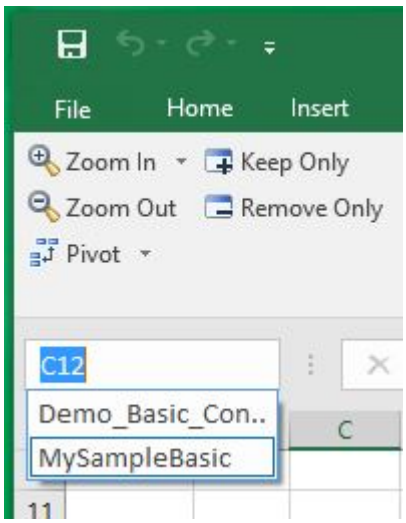


4. Verify that the range name is changed in the **Name Manager** in Excel.

   Here is an example **Name Manager**, accessed from the Formula ribbon in Excel:



   You can also view the changed range name in the Excel **Name Box** drop-down list.



Changing Connections in Multiple-Grid Worksheets

Data source types: Oracle Essbase

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To change the connection of a grid in a multiple-grid worksheet:

1. In the grid whose connection you want to change, select a range of cells,

   You must select a range rather than only one cell.
2. Using **Excel Name Manager**, delete the associated named range.
3. From the Smart View Panel, right click the application to connect to, and then select **Ad Hoc Analysis**.

POV on Essbase Multiple-Grid Worksheets

Data source types: Oracle Essbase

The **POV** button is enabled for Oracle Essbase multiple-grid worksheets that contain only one grid, making it possible for you to toggle the button to show or hide the POV toolbar. The **POV** button remains disabled on multiple-grid worksheets that contain more than one grid.

On multiple-grid worksheets that contain one grid, the POV dimensions are displayed both in the grid and in the toolbar. On regular ad hoc worksheets, POV dimensions are displayed in the grid only if the POV toolbar is hidden.

Multiple-Grid Example: Butterfly Report

Data source types: Oracle Essbase

Typically, Oracle Smart View for Office grids consist of member names on rows above and columns on the left of the data grid. Using the range retrieval capabilities of worksheets enabled for multiple grids, you can create grids with different layouts.

For example, you can create "butterfly" reports, with a column of members between two columns of data cells.

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Figure 10-21 Butterfly Report

Diet Cola	East	Jan
Budget		Actual
$190.00	Sales	$200.00
$80.00	COGS	$84.00
$110.00	Margin	$116.00
$20.00	Marketing	$26.00
$20.00	Payroll	$23.00
	Misc	
$40.00	Total Expenses	$49.00
$70.00	Profit	$67.00
$480.00	Opening Inventory	$500.00
$100.00	Additions	$190.00
$390.00	Ending Inventory	$490.00
57.89	Margin %	58
36.84	Profit %	33.5
$5.83	Profit per Ounce	$5.58

Cascading Reports and Ad Hoc Grids

You can create separate reports for any or all of the members of one or more dimensions in a report based on an ad hoc grid or Smart Slice query.

You can then cascade these reports separately across the worksheets of an Excel workbook. For reports created in the Report Designer, you can also cascade reports across slides in a PowerPoint presentation. Worksheets or slides are created as needed to accommodate all reports.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

Formulas, comments and other text, Smart Slice function grids, charts, tables, and sliders are included in cascaded reports.

Oracle Essbase and Cloud EPM Standard-mode applications only: Cascading is supported for multiple-grid worksheets.

For other guidelines, see Guidelines for Cascading.

Video

Your Goal	Watch This Video
Learn about cascading while connected to Oracle Fusion Cloud Enterprise Performance Management.	Adding Formulas and Cascading a Data Analysis

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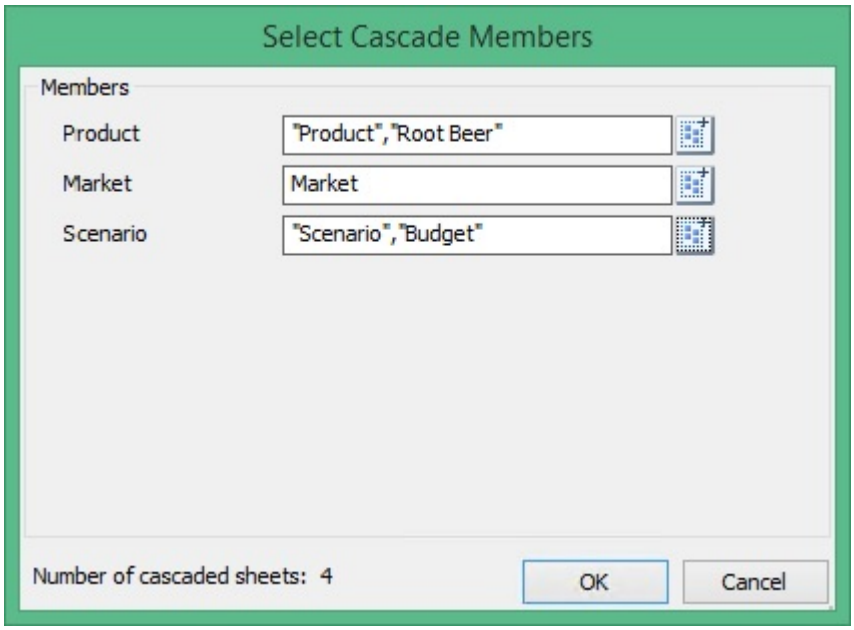
To cascade an ad hoc grid or Smart Slice report:

1. Open an ad hoc grid or Smart Slice report on the worksheet.
2. From the **Essbase** ribbon or from the data provider ad hoc ribbon (for example, **Planning Ad Hoc**), select **Cascade**, and then one of the following:
   - **Same Workbook** to use the current workbook
   - **New Workbook** to use a new workbook
   - **Different Workbooks** to cascade each report to a different workbook
3. In **Select Cascade Members**, click next to each dimension to launch **Member Selection**, where you select the members from each dimension for which you want to create reports.

   One report will be generated for each member you select. A message indicating the number of reports to be generated appears in the bottom left of the dialog.

   In the example dialog below, members were selected for the Product and Scenario dimensions. For Product and Scenario, after selecting members in **Member Selection**, quotation marks are applied to the member names. For the Market dimension, because **Member Selection** was not launched and no members selected, then no quotation marks are applied. The message at the bottom of the dialog indicates that four cascaded sheets will be generated.



Tip

To hand-type member names in the **Select Cascade Members** dialog, as a best practice, you must enclose the member names in quotation marks. This applies to both single name member names and member names containing a comma (,). For example, to select a member named "Laptops" and a member named "Tablets, Smartphones", type:

"Laptops","Tablets, Smartphones"

Additionally, separate each member name with a comma, as shown.

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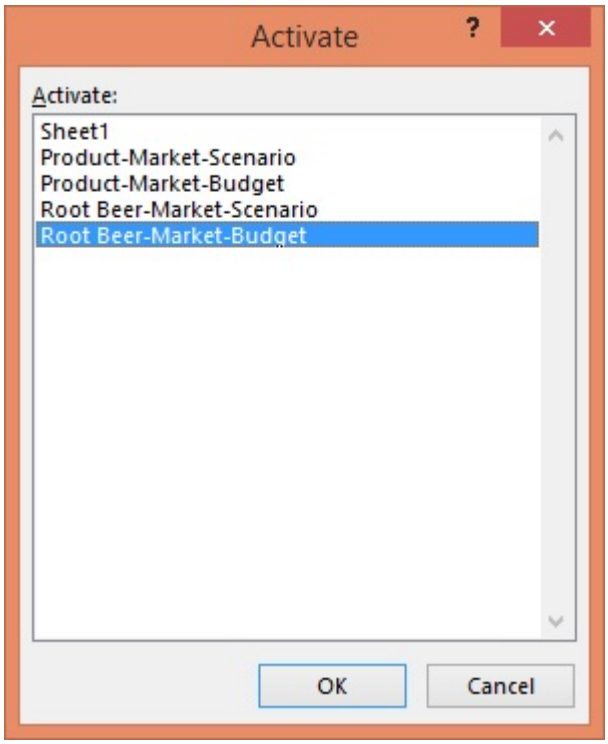
> **Note**
>
> In the **Select Cascade Members** dialog box, JAWS is not reading the "Number of cascaded sheets" label and the number when reciting the dialog content. In JAWS, go to **Utilities**, then **Settings**, then **User**, then **Screen echo**, and then select **Echo all text**.

4. Click **OK** to begin cascading.

   Depending on your earlier cascade selection, the resulting reports are created on separate worksheets in the current workbook or in a new one. Each worksheet tab is named for the dimensions and members of the report it contains. Click a worksheet tab to view a report.

   To see a list of all the worksheets, right-click the left or right arrow at the bottom left of Excel:

   In our example using the "Product", "Market", and "Scenario" dimensions, the following reports were created:



   To display a specific report, select the report in the list, and then click **OK**.

Guidelines for Cascading

- Worksheet tab naming depends on your cascade selections, and the number of resulting sheets. Excel creates each sheet name using the first 30 characters of the selected dimension names, regardless of the length of the dimension names. If this results in more than 30 characters, then the first 28 characters are used and appended with ~n where n is a unique number (1,2,3,…).

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- As a best practice, do not use any the following special characters in dimension, member or alias names:

  { } ( ) [ ] @ \ . - = < + ' " _ |

- Because both Oracle Smart View for Office and Excel have memory limits, cascading may be very slow for large grids and large numbers of result sheets. Keep the following in mind when cascading:
  - Cascading reports with a large number of members may cause Excel to suspend or terminate.
  - Cascade results are limited to approximately 200 sheets. Results larger than 200 may cause Excel to suspend or terminate. Oracle recommends cascading fewer than 200 sheets.
- When extensions are enabled in Smart View, cascading a report with a large number of members can cause Excel to stop responding. You may disable any extensions that are installed from the **Smart View Options** dialog box, **Extensions** tab. After disabling, restart Excel and repeat the cascade operation.

Using Substitution Variables

Substitution variables are global or per-application placeholders that represent variable values.

Data source types: Planning

Application designers or administrators define and manage substitution variables and their corresponding values; Oracle Smart View for Office users can enter a substitution variable into the grid and retrieve its value by refreshing.

For example, the designation "&CurMnth" might be a substitution variable representing the current month. Let's suppose the value for substitution variable "&CurMnth" is August. When you enter &CurMnth into a grid, Smart View displays August after a refresh. Later, if the value is changed to September, then September is displayed after a refresh when you enter &CurMnth.

When connected to Planning, some substitution variables that you enter may represent ranges. For example, "&NewMnthPeriod" might represent the month range of October through December. Or, "&NewQtrPeriod" might represent the quarter hierarchies of Quarter 1 and Quarter 2.

For more information about substitution variables, see the respective data source type documentation available in the Oracle Help Center.

To retrieve the value for a substitution variable:

1. Enter a substitution variable into a cell in the grid.

   > **Note**
   >
   > Substitution variable names must begin with an ampersand (&).

2. From any ribbon, select **Refresh.**

   The current value defined for the substitution variable replaces the substitution variable in the cell (and for any cells in the current worksheet that contain the substitution variable; for example, all instances of &CurMnth would be changed).

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> **Note**
>
> When substitution variables are used in a form, the last column (the right-most column) in forms is dropped or hidden when the form is opened in Smart View.

Retaining Invalid Members and Comments After Refresh

You can retain invalid members in an ad hoc grid after refresh when your Service Administrator enables the **Keep Invalid Members/Comments** option in the application settings of your business process.

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

When the **Keep Invalid Members/Comments** option is enabled, you can detect:

- Unknown or invalid members on a grid
- Text typed outside the grid; for example, your own notes

Additionally, you can set a cell style for comments that allows you to quickly and easily spot comment cells, including invalid or unknown members in the grid or pertinent notes you may have made on a sheet outside of the grid.

In the following example, the cell style for Comments is set to a pink background with bolded italic text. Two errors were made when entering member names. After refreshing the grid, note the invalid members in cells C2 and A4. Also note that the data entered remains on the grid and the data cells associated with the invalid members have no formatting applied.

Figure 10-22 Portion of an Ad Hoc Grid Showing Invalid Members

	A	B	C	D	E	F	G
1		CEO Office	BaseData	FY23	Plan	No Product	Working
2		Jan	***Febb***	Mar	Q1		
3	7410: Utilities	36231	34628.85	26513	97373		
4	***7420: Rent Expenses***	34285.97	32773.55	25133.42	92192.94		
5	7450: Telephone Expenses	21113	20184.01	15449	56746		
6	7510: Postage	6646	6366	4860	17872		
7	Total Office Expenses	98276	93952.41	71956	264184		

Users can replace the invalid members with the correct member names by using the **Member Selection** dialog or by hand-typing the correct member name. Refresh the grid again and note that the row member is placed correctly within the hierarchy and the data remains.

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Figure 10-23 Portion of an Ad Hoc Grid After Correcting Invalid Members and Refreshing

	A	B	C	D	E	F	G
1		CEO Office	BaseData	FY23	Plan	No Product	Working
2		Jan	Feb	Mar	Q1		
3	7410: Utilities	36231	34629	26513	97373		
4	7420: Rent Expense	34286	32774	25133	92193		
5	7450: Telephone Expenses	21113	20184	15449	56746		
6	7510: Postage	6646	6366	4860	17872		
7	Total Office Expenses	98276	93952	71956	264184		

Guidelines and Considerations

- In Oracle Smart View for Office, invalid members are considered comments. Use Cell Styles to set a distinct style for comments to quickly note invalid members and comments on an ad hoc sheet. For more information, see Cell Styles.
- In multi-dimension rows and columns, changing the member in the first column in the first row dimension or any of the rows in the first member column of the grid will result in an error. Changes to any other member cells will work as expected.
- When multi-dimension row or column headers consist of valid and invalid members, then previously non-qualified valid member names or aliases from these headers will be replaced with qualified member names on refresh. For example, you plan to enter Account and Sales South in row 90, but mistype Account as Accoun. Refresh, and you can see the invalid member row with the mistyped member name in column A, and the qualified member name in column B:

87	Account	Sales NorthEast	#Missing
88	Account	Sales Mid-Atlantic	#Missing
89	Account	Sales SouthEast	#Missing
90	***Accoun***	***[Sales Director 2].[430]***	
91	Account	Sales Central	#Missing
92	Account	Sales West	#Missing

Fix the spelling error in column A and refresh. The members in Row 90 are displayed correctly:

87	Account	Sales NorthEast	#Missing
88	Account	Sales Mid-Atlantic	#Missing
89	Account	Sales SouthEast	#Missing
90	Account	Sales South	#Missing
91	Account	Sales Central	#Missing
92	Account	Sales West	#Missing

- When the **Keep Invalid Members/Comments** option is not selected, then the invalid member reverts to the closest previous member in the grid, with the exception of the first

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row or first column in the grid, which is retained as a comment. Blank rows or columns inserted into the grid remain blank.

- **Service Administrators:** To enable users to retain invalid members in an ad hoc grid after a refresh, in **Application Settings**, under **Smart View Add-on**, select the **Keep Invalid Members/Comments** check box. This check box is disabled by default.

  For more information, consult the application settings topics in your business process administration guide. For example, for Planning, see What Application and System Settings Can I Specify? in *Administering Planning*.

Detecting Comments and Unknown Members on Essbase Sheets

You can set options in Oracle Smart View for Office to detect comments and unknown members on Oracle Essbase sheets.

Data source types: Oracle Essbase

When you are connected to an Essbase provider, you can enable options in Smart View that allow you to quickly detect:

- Unknown members on a grid
- Text typed outside the grid; for example, your own notes on a sheet

In Smart View, cells containing these types of data are referred to as *comments*.

You can set options in Smart View that allow you quickly and easily spot comment cells, including invalid, or unknown, members in the grid or pertinent notes you may have made on a sheet outside of the grid.

For example, in an Essbase database on the server, a member named "Oregon Coast" member is renamed "Oregon". Smart View tracks this change and shows it to you if you define a cell style to call out comments. Then, you can quickly note the change and correct it in the grid.

To call out comments on Essbase sheets, you set these options in Smart View

- **Preserve Comments and Unknown Members**
- **Enhanced Comment Handling**
- **Use Cell Styles**

Optionally, define a distinctive cell style for comments.

You can then easily identify comment cells on the sheet, and further select and work with them in the **Comment Edit** dialog box.

See the following topics for more information on working with comments on Essbase sheets:

- Enabling Comment Display in the Sheet
- Viewing Comments in the Sheet
- Editing Comments
- Deleting Comments

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Enabling Comment Display in the Sheet

Data source types: Oracle Essbase

To enable comment display in an Oracle Essbase sheet:

1. In the **Options** dialog box, perform these tasks:
   a. In **Member Options**, select these options:
      - **Preserve Comments and Unknown Members**
      - **Enable Enhanced Comment Handling**

      > **Note**
      >
      > The **Preserve Formulas and Comments in ad hoc operations (except pivot)** option must be selected to enable these options.

   b. In **Formatting**, select **Use Cell Styles**.
   c. In **Cell Styles**, expand **Common**, and then select the check box next to **Comment Cells**. Optionally, right-click **Comment Cells** and define a **Font**, **Background**, or **Border** for cells containing comments.
2. Click **OK**.

   Optionally, click the arrow in the **OK** button and choose either **Save as Default Options** or **Apply to All Sheets**. These options are described in "Sheet Options" in Smart View Options.

   You are now ready for the steps in Viewing Comments in the Sheet

Viewing Comments in the Sheet

Data source types: Oracle Essbase

To view comment cells in an Essbase sheet:

1. Be sure to complete the steps in Enabling Comment Display in the Sheet
2. Open a workbook containing a grid, connect to an Oracle Essbase provider, and click **Refresh**.
3. On the sheet, note the cells containing comments and unknown members.

   In the example in Figure 1, cell C4 is an unknown member and Oracle Smart View for Office marked the cell as a comment. The member name was probably changed in the underlying Essbase database. The comment style indicates to us that this member needs attention.

   Additionally, a second comment in the sheet notes that the Oregon Coast member name needs to be changed to Oregon. This comment is a note someone made outside of the grid and confirms to us that the member name has been changed on the server and that the member needs to be manually updated in the grid.

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Figure 10-24 Grid Showing Cells Marked with Comment Style

	A	B	C	D	E	F
1				Scenario		
2				Measures		
3	Qtr1	Colas	California	341		
4			Oregon Coast			Change to Oregon
5			Washington	170		
6			Utah	342		
7			Nevada	4		
8			West	1042		

4. Continue with Editing Comments or Deleting Comments.

Editing Comments

Data source types: Oracle Essbase

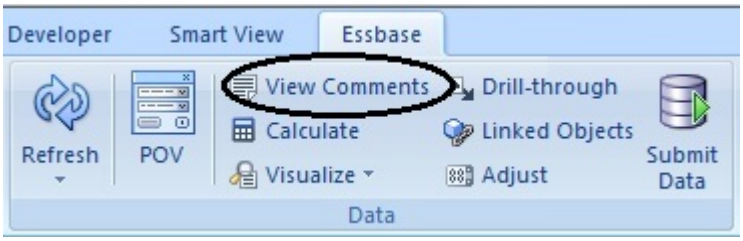
Be sure to complete the steps in Enabling Comment Display in the Sheet.

> **Note**
>
> The procedure in this topic shows you how to edit comments on an Essbase sheet using the **View Comments** command and the **Comment Edit** dialog box in Oracle Smart View for Office. You can also edit comments directly in the grid, without using the Smart View interface elements in this topic.

To edit comments on an Essbase sheet:

1. If you have not already done so, open a workbook containing a grid, connect to an Oracle Essbase provider, and click **Refresh**.
2. Click **View Comments** in the Essbase ribbon.

Figure 10-25 View Comments Command in Essbase Ribbon



> **Tip**
>
> The **View Comments** command is enabled only when there are comments in the sheet.

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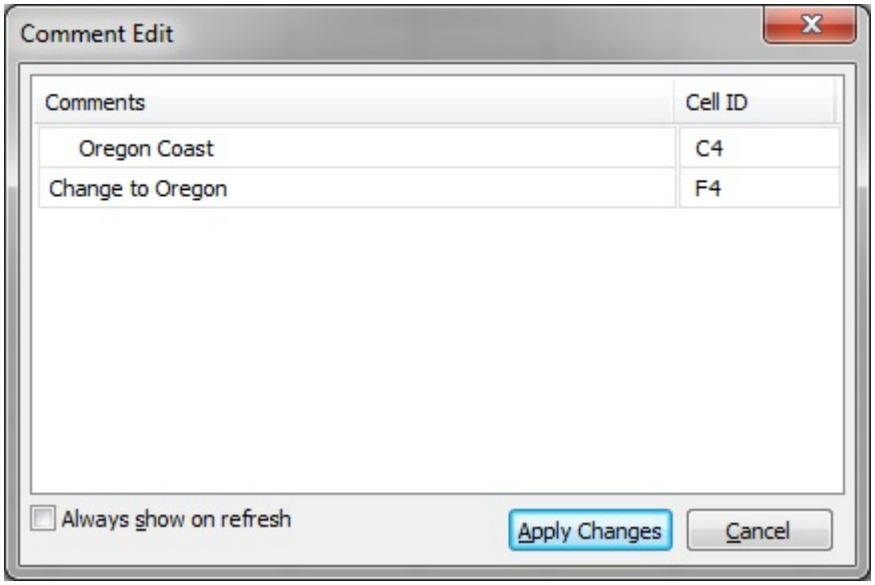
The **Comment Edit** dialog box is launched. The example in Figure 2 shows two comments in the sheet which can be edited.

Figure 10-26 Comment Edit Dialog Box



3. To edit the text in a row, first click in the row to highlight the editable text; for example, click in the "Oregon Coast" row to highlight it, as shown in Figure 3

Figure 10-27 Row Highlighted, Ready for Editing in Comment Edit Dialog Box

4. Edit the text as required; in this example, change "Oregon Coast" to "Oregon".

Figure 10-28 Changed Text in Comment Edit Dialog Box

5. Click **Apply Changes** and note the change in the grid.

   In Figure 5, cell C4 still shows as a commented cell, and will until the sheet is refreshed.

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Figure 10-29 Grid After Clicking Apply Changes; Cell C4 Still Commented

	A	B	C	D	E	F
1				Scenario		
2				Measures		
3	Qtr1	Colas	California	341		
4			Oregon			Change to Oregon
5			Washington	170		
6			Utah	342		
7			Nevada	4		
8			West	1042		

6. Click **Refresh**; the comment style is cleared.

Figure 10-30 Grid After Refresh, Cell Style in Cell C4 Is Cleared; Member is In Sync with Server

	A	B	C	D	E	F
1				Scenario		
2				Measures		
3	Qtr1	Colas	California	341		
4			Oregon	185		Change to Oregon
5			Washington	170		
6			Utah	342		
7			Nevada	4		
8			West	1042		

Deleting Comments

Data source types: Oracle Essbase

Be sure to complete the steps in Enabling Comment Display in the Sheet.

> **Note**
>
> The procedure in this topic shows you how to delete comments using the **View Comments** command and the **Comment Edit** dialog box in Oracle Smart View for Office. You can also delete comments directly in the grid, without using the Smart View interface elements in this topic.

To delete comments:

1. If you have not already done so, open a workbook containing a grid, connect to an Oracle Essbase provider, and click **Refresh**.
2. Click **View Comments** in the Essbase ribbon (see Figure 1).

   The **Comment Edit** dialog box is launched. The example in Figure 1 shows one comment left on the sheet, which can be removed.

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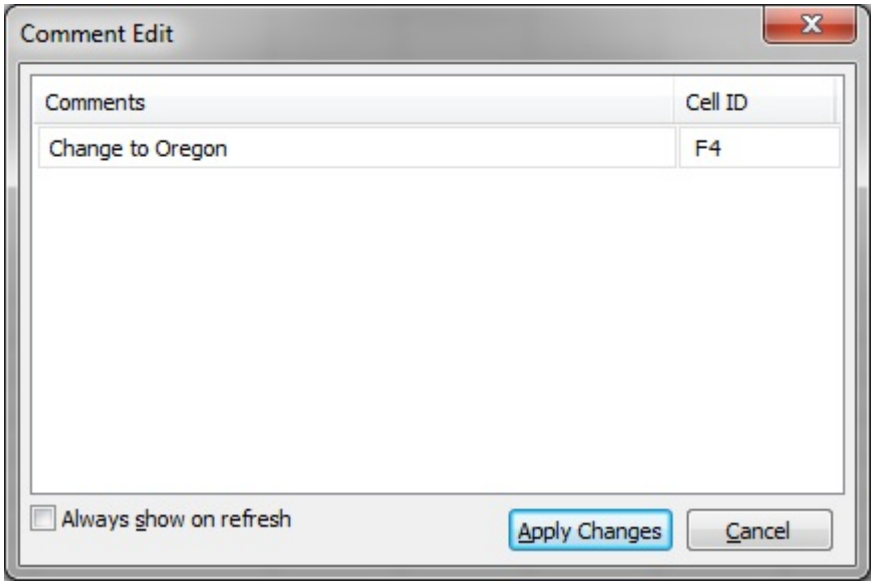
Figure 10-31 Comment Edit Dialog Box



3. To delete the entire comment, first click in the row to highlight the editable text; for example, click in the "Oregon Coast" row to highlight it, as shown in Figure 2, then press the Delete key.

Figure 10-32 Comment Highlighted and Ready to be Deleted

After deletion, the text in the **Comments** column is removed, but the **Cell ID** is still displayed (see Figure 3).

Figure 10-33 Comment Deleted, Cell ID Remaining

4. Click **Apply Changes** and view the changes in the sheet.

   In Figure 4, cell F4 still shows as a commented cell, and will until the sheet is refreshed.

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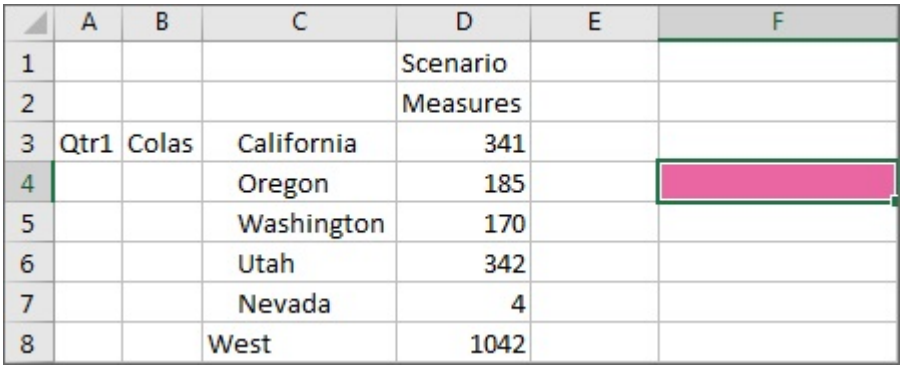
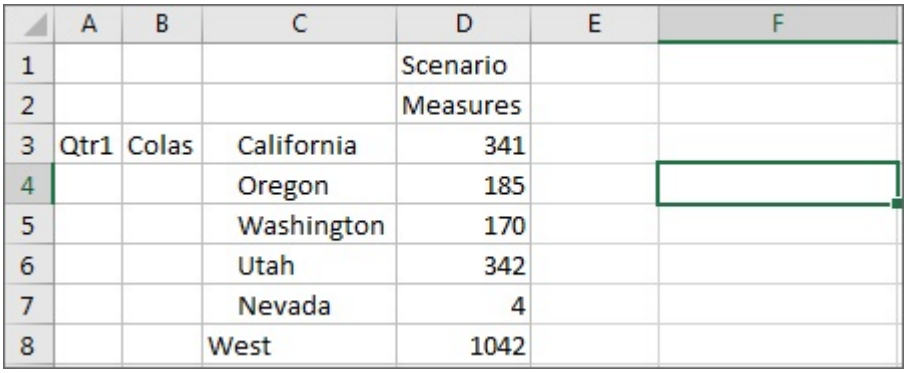
Figure 10-34 Sheet After Clicking Apply Changes; Cell F4 Still Commented



	A	B	C	D	E	F
1				Scenario		
2				Measures		
3	Qtr1	Colas	California	341		
4			Oregon	185		
5			Washington	170		
6			Utah	342		
7			Nevada	4		
8			West	1042		

5. Click **Refresh**; the comment style is cleared.

Figure 10-35 Grid After Refresh, Cell Style in Cell F4 Is Cleared



	A	B	C	D	E	F
1				Scenario		
2				Measures		
3	Qtr1	Colas	California	341		
4			Oregon	185		
5			Washington	170		
6			Utah	342		
7			Nevada	4		
8			West	1042		

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11

Books

Using the EPM Books extension for Oracle Smart View for Office, you can import Books in to Microsoft Excel and work with them by changing POV values and refreshing.

Related Topics

- About the EPM Books Extension
  The EPM Books extension in Smart View allows you to import Cloud EPM books into Excel in a refreshable format.
- Setting Up the Books Extension in Smart View
  Install the EPM Books extension so you can work with EPM Books in Oracle Smart View for Office.
- Launching the EPM Books Panel in Smart View
  From Office, you can launch the EPM Books panel whenever you connect to an Oracle Fusion Cloud Enterprise Performance Management business process that contains Books.
- Working with Books
  In the EPM Books panel, view Book properties, import and download Books in to Oracle Smart View for Office, and manage import jobs in Jobs Console.
- Managing Jobs in the EPM Books Jobs Console
  In addition to downloading Books from the Jobs Console in the EPM Books panel, you can also refresh the status of jobs, remove jobs, and display jobs from the current connection or all connectons from which you have imported Books.

About the EPM Books Extension

The EPM Books extension in Smart View allows you to import Cloud EPM books into Excel in a refreshable format.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Narrative Reporting

In Oracle Fusion Cloud Enterprise Performance Management, books are a collection of one or more reports, books, and other documents, that you generate into a single PDF or Excel output (for Excel output caveats, see the Note below).

Using the EPM Books extension for Oracle Smart View for Office, you can import Books in to Microsoft Excel, work with them by responding to prompts and changing POV values, and refresh them. You can also open and work with Books that were downloaded in Excel format from the web application.

> **Note**
>
> Only Reports are included in the Excel Books opened or imported in Smart View. Other documents—such as Word files, PDF files, or inserted Books—are omitted when imported into Smart View.

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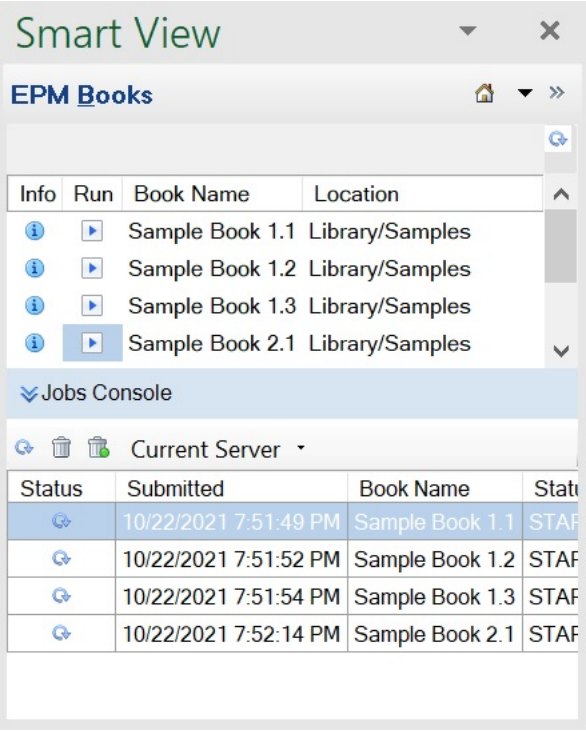
From the Books panel in Smart View, you can view properties for a Book, and import Books into Excel.

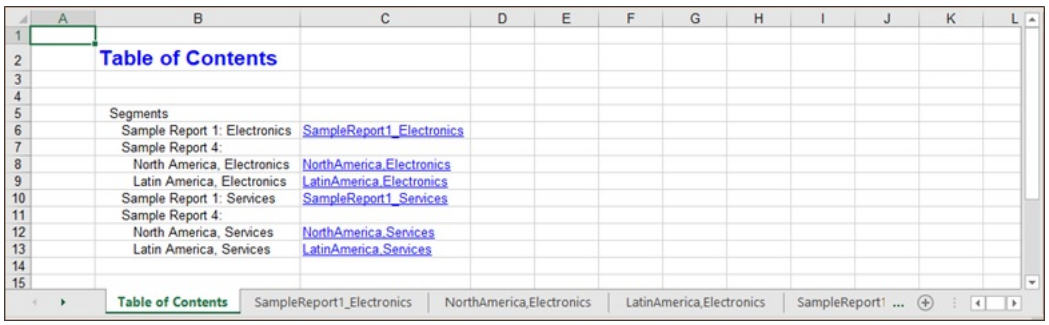
Each Book you import is a "job." Check the **Jobs Console** in the Books panel for the status of the job. You do not need to wait for a job to complete to invoke another job or perform other operations in the panel or elsewhere in Smart View. You can refresh job status, delete selected jobs, or delete all completed jobs in the Jobs Console. You can also view the status of jobs running on other servers that contain Books in your Cloud EPM environment.

Figure 11-1 Example EPM Books Panel



From the **Jobs Console**, download a Book into Excel. In the downloaded Book, each Report is placed on an individual worksheet. A table of contents sheet is generated with links to the individual Report sheets in the workbook. The worksheet names are based on the TOC Headings defined in the Properties panel in the Book Designer in the web application.

Figure 11-2 Example TOC Sheet and Worksheet Tabs in Book Imported into Excel



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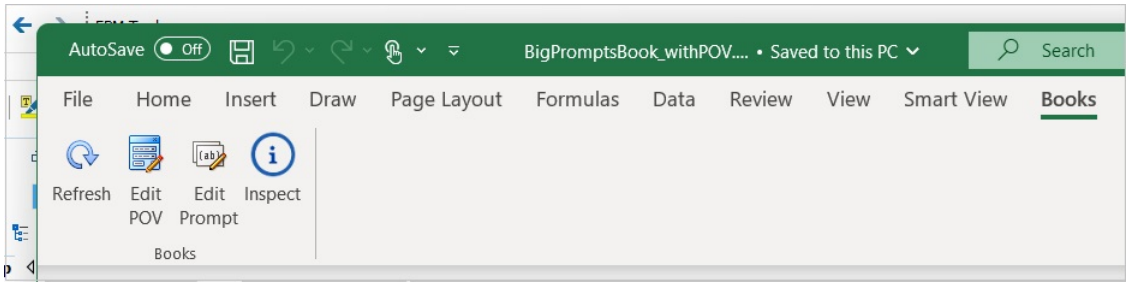
After importing a Book into Smart View, the Books ribbon is displayed in Excel:

Figure 11-3 Books Ribbon in Smart View



With the Books ribbon, you can change the prompts or POV of the Reports in the Book, and refresh the book content. You can also use the **Inspect** button to view properties of the Book, including information about prompts and the POV.

Guidelines for Working with Books in Smart View

- Changing the POV: In 23.08+, Excel supports member selection in the **Select POV** dialog if a dimension's Book POV option is set to "Allow All Members." The **Select** option appears at the bottom of the drop-down list, and launches the **Member Selection** dialog.

  If a dimension's Book POV option is set to "Display Selected Values,", then users select from a pre-defined a choice list. The list of available members to choose from is displayed in the drop-down list for each dimension and POV changes will be properly reflected upon refresh in Excel.

- Responding to runtime prompts: In 24.11+, books can be designed with runtime prompts. Users can respond to prompts when importing the book, and edit the prompts in the downloaded book. Excel supports member selection using a pre-defined choice list or the **Member Selection** dialog, depending on how the book designer has specified the prompts.

  To include runtime prompts in the Book, the report designer enables the **Prompt for Value Upon Preview** option for the Book.

- Nested Books are not supported in Excel. For example, if there is a Book contained within a Book, the inner Book will be suppressed. The resulting Excel workbook will not contain the content related to the nested inner Book.

- PDF and Word documents inserted as part of a Book are not supported. When a Book includes other documents of type PDF or Word, they will be omitted from the Excel workbook.

Setting Up the Books Extension in Smart View

Install the EPM Books extension so you can work with EPM Books in Oracle Smart View for Office.

Related Topics

- Downloading and Running the Smart View Installer
- Creating Connections to Cloud EPM Business Processes
- Installing the EPM Books Extension

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Downloading and Running the Smart View Installer

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Narrative Reporting

To download and run the Oracle Smart View for Office installer:

1. Start your Oracle Fusion Cloud Enterprise Performance Management business process in a web browser, and log in with your user name and password.
2. In the upper-right corner of the web interface, select the arrow next to your user name to display the user menu, and then select **Downloads**.
3. In **Downloads**, under Smart View, click **Download From Oracle Technology Network**.
4. In the **Oracle Smart View for Office** page, click **Download Now**.

   This action take you to the **Oracle Software Delivery Cloud** page.

   If prompted, provide your Oracle login credentials.
5. On the **Oracle Software Delivery Cloud** page:
   a. Review the Oracle Gadgets License Agreement, and then select the **I reviewed and accept the following license agreements** check box.
   b. Select the **Oracle Smart View for Office <version>** check box.
   c. Under **Platforms**, you are required to select an option. However, there is only one Smart View executable file for all platforms, so Oracle recommends selecting the **All** option.
6. Click **Download**, and follow the steps for your browser to download and save the file to a folder on your computer; for example, save the file to the **Downloads** folder.

   An Oracle Software Download Manager EXE file is downloaded to your computer.
7. Double-click the EXE file to launch the **Oracle Download Manager**, then perform these steps:
   a. Under **Destination** click **Browse** and navigate to a folder for the Smart View download ZIP file, and then click **Next**.
   b. In the **Status** window, allow the ZIP file to download, and then click **Open Destination** to open the ZIP download location in File Explorer.
8. In File Explorer, unzip the contents of the ZIP file, and then double-click SmartView.exe or right-click SmartView.exe and select **Run as administrator** to start the installation wizard.

   > **Note**
   >
   > Whenever possible, as a best practice, Oracle recommends using the **Run as administrator** command when installing Smart View.

9. Select a destination folder for Smart View, and then click **OK**; for new installations, Smart View is installed by default in:

   C:/Oracle/SmartView

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> **Note**
>
> If you are upgrading an installation of Smart View, then the installer defaults to the folder where you previously installed Smart View.

10. When installation is complete, click **OK**.

    The tab for the Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

11. Continue the setup process with Creating Connections to Cloud EPM Business Processes.

Creating Connections to Cloud EPM Business Processes

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Narrative Reporting

After you install Oracle Smart View for Office, as described in Downloading and Running the Smart View Installer, you can create connections to the Oracle Fusion Cloud Enterprise Performance Management business process that you will be using with Books.

Connections require information about your service URL. Your Smart View administrator should provide you with the information that you need to create the connection.

You can use shared or private connections for most business processes. To connect to Narrative Reporting, use the quick connection method in Smart View.

To create connections to the business processes that you will be using with Books:

1. Launch Microsoft Excel.
2. From the Smart View ribbon, click **Panel**.
3. To create shared connections to most supported business processes, follow the instructions in Creating Shared Connections.

   You can use shared connections with these business processes:

   - Planning
   - Planning Modules
   - Financial Consolidation and Close
   - Tax Reporting
   - Narrative Reporting

   > **Note**
   >
   > Narrative Reporting requires a private connection, described in the next step.

4. To create a private connection to any supported business process, see Creating Private Connections.

   As a best practice, Oracle recommends using the quick connection method when creating private connections for Books, described in Using the Quick Connection Method. For the private connection syntax appropriate to your supported business processes, see Private Connection URL Syntax.

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5. Once you've created a connection, expand the tree in the Smart View Panel and navigate to the application and database that you want to work with.

   If you are prompted to log in, enter your login credentials.

6. Continue the setup process with "Installing the Books Extension."

Installing the EPM Books Extension

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Narrative Reporting

This topic covers installing the EPM Books extension from within Oracle Smart View for Office.

Before you begin this procedure, complete the steps in "Creating Connections to Oracle Fusion Cloud Enterprise Performance Management Business Processes."

> **Note**
>
> You can also install the extension from the business process web interface; for example, from the Planning web interface. To install the extension from the web, see:
>
> - Downloading and Installing Clients in *Getting Started Guide for Administrators*
> - Downloading and Installing Clients in *Getting Started Guide for Users*

To install the Books extension from Smart View:

1. In the Smart View ribbon, select **Options**, and then **Extensions**.

   > **Note**
   >
   > If the **Extension Alerts** dialog was displayed when you completed the steps in "Creating Connections to Cloud EPM Business Processes", then you should already be in the **Extensions** tab of the **Options** dialog.

2. Click the **Check for Updates, New Installs, and Uninstalls** link.
3. In **Select Location for Extension Updates**, select the check box that corresponds to your Books connection, and then click **Get Updates**.

   The dialog box expands to display a message window providing you with the progress and status of the extension query.

4. Click **Close** in the **Select Location for Extension Updates** dialog to return to the **Extensions** tab of the **Options** dialog.
5. In the list of extensions in the **Extensions** tab, locate **EPM Books** and click the Install link, Install, to launch the installer.

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> **Note**
>
> In release 25.100+, a message alerts you if a minimum version of Smart View is required and the current Smart View installation is not at the minimum version.
>
> You may continue with the installation; however, some features may not be available in the extension being installed.

6. In the popup dialog asking "Apply this extension update?", click **Yes**, and then click **OK** to close the **Options** dialog, **Extensions** tab.

   A dialog display the progress of the extension installation.

7. In the message dialog informing you that the installation is successful and instructing you to restart Office, click **OK**, and then close and restart Office.

For more information on extension installation in Smart View, see the following topics:

- Initially Checking for Available Extensions
- Installing Extensions

After completing the procedure in this topic, you are ready to begin using the Book extension with Smart View.

> **Note**
>
> If you need to uninstall the Books extension, use the **Check for Updates, New Installs, and Uninstalls** link in the Smart View **Options** dialog, **Extensions** tab. The extension will be flagged for removal. Select the **Remove** link in the **Extensions** tab, and restart Office when prompted. The process is described in Uninstalling Extensions.

Launching the EPM Books Panel in Smart View

From Office, you can launch the EPM Books panel whenever you connect to an Oracle Fusion Cloud Enterprise Performance Management business process that contains Books.

Complete the procedures in Setting Up the Books Extension in Smart View before beginning the procedure in this topic.

To log in to a Cloud EPM business process and launch the Books panel in Oracle Smart View for Office:

1. Launch Microsoft Office (Excel, Word, or PowerPoint).
2. Select the Smart View ribbon, and then click **Panel**.
3. In the Smart View Panel, select **Private Connections**.

   Alternatively, from the Smart View Panel, click the arrow next to the **Switch to** button, , and then select **Private Connections** from the drop-down list.
4. In the text box shown in Figure 1, click the arrow to display the drop-down menu and select your connection.

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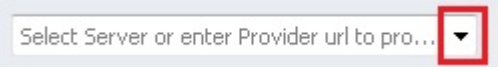
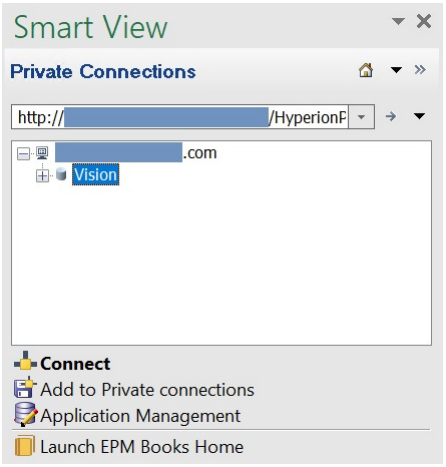
Figure 11-4 Arrow for Quick Connection Drop-down List

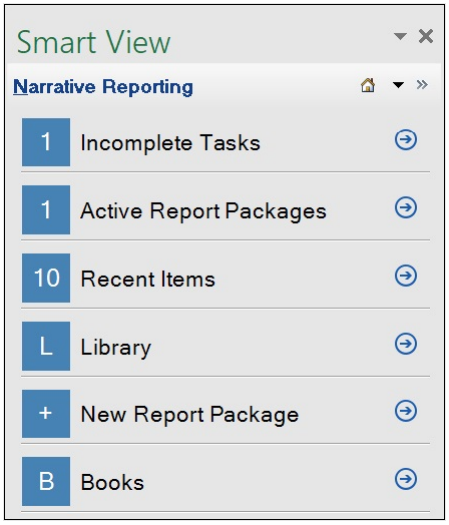


If you created your data source connection using the procedure in Creating Connections to Cloud EPM Business Processes, then it should be listed under **Quick Connect URLs** in the drop-down list.

5. In the **Login** window, enter your **User Name** and **Password**, and then click Sign In.
6. To launch the Books panel, depending on the data source you are connected to, perform an action:
   - Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting:
     a. In the Smart View Panel, select the application node.
     b. In the Action Panel, select **Launch EPM Books Home**:



   - Narrative Reporting Home: Click the **Books** shortcut:



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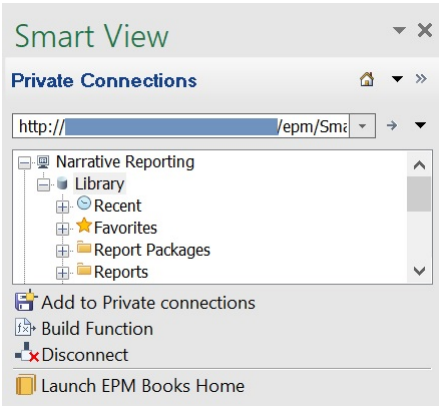
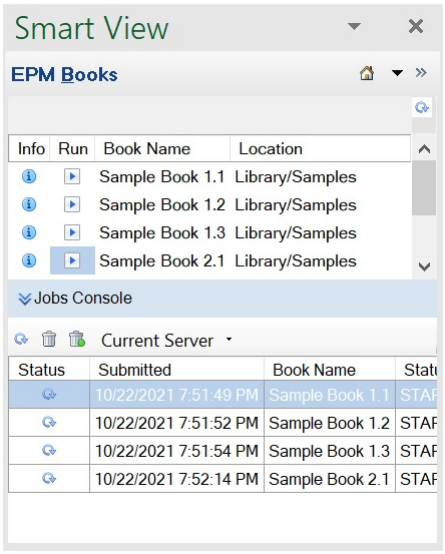
- Narrative Reporting Library panel:
  a. In Narrative Reporting Home, click **Library**.
  b. In the Smart View Panel, expand the **Library** node or click **Connect** in the Action Panel.
  c. In the Action Panel, select **Launch EPM Books Home**:



The EPM Books panel is displayed. Figure 2 shows an example Books panel.

Figure 11-5 Example EPM Books Panel



You're now ready to begin using the Books functionality available in Smart View. Continue with the topics in Working with Books.

Working with Books

In the EPM Books panel, view Book properties, import and download Books in to Oracle Smart View for Office, and manage import jobs in Jobs Console.

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Related Topics

- Importing Books into Smart View
- Working with Downloaded Books in Smart View

Importing Books into Smart View

You can import Books in Oracle Smart View for Office using the EPM Books extension.

To import Books into Smart View:

> **Note**
>
> - Before you begin importing Books, you should have already connected to a data source and launched the EPM Books panel, as described in Launching the EPM Books Panel in Smart View.
> - Books with reports containing relational tables can be imported in Smart View 24.200 and later using EPM Books extension 24.11 and later. However, the **Edit POV** action in the Smart View ribbon is disabled for such books.

To import Books into Smart View:

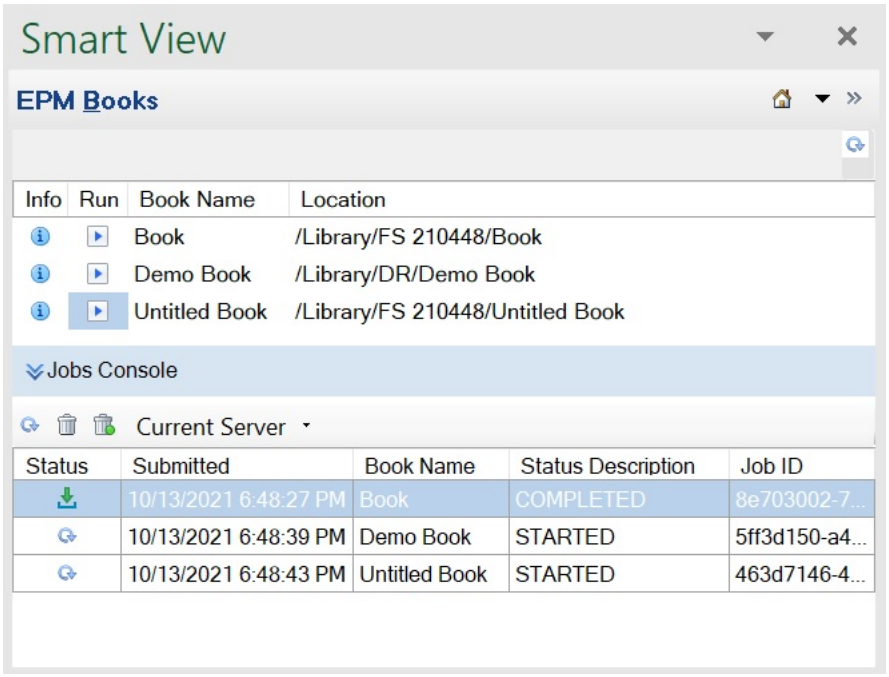
1. In the list of Books in the EPM Books panel, click ▶ next to the Books to import.

   Clicking ▶ begins the import process.

   For each Book you import, a row is added to the Jobs Console pane in the Books panel.

   Figure 1 shows the Books panel with three jobs in the Job Console; one with Completed status and two in progress with Started status. The panel is expanded so that you can see all columns in the Jobs Console.

Figure 11-6 EPM Books Panel Showing Jobs in the Jobs Console



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> **Note**
>
> In the web application, if the User Preference for Reports (Reporting in Narrative Reporting), **Preview POV**, is selected, and the Book definition contains runtime prompts, POVs, or both, then you can respond to the prompts and the POVs before the import process is started. See the next steps for instructions on responding to prompts and POVs.

2. If the Book definition contains runtime prompts, respond to the prompts by making selections in either Full mode or Compact mode, and by selecting members from the **Member Selection** dialog or pre-defined choice lists as applicable.

   See Responding to and Editing Prompts for more information.

3. If you are prompted to select members for the POV, in the **Select POV** dialog, make selections in the drop-down lists for each dimension, and then click **OK**.

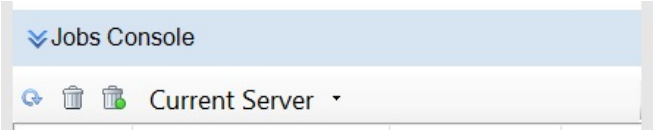
   See Selecting and Editing the POV for more information.

4. In the **Jobs Console**, click the **Refresh** button, , for an individual job to refresh the job status.

   The job status icons for individual jobs are:

   - —Job is in progress. Click to update the job status.
   - —Job is completed. Click to download the job.
   - —An error has occurred. Click to view the error message.

   If you want to check status of all the jobs displayed in the Jobs Console, you can also click the **Refresh** button, , for the Jobs Console and retrieve the status for all jobs. The following shows the buttons for the Jobs Console toolbar, including :

5. In the list of jobs in the Jobs Console, click next to a completed job to download it in to Smart View; click **Yes** at the prompt to confirm the download.

> **Note**
>
> Only Reports are included in the Book imported and downloaded into Excel. Inserted books or third-party documents, such as PDFs or Microsoft Word documents, are not included in the Excel Book import.

The Book and the Books ribbon is displayed in Excel (even if Excel was not previously running) and a table of contents sheet is generated with links to the individual report sheets in the workbook, as shown in Figure 2.

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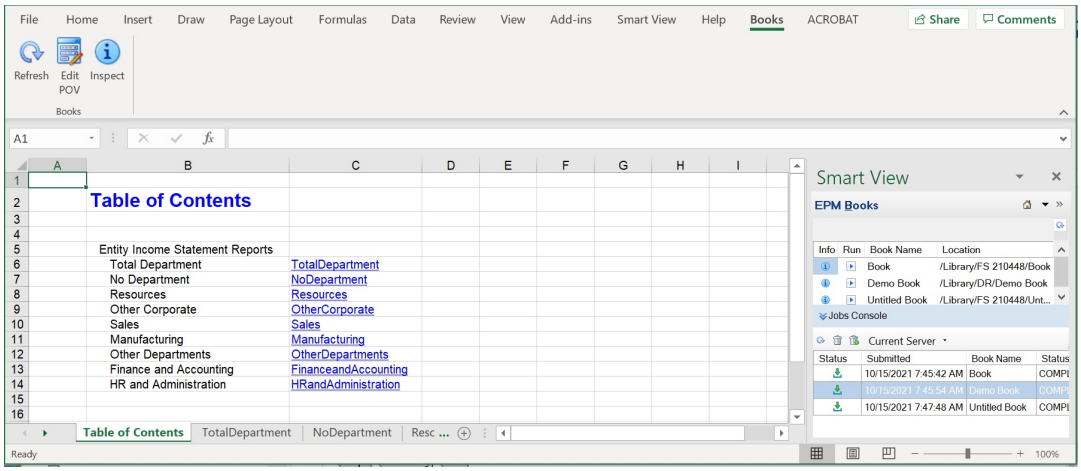
Figure 11-7 Books Ribbon and Example TOC Sheet and Worksheet Tabs in Book Downloaded in to Excel



6. Click the workbook tabs to view the Reports contained within the downloaded Book.
7. Continue with Working with Downloaded Books in Smart View.

Responding to and Editing Prompts

If reports in the book contain runtime prompts, you will be prompted to enter member selections when executing the book.

Related Topics:

- About Prompts
- Responding to Prompts
- Notes on Editing Prompts

About Prompts

If runtime prompts are enabled, then when importing a book, or clicking the **Edit Prompts** button in an existing workbook, the **Prompts** dialog is launched.

Once launched, you can display the **Prompts** dialog in either of two ways, Full mode or Compact mode. For example:

- **Full mode**—Displays all prompts in all reports and inserted books separately

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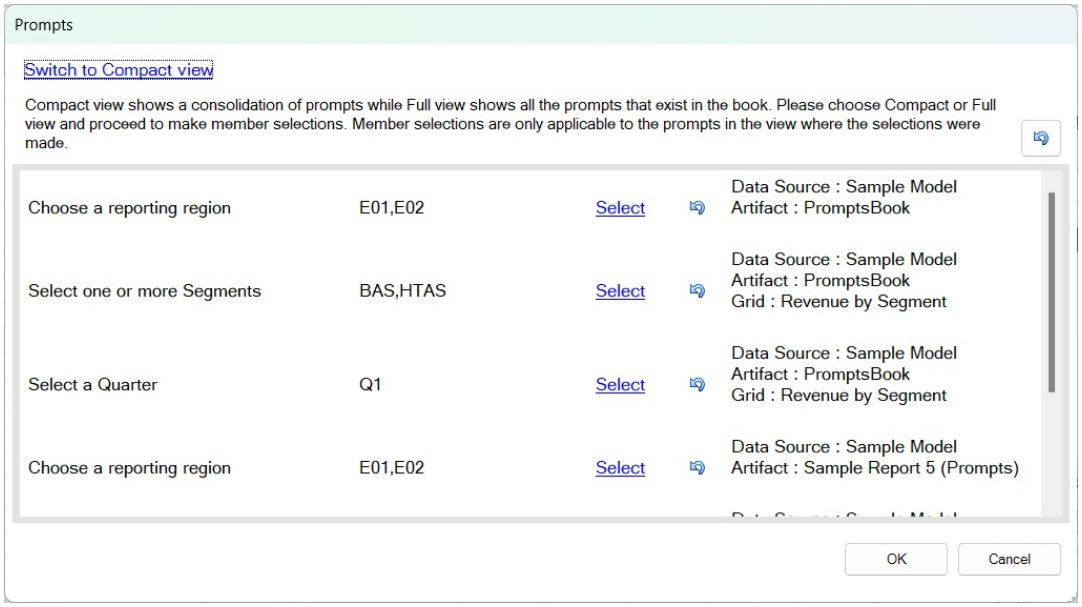
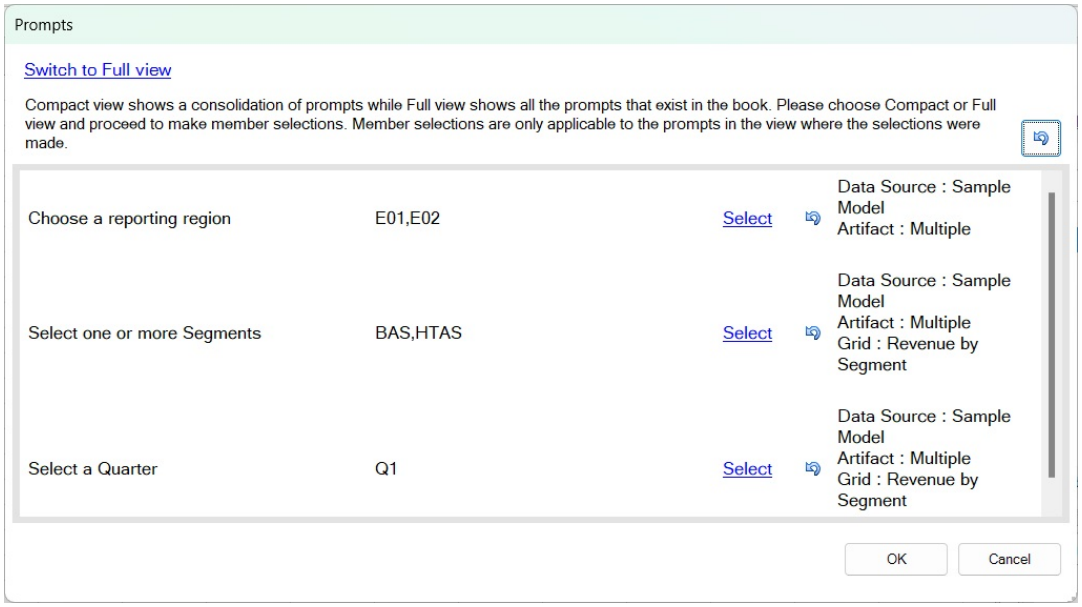


- **Compact mode**—Consolidates duplicate prompts across reports, including the same dimension, prompt label, choice list, default selection, and "Allow Multiple Selections" setting for the same data source.



In the **Prompts** dialog, you can:

- Use the link at the top left of the dialog to switch between Compact mode and Full mode.
- Click the **Select** link next to a prompt to launch the **Member Selection** dialog or the choice list, and make you prompt selection.
- Click the **Reset** button, , to reset any changes you've made to the default prompt selection for an individual prompt.

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- Click the **Reset All** button, , at the top right of the dialog, to reset all prompts selections back to the default selection.

> **Note**
>
> This behavior is slightly different when editing prompts in an existing workbook, described in Notes on Editing Prompts.

- Select values for prompts from a pre-selected choice list, if it is defined for the prompt.
- Select values for prompts using the **Member Selection** dialog, if there is no choice list defined.
- Select multiple values for the prompts, if this is defined for the prompt.

When working with the **Prompts** dialog, selections are only applicable to the mode (Compact versus Full) where the selections were made.

For example, if you made prompts selections in Compact mode and then switched to Full mode, the selections will not be copied over and vice versa.

Once all prompts have been selected, click **OK** to submit the book execution job. The Jobs console will show the newly submitted job.

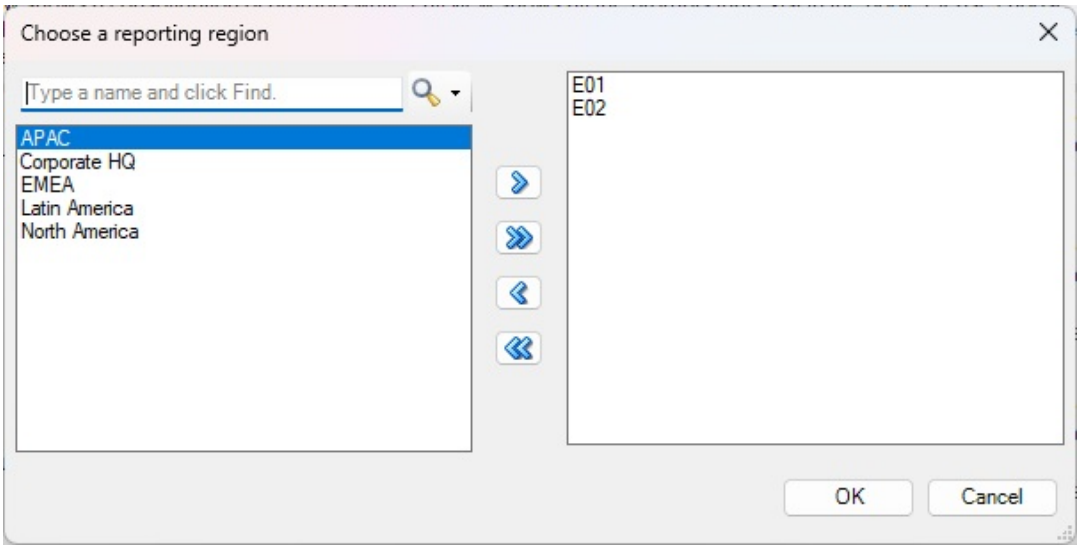
Responding to Prompts

To respond to prompts when importing a book into Oracle Smart View for Office:

1. In the **Prompts** dialog, choose a display mode, **Compact** or **Full**.
2. Click the **Select** link for a dimension.

   If a predefined choice list is displayed, select a member from the left pane and use the arrows to move it to the right pane, as shown in Figure 1.

Figure 11-8 Predefined Choice List for Prompt



If no predefined choice list is defined, then the **Member Selection** dialog is displayed, as shown in Figure 2. You can use all the available features of the **Member Selection** dialog

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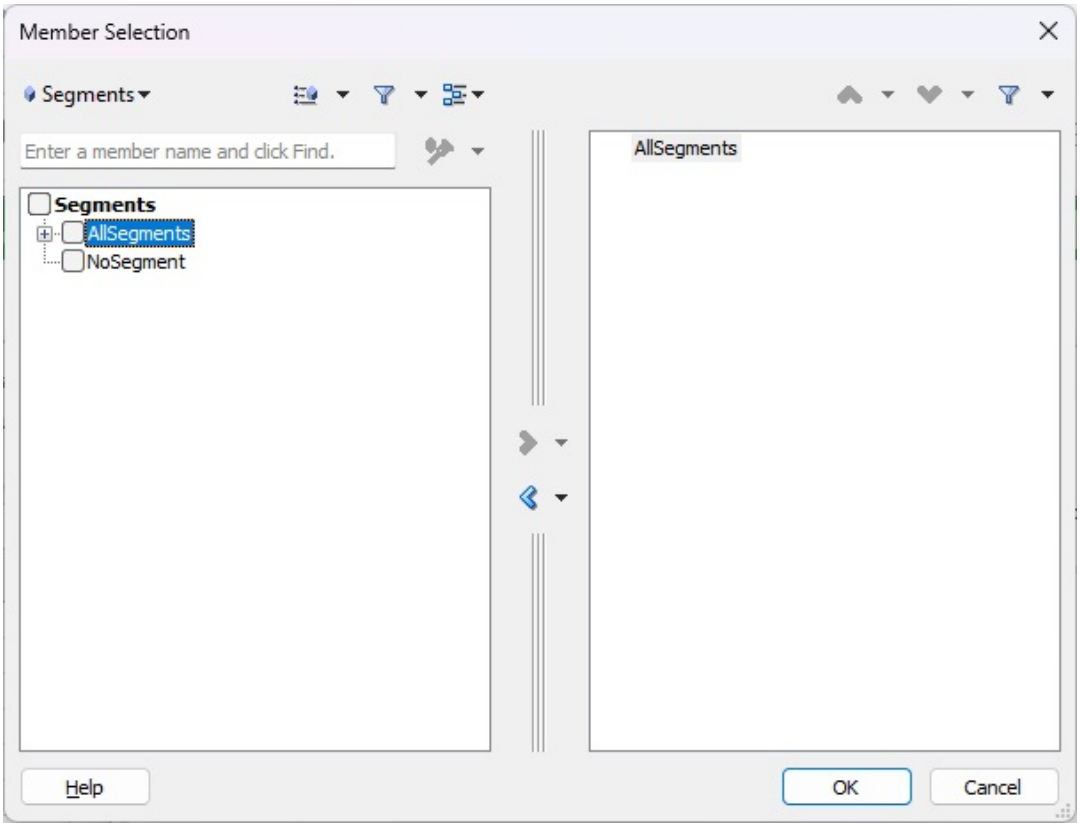
(described in Selecting Members from the Member Selector) to choose members for the prompt.

Figure 11-9 Member Selection Dialog for Prompt



3. When finished responding to prompts, click **OK**.

   If you are prompted to select members for the POV, continue with Selecting and Editing the POV.

   Otherwise, continue with step 4 in Importing Books into Smart View.

Notes on Editing Prompts

To change the prompt values for the current Book, click the **Edit Prompts** button in the Books ribbon to launch the **Prompts** dialog.

The **Prompts** dialog will display the selections made at the time the book was imported and downloaded.

You can switch between Compact mode or Full mode.

Make new selections by clicking the **Select** link next to a prompt to display the **Member Selection** dialog or the choice list, and make your prompt selection.

Clicking Reset, , or Reset All, , will reset the prompt selections to the original selections when the book was imported and downloaded, and not to the default selection from the prompt definition.

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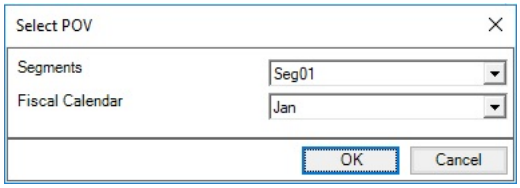
Selecting and Editing the POV

When importing a book into Oracle Smart View for Office, you may be prompted to select members for the POV.

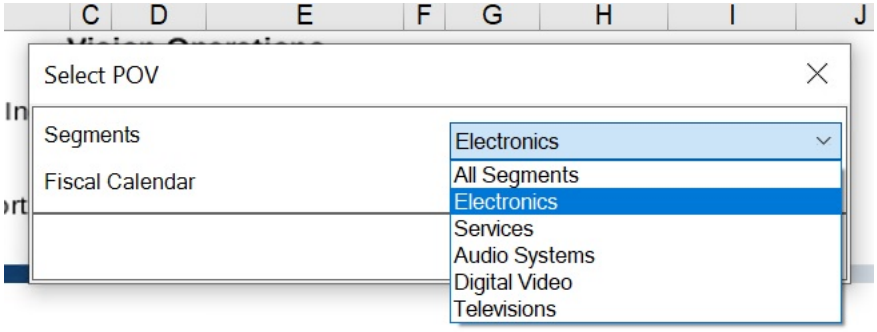
If you are prompted to select members for the POV:

1. In the **Select POV** dialog, make selections in the drop-down lists for each dimension.

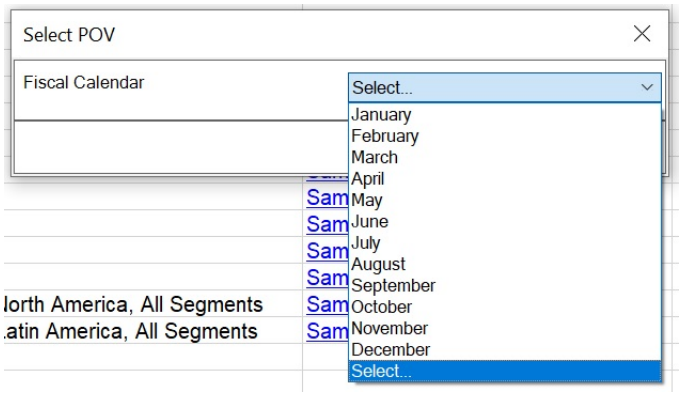
   In the following example **Select POV** dialog, selections were made for the Segments and Fiscal Calendar dimensions.



   If aliases are specified for dimensions in the report, you will see the member aliases in the drop-down selection list in the **Select POV** dialog. In the following example, when changing the POV for the Segments dimension, aliases are displayed for Segment members rather than a product code:



   If the Books designer has enabled Member Selection, then choose the **Select** option in the drop-down list to launch the **Member Selection** dialog; for example:



   After choosing the **Select** option above, the **Member Selection** dialog is displayed. In this example, the Books designer chose to provide access to all members in the Fiscal Calendar dimension, and Q1 is chosen:

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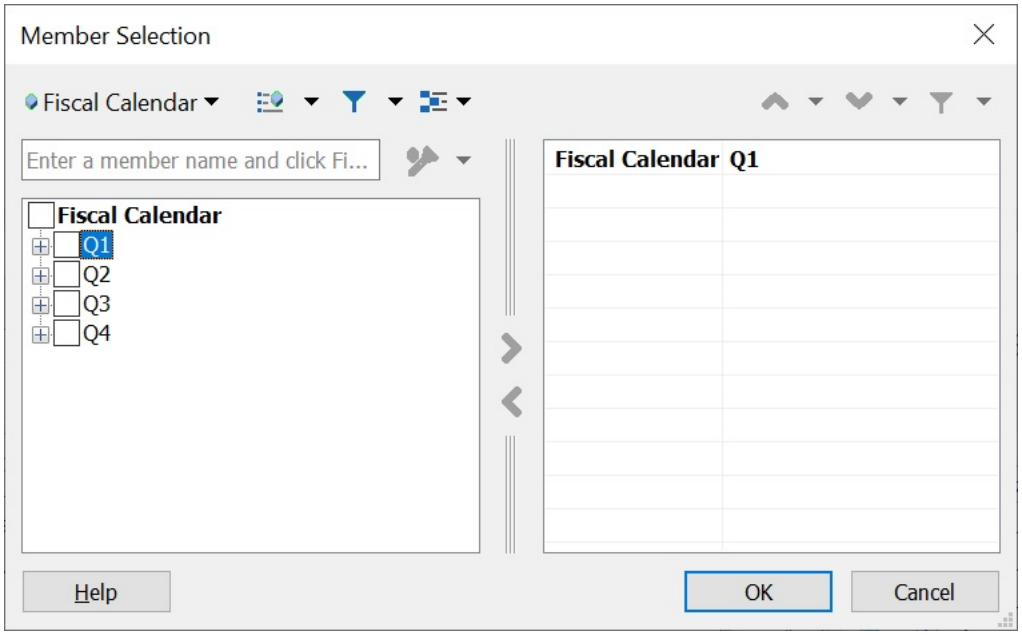


After selecting a member, click **OK** to close the **Member Selection** dialog, then click **OK** in the **Select POV** dialog.

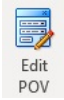
2. When finished making POV selections, click **OK**.

   The process of importing the book into Smart View begins.

   Continue with step 4 in Importing Books into Smart View.

3. To change the POV for the current Book:

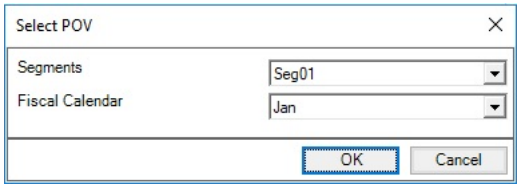
   a. Click the **Edit POV** button in the Books ribbon.



> **Note**
>
> If a Book contains any reports with relational tables, then the **Edit POV** action in the Smart View ribbon is disabled for such books.

   b. In the **Select POV** dialog, make selections in the drop-down lists for each dimension, and then click **OK**.

In the following example **Select POV** dialog, selections were made for the Segments and Fiscal Calendar dimensions.



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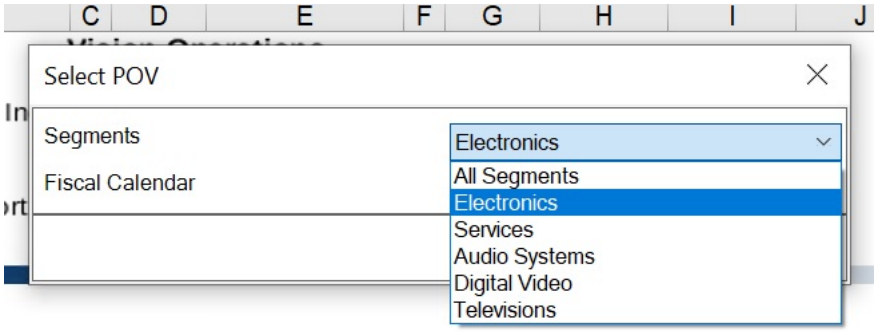
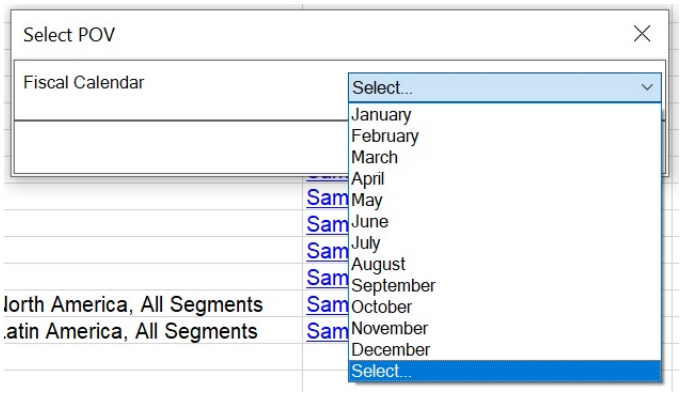
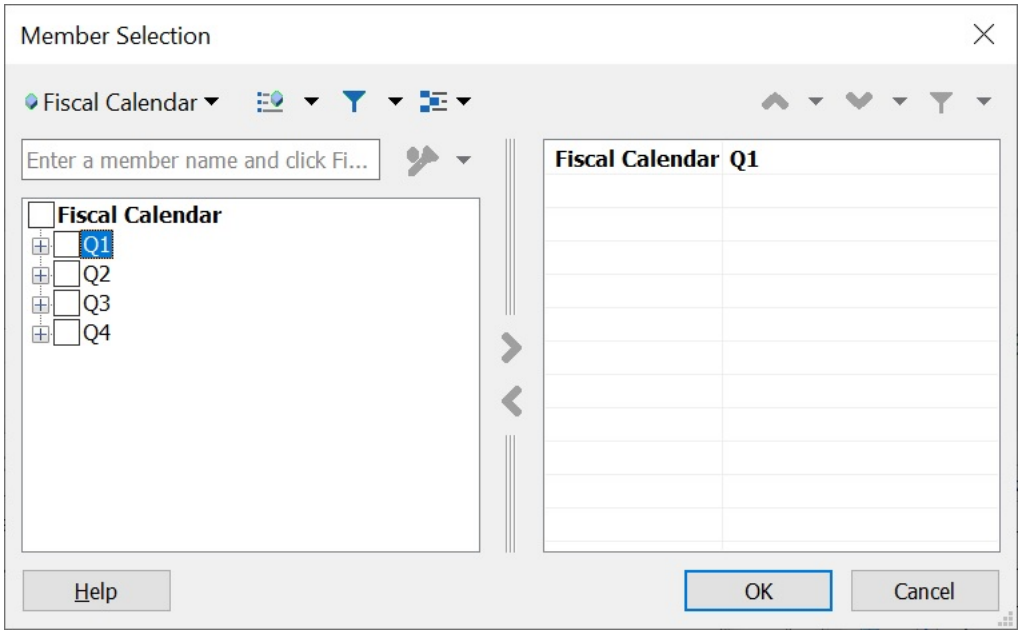
If aliases are specified for dimensions in the report, you will see the member aliases in the drop-down selection list in the **Select POV** dialog. In the following example, when changing the POV for the Segments dimension, aliases are displayed for Segment members rather than a product code:



If the Books designer has enabled Member Selection, then choose the **Select** option in the drop-down list to launch the **Member Selection** dialog; for example:



After choosing the **Select** option above, the **Member Selection** dialog is displayed. In this example, the Books designer chose to provide access to all members in the Fiscal Calendar dimension, and Q1 is chosen:



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After selecting a member, click **OK** to close the **Member Selection** dialog, then click **OK** in the **Select POV** dialog.

A message notifies you that refresh operation with the newly-selected POV values is in progress. Click **OK** in the message. The Jobs Console will display a new job row. You can check the status of the job and download the Book once the job is completed. The newly-downloaded Book will show the updated results that reflect the new POV values.

Working with Downloaded Books in Smart View

To work with a downloaded book in Oracle Smart View for Office:

1. Complete the steps in Importing Books into Smart View.

   The book is imported in to Smart View and the Books ribbon is displayed, as shown in Figure 2.

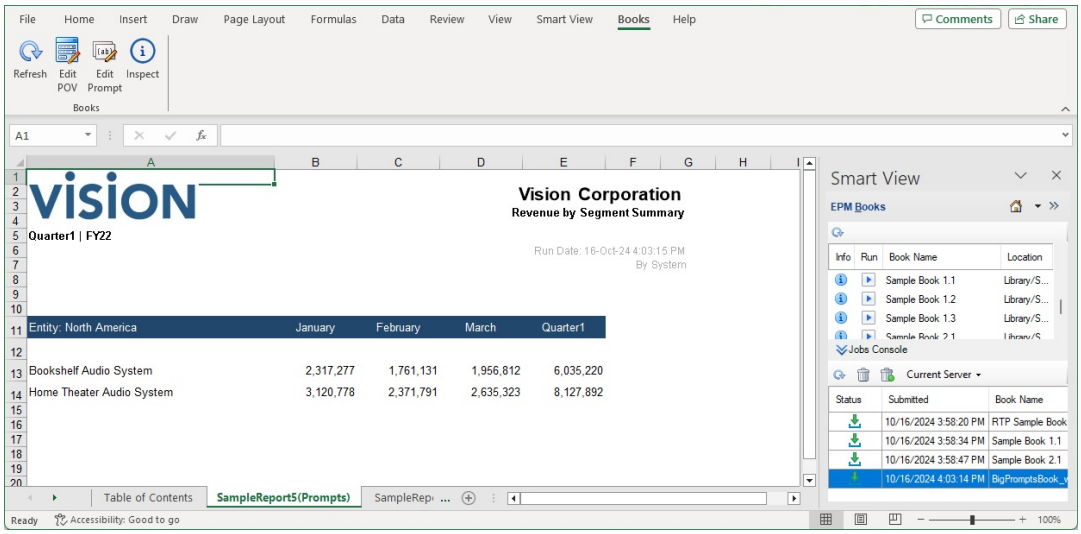
2. Click the links in the **Table of Contents** worksheet tab (Figure 2) to view the reports contained in the book.

   Each worksheet tab is a report that is part of the book that was imported and downloaded to Smart View.

   You can also click the worksheet tabs in after the Table of Contents tab to view the various reports in a book.

   Figure 1 shows an example worksheet containing a report.

Figure 11-10 Books Ribbon and Example Report Contained in Book Downloaded to Excel



3. To edit the prompts for the current book:

   a. Click the **Edit Prompt** button in the Books ribbon.

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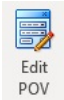
b. Follow the procedure in Responding to and Editing Prompts.

A message notifies you that a refresh operation with the newly selected POV values is in progress. Click **OK** in the message. The Jobs Console will display a new job row. You can check the status of the job and the book is automatically downloaded once the job is completed. replacing the currently open book. The newly downloaded book will show the updated results that reflect the new POV values.

4. To change the POV for the current book:

a. Click the **Edit POV** button in the Books ribbon.



> **Note**
>
> If a book contains any reports with relational tables, then the **Edit POV** option is disabled.

b. Follow the procedure in Selecting and Editing the POV.

A message notifies you that a refresh operation with the newly-selected POV values is in progress. Click **OK** in the message. The Jobs Console will display a new job row. You can check the status of the job and the book is automatically downloaded once the job is completed. replacing the currently open book. The newly downloaded book will show the updated results that reflect the new POV values.

5. To view properties for the book, in the Books ribbon, click **Inspect**.

The **Book Properties** dialog is displayed with the properties of the book, along with the **POV Selections** and **Prompt Selections** for the book.

Not shown in the following example is the **Book Name** and **Location** properties.

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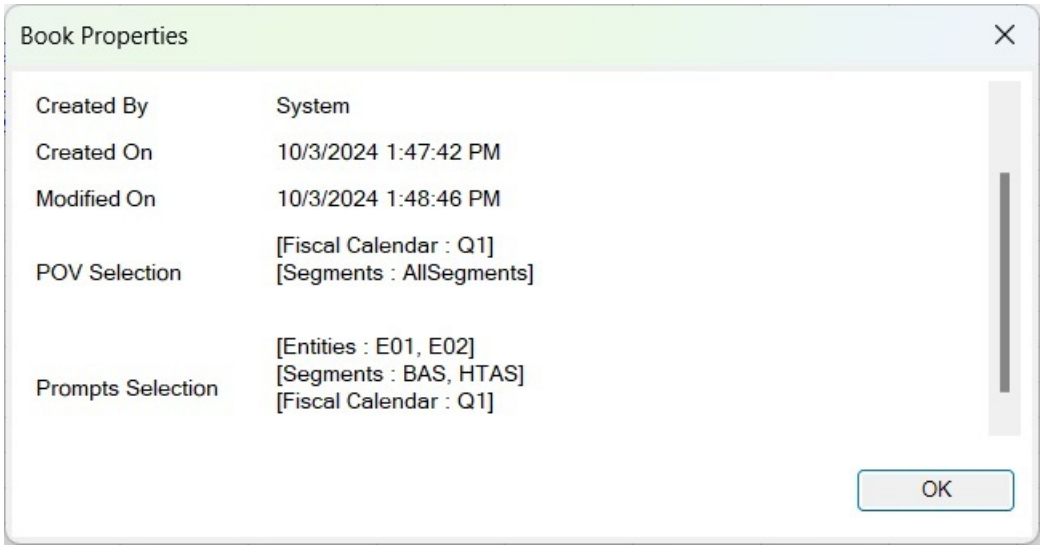
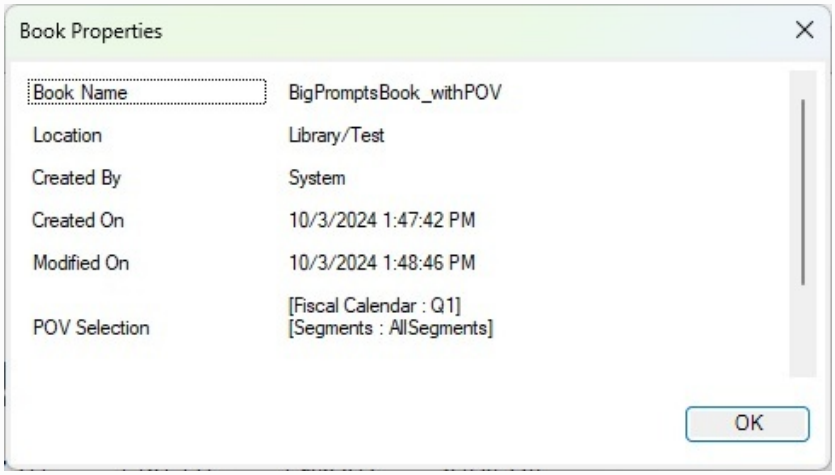


Click **OK** to close the **Book Properties** dialog.

> **Note**
>
> In Smart View, the path information in **Location** will always display the language set in the web application, even if Smart View is set to a different language. Following is an example of the **Book Properties** dialog showing the **Location** property:
>
> 
>
>
> For example, in the web application, if the **Language** option in the **User Preferences**, **General** tab is set to Japanese, and the **Language** option in the Smart View **Options** dialog, **Advanced** tab, is set to French, then the path information in the **Book Properties** dialog, **Location** field, will display as Japanese.
>
> As a best practice, Oracle recommends that the **Language** setting in Smart View **Options** match the **Language** setting in **User Preferences** in the web interface.

6. To refresh the currently-selected report, in the Books ribbon, click **Refresh**.

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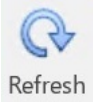

Use the **Refresh** command when data is changed in the business process; for example, when a change is made in Planning data.

Managing Jobs in the EPM Books Jobs Console

In addition to downloading Books from the Jobs Console in the EPM Books panel, you can also refresh the status of jobs, remove jobs, and display jobs from the current connection or all connectons from which you have imported Books.

Related Topics

- About the Jobs Console
- Working with Jobs in the Jobs Console

About the Jobs Console

The Jobs Console in the EPM Books panel displays a list of *jobs*. A job represents a process of importing a Book in to Oracle Smart View for Office. In the Jobs Console, you can refresh the status of jobs, download imported Books to Smart View, remove jobs, and list jobs from the current connection or all connectons from which you have imported Books.

The top portion of the Books panel lists all Books available for import from the current data source connection. Once you import a job, a job is added to the Jobs Console. Each row in the Jobs Console lists the jobs that you have import for the current connection. You can also choose to toggle the display to show jobs for all connections from which you have imported Books.

Figure 1 shows an example of the Books panel with Books listed in the Books list. All Books in the current connection have been imported and the jobs are shown in various states in the Jobs Console.

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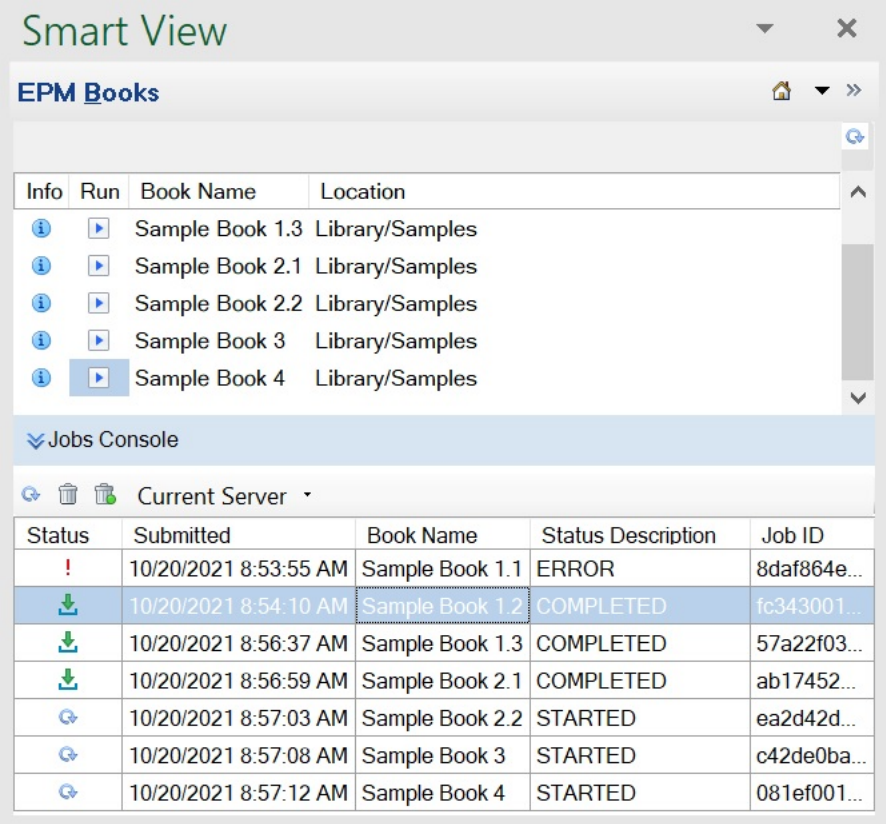
Figure 11-11 Example Books Panel with Jobs Listed in the Jobs Console

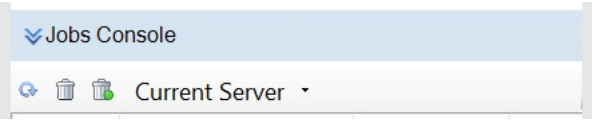


For each job, the Jobs Console provides the following information:

- **Status**—The status of the job, indicated by an icon:
  - —Job is in progress. Click to update the job status.
  - —Job is completed. Click to download the job.
  - —An error has occurred. Click to view the error message.
- **Submitted**—The date and time the job was submitted for import.
- **Book**—The name of the Book that was submitted for import.
- **Status Description**—Valid status descriptions are: **Started**, **Completed**, and **Error**.
- **Job ID**—An internal ID issued for each job by the business process.

The Jobs Console toolbar, located above the list of jobs, provides options for managing jobs, including a refresh option, delete options, and an option for selecting to display jobs from the current connection or all connections from which you have imported Books. The Jobs Console toolbar is shown in Figure 2.

Figure 11-12 Jobs Console Toolbar



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Continue with Working with Jobs in the Jobs Console for information on using the options in the Jobs Console.

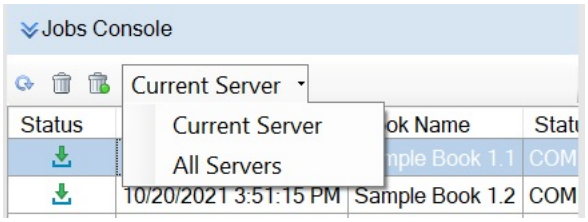
Working with Jobs in the Jobs Console

This topic describes the tasks you can complete in the Jobs Console in the EPM Books panel.

Before you begin working with jobs in the Jobs Console, you should have already connected to a data source that hosts Books and launched the EPM Books panel, as described in Launching the EPM Books Panel in Smart View.

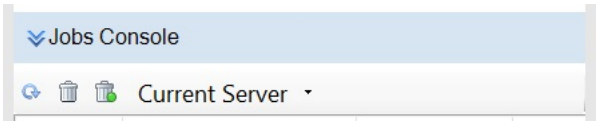
To manage jobs in the Jobs Console in the EPM Books panel, completed any of these optional tasks:

1. To display jobs, perform a task:
   - To display jobs corresponding to Books that you have imported, but not yet deleted, from any business process that hosts Books, select **All Servers** from the **Current Server/All Servers** toggle button in the Jobs Console toolbar; for example:



     When you select **All Servers**, the **Jobs Console** will display all jobs that you have imported but not yet deleted, from the current connection and any other business processes, even if you are not currently connected.
   - To display jobs from Books that you have imported, but not yet deleted, from the current connection, select **Current Server** from the **Current Server/All Servers** toggle button in the Jobs Console toolbar.

   The **Jobs Console** will display jobs from imported Books of all status types: in-progress jobs, completed jobs, and jobs that resulted in error.
2. To refresh the status of jobs in the **Jobs Console**, perform a task:
   - To refresh all jobs for the current connection, click the **Refresh all jobs** button, , in the Jobs Console toolbar:



     The status of all jobs that you have submitted from the current connection are refreshed.
   - To refresh a specific job in the **Jobs Console** list, click in the **Status** column on the row for the job. For example,

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The status of the selected job is refreshed.

3. To delete completed jobs in the **Jobs Console**, perform a task:

   - To delete all completed jobs from all business processes from which you have imported jobs, select **All Servers** from the toggle button in the Jobs Console toolbar, and then click .

     Completed jobs are deleted from any business process from which you have imported jobs, including business processes to which you are not currently connected.

   - To delete all completed jobs from the business process to which you are currently connected, select **Current Server** from the toggle button in the Jobs Console toolbar, and then click .

     Completed jobs are deleted from the current connection.

   - To delete a specific completed job from the current connection in the Books panel, select the row for the job in the **Jobs Console** and click .

     You can use the **Control** key to select more than one contiguous or non-contiguous job from the list, and then click .

     Toggle between **Current Server** and **All Servers**, as you require. You can delete from selected jobs from the current connection or all connections from which you have imported Books.

     The selected jobs are deleted from the list of jobs in the **Jobs Console**

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12

Reports

Reports is a cloud-based reporting solution for creating Oracle Fusion Cloud Enterprise Performance Management financial and managerial reports. It enables users to insert charts and grids utilizing Cloud EPM Platform sources such as Planning or Narrative Reporting, into a report.

Related Topics

- About Reports
  You can import or insert reports as ad hoc queries and as fully formatted reports from Oracle Fusion Cloud Enterprise Performance Management data sources into Oracle Smart View for Office to perform further operations on them.
- Importing Reports as Ad Hoc Queries
  You can import Reports in to Oracle Smart View for Office as ad hoc queries, on which you can then perform available ad hoc operations.
- Importing or Inserting, and Working with Fully Formatted Reports
  You can import or insert reports in to Oracle Smart View for Office as fully formatted reports.

About Reports

You can import or insert reports as ad hoc queries and as fully formatted reports from Oracle Fusion Cloud Enterprise Performance Management data sources into Oracle Smart View for Office to perform further operations on them.

Supported data sources include:

- Cloud EPM: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting
- Oracle Essbase cloud
- Oracle Profitability and Cost Management Cloud Essbase Provider
- Oracle Fusion Applications Essbase Provider
- Oracle Essbase Analytic Provider Services (APS)

Reports is a cloud-based reporting solution for creating Cloud EPM financial and managerial reports. It enables users to insert charts and grids utilizing Cloud EPM sources such as Planning or FreeForm, into a report.

Report grids are tables that contain data from external data source connections. Service Administrators add grids to Reports, defining the dimension layout, selecting members, and then formatting the grid. Using text, dimensions, members, and formulas, administrators define the grid content.

> **Note**
>
> Reports functionality and the Reports folder are available only in Excel.

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Using Smart View for Excel, you can import reports as ad hoc grids, import them as fully formatted reports, or insert them as fully formatted reports.

Import Report as Ad Hoc Grids

You can perform supported ad hoc operations on the grids, such as pivoting and member selection, directly against the data source. The grids can be saved and then used as sources for embedded content in report package doclets.

See Importing Reports as Ad Hoc Queries.

Import or Insert Reports in Excel Workbooks as Fully-Formatted Reports

You can import a single report or insert multiple reports in a workbook. If previewing POV is enabled for reports, you can select the POV while importing or inserting the report. If prompts are included in the report, you specify the prompts during import or insert.

You can also import reports with relational tables in Smart View.

You can do the following with imported and inserted reports:

- Change the POV and refresh the report data, as needed.
- Edit the prompts (for imported reports only).
- Save and refresh the workbook with the latest report data.
- Distribute the report to others as Excel files.
- Generate an ad hoc grid from the report, and then perform further ad hoc operations for the purpose of data analysis.

See Importing or Inserting, and Working with Fully Formatted Reports.

Guidelines about Imported and Inserted Reports

- There will be some differences between reports imported or inserted in the web and reports imported in to Excel, as described in Differences between Reports and Reports Imported in Excel in *Designing with Reports*, available on the Oracle Help Center, **Books** tab, for your Cloud EPM business process.
- **Service Administrators:** During report design, you can configure reports to use the **Member Selection** dialog in prompts or the POV by performing these tasks:
  - Clear the **Display Suggestions Only** option when defining POV dimensions
  - Do not specify a **Choice List** when defining prompts

  In both cases, users can launch the **Member Selection** dialog to select the members to which they have access for the POV and prompts.
- **Service Administrators:** For reports with multiple data sources:
  - When a dimension name is unique among the data sources, then the **Member Selection** dialog can be made available for the POV (clear **Display Suggestions Only**) and prompts (do not specify a **Choice List**).
  - When the same dimension name occurs in more than one of the multiple data sources, then a suggestions or a choice list must be defined for the POV and prompts.
- If **Print All Selections** is enabled during report design, after importing or inserting reports in Excel workbooks, the worksheet names will reflect the report name followed by the first POV dimension that was enabled for **Print All Selections**, truncating the sheet name as needed to meet Excel's 31-character limit.

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- Note that a report may contain a number of grids, charts, text objects and images laid out across one or more pages. All such objects are brought in to the Excel workbook upon import. Text boxes in the report are converted to images in the imported Excel sheet. In some cases, you may need to manually resize the image box in Excel to match the report presentation. To resize an image, use Excel's image formatting tool. Right-click the image and select **Size and Properties**. In **Format Picture**, set **Scale Height** and **Scale Width** to 100%.

Other Ways to Import Reports: Download as Excel and Download as Excel Ad Hoc

You can also use the "Download as Excel" and "Download as Excel Ad Hoc" commands in your web application to import Reports in to Smart View for Excel, as described in Working with Reports in Smart View in *Working with Reports*.

Note the following considerations while working with reports downloaded using the "Download as Excel Ad Hoc" command:

- All non-suppressed and visible data rows and columns in a report's ad hoc grid are also imported in Smart View. Hidden rows and columns in the grid are not included in the resulting Smart View ad-hoc grid. Row or column headings that were hidden in the web application view also appear in the respective dimensions, and are not moved to the POV.
- Only data rows and columns are imported in Smart View. Non-data details are static and remain unchanged even after a grid is refreshed. So to avoid confusion, all non-data details such as text, formula, separator and notes rows and columns are omitted when importing any ad hoc grids present in reports.

Importing Reports as Ad Hoc Queries

You can import Reports in to Oracle Smart View for Office as ad hoc queries, on which you can then perform available ad hoc operations.

The procedure in this topic describes importing Reports as ad hoc grids starting in Smart View for Excel.

You can also use the "Download as Excel Ad Hoc" command in your web application to import Reports as ad hoc grids in to Smart View for Excel, described in Working with Reports in Smart View in *Working with Reports*.

> **Note**
>
> Before you begin, launch Smart View in Excel and connect to a supported Oracle Fusion Cloud Enterprise Performance Management data source as described in Connecting to Data Sources.

To import a report in to Smart View as an ad hoc query:

1. In the Smart View Panel, navigate to the **Reports** folder.

   All reports available in the business process can be accessed from the **Reports** folder.

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> **Note**
>
> - For most Cloud EPM business processes, the **Reports** folder is located under the application folder.
> - For Narrative Reporting, the **Reports** folder is located under the **Library** folder.

2. Expand a report to view the available grids, and then select a grid.
3. In the Action Panel, click **Import as ad hoc query**.

   Alternatively, right-click the grid and select **Import as ad hoc query**.

   The report grid is rendered as an ad hoc query in Smart View. The provider ad hoc ribbon and POV toolbar are displayed.

   > **Note**
   >
   > - Formatting that is displayed when the report is viewed in the web application is not available when the grid is imported in to Smart View.
   > - Report grid text and formula rows and columns are not imported into Excel; only data is imported.
   > - When working with a Cloud EPM application that is set to "Native" mode (Smart View Ad Hoc Behavior option = Native), the POV dimensions are displayed both in the POV toolbar and as page dimensions on the grid.
   >
   >   Additionally, performing a **Change Alias** operation may cause a "Member out of place" error.

4. Perform ad hoc operations as required.

   For example, you can:

   - Zoom in on members
   - If available, click the **POV** button in the data provider ad hoc ribbon to display or hide the POV toolbar
   - Pivot POV dimensions or members to the grid
   - Use **Member Selection** to change the grid point-of-view

Importing or Inserting, and Working with Fully Formatted Reports

You can import or insert reports in to Oracle Smart View for Office as fully formatted reports.

The procedure in this topic describes importing or inserting Reports in Smart View for Excel. You can also use the "Download as Excel" command in your web application to import Reports in to Smart View for Excel, described in Working with Reports in Smart View in *Working with Reports*.

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> **Note**
>
> - Before you begin working with fully formatted reports in Smart View, launch Smart View in Excel and connect to a supported Oracle Fusion Cloud Enterprise Performance Management data source.
> - Reports containing relational tables can be imported in Smart View 24.200 and later using Narrative Reporting extension 24.10 and later.

To import or insert, and then work with a fully formatted report:

1. In the Smart View Panel, navigate to the **Reports** folder.

   All reports available on the instance can be accessed from the **Reports** folder.

   > **Note**
   >
   > - For most Cloud EPM business processes, the **Reports** folder is located under the application folder.
   > - For Narrative Reporting, the **Reports** folder is located under the **Library** folder.

2. Select a report and then, in the Action Panel, choose an option:

   - **Import Formatted Report**—Choose this option if you plan to import a single report into a workbook. This option allows for one report per workbook.

     Each subsequent report you select for import will be imported to a new workbook.

   - **Insert Formatted Report**—Choose this option if you plan to insert multiple reports into one workbook. This option allows for multiple reports per workbook.

     Each subsequent report you select for insert will be added to the same workbook.

     You can also insert the same report multiple times in the same workbook by changing the report's prompt and POV combinations. This is useful when you want to present the same report for differing POV selections, such as time periods, scenarios, entities, or products in the same workbook. Each report gets inserted on a separate sheet within the workbook.

     For example, you want to present the expense information from a report for Manufacturing, Marketing, and Sales Departments for FY24. While inserting the expense report, select *Manufacturing* as the Entity in the **Select POV** dialog. Once the report is inserted, you select the same report again from the Smart View Home Panel and click **Insert Formatted Report**. This time, in the **Select POV** dialog, select *Marketing* as the Entity. This second report gets inserted in a new sheet within the same workbook. Similarly, repeat the same process to insert the same report a third time by selecting *Sales* as the Entity in the **Select POV** dialog. This way, you can get the same expense report with information about three departments on different sheets within the same workbook.

   Alternatively, right-click the report and select the **Import Formatted Report** or **Insert Formatted Report** as you require.

   If the report contains prompts, perform step 3. If previewing POV is enabled, perform step 4. If there are no prompts or preview POV, then the fully formatted report is rendered in a new Excel workbook for imported reports and in the current Excel workbook for inserted reports.

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> **Note**
>
> - If **Print All Selections** is enabled during report design, the worksheet names will reflect the report name followed by the first POV dimension that was enabled for **Print All Selections**, truncating the sheet name as needed to meet Excel's 31-character limit.
> - Note that the report may contain a number of grids, charts, text objects and images laid out across one or more pages. All such objects are brought in to the Excel workbook upon import. Text boxes in the report are converted to images in the imported Excel sheet. In some cases, you may need to manually resize the image box in Excel to match the report presentation. To resize an image, use Excel's image formatting tool. Right-click the image and select **Size and Properties**. In **Format Picture**, set **Scale Height** and **Scale Width** to 100%.

3. If the report contains prompts, you can view them in the **Select Prompts** dialog, categorized under prompt labels for clear differentiation. You can choose to use the default prompts by clicking **OK** in the **Select Prompts** dialog; or, you can change the prompts as described in Editing Prompts in Reports and then click **OK**.

   The fully formatted report is imported or inserted with your prompt selections.

4. If **Preview POV** is enabled for reports, you can choose to use the default POV by clicking **OK** in the **Select POV** dialog; or, you can change the POV as described in Previewing the POV in Reports and then click **OK**.

   The fully formatted report is imported or inserted with the selected POV.

5. **Optional:** After importing or inserting the report, you can do the following:

   - To edit the POV, click **Edit POV** in the **Report** group of the Smart View ribbon, and follow the procedure in Changing the POV in Reports.
   - If prompts are available to edit, click **Edit Prompts** in the **Report** group of the Smart View ribbon, and follow the procedure in Editing Prompts in Reports.

     > **Note**
     >
     > When you use the **Insert Formatted Report** command, you cannot edit prompts in the inserted report. The **Edit Prompts** action in the Smart View ribbon is disabled. Instead, repeat the **Insert Formatted Report** command and select the prompts you require from the **Select Prompts** dialog while inserting the report.

   - To refresh a report, in the **Report** group of the Smart View ribbon, click **Refresh Report** for an imported or inserted report, or click **Refresh All Reports** for refreshing multiple inserted reports and follow the procedure in Refreshing Reports.
   - For reports containing relational tables, you can only refresh the report using the **Refresh Report** option on the Smart View ribbon. The other options of **Edit POV**, **Edit Prompts**, and **Analyze** remain disabled, and will be made available in a future release.

6. **Optional:** To create an ad hoc grid from an imported grid or chart, select a cell inside the grid or select the chart image and, in the Smart View ribbon, click **Analyze**.

   In a sheet containing multiple reports, select one report, and then click **Analyze**.

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The ad hoc grid is launched in a separate worksheet.

> **Note**
>
> - If your report includes percentages, note that percentage formatting is part of the number formatting applied to the values. Importing a formatted report shows applied number formatting. In the ad hoc grid, bare numbers are shown without any formatting.
> - Modifications to prompts and POV are not taken into account when performing **Analyze**. The newly inserted ad hoc grid (or analyzed grid) will always show the default grid.
> - The **Analyze** command is not supported on a formatted report with grouping and on an already analyzed grid.

See Importing Reports as Ad Hoc Queries for information on working with the ad hoc grid.

7. **Optional:** To view the properties of a report, in the tree in the Smart View Panel, select a report and click **Properties**.

   Alternatively, right-click the report name and select **Properties** to access **Report Properties**.

   In the **Report Properties** dialog, view these report properties: **Name**, **Description**, **Path** (if located in a folder other than the default), **Created By** (a user name), **Created On** (a date), and **Modified On** (a date).

8. **Optional:** Use the Excel **Save** or **Save As** commands to save the workbook.

Previewing the POV in Reports

Previewing the POV gives you the ability to control and edit it before importing or inserting a report.

In Oracle Smart View for Office 23.100+, when you import or insert a report from a Cloud EPM business process or Narrative Reporting, you can preview and set the POV.

Before you begin, you need to enable the User Preference option for Reports, **Preview POV**, in the web application as follows:

- In Narrative Reporting, navigate to **Tools**, select **User Preferences**, and then select the **Preview POV** check box in the **Reporting** tab.
- From an Oracle Fusion Cloud Enterprise Performance Management business process, navigate to **Tools**, select **User Preferences**, and then select the **Preview POV** check box in the **Reports** tab.

After saving the user preferences, restart Microsoft Excel if it is already open, and connect to the business process in Smart View.

To preview and select the POV when importing or inserting a report:

1. In the **Select POV** dialog, view the default POV specified for the report and click **OK** if you want to proceed importing the report without changing the POV; to edit the POV, proceed to the next step.

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> **Note**
>
> If you click **Cancel** in the **Select POV** dialog box, the import or insert process is cancelled and the report is not imported in to Smart View.

2. To edit the POV of the report, perform either of the following tasks as you require:
   - Select a value in each dimension drop-down list and click **OK**.
   - Select the drop-down menu for a POV dimension, click Select…; then, in the **Member Selection** dialog, choose a member for the POV, and then click **OK**.

   > **Note**
   >
   > Be sure to choose only one member in the **Member Selection** dialog.

   You can also edit the POV after importing or inserting the report by following the procedure in Changing the POV in Reports.

Editing Prompts in Reports

If the report contains prompts, you can choose to take the default prompts when importing or inserting, or change the prompts.

Prompt labels are defined while designing reports. Report designers give meaningful labels such as "Select a reporting region" or "Select a quarter" so that users can understand and select the prompts correctly. While importing or inserting a report in Oracle Smart View for Office, if the report contains prompts, then the **Select Prompts** dialog lists the available prompts and users can select the required ones before importing or inserting the report.

The prompts are categorized and displayed under prompt labels instead of dimension names in the **Select Prompts** dialog. This becomes helpful, especially when prompts belong to the same dimension. In such cases, prompt labels enable users to distinguish between the prompts easily.

To choose the default prompts, click **OK** in the **Select Prompt** dialog.

To edit the prompts, use the procedure in this topic.

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> **Note**
>
> - Before you begin:
>   - You should have imported the report as described in Importing or Inserting, and Working with Fully Formatted Reports.
>   - Save the workbook if there are changes that you want to keep. The workbook will be closed and regenerated when you edit prompts.
> - When you use the **Insert Formatted Report** command, you cannot edit prompts in the inserted report. The **Edit Prompts** action in the Smart View ribbon is disabled. Instead, repeat the **Insert Formatted Report** command and select the prompts you require.
> - Reports containing relational tables are imported as static reports. So the **Edit Prompts** action in the Smart View ribbon is disabled for such reports.

To edit the prompts for a report:

1. To edit the prompts when importing or inserting the report, in the **Select Prompts** dialog, perform an available action:
   - Use the check boxes to select members for each prompt.
   - Click the ellipsis button, ... to launch the **Member Selection** dialog. In the left pane of the **Member Selection** dialog, expand the members where necessary, then select one or more members and click to move members to the right pane, and then click **OK** to return to the **Select POV** dialog.

     > **Note**
     >
     > You can select multiple members only if the report prompt is configured for multiple member selection.

   The sheets in the resulting workbook will appear in alphabetical order, just as they were listed in the dialog. You can manually reorder the Excel worksheets, if required.
2. To edit the prompts after the report is imported or inserted:
   a. In the Smart View ribbon, click **Edit Prompts**, .
   b. Repeat the actions noted in step 1 for each prompt that you want to edit, and then click **OK** to import the report.

   > **Note**
   >
   > Editing prompts reloads the formatted report.

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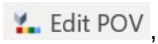
Changing the POV in Reports

You can change the POV in a fully formatted report.

> **Note**
>
> - Before you begin:
>   - You should have imported the report as described in Importing or Inserting, and Working with Fully Formatted Reports .
>   - Save the workbook if there are changes that you want to keep. The workbook will be closed and regenerated when you edit the POV.
> - Reports containing relational tables are imported as static reports. So the **Edit POV** action in the Smart View ribbon is disabled for such reports.

To change the POV in an imported or inserted report.

1. Click **Edit POV**, 

, in the Smart View ribbon to launch the **Select POV** dialog.

   Use the drop-down arrow in each field to locate drop-down lists indicating that the dimension POV can be changed.

   > **Note**
   >
   > Editing the POV reloads the formatted report.

2. If the drop-down list contains a fixed list of options, select an option from the list.
3. If the drop-down list contains the **Select...** option:
   a. Click **Select...** to open the **Member Selection** dialog.
   b. In the left pane of the **Member Selection** dialog, expand the members where necessary, then select one member and click to move it to the right pane, and then click **OK** to return to the **Select POV** dialog.

   > **Note**
   >
   > - Be sure to choose only one member in the **Member Selection** dialog.
   > - Only one member from the current dimension can be selected at a time. To select a member from a different dimension, you must exit **Member Selection** and then choose **Select...** from the drop-down list of a different dimension in the **Select POV** dialog.
   > - The designer of your report specifies during POV definition whether the drop-down list is static or contains a **Select** option indicating that member selection is allowed for the POV (described in Defining the Grid Point of View in the *Designing with Reports*).

4. After making your selections to the dimensions you require in the **Select POV** dialog, click **OK**, taking the newly selected members as your POV selections.

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The formatted report is regenerated using the updated POV.

Refreshing Reports

You can refresh the imported reports and inserted reports when the underlying data in the reports change during your session to fetch the latest updates in data.

Refresh a Report

Using the **Refresh Report** menu, you can refresh the report that is currently open in the workbook. This menu is used to refresh both imported reports and inserted reports.

To refresh a single report at a time:

1. Open the report that you want to refresh.
2. In the Smart View ribbon, under the **Report** group, click **Refresh Report**.
   The report is refreshed with the latest data.

> **Note**
>
> - The **Report** group is displayed in the Smart View ribbon only when the report is open. **Refresh Report** maintains the open workbook and also maintains the user formula.
> - When you refresh an existing exported, imported, or inserted report in Excel, the existing report gets refreshed in the same Excel workbook.
> - You can only refresh reports in Excel that are in the original workbook. If you move or copy report sheets to another workbook, they cannot be refreshed.

Refresh All Reports

Starting Oracle Smart View for Office 25.100+, you can refresh all inserted reports present in a workbook in a single click using the **Refresh All Reports** menu. This menu can be used only for inserted reports. It appears disabled in the Smart View ribbon for imported reports, since these are standalone reports and are always imported in new workbooks.

To refresh all inserted reports in a workbook at once:

1. Open the workbook with the inserted reports that you want to refresh.
2. In the Smart View ribbon, under the **Report** group, click **Refresh All Reports**.
   All reports in the workbook are refreshed with the latest data.

> **Note**
>
> If you do not change the prompt and POV, and insert the report again with the same prompt and POV combination, then Smart View allows you to insert the report. However, when you try to refresh it, only the last inserted report is refreshed. The initially inserted report with the same prompt and POV combination is not refreshed.

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13

Smart Forms

Related Topics

- About Smart Forms
  Create and manage Smart Forms in Oracle Smart View for Office.
- Creating Smart Forms
  In Oracle Smart View for Office, you create Smart Forms by saving ad hoc grids that contain grid labels and business calculations.
- Smart Form Example Scenario
  Smart Forms start with an ad hoc grid.
- Excel Functions Supported in Smart Forms
  Several Excel functions are supported in Smart Forms.

About Smart Forms

Create and manage Smart Forms in Oracle Smart View for Office.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

> **Note**
>
> **Administrators:** Smart Forms are supported for Native-mode applications only. In Native-mode applications, the **Smart View Ad Hoc Behavior** option is set to **Native**. For more information, see the topics on application settings in the *Administering* guide for your cloud business process.

Starting with an ad hoc analysis grid, you can customize the grid by adding business calculations to it, in the form of Excel functions and formulas. These calculations don't affect metadata in the rest of the source application. The business calculations that you create and save in the Smart Form can then be executed in both Smart View and the provider web interface; for example, in Planning. In Smart View, the formulas are evaluated by Excel; in the web interface, the formulas are evaluated by the provider.

For example, say you're analyzing Planning data in Smart View. You want to calculate the average profit margin for four products. You can add a row to the grid, with the grid label of "Average Profit Margin." In the new row, add an Excel function for average profit margin, selecting the profit margin data cells for each of the four products. If the profit margin for each product appears in column D of the grid, then your function may be `=AVERAGE(D5:D8)`. In Smart Forms, the Excel formulas and functions you add are referred to as *business calculations*. After you add the business calculation, the average profit margin is instantly displayed in the new row, but the new row will be saved only in the Smart Form, not the rest of the application.

To make this ad hoc grid with its grid labels and calculations available as a form in Planning, you select the **Save As Smart Form** option in the Planning ribbon in Smart View. Thereafter, in Planning or Smart View, you can open and use this Smart Form as a form, including any rows,

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columns, and business calculations you added. In Smart View, you can perform ad hoc against this Smart Form. You can even create a sandbox from a Smart Form.

The sections that follow provide descriptions and guidelines for working with Smart Forms.

Smart Forms

Smart Forms are a type of data form, created in Smart View and based on ad hoc grids, that have functionality not supported by regular data forms. Smart Forms support grid labels, along with business calculations in the form of Excel formulas and functions. In Smart View, you can save these ad hoc grids to the applicable provider, such as Planning, as Smart Forms. The business calculations and grid labels, along with any empty rows and columns, are saved as a part the Smart Form definition. Additionally:

- Beside calculated cells and empty rows and columns functionality, Smart Forms support extended Excel formatting features including cell merging.
- Smart Forms can be used by end users in the same way as regular forms in the applicable web interface or in Smart View.
- Smart Form design, as with form design in the application web interface, is not available for end users. You must have the Admin or Interactive User role to save ad hoc grids as Smart Forms.

  As with regular forms, the administrator must assign read/write access to Smart Forms for end users.
- In Smart View, you design Smart Forms in Excel worksheets, meaning you can clearly see the Smart Form layout, even an asymmetric layout. In the provider web interface, you would need to create separate rows and columns to achieve this.
- When connected using a shared connection, the following Smart View functions are supported in Smart Forms: HsGetValue, HsSetValue, and HsActive.

  When connected using a private connection, Smart View functions are not supported.

  Note: When you open an a Smart Form containing a Smart View function, click **Refresh** to update the function cells with their correct values.
- In the provider web interface, while in design mode:
  - You can assign business rules to Smart Forms.
  - You cannot modify the Smart Form grid layout, Excel formatting, or business calculations.
- Smart Form functionality is available for ad hoc grids created with Planning, Financial Consolidation and Close, and Tax Reporting. Check with your service administrator about the availability of Smart Forms in your service.

Business Calculations

In Smart Forms, the Excel functions and formulas that you add to an ad hoc grid are referred to as *business calculations*. When a grid is saved as a Smart Form, end users can execute the business calculations from the Smart View client, without adding members to the application metadata.

Business calculations are executed in Smart View utilizing Excel's calculation engine, and do not require queries to the provider. These runtime business calculations are supported in both Smart View and the data provider. Also note the following:

- Many Excel functions are supported in Smart Forms. If an Excel function is not supported, a message will notify you when you attempt to save the Smart Form.

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- You can apply Excel formatting to the business calculation cells so that the figures display according to your preferences; for example, with dollar signs or decimal points.
- In the grid label row or column, you cannot enter only constants for the business calculation cells; for example, 1000 or 0.10 are not supported. If you want to use a constant in a calculated cell, be sure to prefix it with an equal sign (=); for example, =1000 or =0.10.

Grid Labels

Grid labels are used to provide placeholders in a grid for entering business calculations for corresponding data cell intersections. They are required in order to save an ad hoc grid with business calculations. Additionally:

- You enter grid labels manually in Excel in place of actual members in an ad hoc grid.
- Grid label names cannot match any actual member name in the data source application, or any member alias from any alias table. In case of a match, the actual member name or alias name will take precedence over the grid label name.
- Grid labels cannot consist of only blank spaces.
- Grid labels do not have any dimension properties.
- Grid labels are not visible in the Planning Dimension Editor and they are not sent to Oracle Essbase.
- Data cells created by the intersection of actual members with grid labels are referred to as *calculated cells*.

Creating Smart Forms

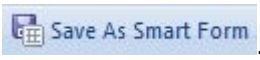
In Oracle Smart View for Office, you create Smart Forms by saving ad hoc grids that contain grid labels and business calculations.

Smart Forms are saved to Planning, Planning Modules, Financial Consolidation and Close, or Tax Reporting accordingly.

To create a Smart Form:

1. Follow the steps in Starting Ad Hoc Analysis to create an ad hoc grid.

   Alternatively, open a form and, from the provider ribbon, click **Analyze** to convert the form to an ad hoc grid.
2. Add grid labels and business calculations (in the form of Excel formulas and functions), to the ad hoc grid.

   See Smart Form Example Scenario
3. After you have added grid labels and business calculations to an ad hoc grid, in the provider ad hoc ribbon, click 

.
4. In the **Save Grid As Smart Form** dialog box:
   - In **Grid Name**, provide a name for the Smart Form.
   - In **Grid Path**, browse to the location where you want to store the Smart Form.

     You can also type a new folder name. The folder appears under the application in the Smart View Panel.
   - **Optional:** Select **Submit Formatting** to save any custom Excel formatting changes that have been applied to the grid.

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See About Working with Native Excel Formatting in Cloud EPM Forms for additional notes and guidelines about saving formatting in ad hoc grids and forms.

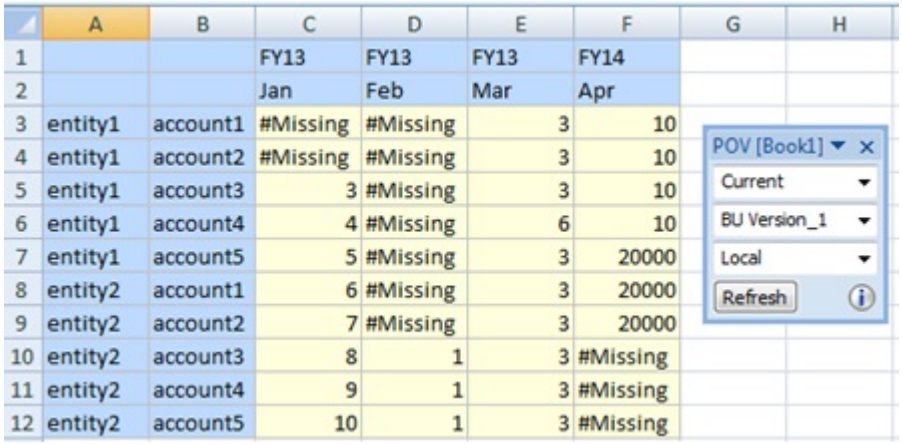
In the Smart View Panel, Smart Forms are designated with the icon.

Smart Form Example Scenario

Smart Forms start with an ad hoc grid.

The ad hoc grid is created either by opening a Planning, Financial Consolidation and Close, or Tax Reporting form for ad hoc analysis or by starting ad hoc analysis at the cube level, as shown in Figure 1.

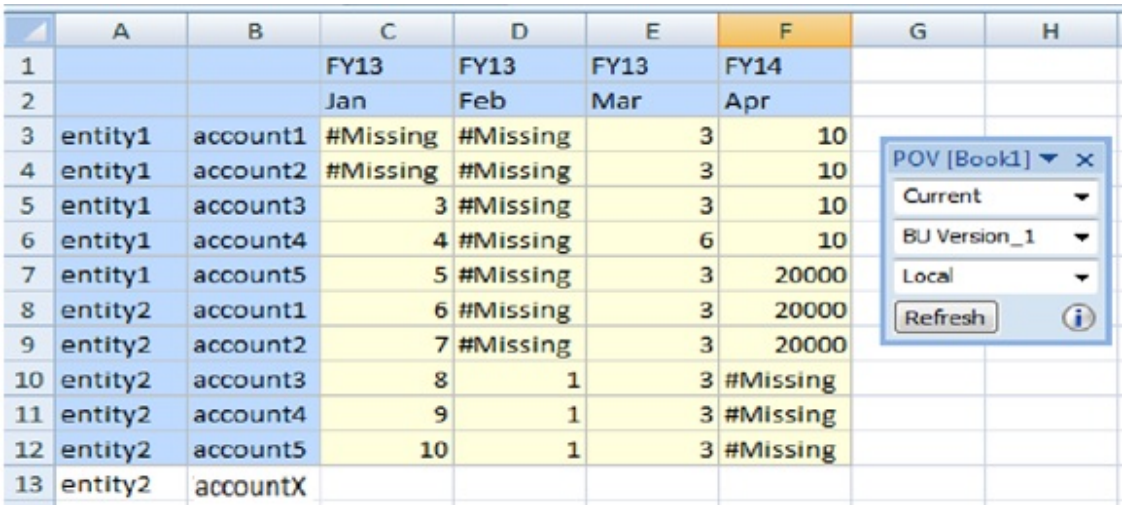
Figure 13-1 Form Opened for Ad Hoc Analysis



	A	B	C	D	E	F
1			FY13	FY13	FY13	FY14
2			Jan	Feb	Mar	Apr
3	entity1	account1	#Missing	#Missing	3	10
4	entity1	account2	#Missing	#Missing	3	10
5	entity1	account3	3	#Missing	3	10
6	entity1	account4	4	#Missing	6	10
7	entity1	account5	5	#Missing	3	20000
8	entity2	account1	6	#Missing	3	20000
9	entity2	account2	7	#Missing	3	20000
10	entity2	account3	8	1	3	#Missing
11	entity2	account4	9	1	3	#Missing
12	entity2	account5	10	1	3	#Missing

Add a row by typing "entity2" for the Entity dimension, and the label "accountX" for the Account dimension on row 13, cells A13 and B13, creating on the row two grid labels. Cells C13:F13 will be calculated cells. In order to be used as grid labels, the member names "entity2" and "accountX" should not exist in any dimension and there should not be any alias with the same name in any alias table. However, note that in the basic ad hoc above, entity2 is a member name, so entity2 will be treated as a member.

Figure 13-2 Grid Labels Added to cells A13 and B13



	A	B	C	D	E	F
1			FY13	FY13	FY13	FY14
2			Jan	Feb	Mar	Apr
3	entity1	account1	#Missing	#Missing	3	10
4	entity1	account2	#Missing	#Missing	3	10
5	entity1	account3	3	#Missing	3	10
6	entity1	account4	4	#Missing	6	10
7	entity1	account5	5	#Missing	3	20000
8	entity2	account1	6	#Missing	3	20000
9	entity2	account2	7	#Missing	3	20000
10	entity2	account3	8	1	3	#Missing
11	entity2	account4	9	1	3	#Missing
12	entity2	account5	10	1	3	#Missing
13	entity2	accountX				

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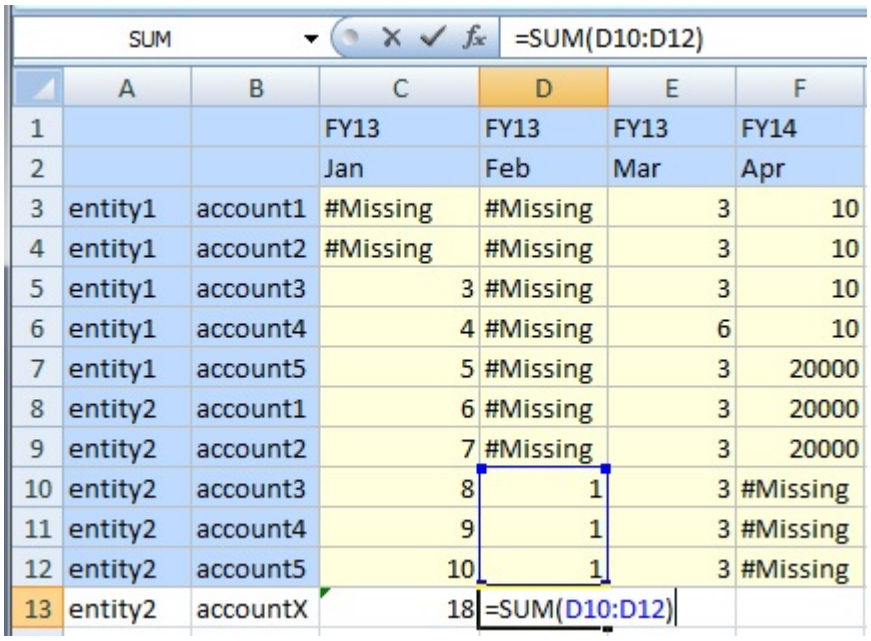
Add business calculations, in the form of Excel formulas, for cells C13:F13, created by the intersection of real column dimension members with the grid label's row 13. Figure 3 shows that the calculation was entered and executed in cell C13, and the same calculation is copied to cell D13.

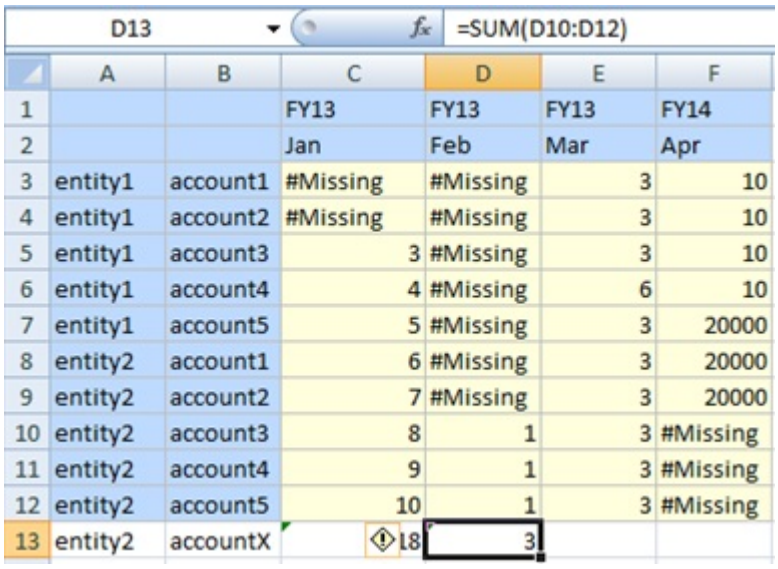
Figure 13-3 Business Calculations Added to Cells C13 and D13, through to Cell F13



	A	B	C	D	E	F
1			FY13	FY13	FY13	FY14
2			Jan	Feb	Mar	Apr
3	entity1	account1	#Missing	#Missing	3	10
4	entity1	account2	#Missing	#Missing	3	10
5	entity1	account3	3	#Missing	3	10
6	entity1	account4	4	#Missing	6	10
7	entity1	account5	5	#Missing	3	20000
8	entity2	account1	6	#Missing	3	20000
9	entity2	account2	7	#Missing	3	20000
10	entity2	account3	8	1	3	#Missing
11	entity2	account4	9	1	3	#Missing
12	entity2	account5	10	1	3	#Missing
13	entity2	accountX	18	=SUM(D10:D12)		

Figure 4 shows the business calculation in the Excel formula bar.

Figure 13-4 Business Calculation in the Excel Formula Bar



	A	B	C	D	E	F
1			FY13	FY13	FY13	FY14
2			Jan	Feb	Mar	Apr
3	entity1	account1	#Missing	#Missing	3	10
4	entity1	account2	#Missing	#Missing	3	10
5	entity1	account3	3	#Missing	3	10
6	entity1	account4	4	#Missing	6	10
7	entity1	account5	5	#Missing	3	20000
8	entity2	account1	6	#Missing	3	20000
9	entity2	account2	7	#Missing	3	20000
10	entity2	account3	8	1	3	#Missing
11	entity2	account4	9	1	3	#Missing
12	entity2	account5	10	1	3	#Missing
13	entity2	accountX	18	3		

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Upon refresh, entity2 in cell A13 will take on the properties of a member, accountX in cell B13 will take on the properties of a grid label, and cells C13 and D13 will take on the properties of business calculation cells.

Notes

- You must enter grid labels in order to save an ad hoc grid with business calculations in the form of Excel formulas and functions.
- If an empty space is entered instead of a grid label, the grid behavior is determined by generic ad hoc rules, such as replacing empty member cell with the same member from this dimension or displaying an error in case the grid becomes malformed.
- You can enter grid labels at any dimension location for an axis: innermost, outermost, or any location in the middle.
- You can enter business calculations only on rows and columns created by grid labels.
- You may type a member name in a grid label row, but it must be placed within the correct dimension. If the member name is entered out of place, and is already in use by the applicable data provider in another dimension, a message is returned upon Refresh, prompting you to change the label name.

Now you can save the ad hoc grid as a Smart Form, as described in Creating Smart Forms. By doing this, our grid labels and business calculations are also saved to the applicable data provider.

The provider will identify "accountX" as a grid label on refresh by displaying it as an ad hoc "comment" row or column (blank cells background). The "entity2" label will take on the same properties as the other entity2 members in the grid, as this member name already exists in the provider database.

Other Examples

Using the Vision sample application, here is an example of a Smart Form, saved from an ad hoc grid, then later opened as a form in Oracle Smart View for Office.

In Figure 5, the business calculation was constructed to show the average gross quarterly profit and average gross total profit for two years, FY13 and FY14. It also shows cell styles applied to the grid label and business calculations cells.

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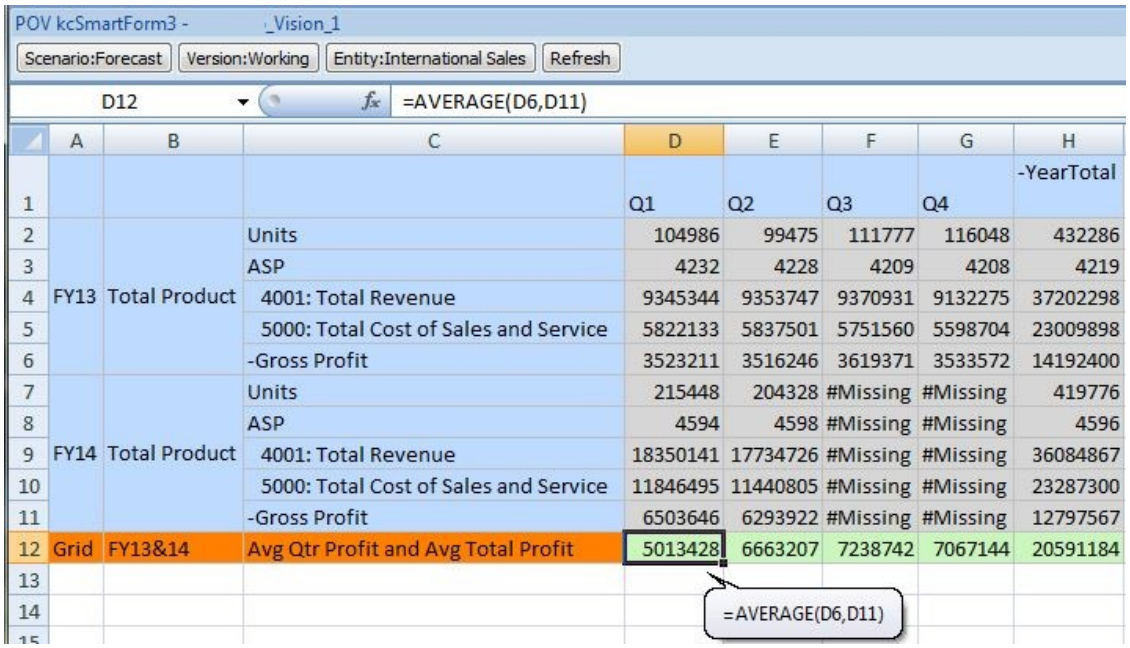
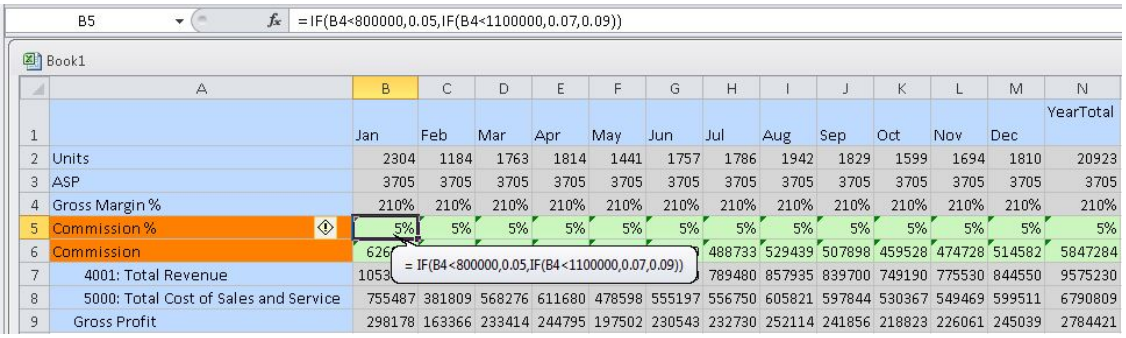
Figure 13-5 Originally an Ad Hoc Grid, Saved as a Smart Form, then Opened as a Form in Smart View



	A	B	C	D	E	F	G	H
1				Q1	Q2	Q3	Q4	-YearTotal
2			Units	104986	99475	111777	116048	432286
3			ASP	4232	4228	4209	4208	4219
4	FY13	Total Product	4001: Total Revenue	9345344	9353747	9370931	9132275	37202298
5			5000: Total Cost of Sales and Service	5822133	5837501	5751560	5598704	23009898
6			-Gross Profit	3523211	3516246	3619371	3533572	14192400
7			Units	215448	204328	#Missing	#Missing	419776
8			ASP	4594	4598	#Missing	#Missing	4596
9	FY14	Total Product	4001: Total Revenue	18350141	17734726	#Missing	#Missing	36084867
10			5000: Total Cost of Sales and Service	11846495	11440805	#Missing	#Missing	23287300
11			-Gross Profit	6503646	6293922	#Missing	#Missing	12797567
12	Grid	FY13&14	Avg Qtr Profit and Avg Total Profit	5013428	6663207	7238742	7067144	20591184
13								
14								

[Figure 6](#) shows a Smart Form opened as an ad hoc grid. The grid labels and business calculations were added in the middle of the grid, and cell styles were applied.

Figure 13-6 Smart Form Opened as an Ad Hoc Grid in Smart View



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YearTotal
2	Units	2304	1184	1763	1814	1441	1757	1786	1942	1829	1599	1694	1810	20923
3	ASP	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705
4	Gross Margin %	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%
5	Commission %	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
6	Commission	626						488733	529439	507898	459528	474728	514582	5847284
7	4001: Total Revenue	1053						789480	857935	839700	749190	775530	844550	9575230
8	5000: Total Cost of Sales and Service	755487	381809	568276	611680	478598	555197	556750	605821	597844	530367	549469	599511	6790809
9	Gross Profit	298178	163366	233414	244795	197502	230543	232730	252114	241856	218823	226061	245039	2784421

[Figure 7](#) is the same ad hoc grid, that was saved as a Smart Form and opened as a form:

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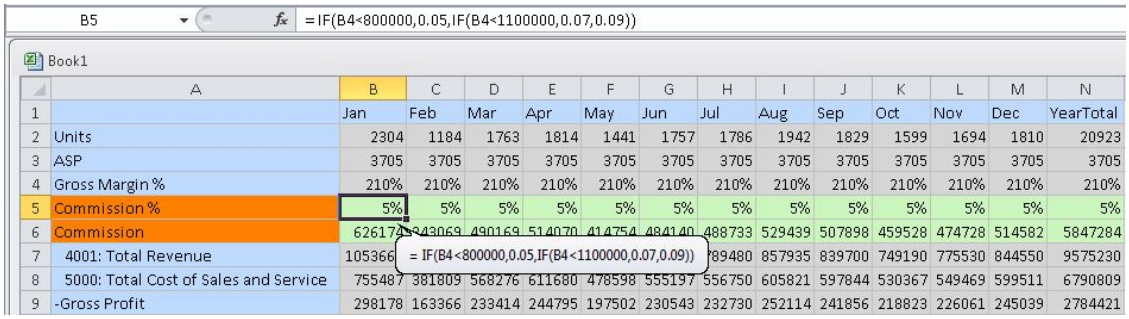
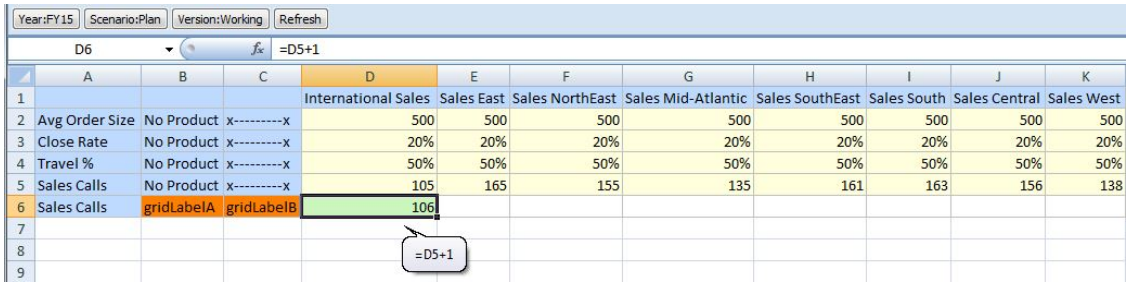
Figure 13-7 Smart Form Opened as a Form in Smart View



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YearTotal
2	Units	2304	1184	1763	1814	1441	1757	1786	1942	1829	1599	1694	1810	20923
3	ASP	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705	3705
4	Gross Margin %	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%	210%
5	Commission %	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
6	Commission	626172	343069	490169	514070	414754	484140	488733	529439	507898	459528	474728	514582	5847284
7	4001: Total Revenue	105366						789480	857935	839700	749190	775530	844550	9575230
8	5000: Total Cost of Sales and Service	755487	381809	568276	611680	478598	555197	556750	605821	597844	530367	549469	599511	6790809
9	-Gross Profit	298178	163366	233414	244795	197502	230543	232730	252114	241856	218823	226061	245039	2784421

Figure 8 shows two grid labels and a business calculation cell formula, along with a member name typed into the grid label row. In the form, the hand-typed member name displays a member.

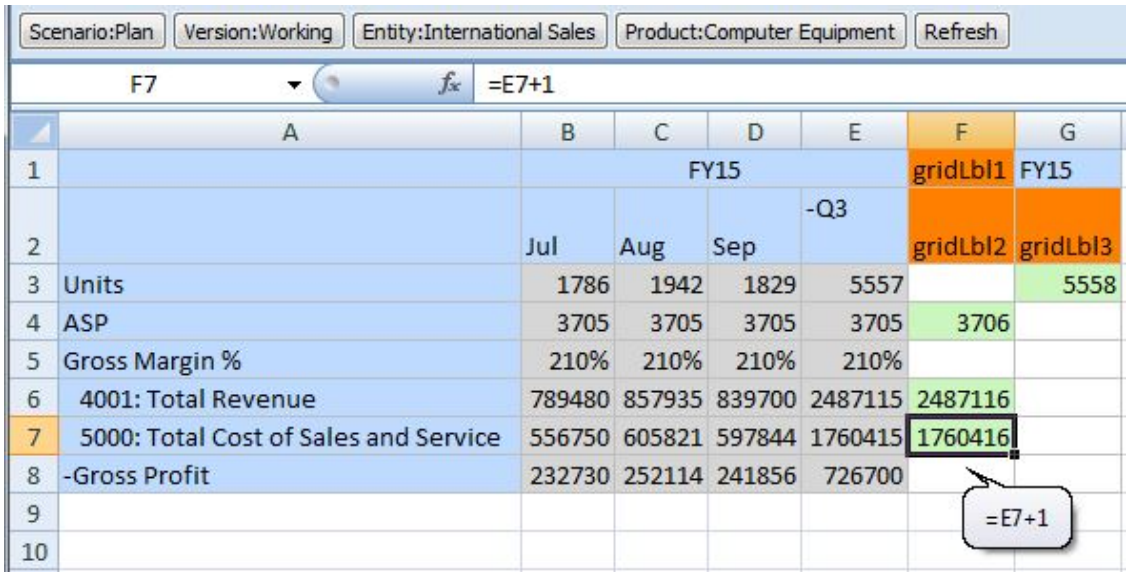
Figure 13-8 Smart Form with Member Name Typed on Grid Label Row



	A	B	C	D	E	F	G	H	I	J	K
1				International Sales	Sales East	Sales NorthEast	Sales Mid-Atlantic	Sales SouthEast	Sales South	Sales Central	Sales West
2	Avg Order Size	No Product	x---------x	500	500	500	500	500	500	500	500
3	Close Rate	No Product	x---------x	20%	20%	20%	20%	20%	20%	20%	20%
4	Travel %	No Product	x---------x	50%	50%	50%	50%	50%	50%	50%	50%
5	Sales Calls	No Product	x---------x	105	165	155	135	161	163	156	138
6	Sales Calls	gridLabelA	gridLabelB	106							
7											
8											
9											

In Figure 9, a new column contains grid labels in cells F1 and F2. Column G contains a repeated, hand-typed member name in cell G1, and a grid label in cell G2 between the member and business calculation in cell G3.

Figure 13-9 Grid Label Between Members



	A	B	C	D	E	F	G
1		FY15				gridLbl1	FY15
2		Jul	Aug	Sep	-Q3	gridLbl2	gridLbl3
3	Units	1786	1942	1829	5557		5558
4	ASP	3705	3705	3705	3705	3706	
5	Gross Margin %	210%	210%	210%	210%		
6	4001: Total Revenue	789480	857935	839700	2487115	2487116	
7	5000: Total Cost of Sales and Service	556750	605821	597844	1760415	1760416	
8	-Gross Profit	232730	252114	241856	726700		
9							
10							

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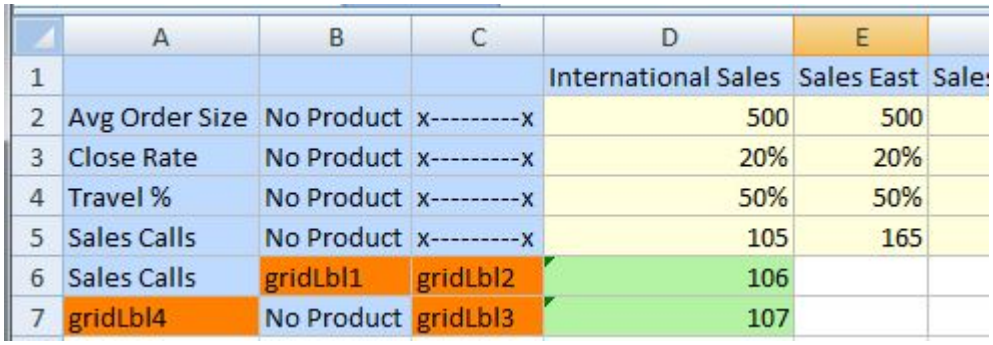
Figure 10 shows how grid labels can surround a valid member.

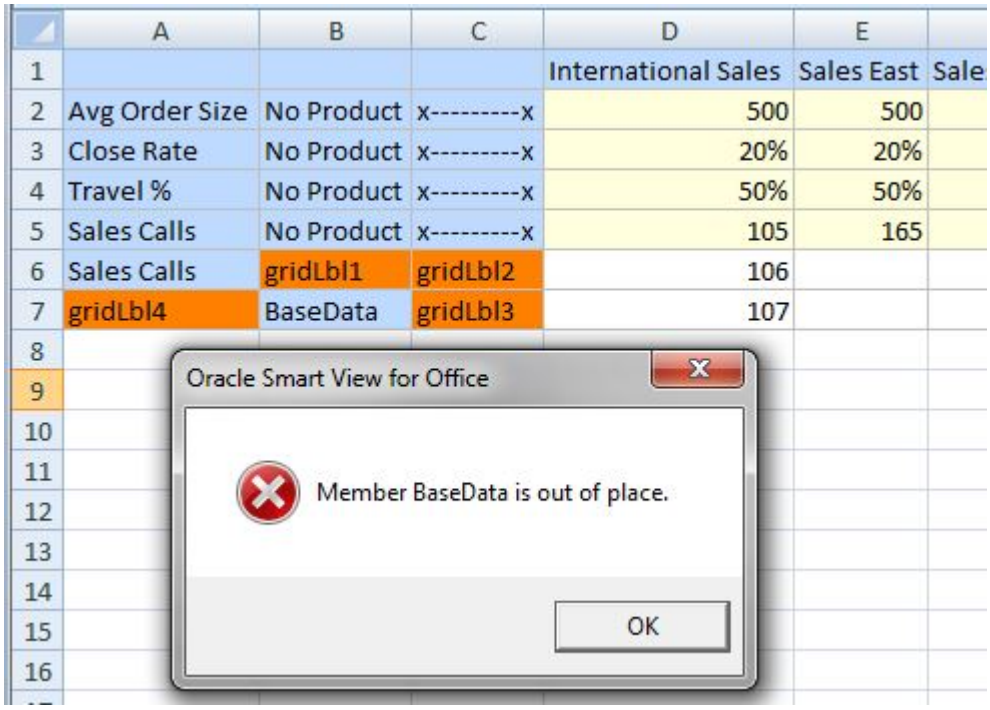
Figure 13-10 Member Between and Below Grid Labels



	A	B	C	D	E	
1				International Sales	Sales East	Sale
2	Avg Order Size	No Product	x---------x	500	500	
3	Close Rate	No Product	x---------x	20%	20%	
4	Travel %	No Product	x---------x	50%	50%	
5	Sales Calls	No Product	x---------x	105	165	
6	Sales Calls	gridLbl1	gridLbl2	106		
7	gridLbl4	No Product	gridLbl3	107		

Figure 11 shows how a member cannot be out of place between, or surrounded by, grid labels. A message notifies you that the member is out of place.

Figure 13-11 Out of Place Member in Grid Label Row



	A	B	C	D	E	
1				International Sales	Sales East	Sale
2	Avg Order Size	No Product	x---------x	500	500	
3	Close Rate	No Product	x---------x	20%	20%	
4	Travel %	No Product	x---------x	50%	50%	
5	Sales Calls	No Product	x---------x	105	165	
6	Sales Calls	gridLbl1	gridLbl2	106		
7	gridLbl4	BaseData	gridLbl3	107		
8						
9						
10						
11						
12						
13						
14						
15						
16						

Excel Functions Supported in Smart Forms

Several Excel functions are supported in Smart Forms.

Subtopics:

- Excel Functions Supported in Smart Forms in Alphabetic Order

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- Excel Functions Supported in Smart Forms by Category

Excel Functions Supported in Smart Forms in Alphabetic Order

Table 13-1 Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
ABS	Math and trigonometry
ACCRINT	Financial
ACCRINTM	Financial
ACOS	Math and trigonometry
ACOSH	Math and trigonometry
AMORDEGRC	Financial
AMORLINC	Financial
AND	Logical
ASIN	Math and trigonometry
ASINH	Math and trigonometry
ATAN	Math and trigonometry
ATAN2	Math and trigonometry
ATANH	Math and trigonometry
AVERAGE	Statistical
AVERAGEA	Statistical
CEILING	Math and trigonometry
COMBIN	Math and trigonometry
COS	Math and trigonometry
COSH	Math and trigonometry
COUNT	Statistical
COUNTA	Statistical
COUPDAYBS	Financial
COUPDAYS	Financial
COUPDAYSNC	Financial
COUPNCD	Financial
COUPNUM	Financial
COUPPCD	Financial
CUMIPMT	Financial
CUMPRINC	Financial
DATE	Date and time
DAY	Date and time
DAYS360	Date and time
DB	Financial
DDB	Financial
DEGREES	Math and trigonometry
DISC	Financial
DOLLARDE	Financial
DOLLARFR	Financial
DURATION	Financial
EDATE	Date and time
EFFECT	Financial
EOMONTH	Date and time

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Table 13-1 (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
EVEN	Math and trigonometry
EXP	Math and trigonometry
FACT	Math and trigonometry
FACTDOUBLE	Math and trigonometry
FLOOR	Math and trigonometry
FV	Financial
FVSCHEDULE ***	Financial
GCD	Math and trigonometry
HOUR	Date and time
IF	Logical
IFERROR	Logical
- TRUE	Logical
- FALSE	Logical
INT	Math and trigonometry
INTRATE	Financial
IPMT	Financial
IRR	Financial
ISERR	Information
ISERROR	Information
ISPMT	Financial
LCM	Math and trigonometry
LEFT	Text
LN	Math and trigonometry
LOG	Math and trigonometry
LOG10	Math and trigonometry
MAX	Statistical
MDURATION	Financial
MID	Text
MIN	Statistical
MINUTE	Date and time
MIRR	Financial
MOD	Math and trigonometry
MONTH	Date and time
MROUND	Math and trigonometry
MULTINOMIAL	Math and trigonometry
NETWORKDAYS	Date and time
NOMINAL	Financial
NOT	Logical
NOW	Date and time
NPER	Financial
NPV	Financial
ODD	Math and trigonometry
OR	Logical
PI	Math and trigonometry

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Table 13-1 (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
PMT	Financial
POWER	Math and trigonometry
PPMT	Financial
PRICE	Financial
PRICEDISC	Financial
PRICEMAT	Financial
PRODUCT	Math and trigonometry
PV	Financial
QUOTIENT	Math and trigonometry
RADIANS	Math and trigonometry
RAND	Math and trigonometry
RANDBETWEEN	Math and trigonometry
RATE	Financial
RECEIVED	Financial
RIGHT	Text
ROUND	Math and trigonometry
ROUNDDOWN	Math and trigonometry
ROUNDUP	Math and trigonometry
SECOND	Date and time
SIGN	Math and trigonometry
SIN	Math and trigonometry
SINH	Math and trigonometry
SLN	Financial
SQRT	Math and trigonometry
SQRTPI	Math and trigonometry
SUM	Math and trigonometry
SUMSQ	Math and trigonometry
SYD	Financial
TAN	Math and trigonometry
TANH	Math and trigonometry
TBILLEQ	Financial
TBILLPRICE	Financial
TBILLYIELD	Financial
TIME	Date and time
TODAY	Date and time
TRUNC	Math and trigonometry
WEEKDAY	Date and time
WEEKNUM	Date and time
WORKDAY	Date and time
XIRR	Financial
XNPV	Financial
YEAR	Date and time
YEARFRAC	Date and time
YIELD	Financial

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Table 13-1 (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
YIELDDISC	Financial
YIELDMAT	Financial

***When using the FVSCHEDULE function in Smart Forms, use cell references to existing data, rather than arrays of data. For example, use =FVSCHEDULE(C10,B15:B17). Do not use =FVSCHEDULE(C10,{0.09,0.11,0.1}).

Excel Functions Supported in Smart Forms by Category

Financial Functions

ACCRINT

ACCRINTM

AMORDEGRC

AMORLINC

COUPDAYBS

COUPDAYS

COUPDAYSNC

COUPNCD

COUPNUM

COUPPCD

CUMIPMT

CUMPRINC

DB

DDB

DISC

DOLLARDE

DOLLARFR

DURATION

EFFECT

FV

FVSCHEDULE ***

INTRATE

IPMT

IRR

ISPMT

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MDURATION

MIRR

NOMINAL

NPER

NPV

PMT

PPMT

PRICE

PRICEDISC

PRICEMAT

PV

RATE

RECEIVED

SLN

SYD

TBILLEQ

TBILLPRICE

TBILLYIELD

XIRR

XNPV

YIELD

YIELDDISC

YIELDMAT

***When using the FVSCHEDULE function in Smart Forms, use cell references to existing data, rather than arrays of data. For example, use =FVSCHEDULE(C10,B15:B17). Do not use =FVSCHEDULE(C10,{0.09,0.11,0.1}).

Information Functions

ISERR

ISERROR

Logical Functions

AND

IF

NOT

OR

IFERROR

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- TRUE
- FALSE

Statistical Functions

AVERAG

AVERAGEA

COUNT

COUNTA

MAX

MIN

Text Functions

LEFT

RIGHT

MID

Date and Time Functions

DATE

DAY

DAYS360

EDATE

EOMONTH

HOUR

MINUTE

MONTH

NETWORKDAYS

NOW

SECOND

TIME

TODAY

WEEKDAY

WEEKNUM

WORKDAY

YEAR

YEARFRAC

Math and Trigonometry Functions

ABS

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ACOS

ACOSH

ASIN

ASINH

ATAN

ATAN2

ATANH

CEILING

COMBIN

COS

COSH

DEGREES

EVEN

EXP

FACT

FACTDOUBLE

FLOOR

GCD

INT

LCM

LN

LOG

LOG10

MOD

MROUND

MULTINOMIAL

ODD

PI

POWER

PRODUCT

QUOTIENT

RADIANS

RAND

RANDBETWEEN

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ROUND

ROUNDDOWN

ROUNDUP

SIGN

SIN

SINH

SQRT

SQRTPI

SUM

TAN

TANH

TRUNC

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14

Task Manager

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Task Manager helps to define, execute, and report the interdependent activities of a business process. It provides centralized monitoring of all tasks and provides a visible, automated, and repeatable system of record for running a business process.

In Oracle Smart View for Office, you can connect to your worklist, work on Task Manager tasks assigned to you, and perform various actions within Excel using the Task Manager Extension.

The available actions, depending on your user role, are as follows:

- **Assignee**: Submit Task
- **Approver**: Approve and Reject Task
- **Assignee or Approver**: Claim and Release Task

Video

Your Goal	Watch This Video
Learn about managing tasks using Smart View.	Managing Tasks using Smart View

Installing and Connecting to the Task Manager Extension

You must download and install Oracle Smart View for Office and the Smart View Extensions for Task Manager, Enterprise Journals, and Supplemental Data Manager.

To install the extensions from the web interface of your business process, see:

- Downloading and Installing Clients in *Getting Started Guide for Administrators*
- Downloading and Installing Clients in *Getting Started Guide for Users*

If an extension is available for you to install, you can install it from the Extensions tab of the Smart View Options dialog box. See Installing Extensions.

You must create a private connection to use with the Task Manager, Enterprise Journals, and Supplemental Data Manager extensions. For more information, see Using the Private Connection Wizard.

The private connection URL syntax for the three extensions are as follows:

- For Task Manager:
  http(s)://serviceURL/HyperionPlanning/cm/svp
- For Supplemental Data Manager:

  http(s)://serviceURL/HyperionPlanning/sdm/svp
- For Enterprise Journals:

  http(s)://serviceURL/HyperionPlanning/ej/svp

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After creating the connection, you will see the Task Manager connection listed in the drop-down menu in the **Private Connection** panel. You can use this connection to connect to your worklist. Once connected, the **Task Manager** ribbon appears and provides various actions to work on Task Manager tasks from Smart View.

Viewing Schedules and Tasks

Using Oracle Smart View for Office, you can view your Task Manager tasks and schedules and work on them directly in Smart View.

You can only view those tasks and schedules for which you are authorized. This is the **Display My Tasks** view of the worklist that you see the web application, so not all the tasks that you have visibility to see will be shown. The **All Schedules** sheet displays a list of the tasks that you are currently working on. You can double-click a task or row to open the task and perform actions on it. After a task has been submitted or approved, it is no longer displayed on the list.

Depending on your current role (for example, Assignee, Preparer, or Approver), the options such as **Approve** or **Reject** change to match the associated role. If you have different roles, then you may need to log in as the specific role to perform different operations.

1. From the Smart View ribbon, click **Panel**.
2. In the Smart View panel, select **Private Connections**.
3. In the **Private Connections** panel, select the Task Manager connection from the drop-down menu.
4. Select the node and click **Connect** in the Action Panel.
5. In the **Login** window, enter your **User Name** and **Password**, and then click **Sign In**.
6. In the **Private Connections** panel, double-click a schedule from the list of schedules available for you.

   Alternatively, you can also right-click the schedule and select **Open** or select the schedule and click **Open** in the Action Panel.
7. In the schedule sheet, view the list of tasks for which you are authorized. You can view the following details:
   - **Name:** Displays the name of the task.
   - **Assignee:** Displays the name of the person to whom the task is assigned.
   - **Status:** Displays the status of the task such as Pending, Success, With Assignee and so on.
   - **Priority:** Displays the priority of the task such as Low, Medium, or High
   - **Needs Attention:** Displays whether the task needs attention or not.
   - **Workflow:** Displays the next step or action needed on the task. For example, Submit Task or Release Task.
   - **Quick Actions:** Displays the following options to open the task quickly, either within the Excel sheet or in the web browser.
8. Open the task that you want to view or work on. You can either double-click the task or use the following options from the **Task Manager** ribbon or the **Quick Actions** column to open the task.
   - **Open**: Use this option to open the task details in the **Task Manager Task** dialog. You can use this open as an alternative to double-clicking a task row in the schedule sheet to launch the **Task Manager Task** dialog.

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- **Open in Browser**: Use this option to open the integrated tasks in the web application within a browser. If you have not logged in to the web application in the current session, you will be prompted to establish a connection and log in as a one-time requirement. Thereafter, you can open the integrated tasks directly in the browser, view the task details, and take necessary actions.
- **Open in Excel**: Use this option to open the embedded artifacts such as forms and dashboards in Excel. Forms open in a new worksheet within the same workbook and dashboards open in a new workbook.

The **Task Manager Task** dialog opens and displays the task details.

9. For integrated tasks, use the embedded task links available in the task details within the **Task Manager Task** dialog to navigate to the relevant tasks.

   For example, if the task is about Reviewing Financial Reports and you click **Open in Browser**, you will see a **View Financial Reports** link in the **Task Manager Task** dialog. This way, you can view the contextual information (that is, the financial reports in this example) directly within the Task Dialog, instead of separately navigating from the web application.

10. Perform the appropriate actions for the selected task:

    - **Submit Task**
    - **Approve or Release Task**
    - **Claim or Release Task**

    You can perform these actions either from the **Task Manager** ribbon or in the **Task Manager Task** dialog.

Claiming or Releasing Tasks

Tasks can be assigned to a team or group of users. If you are a member of the team or group, you must claim the task before performing it. If you have claimed a task, you can release the task back to the team or group allowing another member to take the task.

After a task is claimed, other members of the team can still claim the task but doing this causes the initial user's claim to terminate, thus revoking that user's ability to perform the role functions and granting the ability to the user with the latest claim. The ability to claim a task from another user is required to accommodate cases where a claim has occurred; however, the user with the claim can't complete the role functions (for example, because of an absence).

Before any member of the team has claimed the task, email notifications go to the whole team. Once a team member has claimed the task, emails go to the active user instead of all team members.

To claim or release a task:

1. Open the schedule and select the required task.
2. From the **Task Manager** ribbon, do the following:

   - For tasks that are assigned to your team or group, click **Claim** to claim and work on them.
   - For the tasks that you have claimed, click **Release** to release it back to the team or group.

   Alternatively, you can double-click the task row to open the **Task Manager Task Dialog** and claim or release tasks.

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3. If the task is claimed or released successfully, an acknowledgement message appears. Click **OK**.
   - When a task is claimed, the Assignee changes from the team or group to the member who claimed the task.
   - When a task is released, the Assignee changes from the member who released to the team or group.

Approving or Rejecting Tasks

As an approver, you can either approve or reject a task.

To approve or reject a task:

1. Open the schedule and select the required task.
2. From the **Task Manager** ribbon, click **Approve** or **Reject**.

   Alternatively, you can double-click the task row to open the **Task Manager Task Dialog** and click **Approve** or **Reject**.
3. If the task is approved or rejected successfully, an acknowledgement message appears. Click **OK**.

Submitting Tasks

When you complete the actions required for the task, you submit the task to be moved through the workflow to the next assignee.

To submit a task:

1. Open the schedule and select the task that you need to submit.
2. From the **Task Manager** ribbon, click **Submit Task**.

   Alternatively, you can double-click the task row to open the **Task Manager Task Dialog** and click **Submit Task**.

   > **Note**
   >
   > If you submit a task that is incomplete (for example, if a question is left unanswered), a validation error appears when you submit the task. You can double-click the task row to open the task in the **Task Manager Task Dialog** and review it.
3. If the task is submitted successfully, an acknowledgement message appears. Click **OK**.

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Task Lists

Related Topics

- About Task Lists
  Depending on the data source, open and manage tasks from the Smart View Panel in Excel or Outlook, or integrate task lists from the data source into Outlook and use Outlook functionality to manage tasks.
- Configuring the Opening of Reports from Task Lists
  Reports from a task list can be configured to open in the web application or in the Office application.
- Working with Tasks from the Smart View Panel
  From the Smart View Panel, you can open and view task lists, execute and complete tasks, and create task list reports.
- Integrating Task Lists with Microsoft Outlook
  You can import task lists into Microsoft Outlook and use Outlook functionality to manage your tasks.

About Task Lists

Depending on the data source, open and manage tasks from the Smart View Panel in Excel or Outlook, or integrate task lists from the data source into Outlook and use Outlook functionality to manage tasks.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Task lists help you organize, track, and prioritize your workload. For example, a task might help you complete forms, launch business rules, or promote approval units. They can also launch a website or internal company page.

- In Planning, you can manage tasks from the Smart View Panel in both Excel and Outlook, and integrate task lists into Outlook as described in Working with Tasks from the Smart View Panel.
- In Oracle Hyperion Financial Close Management, you can integrate task lists into Outlook as described in Integrating Task Lists with Microsoft Outlook.

Administrators manage and assign access permissions for task lists. For more information, see the administration documentation for your data source.

Video

Your Goal	Watch This Video
Learn about task lists.	Managing Task Lists in Smart View with Oracle Planning and Budgeting Cloud

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Configuring the Opening of Reports from Task Lists

Reports from a task list can be configured to open in the web application or in the Office application.

> **Note**
>
> The task in this topic is for Service Administrators or users who are familiar with editing the properties.xml file located in the <Smart View Install>/cfg folder (for example, C:\Oracle\SmartView\cfg).

Reports in a task list can be opened either in the web application or in the Office application from where you are accessing the task list. By default, the reports are configured to open in the Office application itself. To default this behavior, the GET call is used and is set in the tasklistURLLaunch property present in the Smart View's properties.xml file.

If you want to continue with the default behavior, ensure that your property file has this configuration: <tasklistURLLaunch>GET</tasklistURLLaunch>.

However, if you want the opening of reports to be redirected to the web application, then you can hide this property, so that a POST call is performed instead of a GET call.

To change the default behavior and open reports in the web application:

1. In your Smart View installation, navigate to the SmartView\cfg folder.
2. Make a backup copy of the original properties.xml file.
3. Open properties.xml for editing.
4. Locate the following entry:

   ```
   <tasklistURLLaunch>GET</tasklistURLLaunch>
   ```

5. Hide this property by adding a comment as follows. Commenting will help you enable this property easily, if required in future. For example:

   ```
   <! --
   <tasklistURLLaunch>GET</tasklistURLLaunch>
   -->
   ```

6. Save the updated file.
7. Restart the Office application.

Working with Tasks from the Smart View Panel

From the Smart View Panel, you can open and view task lists, execute and complete tasks, and create task list reports.

Opening a Task List

Viewing the Task List

Executing a Task

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Completing a Task

Creating Task List Reports

Opening a Task List

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

To open a task list from Excel:

1. From the Smart View ribbon, click **Panel**.
2. If prompted, enter your user name and password.
3. From the Smart View Panel, do one of the following:
   - From **Recently Used** on Smart View Home, click the name of a task list.
   - From Shared Connections or Private Connections, navigate to the task list that you want to open, and then click **Open Task List** on the Action Panel.

To open a task list from Outlook:

1. Ensure that Outlook displays a Smart View ribbon tab. If it does not, do the following:
   a. Close Outlook.
   b. In Excel, from the Smart View ribbon, click **Options**, and then **Advanced** in the left pane.
   c. Clear **Disable Smart View add-in in Outlook**.
   d. Click **OK**.
   e. Reopen Outlook.
2. Ensure that you are connected to a data source as described in Data Source Connections.
3. From the Outlook toolbar, select the Smart View ribbon tab, and then select **Panel** to display the Smart View Panel.
4. From the Smart View Panel, do one of the following:
   - From **Recently Used** on Smart View Home, click the name of a task list.
   - From Shared Connections or Private Connections, navigate to the task list that you want to open, and then click **Open Task List** on the Action Panel.

Viewing the Task List

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

A task list opened in the Task List pane of the Smart View Panel displays the following:

- The individual tasks in the task list. These may contain subordinate tasks. The status of the task—complete, incomplete, or overdue—is indicated by color-coding.

> **Note**
>
> Tasks of type "Copy Version" are not displayed in Oracle Smart View for Office. You must use the web application to view tasks of type "Copy Version."

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- A drop-down menu from which you can select any of the other task lists associated with the current application
- The Action Panel, which displays the actions that are available for the selected task
- Task Details, which opens when you click the double arrows
- A color-coded status bar for the task list

Executing a Task

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

To execute a task:

1. Open the task list that contains the task to execute.
2. From the Action Panel, click **Execute Task**.

   Task execution varies with the task and data source.

Completing a Task

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

After completing task requirements, mark the task complete. To complete a task:

1. Complete the requirements of the task.
2. Open the task list that contains the task to complete.
3. Ensure that any dependent tasks are completed.
4. Select the task to mark complete.
5. From the Action Panel, click **Mark Complete**.

Creating Task List Reports

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

To review the status of your process, you can create a detailed report of one or more task lists in an application in PDF or Excel worksheet format.

To create a task list report:

1. From the Smart View Panel, open a task list.
2. Right-click a task and select **Create Report**.
3. In the Report Wizard, use the arrow keys to move all task lists to be included in the report from **Available Task Lists** to **Selected Task Lists**, and then click **Next**.
4. Use the arrow keys to move the users and groups whose status you want to view from **Available Users** to **Selected Users** and then click **Next**.

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> **Note**
>
> When selecting groups, be aware that all users in the group assigned to a task will be listed in the report. This will result in the same task being listed for each user in the group. For example, if a task is assigned to a group consisting of 10 members, then that task will be listed 10 times in the report, once for each group member.

5. Select options to create your report, and then click **Finish**.

   Depending on your selections, the report is created in PDF or Excel.

Integrating Task Lists with Microsoft Outlook

You can import task lists into Microsoft Outlook and use Outlook functionality to manage your tasks.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Changes to the status of tasks are sent back to the data source, but you cannot delete tasks in Outlook.

To import task lists into Microsoft Outlook:

1. Ensure that Outlook displays a Smart View ribbon tab. If it does not:
   a. Close Outlook.
   b. In Excel, from the Smart View ribbon, click **Options**, and then **Advanced** in the left pane.
   c. Clear **Disable Smart View add-in in Outlook**.
   d. Click **OK**.
   e. Reopen Outlook.
2. Select the Smart View ribbon tab and select **Task List**.
3. Select **Shared Connections** or **Private Connections**.
4. From the Task List, click **Select application**.
5. In **Select Application**, from the drop-down menus, select the server and application associated with the task lists to import.
6. Click **OK**.

   All task lists associated with the selected application are displayed in Task List.
7. Double-click a task list to display its individual tasks in Outlook Task Lists.

   From here, you can apply Outlook functionality to your tasks. See the Outlook product documentation for information on working with tasks in Outlook.

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Free-Form Mode

Related Topics

- About Free-Form Mode
  In ad hoc analysis, if you are familiar with the dimensions and members of your database, you can use *free-form mode* by typing dimension and member names directly into cells.
- Guidelines and Best Practices for Free-Form
  Consider these guidelines and best practices when working in free-form mode.
- Free-Form Grid Examples
  Review the examples in this section when working in free-form mode.
- Comments in Free-Form Grids
  Review the guidelines in this section when working with comments in free-form grids.
- Formulas in Free-Form Grids
  Review the guidelines in this topic when working with formulas in free-form grids.
- Duplicate Aliases in Free-Form Mode
  Review the guidelines and examples in this topic when working with duplicate aliases in free-form mode.
- Attribute Dimensions in Free-Form Grids
  Review the guidelines and examples in this topic when working with attribute dimensions in free-form mode.
- Submitting from Free-Form Grid with Scaling Options Enabled
- Creating Free-Form Reports
  Follow the procedure in this topic to create a free-form report.
- Retrieving Attribute Dimensions in Free-Form Mode
  Follow the procedure in this topic to retrieve attribute dimensions in a free-form report..
- Creating Asymmetric Reports
  Follow the procedure in this topic to create asymmetric free-form report..
- Actions That May Cause Unexpected Behavior
  Review this topic to learn about actions that may cause unexpected behavior in free-form reports.

About Free-Form Mode

In ad hoc analysis, if you are familiar with the dimensions and members of your database, you can use *free-form mode* by typing dimension and member names directly into cells.

You can still use the POV, member selection, and other ad hoc operations in free-form grids.

The components of Oracle Smart View for Office grids are described in Table 1.

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Table 16-1 Smart View Grid Components

Grid Component	Description
Row Dimension	A dimension or member placed down one column across one or more rows in a worksheet
Column Dimension	A dimension or member placed on a row across one or more columns in a worksheet
Comments	Text added by the user
Data Region	Areas of the grid that contain data for dimensions or members
Blank Region	Areas of the worksheet that contain no entries

Related Topics:

Guidelines and Best Practices for Free-Form

Free-Form Grid Examples

Comments in Free-Form Grids

Formulas in Free-Form Grids

Creating Free-Form Reports

Creating Asymmetric Reports

Actions That May Cause Unexpected Behavior

Guidelines and Best Practices for Free-Form

Consider these guidelines and best practices when working in free-form mode.

- Grids do not need to start in cell A1.
- A grid must have at least one row dimension and one column dimension.
- Each row dimension can contain members of only one dimension. Each column dimension can contain members of only one dimension.
- Members of one dimension can be entered only in **one** of the following regions:
  - In the same row
  - In the same column
  - Anywhere in the page dimension region (Oracle Essbase and Standard Smart View Ad Hoc Behavior-mode Oracle Fusion Cloud Enterprise Performance Management applications only)
- The page dimension region can contain members of different dimensions, but no two members in the page dimension region can belong to the same dimension (Essbase and Standard Smart View Ad Hoc Behavior-mode Cloud EPM applications only only).
- Dimensions entered into the page dimension region override any corresponding default or existing dimensions in the page dimension region. For example, if the page dimension contains a Year dimension, and you enter Qtr1, then Qtr replaces Year in the page dimension (Essbase and Standard Smart View Ad Hoc Behavior-mode Cloud EPM applications only only).

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- The replacement labels specified in the **Data Options** page of the **Options** dialog apply in free-form mode.
- Numerical entries are identified as data in the data region, and as comments outside the data region. If you want to use a number as a member name, then as a best practice, precede the member name with a single quotation mark; for example, '100.
- As a best practice, precede member names that contain spaces between words with a single quotation mark.
- When connected to a database that supports duplicate member names, select **Distinct Member Name** on the **Member Options** page of the Oracle Smart View for Office **Options** dialog box to display fully qualified member names in the worksheet. To enter duplicate members, use this syntax for qualified member names:

  [Income].[Other]
  [Expenses].[Other]

- Aliases from the current alias table are permitted in free-form grids, but aliases from other alias tables are treated as comments.
- In an ad hoc grid, if you insert a column and type a member name in the new column, and want to change the alias table for the sheet, then as a best practice, you must first refresh the sheet before changing the alias table.
- If a member name contains a comma (,), then as a best practice, enclose the entire name in quotation marks (" ").

  Use this syntax:

  "*mbr_name*, *mbr_name*"

  For example:

  "Tablets, Smartphones"

- When updating text datatype values in free-form mode, the **Submit Without Refresh** action should be used. This applies to Standard Ad Hoc mode only (the application setting, **Smart View Ad Hoc Behavior=Standard**.)

Free-Form Grid Examples

Review the examples in this section when working in free-form mode.

Simple Grids

Data source types: Oracle Essbase, Planning

Simple Grids in Essbase

In Essbase and Oracle Smart View for Office, free-form behavior is such that the POV members are placed on the first row of an Excel sheet. Column and row dimension members are placed on the grid starting after the POV row rows. This means that all the POV members become part of the grid.

Figure 1 shows a valid simple grid in Oracle Essbase, where Year is the row dimension, and Measures is the column dimension, beginning in row 1.

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Figure 16-1 Simple Grid in Essbase with Only Column and Row Dimensions

	A	B	C	D	E
1		Profit	Inventory	Ratios	Measures
2	Qtr1				
3	Qtr2				
4	Qtr3				
5	Qtr4				
6	Year				

Figure 2 shows what happens after clicking **Refresh** in a connected sheet. As described previously, row 1 is populated with the POV dimensions of Product, Market and Scenario. The row and column dimensions begin on row 2.

Figure 16-2 Result of Ad Hoc Analysis Command on Simple Grid in Essbase

	A	B	C	D	E
1		Product	Market	Scenario	
2		Profit	Inventory	Ratios	Measures
3	Qtr1	-6823	1234	33.31103991	-6823
4	Qtr2	27107	119776	55.38705141	27107
5	Qtr3	27912	#Missing	55.00356413	27912
6	Qtr4	25800	142483	55.41720586	25800
7	Year	73996	1234	51.44275158	73996

Figure 3 shows a valid simple grid in Essbase, where Product is the page dimension in row 1. Year is the row dimension and Measures is the column dimension, beginning on row 2.

Figure 16-3 Simple Grid in Essbase with Dimension in Row 1

	A	B	C	D	E
1				Product	
2		Profit	Inventory	Ratios	Measures
3	Qtr1				
4	Qtr2				
5	Qtr3				
6	Qtr4				
7	Year				

Figure 4 shows what happens after clicking **Refresh** in a connected sheet. In this case, because the Product dimension was already placed on the sheet, it is moved to row 2. The POV dimensions are placed on row 1. The row and column dimensions begin on row 3.

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Figure 16-4 Result of Ad Hoc Analysis Command on Simple Grid in Essbase with Dimension in Row 1

	A	B	C	D	E
1		Market	Scenario		
2		Product	Product	Product	Product
3		Profit	Inventory	Ratios	Measures
4	Qtr1	-6823	1234	33.31103991	-6823
5	Qtr2	27107	119776	55.38705141	27107
6	Qtr3	27912	#Missing	55.00356413	27912
7	Qtr4	25800	142483	55.41720586	25800
8	Year	73996	1234	51.44275158	73996

Simple Grid in Planning

Figure 5 shows a valid simple grid in Planning, where Year is the row dimension and Account is the column dimension.

Figure 16-5 Simple Grid in Planning

	A	B
1		Year
2	Account	3

Two Column By Two Row Layout

Figure 6 is a basic two columns by two rows layout showing the Product and Market dimensions in the first row and column, and members of Sales and Year in the second row and column.

Figure 16-6 Two Columns by Two Rows Layout

	A	B	C	D	E	F
1			Product	Product	Product	Product
2			Profit	Inventory	Ratios	Measures
3	Market	Qtr1				
4	Market	Qtr2				
5	Market	Qtr3				
6	Market	Qtr4				
7	Market	Year				

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Comments in Free-Form Grids

Review the guidelines in this section when working with comments in free-form grids.

Data source types: Oracle Essbase, Planning, Planning Modules, Enterprise Profitability and Cost Management, FreeForm, Financial Consolidation and Close, Tax Reporting

> **Note**
>
> **Oracle Essbase, Cloud EPM Standard-mode applications:** You cannot add comments on worksheets that are enabled for multiple grids.

Comments can be placed as follows:

- Between row dimensions
- Between column dimensions
- Between page dimensions
- Between dimensions and data cells
- Interleaved with members of page dimensions
- Interleaved with members of row, column and page dimensions

  Further, comment rows and comment columns can be interleaved with row and column dimensions.
- To the left, right, top, bottom of the grid.

Comments cannot be placed in data cells or in cells that intersect row and column dimensions in the upper right corner.

When working with comments in Cloud EPM, note that comments are supported both inside and outside of the grid boundaries.

> **Note**
>
> Comments are not saved to the provider server in the free-form worksheet. For example, if you use the Save Ad Hoc Grid command with a Planning free-form or ad hoc grid, the formulas are not saved. However, you can retain the comments in a worksheet by performing a Save in Excel and saving the workbook.

For information about unexpected behavior that may occur, see Actions That May Cause Unexpected Behavior.

Related Topics:

Comments Inside and Outside of Grid Boundaries

Comments in Blank Rows and Columns

Data source types: Oracle Essbase

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Figure 1 shows a grid with comments in cells A5, A6, C1, C2, C10, D1, D2, D10, H5, and H6. These comments are retained in retrieval and zoom operations.

Figure 16-7 Comments in Blank Rows and Columns

	A	B	C	D	E	F	G	H
1			c1	d1				
2			c2	d2				
3				Product	Product	Product	Product	
4				Profit	Inventory	Ratios	Measures	
5	a5	Market	Qtr1					h5
6	a6	Market	Qtr2					h6
7		Market	Qtr3					
8		Market	Qtr4					
9		Market	Year					
10			c10	d10				

Grid with Complex Comments

Data source types: Oracle Essbase

Figure 1 shows an example of a combination of the page region, attributes, and comments on a single grid.

Figure 16-8 Grid with Complex Comments

	A	B	C	D	E	F	G	H
1	Pkg Type							
2	Budget							
3		B3	C3	D3				
4				Product	Product		Product	Product
5					E5	F5	G5	
6				Profit	Inventory		Ratios	Measures
7	Market		Qtr1					
8	Market		Qtr2					
9		B9			E9	F9	G9	
10	Market		Qtr3					
11	Market		Qtr4					
12	Market		Year					
13								
14				D14	E14	F14		

Invalid Placement of Comments

Data source types: Oracle Essbase

Row and column dimension regions can be interleaved with comment rows and comment columns. Figure 1shows a grid that is invalid because the comment in cell C2 does not belong

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to either a comment row or a comment column. (Both row 2 and column C have dimension members.)

Figure 16-9 Invalid Placement of Comments

	A	B	C	D
1		100-10	100-30	100
2		Measures	Comment	Measures
3	Year			

Comments Inside and Outside of Grid Boundaries

Data source types: Planning

Figure 1 shows a grid with a comment in cell B5, inside the grid boundaries. These comments are retained in retrieval and zoom operations, but are not saved in Planning.

Figure 16-10 Grid with Comments Inside Grid Boundaries

	A	B	C	D
1				
2				FY15
3				Period
4		Entity	Account	#Missing
5		Comment Row		
6		Entity	Account	#Missing

Figure 2 shows a grid with comments in cells A3, and C1, outside of the grid boundaries. These comments are retained in retrieval and zoom operations, but are not saved in Planning.

Figure 16-11 Grid with Comments Outside of Grid Boundaries

	A	B	C
1		Year	Comment Column
2	Account	3	
3	Comment Row		

Formulas in Free-Form Grids

Review the guidelines in this topic when working with formulas in free-form grids.

Data source types: Oracle Essbase, Planning

You can enter Excel formulas in cells that can contain comments.

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> **Note**
>
> Excel formulas are not saved to the provider server in the free-form worksheet. For example, if you use the Save Ad Hoc Grid command with a Planning free-form or ad hoc grid, the formulas are not saved. However, you can retain formulas in a worksheet by performing a Save in Excel and saving the workbook.

Figure 1 shows a grid from an Oracle Essbase data source with Excel formulas in cells C8 and F8.

Figure 16-12 Formulas in Essbase Free-Form Grid in Excel

	A	B	C	D	E	F
1			Product	Product	Product	Product
2			Profit	Inventory	Ratios	Measures
3	Market	Qtr1				
4	Market	Qtr2				
5	Market	Qtr3				
6	Market	Qtr4				
7	Market	Year				
8			=SUM(C3:C6)			=SUM(F3:F6)

Figure 2 shows a grid from a Planning data source with Excel formulas in cells B8 and C7.

Figure 16-13 Formulas in Planning Free-Form Grid in Excel

	A	B	C
1		Product	Formula on Column
2		Entity Alias	
3		Version	
4		Scenario	
5		Period	
6		Year	
7	Account	3	=SUM(B7*10)
8	Formula On Row	=SUM(C7+B7)	

For information about unexpected behavior that may occur, see Actions That May Cause Unexpected Behavior.

Duplicate Aliases in Free-Form Mode

Review the guidelines and examples in this topic when working with duplicate aliases in free-form mode.

Data source types: Planning

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Planning supports duplicate aliases for members from different dimensions and for members within dimensions.

To use duplicate aliases, you must have, at a minimum, Oracle Smart View for Office 11.1.2.5.600, and you must be connected to Planning version 16.06 or later.

The guidelines are:

- Duplicate aliases are supported across dimensions and within dimensions.
- Aliases can have the same name as a member.
- Member names are still required to be unique so that they can be used in rules and form design to avoid name collisions.

When typing a duplicate alias name in free-form mode, and then refreshing, a message appears asking you to resolve the duplicate. You can do this either by using the Member Selector to select the correct alias name or by hand-typing the qualified name in this format:

[parent_member_name].[alias]

or

[parent_alias].[alias]

Only duplicate alias names are supported, not duplicate member names; therefore, using the parent member name as a qualifier should be sufficient in many cases.

However, if [parent_alias] is also a duplicate, then the qualified name should be extended up to the first unique ancestor, in this format:

[grand_parent_member_name].[parent_alias].[alias]

or

[grand_parent_alias].[parent_alias].[alias]

For example, suppose a database has the following Market and Geography dimension hierarchies, with duplicate alias names at the Region, State, and City level. In this scenario, East, New York (state), and New York (city) are duplicate alias names, as follows:

```
Market              Geography
  East                East
    New York            New York
      New York            New York
```

You want to enter the city, New York, from the Market dimension into a free-form grid. To do this, you could select the city, New York, from the Market dimension in the Member Selector. Or, you could type the qualified name as follows:

[Market].[East].[New York].[New York]

Attribute Dimensions in Free-Form Grids

Review the guidelines and examples in this topic when working with attribute dimensions in free-form mode.

Data source types: Oracle Essbase

Figure 1 shows an example of both page region and attribute usage. In this example, Pkg Type (an attribute dimension attached to the base member Product) and Budget are page

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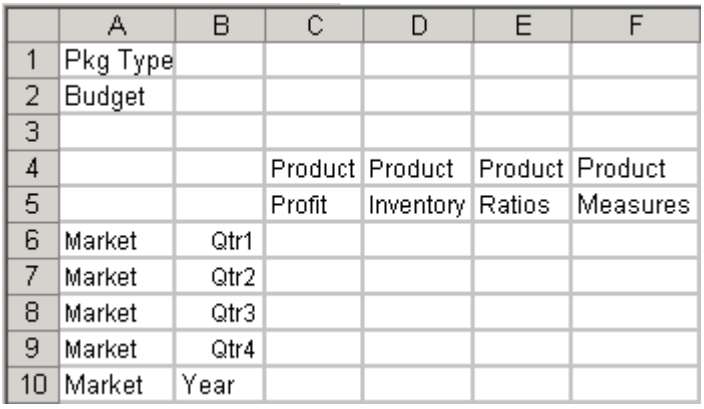
dimensions. By drilling down on Pkg Type you can do attribute based analysis on measures as it relates to specific Product attributes. This can be further used to create a cross-tab analysis of product SKUs by attribute.

Figure 16-14 Attribute Dimensions in Free-Form Grids



	A	B	C	D	E	F
1	Pkg Type					
2	Budget					
3						
4			Product	Product	Product	Product
5			Profit	Inventory	Ratios	Measures
6	Market	Qtr1				
7	Market	Qtr2				
8	Market	Qtr3				
9	Market	Qtr4				
10	Market	Year				

Alternatively, to quickly add attribute dimensions onto a free-form grid, follow the instructions in Inserting Attribute Dimensions on the Sheet. You can then use the member selection instructions in the Dimensions and Members to select and work with members from the attribute dimensions.

Submitting from Free-Form Grid with Scaling Options Enabled

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting; Oracle Essbase

Starting in Smart View 23.200, when attempting a free-form submit with scaling options enabled, and using the **Submit** button in the Smart View ribbon or provider ad hoc ribbon, the following warning is shown:

You are in free-form mode. Perform a Refresh before Submit.

Click the **Details** button, and the following note is displayed:

Free-form submit is not allowed when scaling is enabled.

Using the **Submit Data Without Refresh** or **Submit Data Range** options on the **Submit** button in the provider ad hoc ribbon, the following warning is shown:

To submit scaled data, refresh the grid and submit. You are attempting free-form submit; data will not scale per scaling options and will be submitted as is. Do you want to continue?

If you decide to submit after viewing this message, then the data will be submitted as is.

Additionally, for any free-form submit, a status is shown in the Excel status bar until the submit processing is completed (this status remains depending on the processing time). The status lets you know that the values are being submitted as is, without considering the dirty status or scaling options set.

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> **Note**
>
> For Cloud EPM sources only:
>
> - To take advantage of this feature, the **Smart View Ad Hoc Behavior** option in your application must be set to **Standard**.
> - This feature applies to ad hoc grids in free-form mode and flex forms.

Creating Free-Form Reports

Follow the procedure in this topic to create a free-form report.

Data source types: Oracle Essbase, Planning

To construct a free-form report:

1. Open a worksheet and connect to a data source.
2. In the worksheet, enter member names according to the rules specified in Guidelines and Best Practices for Free-Form.
3. Essbase: Members may have duplicate names (for example, both East and West markets may contain a member named Portland — Maine and Oregon). To enter a duplicate member name, use **Member Selection** to select members.
4. Refresh the grid, or select **Ad hoc analysis**.
5. Perform further ad hoc operations and formatting as needed.

Retrieving Attribute Dimensions in Free-Form Mode

Follow the procedure in this topic to retrieve attribute dimensions in a free-form report..

Data source types: Oracle Essbase

In structured grid processing operations, attribute dimensions are not shown. In free-form, you can type an attribute dimension member in the grid and it will be processed and validated. Only the attribute dimension member that you added will be displayed and used during processing and validation; the remaining attribute dimension members will not be included. Structured grid operations that follow this free-form request will retain the attribute dimension member.

If the base dimension exists in the worksheet, you can also retrieve an attribute member by typing the name directly in the worksheet.

To retrieve an attribute dimension in free-form using **Member Selection**:

1. In a blank worksheet, select a cell.
2. From the data source ribbon, select **Member Selection**.
3. In the **Dimension Name Resolution** dialog box, select the attribute dimension.
4. To orient members vertically in the worksheet starting from the cell you selected in step 3, select the **Vertical Orientation** check box.

   This check box is cleared by default; meaning that members will be oriented horizontally across the sheet from the cell you selected in step 3.
5. Click **OK** to launch the **Member Selection** dialog box.

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6. Select the members to place on the worksheet.

> **Note**
>
> You can also add attribute dimensions and members to the sheet.

Creating Asymmetric Reports

Follow the procedure in this topic to create asymmetric free-form report..

Data source types: Oracle Essbase, Planning

Reports can contain symmetric or asymmetric column groups. The symmetry the symmetry of column groups is determined automatically, based on the members you select.

Symmetric reports, as shown in Figure 1, are characterized by repeating, identical groups of members.

Figure 16-15 Symmetric Report

	East					West				
	Budget			Actual			Budget			Actual	
Qtr1	Qtr2	Qtr3	Qtr1	Qtr2	Qtr3	Qtr1	Qtr2	Qtr3	Qtr1	Qtr2	Qtr3

Asymmetric reports, as shown in Figure 2, are characterized by groups of nested members that differ by at least one member. There can be a difference in the number of members or in the names of members.

Figure 16-16 Asymmetric Report

	East					West		
	Budget			Actual			Budget	
Qtr1	Qtr2	Qtr3	Qtr1	Qtr2	Qtr3	Qtr1	Qtr2	Qtr3

You can create asymmetric reports as follows:

- Enter member names in free-form mode.
- Zoom in with **Within Selected Group** selected on the Member Options page of the Options dialog box.
- Suppress rows that contain missing values, zero values, or underscore characters during data retrievals.

> **Note**
>
> Retrieving data into an asymmetric report may take a long time on large reports.

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Actions That May Cause Unexpected Behavior

Review this topic to learn about actions that may cause unexpected behavior in free-form reports.

Oracle Smart View for Office tries to preserve all comments, formulas, and customized report layouts. Some exceptions that may result in unexpected behavior are when the following actions are performed:

- Zoom in on a page dimension
- Pivot a dimension from the POV to a row or column
- Drag and drop a dimension from the POV to the worksheet
- Pivot a row dimension to a column dimension
- Switch the location of a row dimension to another row
- Switch the location of a column dimension to another column
- Change member aliases using the Change Alias Table command
- With Oracle Essbase data sources, cutting and pasting from Microsoft Word into an Excel worksheet may cause unexpected behavior because of hidden characters. If this happens, contact your administrator, who can identify the issue through logs.

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17

General Operations

Related Topics

- Smart View Operations
  Oracle Smart View for Office provides a set of operations common to all data source types.
- Searching for Forms and Other Artifacts
  You can search for forms and other artifacts present in your Oracle Fusion Cloud Enterprise Performance Management business process starting Oracle Smart View for Office 23.100+.
- Using Quick Actions
  Using the **Quick Action** menu on the Smart View ribbon, you can access various actions quickly, instead of switching between ribbons often or launching the Smart View Options dialog every time to change a setting.
- Using the Document Contents Pane
  Document Contents is a task pane in the Smart View Panel that provides a view of—and allows you to perform actions on—the content existing in the current Office document.
- Using Undo and Redo
  When connected to a data source provider, the Undo option in the Smart View ribbon, undoes the last user action in a cell.
- Copying and Pasting
  You can copy and paste Oracle Smart View for Office ad hoc, data points, functions, and Oracle Business Intelligence Enterprise Edition content between Excel, Word and PowerPoint.
- Saving Office Documents to Cloud EPM
  In Oracle Smart View for Office, you can save Microsoft Office documents to the Oracle Fusion Cloud Enterprise Performance Management Library. Documents you save in the Cloud EPM Library can be made accessible to other users. You can also download saved files from the library.
- Importing Metadata in Office Applications
  Metadata consists of Oracle Smart View for Office artifacts such as the POV, alias tables, and connection information.
- Viewing Sheet Information
  In **Sheet Information**, you can view connection and other details for the current worksheet.
- Opening Forms and Ad Hoc Grids from Web Applications (Web Launch)
  From your web application of your business process, you can open forms and ad hoc grids in Oracle Smart View for Office. This action is also referred to as *web launch*.
- Opening Large Workbooks in Smart View
  Oracle Smart View for Office may stop responding when opening workbooks containing a large number of rows and columns, graphical objects, and Excel comments.
- Working Compatibly on Forms and Ad Hoc Grids Between Smart View and Smart View (Mac and Browser)
  You can work on the same forms and ad hoc grids in a compatible manner in both Smart View and Smart View (Mac and Browser).

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- Entering Percentage Values in Forms and Ad Hoc Grids
  In forms and ad hoc grids, note the best practices outlined in this topic when entering values in cells defined as percentages.
- Enabling Automatic Cell Width and Height Adjustment
  You can enable the automatic adjustment of Excel column width and row height to accommodate the contents of member and data cells.
- Working with Shared Workbooks
  Oracle Smart View for Office does not support Excel shared workbooks.
- Working with Protected Worksheets
  Oracle Smart View for Office operations, such as refresh and ad hoc, are not supported on protected sheets.
- Printing POV Members in the Header and Footer
  You can print active POV members in the header or footer of an Excel document.
- Enabling and Disabling Smart View
  Oracle Smart View for Office is enabled by default after installation.

Smart View Operations

Oracle Smart View for Office provides a set of operations common to all data source types.

These include basic operations, functions, and the ability to set preferences.

Searching for Forms and Other Artifacts

You can search for forms and other artifacts present in your Oracle Fusion Cloud Enterprise Performance Management business process starting Oracle Smart View for Office 23.100+.

Data source types: Cloud EPM: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

The ability to search helps you find and access forms and other artifacts you need faster. In addition to forms, you can also search for smart forms, flex forms, composite forms, ad hoc grids, reports, documents, task lists, and dashboards.

In the Smart View Home panel, you can search within the Library, Reports, Documents, and Task Lists folders.

> **Note**
>
> - For searching documents, your service administrator must enable the Documents folder in Smart View. This is done by setting the value of <enableLibrary> property to 1 in the properties.xml file. You can then view the Documents folder in the Smart View Home panel and search its contents.
> - Searching task lists requires the Cloud EPM 23.08 or later.

The following are supported in search:

- Regular expressions
- Alphanumeric terms: For example, Plan2022, Q3-report, or expenses5Jul

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- Case-insensitive search: For example, searching for "plan", "Plan", or "PLAN" fetches the same list of items which have this term in their names, irrespective of their case.

To search for forms and other artifacts:

1. Connect to the data provider.
2. In the Smart View Panel, expand the tree view to view the list of items.
3. In the search box located above the tree view, type the term you want to search for and press **Enter**.
   The list of matching items is filtered based on the searched term. The items are displayed with their respective icons in the search results for easy identification.

   You can open an item directly from the search results. You can also right-click an item in the search results to view the context menu options specific to the selected item.

   If there are no matching items for the searched term, the panel appears blank. You can clear the search box by clicking the Close icon.

Using Quick Actions

Using the **Quick Action** menu on the Smart View ribbon, you can access various actions quickly, instead of switching between ribbons often or launching the Smart View Options dialog every time to change a setting.

The **Quick Action** menu contains a list of actions that include:

- commonly used menu items on the Smart View, provider, and provider ad hoc ribbons such as Submit Data, Refresh, Zoom In, Change Alias, and so on.
- settings from the Smart View Options dialog such as Suppress Missing Rows, Suppress Repeated Members, Use Excel Formatting, and so on. The status of a setting, whether selected (On) or unselected (Off) is also indicated next to the action.

The list of actions vary based on what is open in context. For example:

- If no form or ad hoc grid is open, then you get basic actions such as Diagnostics or settings from Smart View Options.
- If a form is open, then you get form-related actions such as Submit Data, Adjust, or Business Rules in the Quick Action menu.
- If an ad hoc grid is open, you get ad hoc operations such as Zoom In, Zoom Out, or Remove Only in the Quick Action menu.

Enabling the Quick Action Menu

You can enable and disable the **Quick Action** menu as per your requirement. In the **Health Check** dialog, the **Quick Action** setting is present under **Smart View Options** and is disabled by default.

- To enable it, click in the **Fix/Update/Help Link** column, select **Enable**, and then click **Update Settings**.
- To disable it, click in the **Fix/Update/Help Link** column, select **Disable**, and then click **Update Settings**.

For more information, see Performing a Health Check On Your System.

Customizing Quick Actions

To customize the list of actions that appear in the **Quick Action** menu:

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1. In the Smart View ribbon, expand the **Quick Action** menu and select the **More...** option.
2. In the **Quick Item Selection** dialog, select the required actions from the **Available Actions** section.
   The **Available Actions** section shows the actions that can be added to the **Quick Action** menu. The **Selected Actions** section shows the actions that you have selected to display in the **Quick Actions** menu.
3. Do the following:
   - To add an action, select and move it from **Available Actions** to **Selected Actions**.
   - To remove an action, select and move it back from **Selected Actions** to **Available Actions**.
   - To arrange the order in you want the actions to display in the Quick Actions menu, use the **Up** and **Down** arrow icons in **Selected Actions**.

   Once set, the quick actions are available for all forms and ad hoc grids that you open from a data provider.

> **Note**
>
> - The next time you want to customize the actions list, you may not get the **More...** option in the **Quick Action** menu. You need to open a new sheet tab, and then expand the **Quick Action** menu to select **More...** and open the **Quick Item Selection** dialog for adding or removing actions.
> - After closing the **Quick Item Selection** dialog, if you select the **More...** option again, the **Quick Item Selection** dialog does not open. This is because, until the selection is not changed, the **Quick Action** menu will not initiate the same action again. As a workaround, select a different option from the **Quick Action** menu and then select **More...** again to open the **Quick Item Selection** dialog.

Using the Document Contents Pane

Document Contents is a task pane in the Smart View Panel that provides a view of—and allows you to perform actions on—the content existing in the current Office document.

The **Document Contents** pane displays Office objects in a tree format, allowing you to easily see and interact with the content in a workbook, presentation, or document, regardless of the provider or type of content and including content from extensions. Content is displayed based on the provider connection, or the document layout on sheets, slides, or pages.

Use the drop-down selection list to choose from content in your workbook. The drop-down list in Figure 1 shows a workbook with connections to on-premises Essbase and Planning using a shared connection. A third connection is shown to on-premises Oracle Business Intelligence Enterprise Edition using a private connection.

The drop-down list for the workbook in Figure 1 displays the content for the shared connection sheets, and options for viewing the content on the private Oracle BI EE connection sheet.

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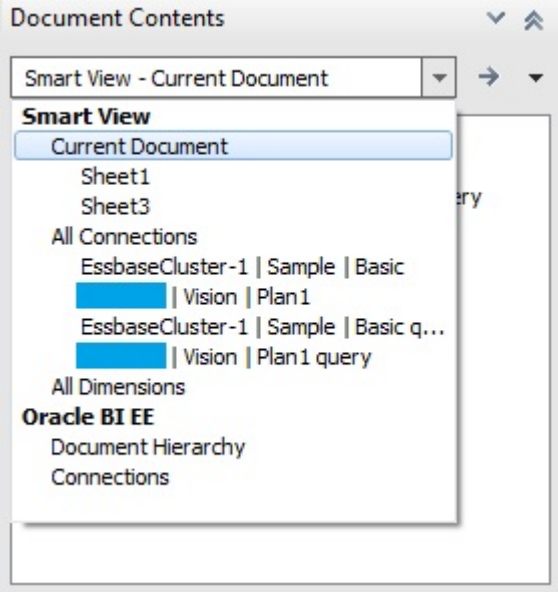
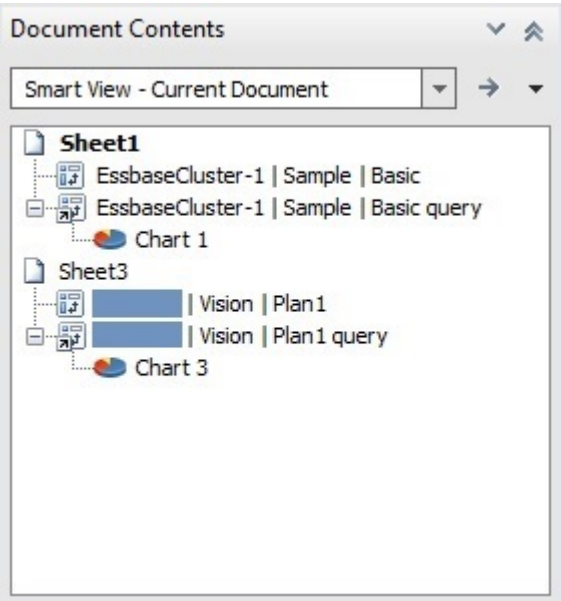
Figure 17-1 Document Contents Pane Showing the Drop-down List



Assuming Sheet1 is open, select **Current Document** in the **Document Contents** list. The content list changes to show that Sheet1 contains Essbase ad hoc grid, ad hoc query and chart, while Sheet3 contains Planning grid, ad hoc query and chart.

Figure 17-2 Document Contents Pane Showing the Content of Sheet1 and Sheet3



To switch the view to Oracle BI EE, select **Document Hierarchy** under **Oracle BI EE** and the content view changes. Figure 3 shows an example of Oracle BI EE content in the **Document Contents** pane.

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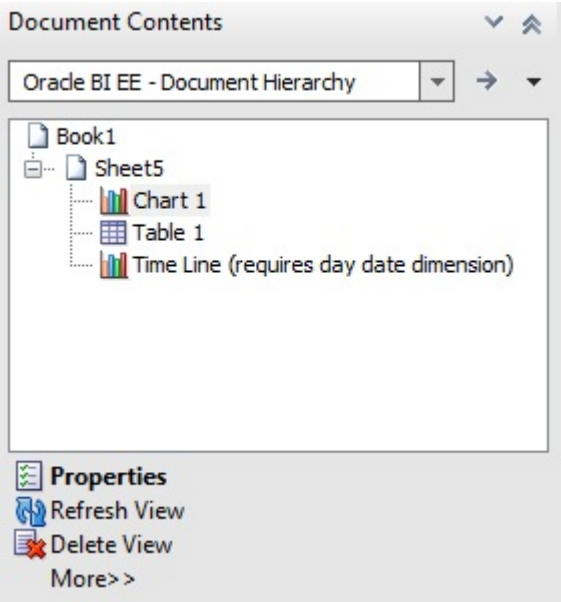
Figure 17-3 Document Contents Pane Displaying Oracle BI EE Content



Depending on the provider, you can perform a subset of tasks on selected objects from the **Document Contents** pane.

- For most providers, you can **Select**, **Refresh** or **Delete** content on a sheet, slide, or document.
- For most providers, you can insert reporting objects, and perform other tasks.
- For Oracle BI EE providers, you can perform additional tasks on individual views; for example, you can **Mask** a view, or review the properties of a view.

For example, in Figure 6, Sheet1 shows the Oracle Essbase ad hoc grid, ad hoc query and chart. You can also see the same artifacts on Sheet3 for Planning, but we're focusing on Sheet1. With the Sheet node selected for Sheet1, the **Refresh** and **Sheet Information** options appear at the bottom of the **Document Contents** pane.

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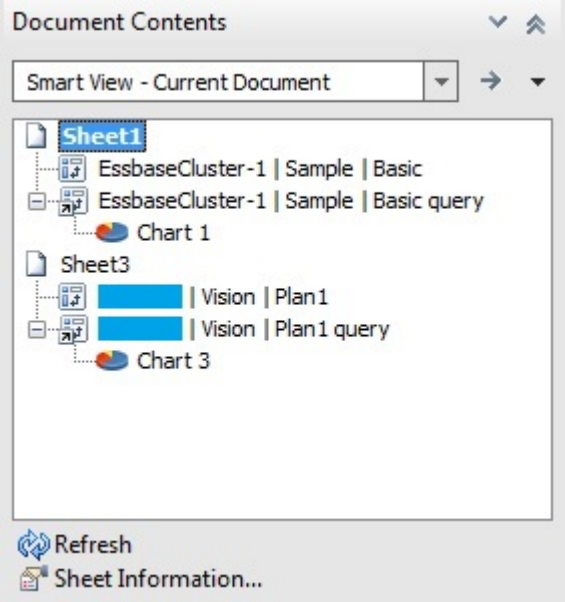
Figure 17-4 An Essbase Ad Hod Grid with the Sheet Node Selected in Document Contents



Click **Sheet Information** to view the **Sheet Information** dialog box (Figure 5), where you can also choose to **Save** or **Delete** metadata for the sheet or workbook.

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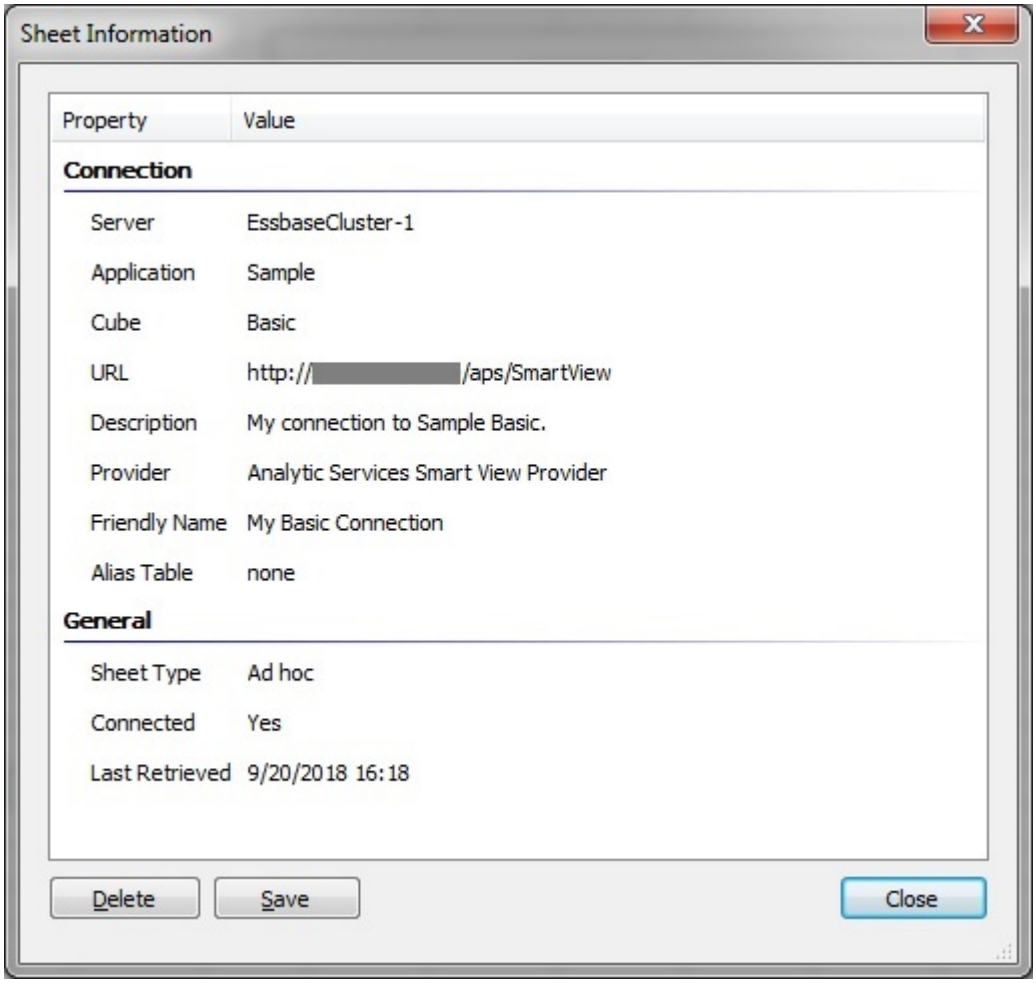
Figure 17-5 Sheet Information Dialog Box for an Essbase Ad Hoc Grid



Select the object node in **Document Contents**, and the context changes showing the **Select**, **Insert New Report Object/Control**, **Refresh**, **Modify Connection**, and **Delete** options at the bottom of the pane (Figure 6).

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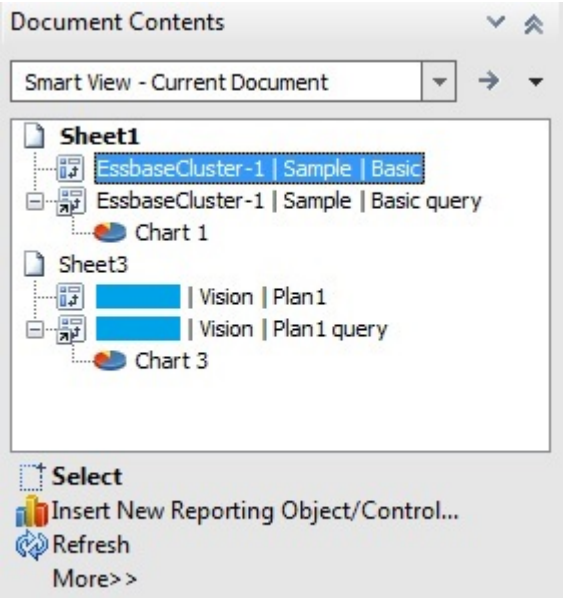
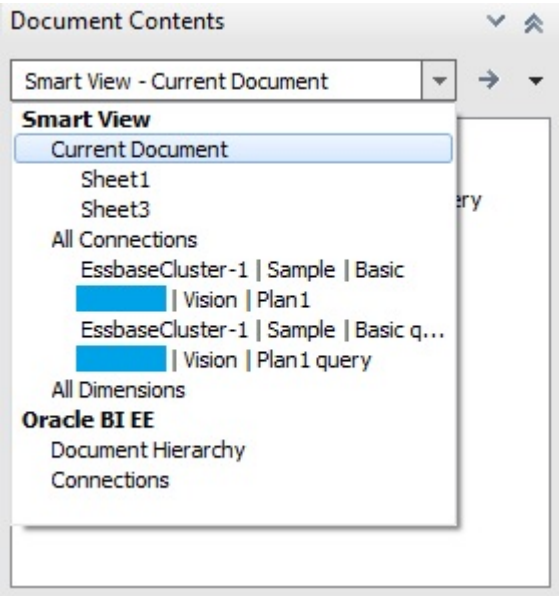
Figure 17-6 An Essbase Ad Hoc Grid Selected in Document Contents



In general, content is grouped by Oracle Smart View for Office providers (Essbase, Oracle Hyperion Financial Management, Planning, and Oracle Hyperion Reporting and Analysis). Content from Oracle BI EE is grouped separately. In workbooks containing multiple objects from different data sources, you can switch the view using the **Document Contents** drop-down menu shown in Figure 7.

Figure 17-7 Available Options in Document Contents Drop-Down Menu



Select the **All Connections** option and the **Document Contents** view changes to show objects sorted by provider (Figure 8).

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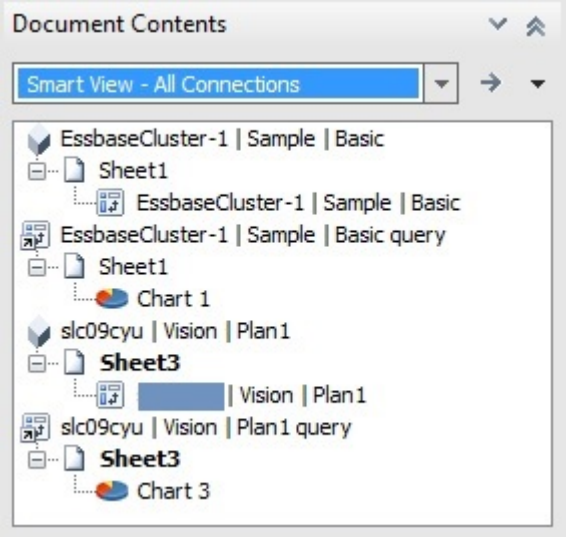
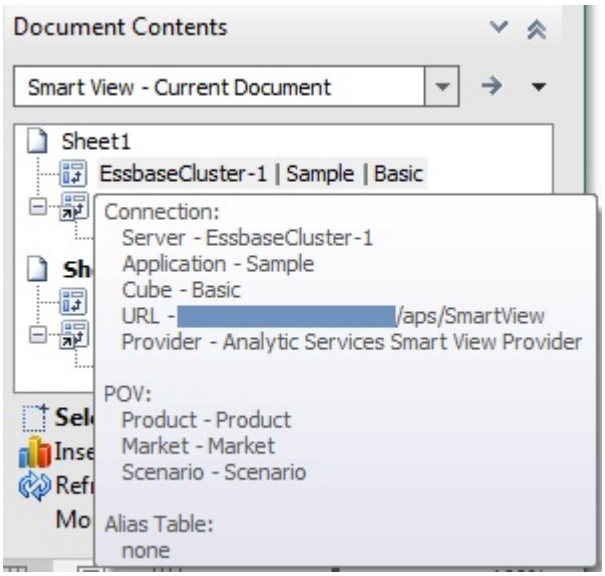
Figure 17-8 Smart View Provider Content Listed by Provider in Document Contents



For Smart View provider content, such as Planning or Essbase objects, you can click in the tree area of **Document Contents** and then hover over an object icon to view connection properties, such as Server, Application, Cube, URL, Provider, POV and Alias Table, as shown in Figure 9. Properties vary depending on the provider.

Figure 17-9 Connection Properties of an Essbase Ad Hoc Query



For Oracle BI EE content, select an Oracle BI EE object, and then use the **Properties** link at the bottom of **Document Contents** to launch the **View Properties** dialog, where you can view connection and other properties (see Figure 3).

For some providers, such as Essbase and Planning ad hoc, you can insert reporting objects such as a table native Office chart based on an ad hoc query or grid object. Select the grid or query object in **Document Contents**, and then select **Inserting Reporting Object/Control**. You are prompted to choose from Table or Chart:

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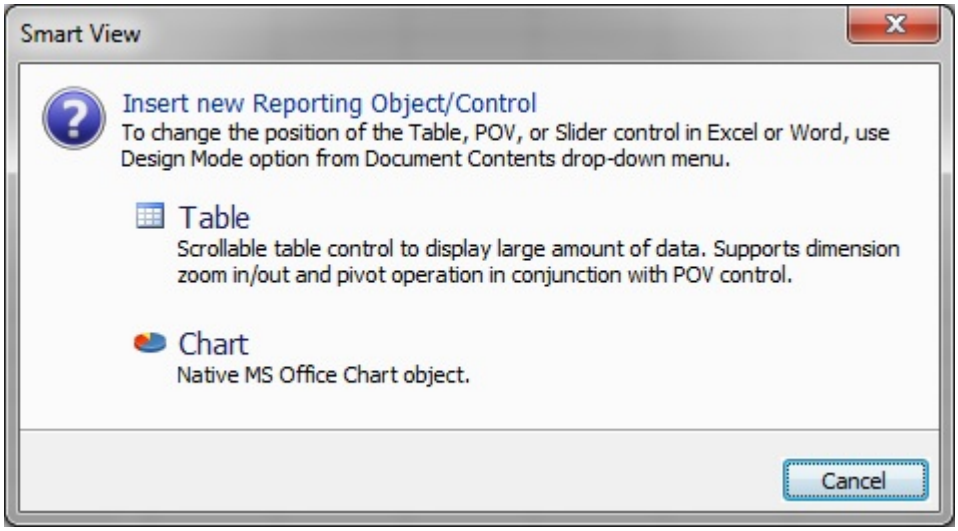

> **Note**
>
> When inserting 3-D charts for large datasets (for example, more than 3,000 cells) from the **Document Contents** pane, Microsoft Office consumes large amounts of memory and may fail.
>
> To avoid this issue, Smart View renders the chart as 2-D.

For Smart Slices and Financial Reporting, you can insert reporting objects such as function grids and slider controls. Refer to the following for more information on inserting these types of reporting objects from **Document Contents**:

Smart Slices

Smart View and Financial Reporting

Using Undo and Redo

When connected to a data source provider, the Undo option in the Smart View ribbon, undoes the last user action in a cell.

Undo, Undo, and **Redo**, Redo, behave differently depending on the data source to which you are connected.

Additionally:

- In ad hoc analysis with Oracle Essbase or Narrative Reporting data sources, **Undo** undoes **Zoom In**, **Zoom Out**, **Keep Only**, **Remove Only**, or **Refresh** and restores the previous database view to the grid. Performing an **Undo** after modifying member data returns the sheet to its state before the last refresh, not to its state before the data modification.
- In forms, **Undo** undoes the last user action in a cell.
- In ad hoc grids for all providers, Excel formatting is not retained when performing an **Undo**.
- When you change the alias table, you will not be able to undo any previously performed actions. For example, you set the **Number of Undo Actions** option to 9. If you perform

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three ad hoc operations, such as **Zoom In**, **Pivot**, and then **Keep Only**, and then change the alias table, those three previously performed actions can no longer be undone. However, any supported actions you perform after changing the alias table are tracked and can be undone according to the setting in **Number of Undo Actions**. See Specifying the Number of Undo and Redo Actions for instructions on setting this option.

See also Undo Support By Provider.

> **Note**
>
> You can only undo operations that are performed in Oracle Smart View for Office. You cannot undo operations that are performed on the provider server, such as calculation status.

Specifying the Number of Undo and Redo Actions

To specify the number of permitted undo and redo actions:

1. From the Smart View ribbon, select **Options**, then select **Advanced** in the left panel.
2. In **Number of Undo Actions**, specify the number of permissible **Undo** operations, 0 through 100.

   This is also the number of **Redo** operations permitted.
3. Click **OK**. The setting takes effect after you refresh or perform a drill operation.

Undo Support By Provider

Undo Support in Essbase

Table 17-1 Undo Operations Supported by Essbase - Ad Hoc

Operation	Single Grid	Multiple Grid	VBA	Functions
Zoom In	Supported	N/A	N/A	N/A
Zoom Out	Supported	N/A	N/A	N/A
Keep Only	Supported	N/A	N/A	N/A
Remove Only	Supported	N/A	N/A	N/A
Pivot	Supported	N/A	N/A	N/A
Refresh	Supported	N/A	N/A	N/A

Table 17-2 Undo Operations Supported by Essbase - Member Options

Operation	Single Grid	Multiple Grid	VBA	Functions
General	**General**	**General**	**General**	**General**
Zoom In Level	Supported	N/A	N/A	N/A
Member Name Display	Supported	N/A	N/A	N/A
Indentation	Supported	N/A	N/A	N/A
Ancestor Position	Supported	N/A	N/A	N/A
Member Retention	**Member Retention**	**Member Retention**	**Member Retention**	**Member Retention**

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Table 17-2 (Cont.) Undo Operations Supported by Essbase - Member Options

Operation	Single Grid	Multiple Grid	VBA	Functions
Include Selection	Supported	N/A	N/A	N/A
Within Selected Group	Supported	N/A	N/A	N/A
Remove Unselected Groups	Supported	N/A	N/A	N/A
Comments and Formulas	**Comments and Formulas**	**Comments and Formulas**	**Comments and Formulas**	**Comments and Formulas**
Preserve Formulas and Comments in ad hoc operations (except pivot)	Preserve Excel Formulas: Not Supported Preserve Smart View Functions: Not Supported	N/A	N/A	N/A
—Formula Fill	Preserve Excel Formulas: Not Supported Preserve Smart View Functions: Not Supported			
—Enable Enhanced Comment Handling	Preserve Comments: Supported			
Preserve Formula on POV Change	N/A	N/A	N/A	N/A

Table 17-3 Undo Operations Supported by Essbase - Data Options

Data Options	Data Options	Data Options	Data Options	Data Options
Rows	**Rows**	**Rows**	**Rows**	**Rows**
Suppress No Data/ Missing	Supported	N/A	N/A	N/A
Zero	Supported	N/A	N/A	N/A
No Access	Supported	N/A	N/A	N/A
Invalid	Supported	N/A	N/A	N/A
Underscore Characters	Supported	N/A	N/A	N/A
Repeated Members	Supported	N/A	N/A	N/A
Columns	**Columns**	**Columns**	**Columns**	**Columns**
Suppress No Data/ Missing	Supported	N/A	N/A	N/A
Zero	Supported	N/A	N/A	N/A
No Access	Supported	N/A	N/A	N/A
Mode	**Mode**	**Mode**	**Mode**	**Mode**
Suppress Missing Blocks	N/A	N/A	N/A	N/A

Table 17-4 Undo Operations Supported by Essbase - Other Actions

Operation	Single Grid	Multiple Grid	VBA	Functions
Modify Open Saved	Not Supported	N/A	N/A	N/A

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Table 17-4 (Cont.) Undo Operations Supported by Essbase - Other Actions

Operation	Single Grid	Multiple Grid	VBA	Functions
Alias Table	Supported	N/A	N/A	N/A
Metadata (member data)	Not Supported	N/A	N/A	N/A
Cell Style	N/A	N/A	N/A	N/A

Undo Support in Planning

Table 17-5 Undo Operations Supported by Planning - Ad Hoc Options

Operations	Form	Ad Hoc	VBA	Functions
Zoom In	N/A	Supported	N/A	N/A
Zoom Out	N/A	Supported	N/A	N/A
Keep Only	N/A	Supported	N/A	N/A
Remove Only	N/A	Supported	N/A	N/A
Pivot	N/A	Supported	N/A	N/A
Refresh	N/A	Supported	N/A	N/A

Table 17-6 Undo Operations Supported by Planning - Member Options

Operations	Form	Ad Hoc	VBA	Functions
General	**General**	**General**	**General**	**General**
Zoom In Level	N/A	Supported	N/A	N/A
Member Name Display	N/A	Supported	N/A	N/A
Indentation	N/A	Supported	N/A	N/A
Ancestor Position	N/A	Supported	N/A	N/A
Member Retention	**Member Retention**	**Member Retention**	**Member Retention**	**Member Retention**
Include Selection	N/A	Supported	N/A	N/A
Within Selected Group	N/A	Supported	N/A	N/A
Remove Unselected Groups	N/A	Supported	N/A	N/A
Comments and Formulas	**Comments and Formulas**	**Comments and Formulas**	**Comments and Formulas**	**Comments and Formulas**
Preserve Formulas and Comments	N/A	Supported	N/A	N/A
—Formula Fill	N/A	Supported	N/A	N/A
—Enable Enhanced Comment Handling	N/A	Supported	N/A	N/A
Preserve Formula on POV Change	N/A	Supported	N/A	N/A

Table 17-7 Undo Operations Supported by Planning - Data Options

Operations	Form	Ad Hoc	VBA	Functions
Data Options	**Data Options**	**Data Options**	**Data Options**	**Data Options**
Rows	**Rows**	**Rows**	**Rows**	**Rows**

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Table 17-7 (Cont.) Undo Operations Supported by Planning - Data Options

Operations	Form	Ad Hoc	VBA	Functions
Suppress No Data/ Missing	N/A	Supported	N/A	N/A
Zero	N/A	Supported	N/A	N/A
No Access	N/A	Supported	N/A	N/A
Invalid	N/A	Supported	N/A	N/A
Underscore Characters	N/A	Supported	N/A	N/A
Repeated Members	N/A	Supported	N/A	N/A
Columns	**Columns**	**Columns**	**Columns**	**Columns**
Suppress No Data/ Missing	N/A	Supported	N/A	N/A
Zero	N/A	Supported	N/A	N/A
No Access	N/A	Supported	N/A	N/A
Mode	**Mode**	**Mode**	**Mode**	**Mode**
Suppress Missing Blocks	N/A	Supported	N/A	N/A

Table 17-8 Undo Operations Supported by Planning - Other Actions

Operations	Form	Ad Hoc	VBA	Functions
Modify Open Saved	N/A	Not Supported	N/A	N/A
Alias Table	N/A	Supported	N/A	N/A
Metadata (member data)	N/A	Not Supported	N/A	N/A
Cell Style	N/A	Not Supported	N/A	N/A

Undo Support in Narrative Reporting

Table 17-9 Undo Operations Supported by Narrative Reporting - Ad Hoc

Operation	Single Grid	Multiple Grid	VBA	Functions
Zoom In	Supported	N/A	N/A	N/A
Zoom Out	Supported	N/A	N/A	N/A
Keep Only	Supported	N/A	N/A	N/A
Remove Only	Supported	N/A	N/A	N/A
Pivot	Supported	N/A	N/A	N/A
Refresh	Supported	N/A	N/A	N/A

Table 17-10 Undo Operations Supported by Narrative Reporting - Member Options

Operation	Single Grid	Multiple Grid	VBA	Functions
General	**General**	**General**	**General**	**General**
Zoom In Level	Supported	N/A	N/A	N/A
Member Name Display	Supported	N/A	N/A	N/A
Indentation	Supported	N/A	N/A	N/A

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Table 17-10 (Cont.) Undo Operations Supported by Narrative Reporting - Member Options

Operation	Single Grid	Multiple Grid	VBA	Functions
Ancestor Position	N/A	N/A	N/A	N/A
Member Retention	**Member Retention**	**Member Retention**	**Member Retention**	**Member Retention**
Include Selection	Supported	N/A	N/A	N/A
Within Selected Group	N/A	N/A	N/A	N/A
Remove Unselected Groups	N/A	N/A	N/A	N/A
Comments and Formulas	**Comments and Formulas**	**Comments and Formulas**	**Comments and Formulas**	**Comments and Formulas**
Preserve Formulas and Comments in ad hoc operations (except pivot)	NA	N/A	N/A	N/A
—Formula Fill	N/A			
—Enable Enhanced Comment Handling	N/A			
Preserve Formula on POV Change	N/A	N/A	N/A	N/A

Table 17-11 Undo Operations Supported by Narrative Reporting - Data Options

Operation	Single Grid	Multiple Grid	VBA	Functions
Rows	**Rows**	**Rows**	**Rows**	**Rows**
Suppress No Data/ Missing	Supported	N/A	N/A	N/A
Zero	Supported	N/A	N/A	N/A
No Access	N/A	N/A	N/A	N/A
Invalid	N/A	N/A	N/A	N/A
Underscore Characters	N/A	N/A	N/A	N/A
Repeated Members	N/A	N/A	N/A	N/A
Columns	**Columns**	**Columns**	**Columns**	**Columns**
Suppress No Data/ Missing	Not Supported	N/A	N/A	N/A
Zero	Not Supported	N/A	N/A	N/A
No Access	N/A	N/A	N/A	N/A
Mode	**Mode**	**Mode**	**Mode**	**Mode**
Suppress Missing Blocks	N/A	N/A	N/A	N/A

Table 17-12 Undo Operations Supported by Narrative Reporting - Other Actions

Operation	Single Grid	Multiple Grid	VBA	Functions
Modify Open Saved	Not Supported	N/A	N/A	N/A
Alias Table	Supported	N/A	N/A	N/A
Metadata (member data)	N/A	N/A	N/A	N/A
Cell Style	N/A	N/A	N/A	N/A

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Copying and Pasting

You can copy and paste Oracle Smart View for Office ad hoc, data points, functions, and Oracle Business Intelligence Enterprise Edition content between Excel, Word and PowerPoint.

Related Topics

- Copying, Pasting, and Refreshing Smart View Content
- Copying Data Between Excel, Word, and PowerPoint
- Viewing Cell POV and Server Information for Pasted Data Points
- Excel Copy and Paste Guidelines and Best Practices
  Consider these guidelines and best practices while copuying and pasting in Excel.

Copying, Pasting, and Refreshing Smart View Content

The following Oracle Smart View for Office content can be copied and pasted using the Copy and Paste buttons in the Smart View ribbon, and then refreshed using Smart View Refresh.

- Ad hoc—all applicable providers
- Data points—all applicable providers
- Functions—only HsGetValue (see also Copying and Pasting HsGetValue Functions)
- Oracle Analytics Cloud content

Other content in Smart View will be pasted as static text, including forms such as Planning forms.

Chart copy and paste is only supported for Oracle Analytics Cloud charts. Charts based on other providers, such as Planning, do not always paste correctly. For example, if you insert a chart, then change the format (such as from bar chart to pie chart), and then copy and paste it, the chart will not paste correctly.

Copying Data Between Excel, Word, and PowerPoint

In Oracle Smart View for Office, you can copy data from Excel and paste it into Excel, Word, or PowerPoint. The data you copy and paste is dynamic between Office applications. You can copy and paste data from:

- Excel to Word and PowerPoint
- Excel to Excel (ad hoc only)
- Word to Word and PowerPoint
- PowerPoint to Word and PowerPoint

The data points retain their original Excel-based query information, enabling you to perform data analysis.

Related Topics:

Notes

Video

Copying and Pasting

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Retrieving Spreadsheets From Which Data Points Were Copied

Notes

- Dynamic data points are maintained only in Word and PowerPoint. If you copy and paste data points within Excel, the data points are not linked to the Excel grid.
- When copying and pasting from Word to PowerPoint, or vice versa, data is displayed in a straight line. The tabular format is preserved only when copying data from Excel into Word or PowerPoint.
- Numeric formatting in Excel is preserved when data is pasted into Word and PowerPoint. Apply numeric formatting in Excel before copying and pasting data.
- If the name of the connection to the data source contains a semicolon (;), you may not be able to paste function data points.
- Copying and pasting data points is limited to use with grids and functions. You can copy data points from forms, but they will be pasted as static text.
- When you copy and paste a data cell within Excel, Smart View generates an HsGetValue function that appears in the Excel formula bar when the pasted cell is selected, Functions generated by Smart View contain the SVLink syntax; for example:

  = HsGetValue("", "Measures#Measures", "Year#Year", "**SVLink15131004130EOL**", "Row0", "Col0")

  When copied and pasted, functions containing the SVLink syntax result in static text. These functions may, however, be used as a template for creating other HsGetValue functions, providing that you remove the SVLink syntax and replace it with the POV dimensions and members you require.
- On computers where Smart View is installed, an error occurs when updating links in PowerPoint that were copied from Excel to PowerPoint.
- Formatting is not retained when copying and pasting cells from Excel to Word.
- Number formatting is not retained when copying data points from Excel to Word or PowerPoint.
- When working with Oracle Hyperion Financial Management ad hoc, and copying and pasting cells from Excel to Word, formatting is not retained even though the **Use Excel Formatting** option is selected.
- In Excel, copying a sheet containing a POV or slider to another sheet in the workbook results in an error.

Video

Your Goal	Watch This Video
Learn about integrating data in Office applications, including copying and pasting data points.	Integrating Plan Data with Microsoft Office in Oracle Planning and Budgeting Cloud

Copying and Pasting

To copy and paste data *from* Excel, Word, or PowerPoint *to* Excel, Word, or PowerPoint:

1. Select a data cell or range (may or may not include members).
2. From the Smart View ribbon, select **Copy**.
3. Open a Word or PowerPoint document, or another Excel worksheet or workbook.
4. If asked if you want to create a connection, click **Yes.**

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5. From the Smart View ribbon, select **Paste**.
6. Refresh.

> **Note**
>
> If you paste data into a Word document and save it in a different format such as .htm or .mht, you cannot refresh the data in these other formats.

7. **Optional:** To change the POV in Word or PowerPoint after you paste the data, click **Manage POV** and follow the procedure in Selecting Members for the Default or Background POV.

Retrieving Spreadsheets From Which Data Points Were Copied

To retrieve the Excel spreadsheets from which data points were copied:

1. In a Word or PowerPoint document into which Excel data points were pasted, select a data cell.
2. From the data source ribbon, select **Visualize in Excel**.
3. If asked to log on the data source, enter the user name and password.

   Excel displays the spreadsheet associated with the data cells. You can perform ad hoc analysis on the data.

Viewing Cell POV and Server Information for Pasted Data Points

After copying and pasting data points from Microsoft Office applications, and then refreshing the Office document, you can select data points and view the POV and source server information.

This procedure applies to data points copied from Excel and pasted to Excel, Word, or PowerPoint, or copied and pasted between Word and PowerPoint.

To view the POV and source server information of a pasted data point:

1. In the target Office document, select the data point.

   For example, if you copied and pasted an ad hoc grid from Excel to Word, then in Word, select a data point within the pasted and refreshed grid. In some cases, double-clicking the cell may be sufficient, but if there a decimal point in the cell, then you must select it manually.
   The cell POV and server information is displayed as hover text, as shown in Figure 1.

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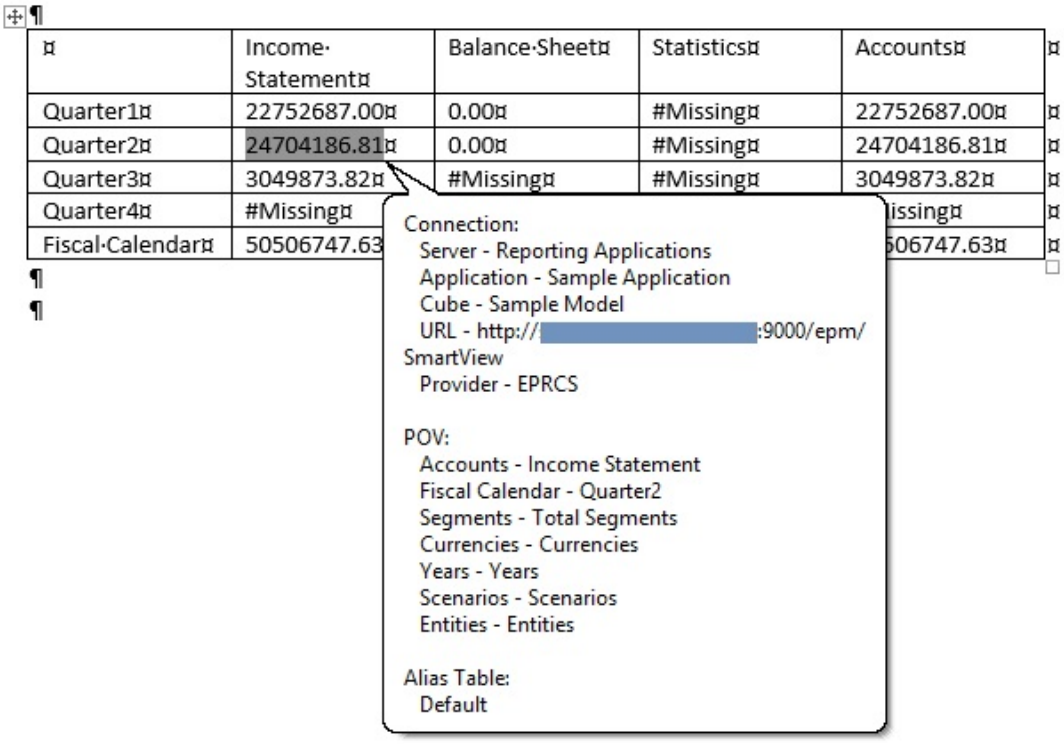
Figure 17-10 Pasted Grid Showing Hover Text Over Selected Data Cell



2. To close the hover text, click anywhere on your screen.

Excel Copy and Paste Guidelines and Best Practices

Consider these guidelines and best practices while copuying and pasting in Excel.

- In data forms, after copying a cell, only a single paste is allowed. Pasting into subsequent cells is not supported.

  Workaround: After pasting the cell once, you must copy the cell again in order to paste it into another cell.

- In forms or ad hoc grids with hidden columns, you will have unexpected results if you attempt to copy two or more consecutive cells from a range containing visible and hidden cells and paste them into a range of visible and hidden cells. The copied cells will be pasted to both the visible and hidden cells. This is Excel behavior.

  For example, suppose you are working with the following Year hierarchy on a form:

  Year
  Quarter
  Month

  On the form, the Quarter members are collapsed, so that the only visible members are Year and Month. Copy the values from one of the rows under the four Quarter cells, and paste them onto another row in another grid or form under Quarter, where the Quarter members are also collapsed.

  You may expect to see each of the four Quarter values pasted into the same position as on the previous sheet, but this is not the case. The cells will paste into the first visible cell and into the next three hidden cells (for example, Jan, Feb, Mar).

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Consider also that some Planning forms may also have spreading enabled, which can affect how the values are updated in the cells.

- Office Copy and Paste is not supported for copying and pasting Oracle Smart View for Office objects—such as charts, tables, sliders, or the POV—between slides, pages, and sheets. Smart View does not always handle the invalid copy gracefully. For example, in PowerPoint, if a Smart View chart is copied using Office Copy and Paste, an error message is displayed upon Refresh. Follow these best practices:
  - Do not use Office Copy and Paste to copy Smart View reporting objects. Instead, use Smart View Copy and Paste.
  - Do not copy and paste charts inserted using the Insert Chart command in PowerPoint. This applies to both Office Copy and Paste and Smart View Copy and Paste.
- Using the copy and paste functionality in Excel and then performing any Smart View operation (such as Refresh, Zoom In, or Submit) causes Smart View to stop responding in the following cases:
  - Copying a column to multiple columns if the column copied contains a Smart List or the database to which you're connected supports duplicate member names
  - Copying one Smart List cell to multiple cells

    Copying one member cell to multiple cells if the database to which you're connected supports duplicate member names

  To work around this, consider the following:
  - While designing the ad hoc grid and copying and pasting columns or cells, ensure that the **Member Name Display** option is set to "Distinct Member Name Only." The **Member Name Display** option is in the **Member Options** tab of the **Options** dialog box.
  - After pasting, save the workbook and reopen it, then perform the refresh.

  Microsoft Fix for Office 2016:

  The copy and paste cases noted above work as expected in Office 2016 if you have applied the update described in the Microsoft Knowledge Base (KB) article, "August 9, 2016, update for Excel 2016 (KB3115438)":

  https://support.microsoft.com/en-us/help/3115438/august-9--2016--update-for-excel-2016-kb3115438

Saving Office Documents to Cloud EPM

In Oracle Smart View for Office, you can save Microsoft Office documents to the Oracle Fusion Cloud Enterprise Performance Management Library. Documents you save in the Cloud EPM Library can be made accessible to other users. You can also download saved files from the library.

Related Topics

- About Saving Office Documents to Cloud EPM from Smart View
  In Oracle Smart View for Office, you can save Microsoft Office documents (Word, Excel, and PowerPoint files) to the Cloud EPM Library. You can also download saved files from the library.
- Creating Folders in the Cloud EPM Platform Library Using the Web Interface
  You may organize documents by creating folders in the Cloud EPM Platform Library using the web interface for your business process, such as Planning or Financial Consolidation and Close.

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- Creating Folders in the Narrative Reporting Library Using Smart View
  You may organize documents by creating folders in the Narrative Reporting library. You can create folders in the tree structure in the Smart View Panel under the **Documents** node.
- Saving Office Documents to Cloud EPM Library Using Smart View
  You can save documents to Oracle Fusion Cloud Enterprise Performance Management in the **Documents** folder or subfolders that you have created.
- Managing Access to Office Documents in Cloud EPM Library
  Narrative Reporting users and Cloud EPM Platform users with the Service Administrator or Power User role can limit user access to Microsoft Office documents in the Cloud EPM Library from Oracle Smart View for Office.

About Saving Office Documents to Cloud EPM from Smart View

In Oracle Smart View for Office, you can save Microsoft Office documents (Word, Excel, and PowerPoint files) to the Cloud EPM Library. You can also download saved files from the library.

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting

> **Note**
>
> In the topics on saving Office documents, Cloud EPM Platform refers to these business processes: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, and Tax Reporting.

Users often share Office documents by emailing them or saving them to an internal location. Storing files in the Oracle Fusion Cloud Enterprise Performance Management Library gives users another option for saving files in a central location and facilitates sharing documents with other users. Users can also download saved files from the library.

In order to view the folders and files under the **Documents** node in the Smart View Panel, users must be connected to their Cloud EPM business process. If users are not already connected, they will be prompted to sign in when using the **Save** or **Save As** options.

See Saving Office Documents to Cloud EPM Library Using Smart View

Guidelines about Documents, Folders, and Access

- Cloud EPM Platform:
  - You must have the Service Administrator or Power User role in order to save documents to Cloud EPM.
  - Any Word, Excel, or PowerPoint file that is up to 20 MB in size can be saved to the Cloud EPM Library. The files do not need to be related in any way to a Cloud EPM business process.
- Cloud EPM Service Administrators:
  - Smart View requires Write access to the <Smart View Install>/cfg folder, properties.xml file during runtime. An "Access Denied" error may occur when attempting to save if users do not have permission to write to this folder and file.

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  - You can limit access to the **Save** and **Save As** options by configuring the enableLibrary property in the properties.xml file, described in Managing Access to Office Documents in Cloud EPM Library
  - Using an EPM Automate command or REST API, you can enable virus scan on Office documents saved to the Cloud EPM Library from Smart View. Enabling virus scanning helps you enhance the security of your OCI (Gen 2) environment by ensuring that no one can upload infected files to the environment. See:
    * Virus Scan on Uploaded Files in OCI (Gen 2) Environments in *Getting Started Guide for Administrators*
    * *Working with EPM Automate*:
      * getVirusScanOnFileUploads
      * setVirusScanOnFileUploads
    * *REST APIs*
      * Get Virus Scan on File Upload
      * Set Virus Scan on File Upload

- Narrative Reporting:
  - If you have enabled the Narrative Reporting extension, you will see some folders under the **Library** node repeated under the **Documents** node in the Smart View Panel. This is a virtual view of the folders and does not affect the behavior of the **Save** or **Save As** options. You can access your saved content from either location in the tree.
  - When saving a doclet from a report package, the doclet will lose all metadata associated with Narrative Reporting and the report package; it becomes a regular Office document. Upon **Save** or **Save As**, the Office document is closed. You can reopen the saved document from the location where you saved it by selecting it from the tree in the Smart View Panel.
  - There is no size limit for saving Narrative Reporting reports to the Cloud EPM Library.

Creating Folders in the Cloud EPM Platform Library Using the Web Interface

You may organize documents by creating folders in the Cloud EPM Platform Library using the web interface for your business process, such as Planning or Financial Consolidation and Close.

Applies to: Cloud EPM Platform

The procedure in this topic describes creating folders in Oracle Fusion Cloud Enterprise Performance Management business processes. You cannot create folders from Oracle Smart View for Office while connected to a Cloud EPM business process.

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> **Note**
>
> - Cloud EPM Platform: In order to view the folders files in Smart View, under the **Documents** node in the Smart View Panel, you must be connected to your supported business process and have the System Administrator or Power User role.
> - Narrative Reporting: To create folders in Narrative Reporting web, see Creating Artifacts in the Library in *Narrative Reporting Authoring and Approving Doclets*. Or, you can create folders from Smart View, described in Creating Folders in the Narrative Reporting Library Using Smart View.

To create Library folders in the Cloud EPM Platform web interface:

1. Log on to a supported Oracle Fusion Cloud EPM web business process; for example, Planning.
2. In the Home page, click **Reports**.
3. At the left, click **Documents**.
4. Select the folder under which to create a new folder, click the **Actions** drop-down menu for the selected folder, and then select **Create Folder**.
5. In the **Create Folder** dialog, enter a folder name, and then click **OK**.

   The folder you just created is displayed under the parent folder you previously selected.

   For example, if you selected the **Library** folder, then the new folder appears under **Library** in the web; and under the **Documents** node in Smart View.

   You can now save files to this folder.
6. **Optional:** Repeat these steps to add new folders or subfolders.
7. To save files in the Library folder (**Documents** node in Smart View) and other the folders you've created, see Saving Office Documents to Cloud EPM Library Using Smart View.

Creating Folders in the Narrative Reporting Library Using Smart View

You may organize documents by creating folders in the Narrative Reporting library. You can create folders in the tree structure in the Smart View Panel under the **Documents** node.

Applies to: Narrative Reporting

The procedure in this topic describes creating folders in Oracle Smart View for Office while connected to Narrative Reporting. To create folders in Cloud EPM Platform business processes, see Creating Folders in the Cloud EPM Platform Library Using the Web Interface. To create folders in Narrative Reporting web, see Creating Artifacts in the Library in *Narrative Reporting Authoring and Approving Doclets*.

In order to create folders in Smart View, and to view the folders and files under the **Documents** node in the Smart View Panel, you must be connected to a Narrative Reporting business process.

To create Oracle Fusion Cloud Enterprise Performance Management Library folders in Smart View:

1. Connect to Narrative Reporting.

   See Connecting Using a Private Connection.

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2. In the Narrative Reporting Home, select **Library**.
3. In the Smart View Panel, expand **Narrative Reporting**, then expand **Library**.
4. Locate the **Documents** node in the tree.
5. Right-click the **Documents** node and select **New Folder**.

   Alternatively, select **Documents**, and then select **New Folder** in the Action Panel.
6. In the **Create New Folder** dialog, enter a folder name, and then click **OK**.

   The folder you just created is displayed under the **Documents** node.

   You can now save files to this folder.
7. **Optional:** Repeat these steps to add new folders or subfolders.

> **Note**
>
> If you have enabled the Narrative Reporting extension, you will see some folders under the **Library** node repeated under the **Documents** node in the Smart View Panel. When creating folders and subfolders, be sure to select the **Documents** node or a folder under the **Documents** node to access the **New Folder** command.

8. To save files in My Library and the folders you've created, see Saving Office Documents to Cloud EPM Library Using Smart View.

Saving Office Documents to Cloud EPM Library Using Smart View

You can save documents to Oracle Fusion Cloud Enterprise Performance Management in the **Documents** folder or subfolders that you have created.

In Oracle Smart View for Office, you may save Microsoft Office documents (Word, Excel, and PowerPoint files) that are up to 20 MB in size to the Cloud EPM Library. However, there is no size limit for saving Narrative Reporting reports to the Cloud EPM Library. Documents you save in the Cloud EPM Library are accessible to other users with the proper access rights. You can also download saved files from the library.

Before you begin, create any folders you may require. See Creating Folders in the Cloud EPM Platform Library Using the Web Interface or Creating Folders in the Narrative Reporting Library Using Smart View.

To save Office documents to Cloud EPM:

1. Open an Office application (Word, Excel, or PowerPoint), and connect to a Cloud EPM business process.

   If you aren't already connected, you will be prompted to sign in when you use the **Save** or **Save As** options.
2. **Perform this step before saving an Office document to Cloud EPM the first time:** In the Smart View Panel, navigate to a cube and, from the Action Panel, select **Connect**.

   Alternatively, right-click the cube in the Smart View Panel and select **Connect**.

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> **Note**
>
> This step only needs to be performed once for each business process to which you plan to save Office documents.

3. To save the currently-opened Office document to the same folder from which it was opened, click **Save** in the Smart View ribbon.

   Use the **Save** command after downloading and modifying a file. Clicking **Save** saves the file back to the same location in the **Documents** node.

   > **Note**
   >
   > Consider the following best practices:
   >
   > - If you have just started a new Office document, you must first perform a Save in the Office application. For example, if you just started a new Word file, save the file using the Save command in Word so that the file is saved locally or in a network location.
   >
   >   Then, when you click **Save** in the Smart View ribbon, Smart View saves the document with the name with which you saved the file in Office.
   > - When connected to a Cloud EPM OCI (Gen 2) environment where virus scanning is enabled, if the file you are attempting to save contains a virus, the file will not be saved.
   > - **Narrative Reporting:** By default, the **Save** option saves the Office file to My Library, which is your personal folder. A message alerts you to a successful or failed save; click **OK** in this message.
   >
   >   Other users will not have access to your My Library folder or the saved file. You can download and work with files saved to My Library. After downloading and modifying a file, click **Save** to save the file back to the same location in My Library. Use the **Save As** option to save the file to a folder location accessible to others within the Cloud EPM Library.

4. To save the currently-opened Office file to the folder you choose in the Cloud EPM Library, click **Save As**, then specify the settings below, and then click **Upload**.

   - **Cloud Connection** - Select the library provider connection from the drop-down list.
   - **Library folder location** - Use the **Browse** button to navigate to the folder to save the file.
   - **Document name** - Enter a name for the file; the name does not need to be the same as the actual file name.
   - **Description** - Enter an optional description for the saved file.

   You and other users can download and work with files saved to folders in the Cloud EPM Library. Consider the following best practices:

   - After downloading and modifying a file, click **Save** to save the file back to the same location in the Cloud EPM Library.
   - Use the **Save As** option to save a downloaded file to a different folder location accessible to others within the Cloud EPM Library.

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- While saving documents using the **Save As** option, the file extension is automatically added based on the default file extension of your document. For example, if your local Excel sheet has the old extension format of .xls, the sheet will be saved to the Cloud EPM Library with the same extension.
- To convert a document from an old Microsoft Office format (.xls, .doc, .ppt) to a new format (.xlsx, .docx, .pptx), use the Save As command of the Office application to first save the file locally in the new format, and then upload it to the Cloud EPM Library using the **Save As** feature of Smart View.

5. Repeat the previous steps for any other Office documents that you want to save to the **Documents** folder to a folder you choose in the Cloud EPM Library.

Managing Access to Office Documents in Cloud EPM Library

Narrative Reporting users and Cloud EPM Platform users with the Service Administrator or Power User role can limit user access to Microsoft Office documents in the Cloud EPM Library from Oracle Smart View for Office.

> **Note**
>
> - The task in this topic is for Service Administrators or users who are familiar with editing the properties.xml file located in the <Smart View Install>/cfg folder (for example, C:\Oracle\SmartView\cfg).
> - In Cloud EPM Platform, this feature is limited to users with Service Administrators and Power User roles.
> - In Narrative Reporting, there is no user limitation by role.

The ability to access and save Office documents to the Cloud EPM Library is enabled by default in Smart View.

You can remove this access by setting the enableLibrary property to 0 in the Smart View properties.xml file. This file is located in the <Smart View Install>/cfg folder (for example, C:\Oracle\SmartView\cfg).

Table 1 summarizes the effect of enabling and disabling the enableLibrary property for users with and without the Service Administrator or Power User role.

Table 17-13 Effects of enableLibrary Property with Service Administrator or Power User Role Settings

enableLibrary Property Setting	Service Administrator or Power User Role = Yes	Service Administrator or Power User Role = No
enableLibrary=1	• **Documents** node shown in tree • Ribbon buttons are displayed • Provider URL is in dialog	• No **Documents** node shown in tree • Ribbon buttons are displayed (can save to other providers) • Provider URL is NOT in dialog

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Table 17-13 (Cont.) Effects of enableLibrary Property with Service Administrator or Power User Role Settings

enableLibrary Property Setting	Service Administrator or Power User Role = Yes	Service Administrator or Power User Role = No
enableLibrary=0	• No **Documents** node shown in tree • Ribbon buttons hidden (can't access dialog)	• No **Documents** node shown in tree • Ribbon buttons hidden (can't access dialog)

This procedure shows you how to disable and re-enable the enableLibrary property in the properties.xml

To disable the enableLibrary property and limit access to saving and downloading Office documents in Oracle Fusion Cloud Enterprise Performance Management:

1. Open the Smart View properties.xml file with a text editor.

   The properties.xml file is located in the <Smart View Install>/cfg folder (for example, C:\Oracle\SmartView\cfg).

2. Locate the following entry:

   ```
   <!-- Enable Library on client. -->
     <enableLibrary>1</enableLibrary>
   ```

3. Change the enableLibrary value to 0; for example:

   ```
   <!-- Enable Library on client. -->
     <enableLibrary>0</enableLibrary>
   ```

4. Save the updated file.

5. Distribute the file according to your internal processes.

   Once the properties.xml file is distributed to users, the ability to access or use the **Save** and **Save As** options and view the **Documents** folder in the library will depend on each user's Service Administrator or Power User status, described in Table 1.

6. **Optional:** Re-enable the enableLibrary property by repeating this procedure, setting the property to 1; for example:

   ```
   <!-- Enable Library on client. -->
     <enableLibrary>1</enableLibrary>
   ```

   Once the properties.xml file is distributed to users, Narrative Reporting users and Cloud EPM Platform users with the Service Administrator or Power User role can use the **Save** and **Save As** options that will now appear in the **Library** group on the Smart View ribbon the next time they start Smart View.

Importing Metadata in Office Applications

Metadata consists of Oracle Smart View for Office artifacts such as the POV, alias tables, and connection information.

Related Topics:

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Importing Metadata into Copied Worksheets

Importing Metadata into Copied Word Documents

Importing Metadata into Copied Slides or Presentations

Data source types: Oracle Essbase, Planning, Narrative Reporting, Financial Consolidation and Close, Tax Reporting, Oracle Hyperion Reporting and Analysis

In a new Office document, you may want to make use of Smart View content in an existing document that contains not only the formatting and layout that you need, but data points as well. Instead of recreating the Smart View content from scratch, you can reuse the work that is already available.

When you use the Microsoft Office copy and paste commands to copy Smart View content within or between Office documents, the static data and formatting is copied; but the Smart View metadata is not copied. This may cause a "Member out of place " error after refreshing an ad hoc sheet which has copied data in it. To prevent this error, you need to use the **Import Metadata** command to ensure that any additional data is also carried over to the new sheet.

By using the **Import Metadata** command, after the data is copied, you can import the metadata from the original Office document into the new Office document.

You can use the Office copy and paste commands to copy content within individual Office applications as follows:

- *From* an Excel worksheet *to* another worksheet within the current Excel workbook or *to* a different workbook
- *From* a Word document *to* the same or different page within the current Word document or *to* a different Word document
- *From* a PowerPoint slide or presentation *to* a slide within the current PowerPoint presentation or a different presentation

Guidelines and Best Practices for Importing Metadata

Note the following guidelines and best practices when copying, pasting, and importing metadata:

- **Excel:**
  - You can import metadata in the following:
    - Ad hoc mode, including Smart Slices
    - Forms
    - Functions
      - Query-bound functions in sheets created by Smart View copy and paste
      - Non-query-bound functions created by the Function Builder
    - Worksheets that contain reports imported from Reporting and Analysis providers
  - You cannot import metadata in worksheets that contain Report Designer objects, but such workbooks can be replicated by cascading as described in Cascading Reports and Ad Hoc Grids.

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> **Note**
>
> This procedure should be performed only by advanced users.

- **Word:**
  - You can copy and paste graphs
  - You can copy and paste entire tables containing data points or copy and paste individual data points inline, within existing text
  - Metadata must be imported from the same object or shape that was copied.
  - Metadata is copied only for the copied objects or shapes, only rather than copying all the metadata present in the source Word document.
  - For the **Import Metadata** command to work, there must be at least one copied Smart View object in the destination document, whether it is the current Word document or a different one.
  - Copying the POV or slider within the same Word document will result in incorrect behavior in the document.
- **PowerPoint:**
  - You must select a single slide to begin the import process. Smart View displays an error message if you invoke the **Import Metadata** command when either no slide is selected or multiple slides are selected.
  - You must first copy objects before selecting the **Import Metadata** command; otherwise, Smart View prompts you with a message.
  - The slide from which the object is copied and the slide from which the metadata is to be imported must be the same.
  - Metadata is copied only for the copied objects or shapes, only rather than copying all the metadata present in the source slide.
  - You can duplicate a slide containing a POV or slider, but importing the metadata will result in an error.
  - Copying a POV or slider within the same presentation will result in incorrect behavior in the presentation.

Importing Metadata into Copied Worksheets

Data source types: Oracle Essbase, Planning, Narrative Reporting, Financial Consolidation and Close, Tax Reporting, Oracle Hyperion Reporting and Analysis

Before you begin, be sure to review the content in Importing Metadata in Office Applications.

> **Note**
>
> This operation cannot be undone.

To import metadata to a copied worksheet:

1. Back up your work.

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2. From the Smart View ribbon, select **Options**, then **Advanced**, and ensure that **Improved Metadata Storage** is selected.
3. Use Excel to copy a worksheet.

   This operation copies the visible contents of the source worksheet but not the metadata (connection information, POV selections, alias tables, and such items) to the destination worksheet.
4. With the destination worksheet active, from the Oracle Smart View for Office menu, select **More**, then **Import Metadata** to display a list of all open workbooks and their corresponding open worksheets.
5. From the list, select the worksheet that contains the metadata that you want to import to the destination worksheet.
6. Click **OK**. You will be asked to confirm your selection.
7. Refresh.
8. To refresh the **Document Contents** pane, click

Importing Metadata into Copied Word Documents

Data source types: Oracle Analytics Cloud, Oracle Essbase, Planning, Planning Modules, Narrative Reporting, Financial Consolidation and Close, Tax Reporting

Before you begin, be sure to review the content in Importing Metadata in Office Applications.

> **Note**
>
> This operation cannot be undone.

To import metadata into a Word document:

1. Back up your work.
2. From the Smart View ribbon, select **Options**, then **Advanced**, and ensure that **Improved Metadata Storage** is selected.
3. Use the Copy and Paste commands in Word to copy a Smart View object, such as a graph or table.

   This operation copies the visible contents of the source object, but not the metadata—for example, connection information, POV selections, alias tables, and other such items—to the destination document.
4. With the destination document active, from the Smart View ribbon, click **Import Metadata**,

5. In the **Select document** dialog box, select the slide or presentation that contains the metadata to import to the destination slide or presentation, and then click **Import**.

   In the following example, import_metadata_word.docx is the document from which we want to import metadata.

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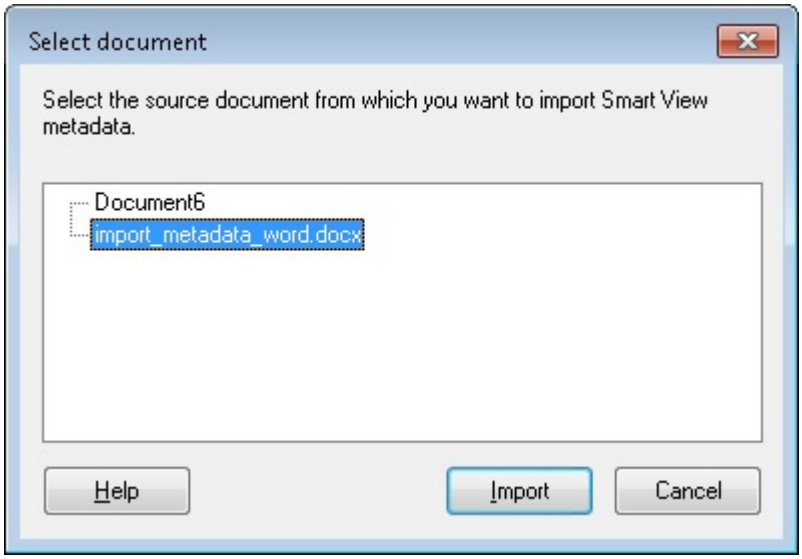
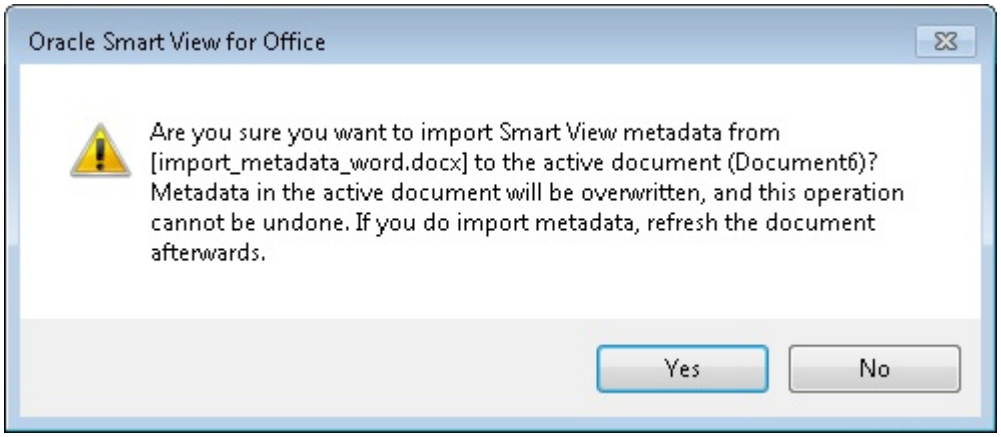


> **Note**
>
> When importing metadata in Word, the active, or target, document is shown in the tree in the **Select document** dialog box. This is because, the active document can also be the destination document in cases where metadata is being import within a Word document.

A confirmation message is displayed.



6. Click **Yes** in the confirmation dialog box.
7. Refresh.

   When successful, you will see that the**Document Contents** pane is updated with metadata for the document. An example is shown in Figure 1.

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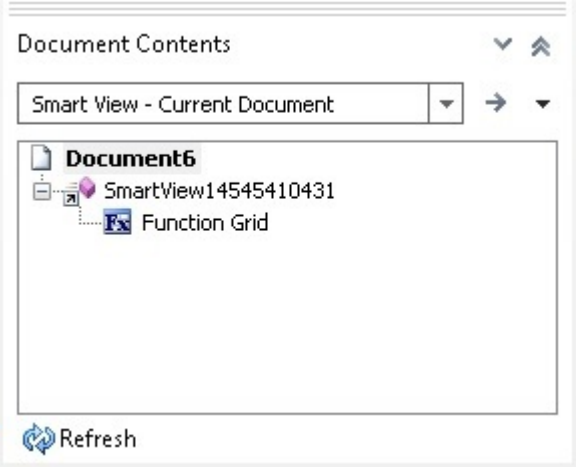
Figure 17-11 Document Contents Pane After Importing Metadata



Importing Metadata into Copied Slides or Presentations

Data source types: Oracle Analytics Cloud, Oracle Essbase, Planning, Planning Modules, Narrative Reporting, Financial Consolidation and Close, Tax Reporting, Oracle Hyperion Reporting and Analysis

Before you begin, be sure to review the content in Importing Metadata in Office Applications.

> **Note**
>
> This operation cannot be undone.

To import metadata into a PowerPoint slide or presentation:

1. Back up your work.
2. From the Smart View ribbon, select **Options**, then **Advanced**, and ensure that **Improved Metadata Storage** is selected.
3. Use the PowerPoint copy command to copy information in any of the ways supported by PowerPoint; for example:
   - Copy individual objects and paste to the destination slide. The destination slide could be a part of source presentation or different presentation.
   - Duplicate a slide.
   - Copy a complete slide and paste into the same presentation or a different one.
   - Drag any slide and drop to another presentation.
   - Copy and paste an entire presentation.

   This operation copies the visible contents of the source slides but not the metadata—for example, connection information, POV selections, alias tables, and other such items—to the destination slide or presentation.
4. With the destination slide or presentation active, from the Smart View ribbon, click **Import Metadata**, Import Metadata.

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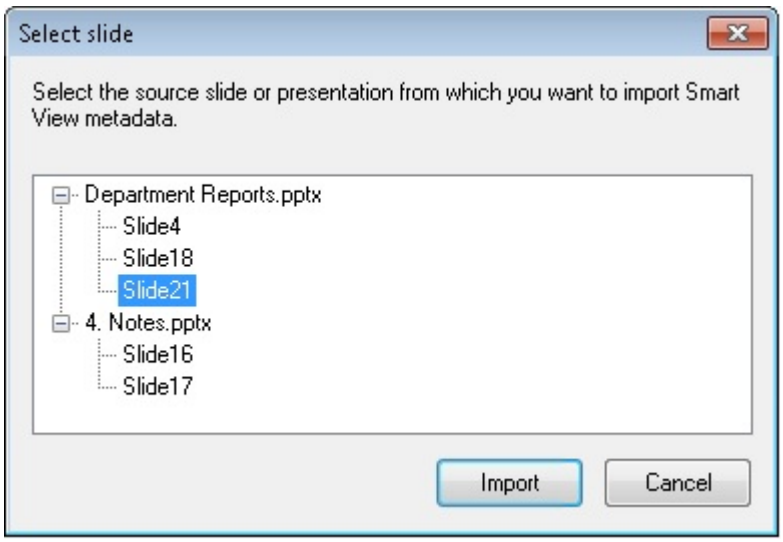
5. In the **Select slide** dialog box, select the slide or presentation that contains the metadata that you want to import to the destination slide or presentation, and then click **Import**.

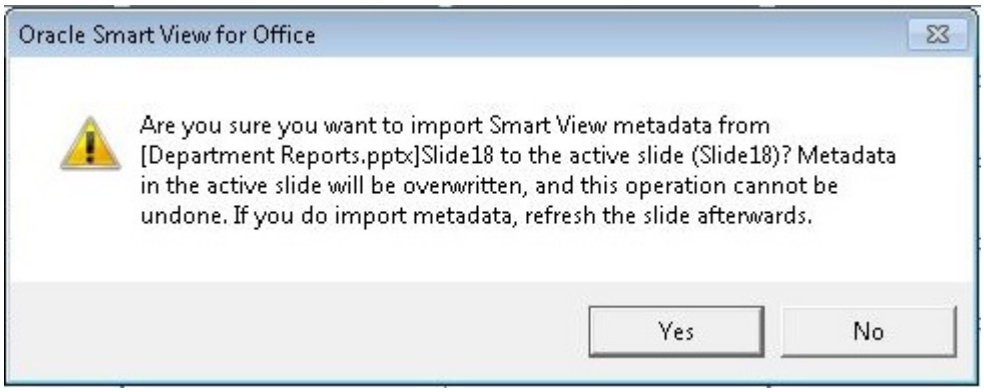
   Note that importing metadata from a presentation may be a time consuming operation, particularly for presentations with large number of slides and Oracle Smart View for Office metadata.

   In the following example, Slide21 from Department Reports.pptx is the slide from which we want to import metadata.



> **Note**
>
> When importing metadata from a slide to the active slide, the active slide is not shown in the tree in the **Select slide** dialog box. This is because the active slide is the destination slide where metadata is to be imported and is, therefore, not available for selection. For the same reason, when importing metadata from a presentation to the active presentation, the **Import** button is disabled when the active presentation is selected in the **Select slide** dialog box.

A confirmation message is displayed.



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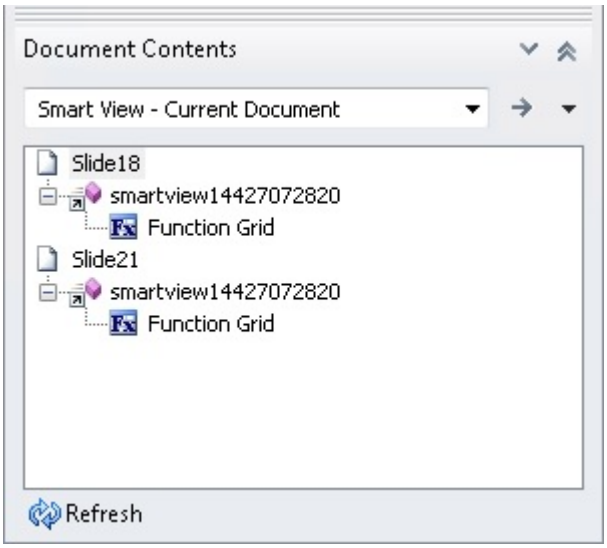
6. Click **Yes** in the confirmation dialog box.
7. Refresh.

   When successful, you will see that the **Document Contents** pane is updated with metadata for each slide. An example is shown in Figure 1.

Figure 17-12 Document Contents Pane After Importing Metadata



Viewing Sheet Information

In **Sheet Information**, you can view connection and other details for the current worksheet.

In addition to viewing connection details, you can delete Smart View metadata from a sheet or workbook, save the metadata to another sheet, and copy list items from the dialog to another sheet or document.

To view sheet information for an insights sheet, see Viewing Insight Metadata in Sheet Information.

1. From the Smart View ribbon, click **Sheet Info**.

   Depending on the Oracle Smart View for Office data on the sheet, **Sheet Information** displays details on the following properties:

   - **Connected**—Connection status; Yes if connected, No if not connected.
   - **Sheet Type**—Ad hoc, Multiple grid ad hoc, Form, or Function.

     > **Note**
     >
     > For a functions sheet, only this field is displayed with the value as Function in the Sheet Information dialog.

   - **Server**—The name of the server to which the sheet is connected.
   - **Application**—The application to which the sheet is connected.
   - **Cube**—The cube, model, or database to which the sheet is connected.

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- **URL**—The URL string of the data source provider to which the sheet is connected.
- **Provider**—The data source type to which the sheet is connected; for example, Planning, Oracle Hyperion Financial Management, or Analytic Services (Oracle Essbase).
- **Provider URL**—The URL string of the data source provider to which the sheet is connected; this property is applicable to Analytic Oracle Hyperion Provider Services 11.1.1.4.x and earlier releases.
- **Friendly Name**—For private connections only. The data source connection name specified by the user when creating or editing a private connection, or when adding a shared connection to private connections.
- **Alias Table**—The current alias table.
- **Associated Ranges**—For multiple grid sheets. The sheet name, application, database, and a unique identifier for each grid in the multiple grid sheet. Multiple grid worksheets apply to supported Oracle Fusion Cloud Enterprise Performance Management business processes and Oracle Essbase data sources only. To use **Sheet Information** with multiple grid worksheets, see Sheet Information Guidelines.
- **Description**—For private connections only. The optional connection description entered by the person creating or editing the private connection.
- **Form Name**—The name of the form to which the sheet is connected. This properties applies when connected to forms in Planning and Financial Management only.
- **Last Retrieved**—The date and time that the last refresh was performed on the sheet.

2. **Optional:** Select from the following options as needed.
   - **Delete**—Provides these options for deleting Smart View information, referred to as "metadata":
     - **Delete worksheet metadata**—Deletes metadata from the current sheet.

       After selecting this option, the **Sheet Information** dialog displays only these properties: **Sheet Type** (Empty) and **Connected** (No).
     - **Delete workbook metadata**—Deletes workbook metadata. Generally, this is cached metadata that is not visible to users.

       The sheet metadata remains unchanged in the **Sheet Information** dialog; that is, the same fields that were populated in the previous step are still displayed.
     - **Delete all metadata**—Deletes both workbook metadata and metadata from all worksheets.
   - **Save**—Saves the **Sheet Information** content to an Excel spreadsheet.
3. **Optional:** To copy a selected item in the list to the clipboard, press **Ctrl+C**.

   To copy the entire **Sheet Information** list, ensure that no items are selected in **Sheet Information**, then press **Ctrl+C**. If you have already selected an item in the list, then close **Sheet Information**, reopen it, and press **Ctrl+C**.
4. Click **Close**.
5. To view sheet information support by provider, sheet type, and connection status, see Sheet Information Support By Provider.

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Sheet Information Guidelines

- Friendly names are for private connections only. The friendly name is the data source connection name specified by the user when creating or editing a private connection, or when adding a shared connection to private connections.
- When using the **Sheet Info** command with multiple grid worksheets, consider the following best practices:
  - To display information on all grids on a multiple grid worksheet, click anywhere outside of the grid boundaries, or select only one cell within a grid.
  - To display information for only one of the grids on a multiple grid worksheet, select the entire grid, and do not select any cells outside of the grid boundaries.
- When connected to Planning, it is not necessary to use the **Set as Default Connection** option to associate the sheet with an active connective. The association is made automatically immediately after connecting.
- When you associate a connection to an ad hoc worksheet using **Set Active Connection**, members may disappear from the worksheet when you refresh. Instead of associating a connection, as a best practice, perform direct ad hoc analysis on the worksheet.

Sheet Information Support By Provider

Related Topics:
Sheet Information Support in Essbase

Sheet Information Support in Cloud EPM and Oracle Hyperion Planning

Sheet Information Support in Essbase

Data source types: Oracle Essbase

Table 17-14 Sheet Information Supported by Essbase

Connection Status	Single Grid	Multiple Grid	VBA (HypExecuteMenu)	Formulas	Functions (HsGetVal, HsGetSheetInfo)
Shared Connection	Yes	Yes	Yes	Yes	No
Private Connection	Yes	Yes	Yes	Yes	No
Private Connection—Set as Default Connection	Yes	Yes	Yes	Yes	No
No Connection, open new blank worksheet	No	No	No	No	No
No connection, open a saved worksheet	Yes	Yes	Yes	No	No
Set Active Connection for this Worksheet	Yes (see Sheet Information Guidelines)	Yes (see Sheet Information Guidelines)	Yes	Yes (see Sheet Information Guidelines)	No

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Table 17-14 (Cont.) Sheet Information Supported by Essbase

Connection Status	Single Grid	Multiple Grid	VBA (HypExecuteMenu)	Formulas	Functions (HsGetVal, HsGetSheetInfo)
Set as Default Connection, before associate with active connection	No (see Sheet Information Guidelines)	Yes (see Sheet Information Guidelines)	Yes	Yes (see Sheet Information Guidelines)	No
Set as Default Connection, after associating with active connection	Yes (see Sheet Information Guidelines)	Yes (see Sheet Information Guidelines)	Yes	Yes (see Sheet Information Guidelines)	No
Last Retrieved	Yes				

Sheet Information Support in Cloud EPM and Oracle Hyperion Planning

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

Table 17-15 Sheet Information Supported by Planning

Connection Status	Form	Ad Hoc	Smart Form	VBA	Rules	Functions
Shared Connection	Yes	Yes	Yes	Yes	Yes	No
Private Connection	Yes	Yes	Yes	Yes	Yes	No
Private Connection—Set as Default Connection	Yes	Yes	Yes	Yes	Yes	No
No Connection, open new blank worksheet	No	No	No	No	No	No
No connection, open a saved worksheet	Yes	Yes	Yes	Yes	Yes	No
Set Active Connection for this Worksheet	Yes (see Sheet Information Guidelines)	Yes (see Sheet Information Guidelines)	Yes (see Sheet Information Guidelines)	Yes	Yes	No
Set as Default Connection, before associate with active connection	Not applicable (see Sheet Information Guidelines)	Not applicable	Not applicable	Yes	Not applicable	Not applicable
Set as Default Connection, after associating with active connection	Yes (see Sheet Information Guidelines)	Yes	Yes	Yes	Yes	No
Last Retrieved	Yes	Yes				

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Opening Forms and Ad Hoc Grids from Web Applications (Web Launch)

From your web application of your business process, you can open forms and ad hoc grids in Oracle Smart View for Office. This action is also referred to as *web launch*.

Data source types: Planning, Planning Modules, FreeForm, Enterprise Profitability and Cost Management, Financial Consolidation and Close, Tax Reporting

Note the following best practices for using wb launch:

- Mozilla Firefox, Google Chrome, and Microsoft Edge require a browser-specific add-on for web launch. Follow the instructions on installing the add-on for these browsers in the *Oracle Smart View for Office Installation and Configuration Guide*, Installing Browser Add-ons.
- Configure the download handling option on your browser to either launch the Smart View download link file (SVLNK) directly in Excel; or to save the SVLNK file, which you then double-click from the download location to launch in Excel.

  Set your web browser's download option to determine how the SVLNK files required for web launch are handled. Following are general references for accessing and setting the download options for supported browsers:

  - **Mozilla Firefox:** Go to **Tools**, then **Settings**. Under **Files and Applications**, in the **Applications** section, choose an option for the question, "What should Firefox do with other files?"
  - **Google Chrome:** Click the ellipsis, ⋮, at the top left of the browser window, select **Settings**, and then **Download**. Choose to enable or disable the **Ask where to save each file before downloading** option.
  - **Microsoft Edge:** Click the ellipsis, ⋯, at the top left of the browser window, select **Settings**, and then **Download**. Choose to enable or disable the **Ask me what to do with each download** option.
- For the best experience, start Excel before completing the following procedure.

To use web launch to open a form or ad hoc grid in Smart View:

1. In a supported Oracle Fusion Cloud Enterprise Performance Management web application, open a form or ad hoc grid.
2. From the form or ad hoc grid in the Cloud EPM web application, select **Actions**, and then **Open in Smart View**.

   You are prompted by your browser depending on the download handling options you have selected to either save the file or open it in Excel.

   - If Excel is already open, the form or ad hoc grid is launched on a new sheet in the existing opened workbook along with the proper ribbon. For example, if you chose to open a Planning form in Smart View, then the Planning ribbon is displayed. You will be prompted for login if not already signed in.
   - If not already open, Excel is launched, you are prompted for login, and the form or ad hoc grid appears in Smart View along with the proper ribbon.

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Opening Large Workbooks in Smart View

Oracle Smart View for Office may stop responding when opening workbooks containing a large number of rows and columns, graphical objects, and Excel comments.

To alleviate this problem, enable the **Improve Metadata Storage** option by selecting **Options**, then **Advanced**, and then select the **Improved Metadata Storage** check box.

In addition, when working with larger workbooks, or performing an operation that results in a large data set, a "not enough resources" error may occur. To alleviate this problem, break up your workbook into smaller workbooks. Upgrading to Office 64-bit may resolve the issue.

Working Compatibly on Forms and Ad Hoc Grids Between Smart View and Smart View (Mac and Browser)

You can work on the same forms and ad hoc grids in a compatible manner in both Smart View and Smart View (Mac and Browser).

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting, Oracle Essbase

Starting in 23.100, compatibility of forms and regular ad hoc grids (Standard mode) is supported between Smart View for Office and Smart View for Office (Mac and Browser) 23.04+. Oracle Fusion Cloud Enterprise Performance Management forms, Cloud EPM ad hoc grids, and Essbase ad hoc grids are made compatible such that you can easily work on them between Smart View for Office and Smart View for Office (Mac and Browser).

For example:

1. Open a form or a regular ad hoc grid in Smart View on your desktop version of Microsoft Excel, change the POV, refresh or submit, and close the sheet.
2. Now, open the same form or grid in Excel 365 on a Mac or on browser using Smart View (Mac and Browser) and click Refresh first before starting any operations.
3. Observe that your POV selections are retained in the sheet, and you can continue working on it.
4. Once you make any changes to the POV in Smart View (Mac and Browser), click Refresh to save the changes. You should see the changes when you open the form again in Smart View.

The compatibility between both Smart View products ensures that Smart View:

- Identifies the type of sheet, whether form or ad hoc
- Displays the same sheet information in both products
- Retains the same POV and pages selections
- Displays the same data that is saved, refreshed, or submitted
- Retain preferences set in Data Options and Member Options under Smart View Options

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> **Note**
>
> Composite forms, flex forms, and multiple-grid ad hoc worksheets are not yet compatible between the Smart View products.

Enabling Compatibility in Smart View for Office

While this compatibility is always enabled for Smart View for Office (Mac and Browser), service administrators need to enable it in Smart View for Office.

Compatibility in Smart View for Office can be enabled in the following ways:

From the Health Check dialog:

This is an easier way of enabling compatibility from the Smart View user interface. From the Smart View ribbon, click the arrow next to **Help**, and then select **Health Check**. In the **Health Check** dialog, the **Compatibility** setting is present under **Smart View Options** and is **Disabled** by default.

- To enable it, click in the **Fix/Update/Help Link** column, select **Enable**, and then click **Update Settings**.
- To disable it, click in the **Fix/Update/Help Link** column, select **Disable**, and then click **Update Settings**.

For more information on the Health Check settings, see Performing a Health Check On Your System.

From the properties.xml file:

Service administrators can enable compatibility by uncommenting or enabling the JSONMetadata365URL property present in the Smart View properties.xml file. This file is located in the <Smart View Install>/cfg folder (for example, C:\Oracle\SmartView\cfg). Also, the detected connection URL may need to be mapped to the actual connection URL in Smart View for Office by using the **Manage URL Mappings** option. For more information, see Managing Connection URL Mappings.

Best Practices on Working Compatibly between Smart View Products

Consider the following best practices on compatibility between Smart View products:

- Whenever you open a form or ad hoc grid from Smart View for Office in Smart View for Office (Mac and Browser) and vice versa, it is recommended that you always click **Refresh** first before starting any operations on the sheet.
- It is recommended not to keep open the same form or ad hoc grid in both Smart View for Office and Smart View for Office (Mac and Browser) at the same time, as it can cause conflict between cell styles.
- When you create workbooks containing forms or ad hoc grid in Smart View for Office and open them in Smart View for Office (Mac and Browser), you have to first open the Smart View Home Panel and either click **Refresh** or open another sheet in order to launch the relevant provider context ribbon such as the Planning ribbon.

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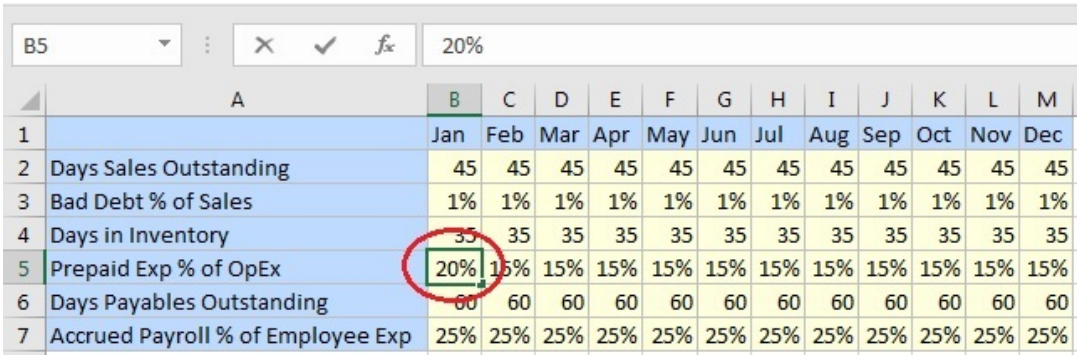
Entering Percentage Values in Forms and Ad Hoc Grids

In forms and ad hoc grids, note the best practices outlined in this topic when entering values in cells defined as percentages.

- When entering a percentage value directly into a cell, enter the percent sign along with the percentage value. For example, to express "twenty percent" numerically, in the form or grid cell, enter

  20%

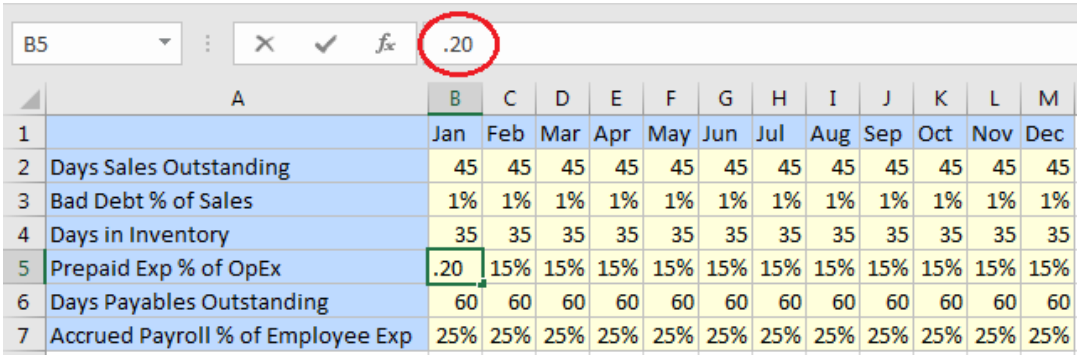
  Be sure to include the % sign, as follows:



	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2	Days Sales Outstanding	45	45	45	45	45	45	45	45	45	45	45	45
3	Bad Debt % of Sales	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
4	Days in Inventory	35	35	35	35	35	35	35	35	35	35	35	35
5	Prepaid Exp % of OpEx	20%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
6	Days Payables Outstanding	60	60	60	60	60	60	60	60	60	60	60	60
7	Accrued Payroll % of Employee Exp	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

- When entering a percentage value into the formula bar, enter the decimal point and the value, without the percent sign. For example, to express "twenty percent" numerically, in the formula bar, enter

  .20



	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2	Days Sales Outstanding	45	45	45	45	45	45	45	45	45	45	45	45
3	Bad Debt % of Sales	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
4	Days in Inventory	35	35	35	35	35	35	35	35	35	35	35	35
5	Prepaid Exp % of OpEx	.20	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
6	Days Payables Outstanding	60	60	60	60	60	60	60	60	60	60	60	60
7	Accrued Payroll % of Employee Exp	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

In either of the above cases, after pressing **Enter**, 20% is displayed in a dirty cell. This changed cell value can be submitted.

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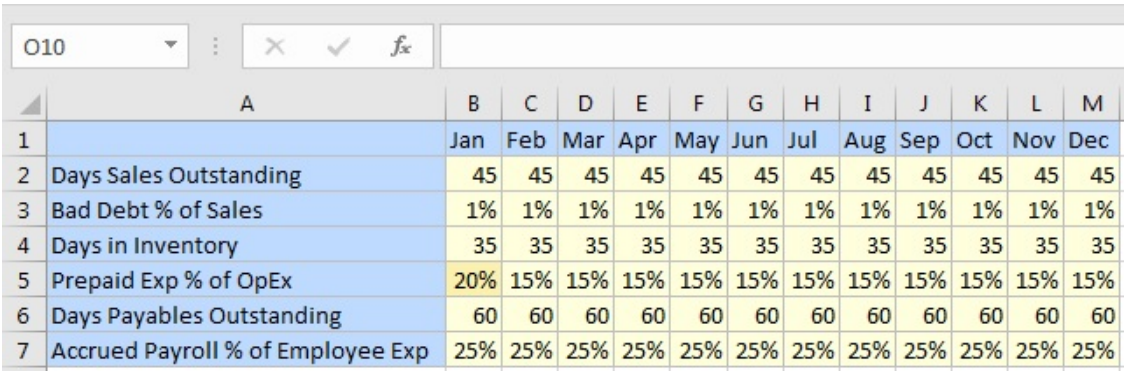
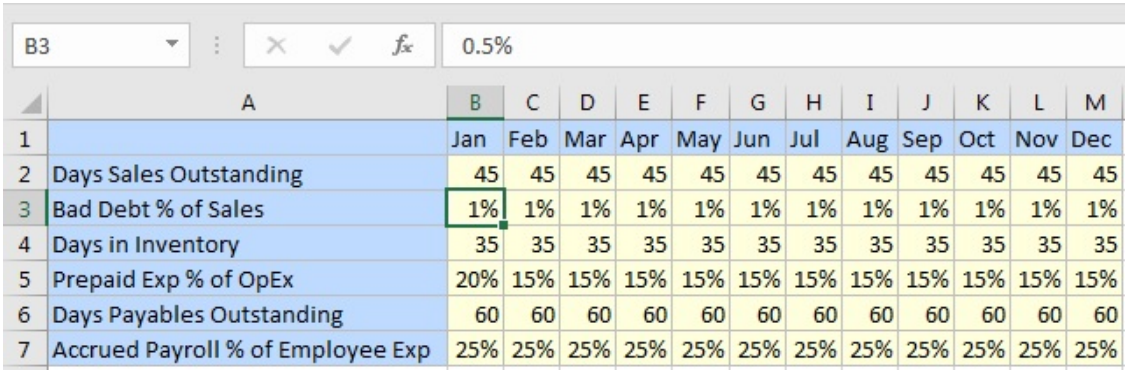


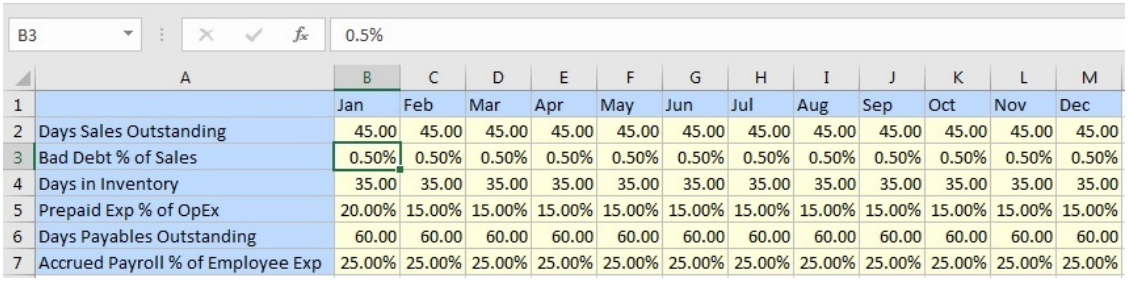
	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2	Days Sales Outstanding	45	45	45	45	45	45	45	45	45	45	45	45
3	Bad Debt % of Sales	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
4	Days in Inventory	35	35	35	35	35	35	35	35	35	35	35	35
5	Prepaid Exp % of OpEx	20%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
6	Days Payables Outstanding	60	60	60	60	60	60	60	60	60	60	60	60
7	Accrued Payroll % of Employee Exp	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

You can use the **Decimal Places** option in the **Options** dialog, **Formatting** tab, for a more granular display of percentages. For example, in the grid below, the values in row 3 show 1%, but in the formula bar, we see the actual value of cell B3 is 0.5%.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2	Days Sales Outstanding	45	45	45	45	45	45	45	45	45	45	45	45
3	Bad Debt % of Sales	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
4	Days in Inventory	35	35	35	35	35	35	35	35	35	35	35	35
5	Prepaid Exp % of OpEx	20%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
6	Days Payables Outstanding	60	60	60	60	60	60	60	60	60	60	60	60
7	Accrued Payroll % of Employee Exp	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

In the **Options** dialog, **Formatting** tab, change the **Decimal Places** option to 2, and refresh the grid. This has the effect of adding two decimal places to all values in the grid. This change may be helpful for viewing the fractional percentage values, but may not help with reading and interpreting the grid overall:



	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2	Days Sales Outstanding	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00
3	Bad Debt % of Sales	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%	0.50%
4	Days in Inventory	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00
5	Prepaid Exp % of OpEx	20.00%	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%
6	Days Payables Outstanding	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00
7	Accrued Payroll % of Employee Exp	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%

Follow these best practices when entering fractional percentages:

- To enter a half percent numerically, in the form or grid cell, enter .5%
- To enter a half percent numerically in the formula bar, enter .005

In general, Oracle Smart View for Office mimics standard Excel behaviors in handling percentages. Read more about Excel and percentages in the Microsoft documentation here.

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Enabling Automatic Cell Width and Height Adjustment

You can enable the automatic adjustment of Excel column width and row height to accommodate the contents of member and data cells.

1. From the Smart View ribbon, select **Options**.
2. In **Options**, from the left panel, select **Formatting**.
3. Select the **Adjust Column Width and Row Height** check box.
4. Click **OK**.
5. From any ribbon, select **Refresh** to adjust columns in the current sheet.

If **Adjust Column Width and Row Height** is not selected, you can adjust the width of columns manually.

Working with Shared Workbooks

Oracle Smart View for Office does not support Excel shared workbooks.

When the Excel option for sharing workbooks is enabled, Smart View operations are not supported.

To clear the shared workbook option in Excel, go to the **Review** ribbon, then click the **Share Workbook** button, and then clear the **Allow changes by more than one user at the same time** check box.

Working with Protected Worksheets

Oracle Smart View for Office operations, such as refresh and ad hoc, are not supported on protected sheets.

For example, you cannot perform Zoom In or Keep Only on protected sheets.

Printing POV Members in the Header and Footer

You can print active POV members in the header or footer of an Excel document.

Data source types: Oracle Essbase, Planning, Planning Modules, Narrative Reporting, Financial Consolidation and Close, Tax Reporting

> **Note**
>
> Printing POV members is not supported when connected to Oracle Hyperion Financial Management.

To print the active POV members in the header or footer of an Excel document:

1. In Excel, use your preferred method to add a custom header or footer.

   For example, go to the Page Layout ribbon, then select **Print Titles**, then the **Header/Footer** tab, and then click **Custom Header** or **Custom Footer**.

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2. In the header or footer text box, add the following statement:

   POV:{}

   You may also include any other text that you may require in the header or footer.

   When you print the Excel document, the POV members are printed in the header or footer as specified, along with any other text you may have added.

> **Note**
>
> In some cases, after adding the POV:{} statement, the POV members do not display in Print Preview mode the first time you launch Print Preview. However, they will print. After printing the sheet, then return to Print Preview to view the POV members in Print Preview mode.

Enabling and Disabling Smart View

Oracle Smart View for Office is enabled by default after installation.

You can disable Smart View within Smart View for all Microsoft Office applications on your computer or for Outlook alone.

Smart View may also be enabled through Office applications.

Related Topics:

Enabling and Disabling Smart View Using the Smart View Ribbon

Enabling and Disabling Smart View from Microsoft Office

Enabling and Disabling Smart View Using the Smart View Ribbon

You can intentionally disable Oracle Smart View for Office from the Smart View ribbon for all Microsoft Office applications on your computer or for Outlook alone.

To disable Smart View for all Microsoft Office applications (including Outlook):

1. From the Smart View ribbon, select **Help**.
2. Select **About**.
3. Clear **Enable Add-in** to disable Smart View the next time you open an Office application.

   The Smart View ribbon remains, containing only the **About** button.

To enable Smart View for all Microsoft Office applications (including Outlook):

1. Start Excel, Word, or PowerPoint.
2. From the Smart View ribbon, select **About**.
3. Select **Enable Add-in** to enable Smart View the next time you open an Office application.

To disable Smart View for Outlook only:

1. From the Smart View ribbon in Excel, Word, or PowerPoint, or from the Smart View menu in Outlook, select **Options**, then **Advanced** in the left panel.
2. Under **Display**, select **Disable Smart View add-in in Outlook**.

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Enabling and Disabling Smart View from Microsoft Office

You can enable or disable Oracle Smart View for Office from **Add-ins** in Excel Options. This method is useful in cases where Smart View is disabled unintentionally, through a Microsoft Smart View error.

To enable or disable Smart View for all Microsoft Office applications (including Outlook):

1. In Office, go to **File**, then **Options**, and then **Add-ins**:
2. From **Manage**, select **COM Add-ins**, and then **Go**.
3. In **COM Add-ins**, perform a task:
   - Select the check box to enable the **Oracle Smart View for Office** add-in, and click **OK**.
   - Clear the check box to disable the **Oracle Smart View for Office** add-in.
4. Click **OK**.

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18

Functions

Related Topics

- Using Functions
  If you are familiar with the contents of your database, you can use Oracle Smart View for Office functions to perform operations on specific data in Excel cells.
- Creating Functions
  You can create Oracle Smart View for Office functions manually or by using the Function Builder.
- Running Functions
  You can run most Oracle Smart View for Office functions automatically using **Refresh** commands. For HsGetValue, use the **Submit Data** command.
- Fixing Links in Functions
  You may need to fix broken links in Smart View functions.
- Copying and Pasting HsGetValue Functions
  You may copy cells and ranges of cells containing the HsGetValue function from one Office application and paste them into Excel, Word or PowerPoint.
- Function Descriptions
  Oracle Smart View for Office provides these functions. Click a function name to access description, syntax, and examples.
- Common Function Error Codes
  These are some common error codes displayed in functions.

Using Functions

If you are familiar with the contents of your database, you can use Oracle Smart View for Office functions to perform operations on specific data in Excel cells.

> **Note**
>
> When using the Smart View functions in Table 1, as a best practice, do not use the hash mark (#) or the semicolon (;) in member names, dimension names, or variable names. These characters are reserved for delimiters in the functions noted in this chapter.

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Table 18-1 Smart View Functions and Supported Providers

Function	Description	Supported Providers
HsGetValue	Retrieves data from a data source.	• Oracle Essbase • Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting • Narrative Reporting
HsSetValue	Sends values to the data source.	• Essbase • Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting
HsGetSheetInfo	Retrieves detailed information about the current worksheet.	Provider-independent
HsAlias	Displays the alias of the specified dimension member.	• Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting
HsDescription	Displays the description for the default member.	• Essbase • Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting
HsGetVariable	Retrieves the associated value for a substitution variable.	Essbase
HsGetSharedConnectionURL	Use this to quickly identify the shared connection data source that is being used.	• Essbase • Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting • Narrative Reporting

Creating Functions

You can create Oracle Smart View for Office functions manually or by using the Function Builder.

Note that not all functions are available to all providers. See Table 1 for a list of functions and the supported providers.

Related Topics:

- Creating Functions in the Function Builder
- Creating Functions Manually

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Creating Functions in the Function Builder

In the Function Builder, you select a function and specify the connection and members that you want the function to use. The Function Builder then creates the function using the proper syntax and enters it into the selected cell. You can edit these functions.

The selections available to you in a given Function Builder field are limited by your selections in other fields of the Function Builder. For example, only the connections supported by the selected function are displayed, and only the dimensions supported by the function you select are displayed.

A cell reference can be selected for each function argument. If you know argument input values, you can create functions in offline mode; that is, when not connected to a data source. Type-in functionality is available for each argument. For more information, see Function Descriptions.

> **Note**
>
> You can use functions that were created in the Function Builder prior to Release 11.1.2.2.310. However, starting with Release 11.1.2.2.310, the Function Builder uses commas (,) to separate member list arguments rather than semicolons (;). Both characters are supported by the new Function Builder, but when you modify a function created in the previous version, you are prompted to convert to the new comma-separated format. If you choose not to convert, then none of your modifications to the function are applied.

To create functions using the Function Builder:

1. Connect to the appropriate data source.

   Function Builder supports shared, private, and URL connections. As a best practice, ensure that you are connected at the cube level. If you are connected at the application level, you may get a "Cube Not Selected" message when you use Smart View functions such as HsGetValue or HsSetValue.

   Oracle Essbase: If you are using a private connection, and your function is going to use an alias table, you must verify that the correct alias table or the "Default" alias table is set for the connection. In the Smart View Panel, right-click the database name, and select **Set alias table**. Ensure that the correct alias table is selected, and then refresh the sheet.

2. In the sheet, select the cell in which you want to enter the function.

3. In the Smart View Panel, navigate to the database on which you want to base the function, right-click the database name, and then select **Build Function**.

   Accessing the Function Builder in this way will prepopulate the **Connection** field of the **Function Arguments** dialog box with specific connection information, as described in step 4.

   Alternatively, from the Smart View ribbon, select **Functions,** and then **Build Function**.

   When you access the Function Builder in this way, the **Connection** field in the **Function Arguments** dialog box is blank. You may provide connection information, as described in step 4. Or, if there is an active connection on the sheet, select HSACTIVE from the drop-down list.

4. In **Select Function**, select a function from the list and click **OK**.

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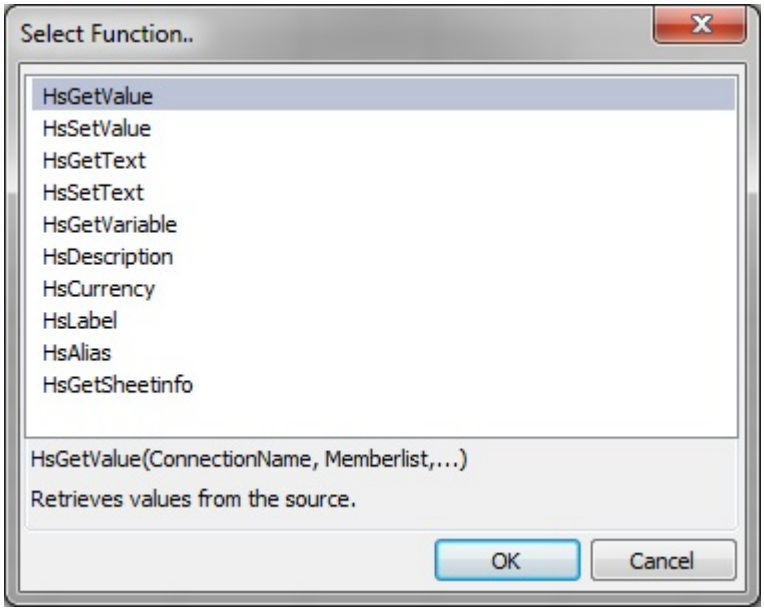
Figure 18-1 Function Builder, Select Function Dialog Box



> **Note**
>
> Not all functions are available to all providers. See Table 1 for a list of functions and the supported providers.

The **Function Arguments** dialog box is displayed with the **Connection** field automatically populated with connection information in one of the following formats.

- For shared connections:

  WSFN|*ProviderType*|*Server*|*Application*|*Database*

  The WSFN parameter above signifies that this function is a workspace function and uses a shared connection. Workspace functions support Oracle Fusion Cloud Enterprise Performance Management connections.

- For private connections:

  PrivateConnectionName

- For URL connections:

  URLFN|*URL*|*Server*|*Application*|*Database*

All the information needed to make a connection is part of the token, as shown above. If the token contains any invalid information, then generally a #NoConnection error is shown, with the following exceptions for the Server token:

- For Cloud EPM business processes, such as Planning, the Server token can be blank (or invalid)
- The Essbase Server token can be blank only
- Oracle Hyperion Financial Management requires the Server token parameter

To manually enter the connection info, use the syntax above.

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5. In **Function Arguments**, for each argument in the selected function, do one of the following:

   - Click the right-most button, .

     For example, for HsGetValue, click to select members from **Member Selection**; for HsLabel and HsGetVariable, select from drop-down lists of labels or variables.

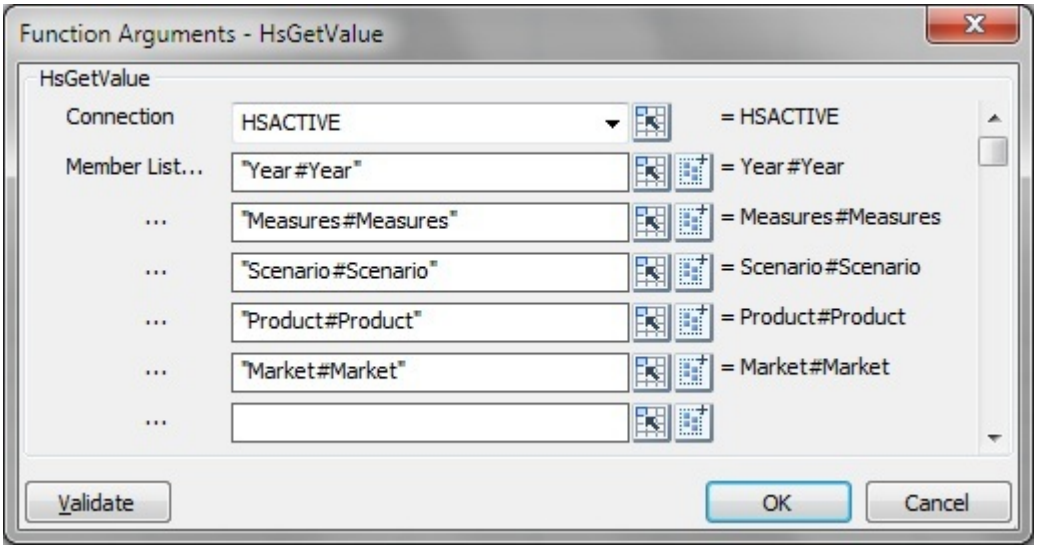
     Essbase: Note that when variable names are duplicated, their fully qualified name is displayed in the drop-down list. This helps to identify variables defined at the global, application, and database levels.

   - To type arguments manually, enter the argument in the text box. For example, to type a member, use the format: dimension#member; such as Year#Qtr1 or Year#Jan.

   - To use cell references, follow the procedure in Using Cell References.

   Figure 2 shows a completed **Function Arguments** dialog box for the HsGetValue function.

Figure 18-2 Function Builder, Function Arguments Dialog Box for HsGetValue Based on the Essbase Sample Basic Database



The arguments listed in **Function Arguments** vary depending on the function selected in the previous step.

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> **Note**
>
> Consider the following best practices:
>
> - For HsGetSheetInfo, use a cell reference. See Using Cell References for more information.
> - For HsSetValue only: Select **Data** or **Cell Reference** and enter the value to submit.
> - For HsGetText and HsSetText only:
>   - Select **Comments** or **Cell Reference**, and then enter the cell text to submit
>   - Select **Cell Text Label**, and then select a label from the drop-down menu
> - If an active worksheet connection is available, you can select **HSACTIVE** from the **Connection** drop-down list.

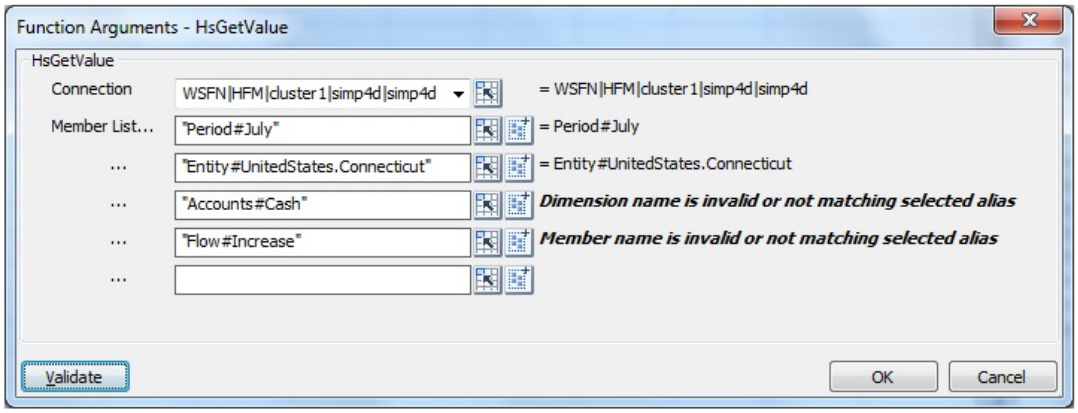
6. Click **Validate** and correct any errors that may be noted.

   Some of the errors you may see are:

   - Connection offline or invalid
   - Invalid selection
   - Member name is invalid or not matching selected alias
   - Dimension name is invalid or not matching selected alias
   - Incomplete Dimension#Member combination
   - Generic "Error" in cases of missing quotation marks or other minor syntax errors

   Figure 3 shows errors in the Function Arguments dialog box after clicking the **Validate** button. In the following example from the Financial Management Simple application, there are errors in the syntax for two of the Dimension#Member combinations. The first error is that the Dimension name is invalid or not matching the selected alias. The second error is that the member name is invalid or not matching the selected alias.

Figure 18-3 Function Builder Validation Errors



7. When the function validation is successful, click **OK** to insert the function in the selected cell.
8. To execute the function, follow the procedure in Running Functions.

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Using Cell References

You can enter references to single cells for connection, label, data/text, or variable arguments. You can also enter references to two contiguous or noncontiguous cells for dimension/member references. References cannot be made to cell ranges of more than two cells.

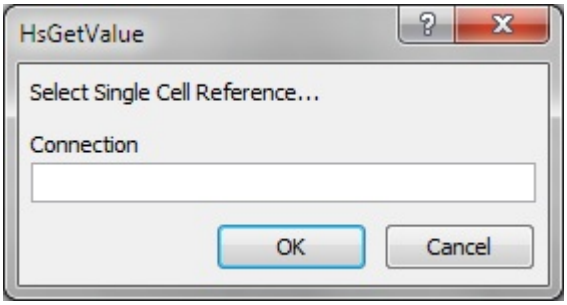
To use cell references:

1. Follow the steps in Creating Functions in the Function Builder to open the **Function Arguments** dialog box.
2. In the **Function Arguments** dialog box, for each argument in the selected function, click the **Cell Reference** button, .

   Depending on the type of argument selected, a Cell Reference dialog box is displayed.

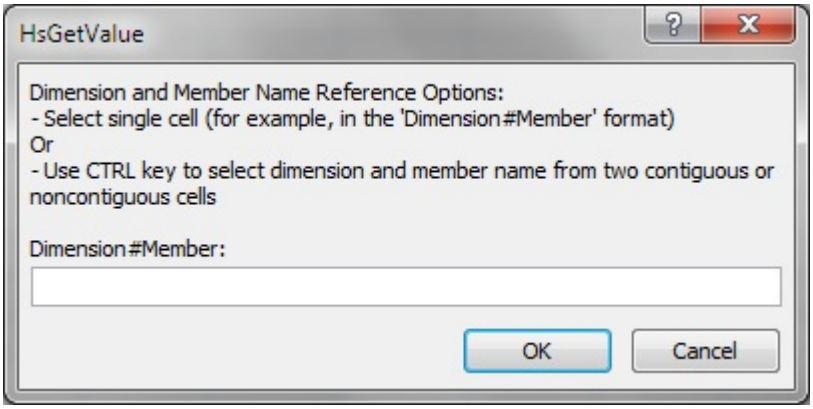
   - If you select a connection, label, data/text, or variable argument, the **Select Single Cell Reference** dialog box is displayed.

Figure 18-4 Select Single Cell Reference Dialog Box



   - If you select a member list argument, the **Cell Reference** dialog box for a dimension and member name cell reference is displayed.

Figure 18-5 Dimension and Member Name Cell Reference Dialog Box



3. In the grid, perform an action:
   - For the **Single Cell Reference** dialog box, depending on the type of argument, click a single cell to reference; for example, a cell containing a variable.

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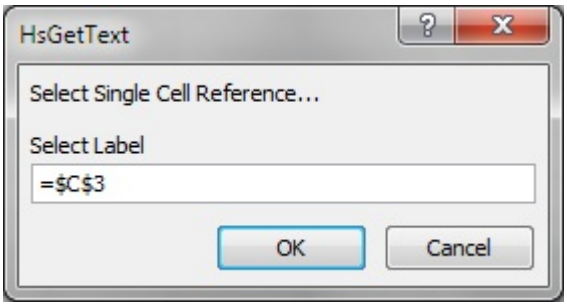
Figure 3 shows the **Single Cell Reference** dialog box with a cell selected for a label argument.

Figure 18-6 Cell Reference Dialog Box with Single Cell for Label Argument Selected

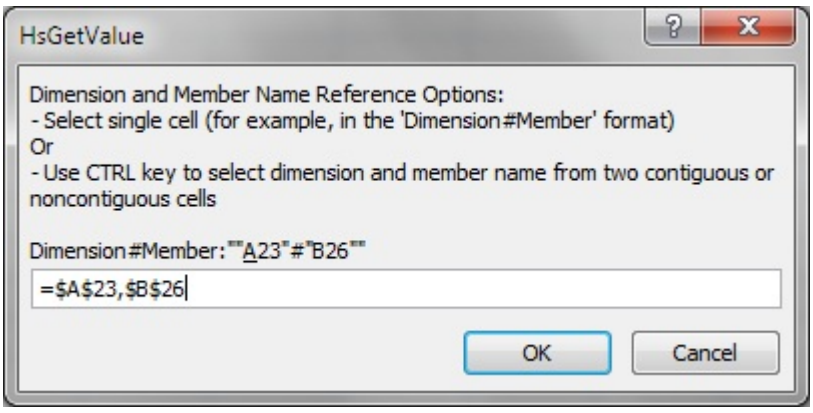


- For the **Dimension and Member Name Cell Reference** dialog box, do one of the following:
  - Click a single cell to reference; for example, a cell that contains both a dimension and a member name.
  - Pressing the **Ctrl** key, select two contiguous or noncontiguous cells; for example, a dimension and a member cell.

    You may press **Ctrl**, click in two cells from different areas of the worksheet or two adjacent cells. Each cell selection much be performed by a single click while the **Ctrl** key is still pressed.

Figure 4 shows the **Dimension and Member Name Cell Reference** dialog box with two noncontiguous cells selected.

Figure 18-7 Cell Reference Dialog Box with Two Noncontiguous Cells Selected



4. Click **OK** in the **Cell Reference** dialog box.

   In **Function Arguments**, the text field for the argument contains the referenced cell or cells in the format shown in Table 1.

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Table 18-2 Cell Reference Formats

Cell Reference	Format in Function Arguments
Single cell	""&A3&"" See "Notes" below this table for a full explanation.
Two contiguous cells	""&A3&"#"&B3&""
Two noncontiguous cells	""&A5&"#"&B9&""

Notes: Consider the following best practices while using cell references:

- For a single cell reference, if the member name that you selected in step 3 is displayed as dimension#member in the grid, then the argument selection is complete. For example, if the member is displayed in the grid as Year#Qtr 2 in cell A3, then ""&A3&"" is complete.

  If only the member name is displayed in the grid, then you must manually enter the dimension name followed by # between the first two sets of double quotation marks. For example, if the member is displayed as Qtr2 in cell A3, then you must enter Year# between the quotation marks: "Year#"&A3&""
- If an argument text field contains text before you select a reference cell, the cell reference text is appended to this text. Therefore, delete any unwanted text in the field before selecting a cell for reference.
- If a date cell is directly referred as input, then convert the input to the proper text format using a Text function as follows; in this example, cell B3 contains a proper date:

  =HsSetValue(TEXT(B3,"dd/mm/yyyy"),"ConnectionName", "dim#member"…)
- If you plan to use HsGetValue functions with cell references that point to a connection name, see Example with Cell Reference to Data Source Connection in HsGetValue.

5. Click **OK** to insert the function in the selected cell.
6. Refresh.

Creating Functions Manually

See Microsoft documentation and support site for information about character and other Excel function limitations.

To create a function manually:

1. In Excel, click the cell in which you want to enter the function.
2. Enter an equals sign (=).
3. Enter the function name; for example, enter HsSetValue
4. Enter parameters for the function according to rules described in Function Syntax Guidelines, using the information specific to each function in Function Descriptions.
5. To refresh the worksheet, from the Smart View ribbon, select **Refresh.**

   Functions are validated only when you refresh them.

Function Syntax Guidelines

See Function Descriptions for the syntax of individual functions.

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- To work with a shared connection, you must add to the function the WSFN identifier, which specifies a workspace function, along with a connection string. The format is:

  "WSFN|*ProviderType*|*Server*|*Application*|*Database*","*POV*"

  For example, in the HsGetValue function for a shared connection to an Oracle Essbase data source, the WSFN identifier and connection string is added to the function as follows:

  =HsGetValue("WSFN|Essbase|myserver|Sample|Basic","Market#South")

  For *ProviderType*, use one of the following case-sensitive strings:

  – Essbase (for Oracle Essbase on-premises only; Oracle Essbase cloud requires private connection syntax)

  – HP (for Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting)

- To work with a URL connection, you must add to the function the URLFN identifier, which specifies a URL function, along with a connection string. The format is:

  URLFN|*URL*|*Server*|*Application*|*Database*

  For example the syntax for the HsGetValue function using the URL for a connection to a Planning business process:

  HsGetValue("URLFN|URL|Server|Application|Database","POV")

  All the information needed to make a connection is part of the token, as shown above. If the token contains any invalid information, then generally a #NoConnection error is shown, with the following exceptions for the Server token:

  – For Oracle Fusion Cloud Enterprise Performance Management business processes, such as Planning, the Server token can be blank (or invalid)

  – The Essbase Server token can be blank only

  – Oracle Hyperion Financial Management requires the Server token parameter

- Private connection parameters can have these values:

  – **Empty**: the default connection

  – **HsActive**: the active associated connection

  – The user-defined name for a private connection

  If you specify a private connection, it must precede the POV.

- The POV is composed of *dimension#member* pairs, for example:

  Entity#Connecticut

- Parent-child relationships are designated by a period, (.); for example:

  Entity#UnitedStates.Maine

- The connection and each POV *dimension#member* pair can be split into separate function parameters, each parameter enclosed in quotation marks, ("), and separated by a comma, (,); for example:

  "My_connection","Entity#UnitedStates","Account#Sales"

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Alternatively, the connection can be separated from the POV by a comma, (,), with the entire POV enclosed in quotation marks, ("), and with each *dimension#member* pair separated by semicolon, (;); for example:

```
"My_connection","Entity#UnitedStates;Account#Sales"
```

- Aliases are supported in functions as follows:
  - Do not mix a dimension name and its aliases.
  - For members, you can either use the member name or its alias from the selected alias table.
  - The same alias table must be used for all aliases.
  - If using a named private connection, ensure that the correct alias table is set for the connection.
  - If an alias label has the same value as another member name, an "invalid member" message is displayed.

Running Functions

You can run most Oracle Smart View for Office functions automatically using **Refresh** commands. For HsGetValue, use the **Submit Data** command.

To run functions and retrieve values:

1. Open the worksheet that contains the functions you want to run.
2. Do one of the following:
   - For HsSetValue, from the Smart View ribbon, select **Submit Data**.
   - For other functions, select one:
     - To run functions and update all worksheets in the workbook, from the Smart View ribbon, select **Refresh all Worksheets.**
     - To run functions and update only the active worksheet, select **Refresh**.

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Note

- When opening a workbook containing Smart View functions, users may be prompted to connect if they are not already connected. You may dismiss this dialog to see the old value for these functions from the last retrieval.
- **Cloud EPM Classic Environments:** When working with a sheet containing multiple functions to multiple standalone Cloud EPMbusiness processes and using the URL connection format, you will be prompted to log in to each business process as each function on the sheet is refreshed. For example, if a sheet contains functions for Planning, Financial Consolidation and Close, and Tax Reporting, where each connects to a different service URL, you will be prompted to log in to each business process as functions are being run.

  Cloud EPM OCI (Gen 2) Environments: Because different Cloud EPM business processes share the same service URL, you will not be prompted to log in to each business process as functions are being run.
- When a worksheet that contains saved functions is opened on a different computer from the one on which it was created, the functions include the full path of the original computer. Smart View automatically updates these function paths when you open the worksheet if all three of the following conditions are met.
  - The worksheet is unprotected.
  - The Excel option **Ask to update automatic links** is cleared.
  - When you open a workbook, if prompted to update link automatically, select **Continue** or **Cancel**. Do not select **Edit Links**.

  Otherwise, you must manually update functions using the Excel **Links** option.
- For the numeric zero setting to be immediately applied for functions when the workbook is opened, perform these steps:
  1. In the Smart View **Options** dialog, **Data Options** tab, set the **#NoData/ Missing Label** option to #NumericZero.
  2. **Important!** Be sure to select the **Save as Default Options** setting on the **OK** button to save this selection as the default for the current workbook and any workbooks that you open later.

Fixing Links in Functions

You may need to fix broken links in Smart View functions.

In workbooks containing functions, such as HsGetValue and HsSetValue, broken links can occur when you uninstall Oracle Smart View for Office on one drive and install it on another drive, or send a Smart View workbook file to a user who has Smart View installed on a different drive.

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> **Tip**
>
> Smart View functions (such as HsGetValue and HsSetValue), make use of the HsTbar.xla file, located in the <SmartViewInstallLocation>/bin/ folder. Excel caches the path to this file with every workbook where functions are used.
>
> If users plan to share workbooks, then as a best practice Oracle recommends that Smart View is installed in the same location on each users' machine so that users do not need to apply **Fix Links** to adjust the path of HsTbar.xla file in their workbooks.

To fix broken links in functions:

1. From the Smart View ribbon, select the arrow next to **Functions**.
2. From the drop-down menu, select **Fix Links**.

Copying and Pasting HsGetValue Functions

You may copy cells and ranges of cells containing the HsGetValue function from one Office application and paste them into Excel, Word or PowerPoint.

Note these guidelines when copying and pasting functions:

- Only cells containing the HsGetValue function may be copied and pasted. You may not copy and paste cells containing other functions.
- The data point generated will use the connection-level alias.
- Any cell references in the function will be replaced with its evaluated values. For example, if a function contains "Year#""&A2&"" for the dim#member combination, and cell A2 contains "Qtr2", then the function generated will have "Year#Qtr2" as the extracted value.
- Any POV changes applied on the data point query from the POV Manager will be applied only to the dimensions not present in the data point.
- Function XML may be exported from legacy applications.
- The following copy/paste scenarios are supported:
  - Functions from a single connection with no cell references.
  - Functions from a single connection with cell references.
  - Functions from multiple connections
  - Visualize in Excel—a grid with single intersection will be generated using the function POV.
  - Functions with case insensitive connection names.
- The following copy/paste scenarios are *not* supported:
  - Functions from an ad hoc grid (these will be pasted as static values).
  - Nested formulas.
  - Formulas with arithmetic operations; for example, divide or multiply.
  - Other Excel functions; for example, IF or SUM.
  - Functions containing the SVLink syntax. These are functions generated by Oracle Smart View for Office as a result of a Smart View copy and paste. Copying and pasting these functions results in static text.

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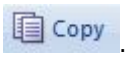
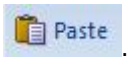
To copy and paste functions:

1. Select the cell or range of cells to copy and perform an action:
   - In Excel, click 

.
   - In Word and PowerPoint, click

.
2. If not already open, launch the Office application to which you want to paste the copied function cells.
3. Perform an action:
   - In Excel, select the cell where the copied functions will be pasted and, in the Smart View ribbon, click 

.
   - In Word or PowerPoint, place the cursor at the point in the page or slide where the copied function will pasted and, in the Smart View ribbon, click

.
4. Refresh the sheet, page, or slide.

Function Descriptions

Oracle Smart View for Office provides these functions. Click a function name to access description, syntax, and examples.

HsGetValue: Retrieves data from the data source for selected dimension members of a Point of View.

HsSetValue: Sends a value to the data source for selected dimension members of a Point of View.

HsGetSheetInfo: Retrieves detailed information about the current worksheet.

HsDescription: Displays the description for the default Point of View member.

HsAlias: Displays the alias of the specified dimension member.

HsGetVariable: Retrieves the value for a substitution variable.

HsGetSharedConnectionURL: Identifies the shared connection data source that is being used.

HsGetValue

Describes the Smart View function, HsGetValue.

Data source types: Oracle Essbase, Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Narrative Reporting

Description

HsGetValue retrieves data from the data source for selected dimension members of a Point of View (POV).

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When HsGetValue retrieves no data, the value specified for the #NoData/Missing Label replacement option is used (see Table 1).

When users select Refresh or Refresh All, only HsGetValue is called. When users select Submit, HsSetValue is called first, and HsGetValue is then called only if HsSetValue returns successfully.

The HsGetValue function supports the use of one attribute dimension and member with Essbase data sources. In Oracle Smart View for Office 11.1.2.5.710+, HsGetValue extends attribute support to Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting data sources (see Example with Attribute).

In Smart View 11.1.2.5.720+, HsGetValue can be used to return enumerated data types, such as Smart List, text, and dates (see Example with Smart List).

With Narrative Reporting 24.02+, server-initiated refresh is supported for HsGetValue() functions built with Excel cell references.

Syntax

Private connection:

HsGetValue("*PrivateConnectionName*","*POV*")

Shared connection:

HsGetValue("WSFN|*ProviderType*|*Server*|*Application*|*Database*","*POV*")

URL connection:

HsGetValue("URLFN|*URL*|*Server*|*Application*|*Database*","*POV*")

For detailed syntax information, see Creating Functions Manually.

Example 18-1 Example without Attribute

Data source types: Essbase, Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Narrative Reporting

In this example, HsGetValue returns the value from the HFM01 application for the default POV.

Private connection:

```
=HsGetValue("HFM01","Scenario#Actual","Year#2004","Period#July","View#YTD","Entity#UnitedStates.Connecti
cut","Value#USD","Account#Sales","ICP#[ICP
None]","Custom1#GolfBalls","Custom2#Customer2","Custom3#[None]","Custom4#Increases")
```

Shared connection:

```
=HsGetValue("WSFN|HFM|hfm_svr|HFM01|
HFM01","Scenario#Actual","Year#2004","Period#July","View#YTD","Entity#UnitedStates.Connecticut","Value#US
D","Account#Sales","ICP#[ICP
None]","Custom1#GolfBalls","Custom2#Customer2","Custom3#[None]","Custom4#Increases")
```


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URL connection:

```
=HsGetValue("URLFN|http://<servername:port>/hfmadf/../hfmadf/officeprovider|<servername:port>|HFM01|
HFM01","Scenario#Actual","Year#2004","Period#July","View#YTD","Entity#UnitedStates.Connecticut","Value#US
D","Account#Sales","ICP#[ICP
None]","Custom1#GolfBalls","Custom2#Customer2","Custom3#[None]","Custom4#Increases")
```

Example 18-2 Example with Attribute

Data source types: Essbase, Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

In this example, HsGetValue returns the value from the Vision application, Plan1 database, and the POV includes an attribute dimension and member, Entity_Regions#NA_Reg.

> **Note**
>
> HsGetValue supports only one attribute dimension and member per function.

Private connection:

```
=HsGetValue("Vision","Account#Amount","Period#Jan","Years#2017","Scenario#Annual
Contract","Version#Final","Entity#AR02-Argentina-IS_Adjustments","Package#Depreciation","Currency#Local
Currency","Entity_Regions#NA_Reg")
```

Shared connection:

```
=HsGetValue("WSFN|HP|serviceURL|Vision|
Plan1","Account#Amount","Period#Jan","Years#2017","Scenario#Annual Contract","Version#Final","Entity#AR02-
Argentina-IS_Adjustments","Package#Depreciation","Currency#Local Currency","Entity_Regions#NA_Reg")
```

URL connection:

```
=HsGetValue("URLFN|https://<servername:port>/HyperionPlanning/SmartView
|<servername:port>|Vision|Plan1","Account#Amount","Period#Jan","Years#2017","Scenario#Annual
Contract","Version#Final","Entity#AR02-Argentina-IS_Adjustments","Package#Depreciation","Currency#Local
Currency","Entity_Regions#NA_Reg")
```

Example 18-3 Example with Smart List

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

In this example, HsGetValue returns a Smart List value from the Vision application, Plan1 database. The Smart List in this case is looking for the Driver value for Cleaning and Maintenance. Possible values that can be returned are "% of Revenue," "Units," "FTE Hours," "Sales Calls," "Trips," "Square Feet," and "None."

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Private connection:

```
=HsGetValue("Vision","Account#7440: Cleaning and Maintenance","Period#x---------
x","HSP_View#BaseData","Year#FY15","Scenario#Plan","Version#Driver","Entity#No Entity","Product#No
Product")
```

Shared connection:

```
=HsGetValue("WSFN|HP|serviceURL|Vision|Plan1","Account#7440: Cleaning and Maintenance","Period#x---------
x","HSP_View#BaseData","Year#FY15","Scenario#Plan","Version#Driver","Entity#No Entity","Product#No
Product")
```

URL connection:

```
=HsGetValue("URLFN|https://<servername:port>/HyperionPlanning/SmartView|<servername:port>|Vision|
Plan1","Account#7440: Cleaning and Maintenance","Period#x---------
x","HSP_View#BaseData","Year#FY15","Scenario#Plan","Version#Driver","Entity#No Entity","Product#No
Product")
```

Example 18-4 Example with Cell Reference to Data Source Connection

For HsGetValue functions built with cell references to data source connections, in the Excel file, define the connection for the function using the URL connection format:

```
URLFN|URL:Port|Server|Application|Database
```

> **Note**
>
> If your workbook contains HsGetValue functions that use cell references pointing to a private connection name, be aware that private connections are not portable across machines, and so are not supported by server-initiated refresh. Oracle recommends that you convert those functions to use the URLFN format.

For the following example, assume that cell B1 contains connection information. Enter the connection information in the following format, prefixed with URLFN:

```
URLFN|http://<serviceURL>:<port>/HyperionPlanning/SmartView|<serverName>|App|Database
```

Then build the function with the connection parameter referencing cell B1, as follows:

```
=HsGetValue(B1,"Scenario#Actual","Year#2004","Period#July","View#YTD","Entity#UnitedStates.Utah","Value#U
SD","Account#Sales","ICP#[ICP
None]","Custom1#GolfBalls","Custom2#Customer2","Custom3#[None]","Custom4#Increases")
```

HsSetValue

Describes the Smart View function, HsSetValue.

Data source types: Oracle Essbase, Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

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Description

HsSetValue sends a data value from a worksheet to the data source for selected dimension members of a Point of View (POV). Attribute dimensions and members are not supported in HsSetValue.

To send data to a data source, you must have the appropriate load rule and have write access for the data source.

In Smart View 11.1.2.5.810+, HsSetValue can be used to send enumerated data types, such as Smart List, text, and dates.

> **Note**
>
> HsSetValue function should not be used to set value for a data cell containing supporting details. If used, the HsSetValue function cannot identify if a cell contains supporting details or not, and proceeds to update and submit the cell value with the new function-fetched value. This leads to an incorrect behavior. The original value continues to appear in the Supporting Details dialog box for the cell. So it is recommended not to use HsSetValue function to set value in cells with supporting details.

Syntax

Private connection:

HsSetValue (value,"*PrivateConnectionName*","*POV*")

Shared connection:

HsSetValue (value,"WSFN|*ProviderType*|*Server*|*Application*|*Database*","*POV*")

URL connection:

HsSetValue (value,"URLFN|*URL*|*Server*|*Application*|*Database*","*POV*")

For detailed syntax information, see Creating Functions Manually.

Example 18-5 Basic Example

Data source types: Essbase, Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

In this example, HsSetValue sends the value from cell H4 to the HFM01 application.

Private connection:

```
HsSetValue(H4, "HFM01","Scenario#Actual;Year#2004;Period#"&B$2&";View#<Scenario
View>;Entity#UnitedStates.Connecticut;Value#<Entity Currency>;Account#"&$A4&";ICP#[ICP
None];Custom1#GolfBalls;Custom2#Customer2;Custom3#[None];Custom4#
Increases")
```


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Shared connection:

```
HsSetValue(H4, "WSFN|HFM|hfm_svr|HFM01|
HFM01","Scenario#Actual;Year#2004;Period#"&B$2&";View#<Scenario
View>;Entity#UnitedStates.Connecticut;Value#<Entity Currency>;Account#"&$A4&";ICP#[ICP
None];Custom1#GolfBalls;Custom2#Customer2;Custom3#[None];Custom4#
Increases")
```

URL connection:

```
HsSetValue(H4, "URLFN|http://<servername:port>/hfmadf/../hfmadf/officeprovider|<servername:port>|HFM01|
HFM01","Scenario#Actual;Year#2004;Period#"&B$2&";View#<Scenario
View>;Entity#UnitedStates.Connecticut;Value#<Entity Currency>;Account#"&$A4&";ICP#[ICP
None];Custom1#GolfBalls;Custom2#Customer2;Custom3#[None];Custom4#
Increases")
```

Example 18-6 Example with Smart List

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

In this example, the syntax is similar to that used for text, but the text but has to match one of the text values in the Smart List.

Private connection:

```
HsSetValue("Trips", "Vision","Account#7110: Advertising","Period#x---------
x","HSP_View#BaseData","Year#FY16","Scenario#Forecast","Version#Driver","Entity#International
Sales","Product#No Product")
```

Shared connection:

```
HsSetValue("Trips", "WSFN|HP|serviceURL|Vision|Plan1","Account#7110: Advertising","Period#x---------
x","HSP_View#BaseData","Year#FY16","Scenario#Forecast","Version#Driver","Entity#International
Sales","Product#No Product")
```

URL connection:

```
HsSetValue("Trips", "URLFN|https://<servername:port>/HyperionPlanning/SmartView|<servername:port>|Vision|
Plan1","Account#7110: Advertising","Period#x---------
x","HSP_View#BaseData","Year#FY16","Scenario#Forecast","Version#Driver","Entity#International
Sales","Product#No Product")
```

Example 18-7 Example with Text

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

When using a text value inside the function, surround the text value with quotation marks.

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Private connection:

HsSetValue("Enter Some Text", "Vision","Account#7110: Advertising","Period#Jun","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Commentary","Entity#International Sales","Product#No Product")

Shared connection:

HsSetValue("Enter Some Text", "WSFN|HP|*serviceURL*|Vision|Plan1","Account#7110: Advertising","Period#Jun","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Commentary","Entity#International Sales","Product#No Product")

URL connection:

HsSetValue("Enter Some Text", "URLFN|https://<servername:port>/HyperionPlanning/SmartView|<servername:port>|Vision|Plan1","Account#7110: Advertising","Period#Jun","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Commentary","Entity#International Sales","Product#No Product")

Example 18-8 Example with Date

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

When using the date value inside the function, surround the date value with quotation marks.

Private connection:

HsSetValue("01/03/2003","Vision","Account#Request Date","Period#x---------x","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Working","Entity#No Department","Product#No Product")

Shared connection:

HsSetValue("01/03/2003","WSFN|HP|*serviceURL*|Vision|Plan1","Account#Request Date","Period#x---------x","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Working","Entity#No Department","Product#No Product")

URL connection:

HsSetValue("01/03/2003","URLFN|https://<servername:port>/HyperionPlanning/SmartView|<servername:port>|Vision|Plan1","Account#Request Date","Period#x---------x","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Working","Entity#No Department","Product#No Product")

Example 18-9 Example with Date Using TODAY Function for Today's Date

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

You can also use the TODAY function for today's date.

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Private connection:

HsSetValue(TEXT(TODAY(),"mm/dd/yyyy"),"Vision","Account#Request Date","Period#x---------x","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Working","Entity#No Department","Product#No Product")

Shared connection:

HsSetValue(TEXT(TODAY(),"mm/dd/yyyy"),"WSFN|HP|*serviceURL*|Vision|Plan1","Account#Request Date","Period#x---------x","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Working","Entity#No Department","Product#No Product")

URL connection:

HsSetValue(TEXT(TODAY(),"mm/dd/yyyy"),"URLFN|https://<servername:port>/HyperionPlanning/SmartView|<servername:port>|Vision|Plan1","Account#Request Date","Period#x---------x","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Working","Entity#No Department","Product#No Product")

HsGetSheetInfo

Describes the Smart View function, HsGetSheetInfo.

Data source types: Provider-independent

Description

HsGetSheetInfo retrieves detailed information about the current worksheet, as described in Table 1.

Table 18-3 HsGetSheetInfo Details

Numerical Equivalent	String Equivalent	Sheet Information
1	Connected	Connection status
2	Sheet Type	Ad hoc or form
3	Server	The server to which the sheet is connected
4	Application	The application to which the sheet is connected
5	Cube	The cube to which the sheet is connected
6	URL	The URL to which the sheet is connected
7	Provider	The data source type to which the sheet is connected
8	Provider URL	The provider to which the sheet is connected; applicable for Oracle Hyperion Provider Services connections
9	Friendly Name	The data source connection name

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Table 18-3 (Cont.) HsGetSheetInfo Details

Numerical Equivalent	String Equivalent	Sheet Information
10	Alias Table	The current alias table
12	Description	The connection description
13	Last Retrieved	The date and time that the last refresh was performed on the sheet

Syntax

```
HsGetSheetInfo("<string equivalent>")
```

```
HsGetSheetInfo("<numerical equivalent>")
```

For detailed syntax information, see Creating Functions Manually.

Example

In this example, HsGetSheetInfo tells you whether the worksheet contains an ad hoc grid or a form.

```
HsGetSheetInfo("Sheet Type")
```

HsDescription

Describes the Smart View function, HsDescription.

Data source types: Oracle Essbase, Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Description

HsDescription displays the description of the specified dimension member.

Oracle Essbase only: HsDescription returns the alias name of the specified dimension member.

Syntax

Private connection:

```
HsDescription ("PrivateConnectionName","Dimension#Member")
```

Shared connection:

```
HsDescription ("WSFN|ProviderType|Server|Application|Database","Dimension#Member")
```


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URL connection:

HsDescription ("URLFN|*URL*|*Server*|*Application*|*Database*","*Dimension#Member*")

For detailed syntax information, see Creating Functions Manually.

Example

In this example, HsDescription displays the description for Custom 4.

Private connection:

HsDescription("HFM01","Custom4#Increases")

Shared connection:

HsDescription("WSFN|HFM|hfm_svr|HFM01|HFM01","Custom4#Increases")

URL connection:

HsDescription ("URLFN|https://<servername:port>/hfmadf/../hfmofficeprovider/OfficeProvider|<servername:port>|HFM01|HFM01","Custom4#Increases")

HsAlias

Describes the Smart View function, HsAlias.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Description

HsAlias displays the alias of the specified dimension member.

Syntax

Private connection:

HsAlias("PrivateConnectionName","Dimension#Member", "OutputAliasTable", "MemberNameFromAliasTable", "FlagToReturnDistinctName")

Shared connection:

HsAlias("WSFN|ProviderType|Server|Application|Database","Dimension#Member", "OutputAliasTable", "MemberNameFromAliasTable", "FlagToReturnDistinctName")

URL connection:

HsAlias("URLFN|URL|Server|Application|Database","Dimension#Member", "OutputAliasTable", "MemberNameFromAliasTable", "FlagToReturnDistinctName")

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> **Note**
>
> For detailed syntax information, see Creating Functions Manually.

Notes

- The connection and Dimension#Member parameters are required.
- For private connections, the OutputAliasTable parameter is optional. If OutputAliasTable is empty, then the connection level alias will be used for OutputAliasTable.
- It is optional to specify which alias table the member is from. If MemberNameFromAliasTable is empty, then the original member name from the outline will be used.
- If the member name is not found in the alias table specified in MemberNameFromAliasTable, then the original member name from the outline will be used.
- The HsActive keyword within the HsAlias function can only be used on a sheet with an ad hoc grid.
- Copy and Paste either from Oracle Smart View for Office or Excel is not supported. Only static text will be pasted.
- The Boolean argument, FlagToReturnDistinctName, determines if the alias output is a short name or fully qualified name. The default is False.

Example

Private connection:

```
HsAlias("Planvision","Scenario#Actual", "German", "Default", "True")
```

Shared connection:

```
HsAlias("WSFN|HP|svr|Vision|Plan1","Scenario#Actual", "German", "Default" "True")
```

URL connection:

```
HsAlias("URLFN|URL|svr|Vision|Plan1","Scenario#Actual", "German", "Default" "True")
```

HsGetVariable

Describes the Smart View function, HsGetVariable.

Data source types: Oracle Essbase

Description

HsGetVariable retrieves the associated value for a substitution variable.

You cannot use HsGetVariable with Smart Slices.

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Syntax

HsGetVariable can use the default connection name, a private connection name, a shared connection, or an Excel named range on a multiple-range grid, as follows:

- **Default connection:** HsGetVariable("*substitution variable name*")
- **Private connection:** HsGetVariable("*PrivateConnectionName*","*substitution variable name*")
- **Shared connection:** HsGetVariable("WSFN|*ProviderType*|*Server*|*Application*|*Database*","*substitution variable name*")
- **URL connection:**HsGetVariable("URLFN|*URL*|*Server*|*Application*|*Database*","*substitution variable name*")
- **Named range on a multiple-range grid:** HsGetVariable("*range name*","*substitution variable name*")

For detailed syntax information, see Creating Functions Manually.

Examples

- Default connection: HsGetVariable("CurMonth")
- Private connection: HsGetVariable("myprivateconnection_Sample_Basic","CurMonth")
- Shared connection: HsGetVariable("WSFN|Essbase|esbsvr|Sample|Basic","CurMonth"
- URL connection: HsGetVariable("URLFN|https://<servername:port>/aps/SmartView|<servername:port>|Application|Database","substitution variable name")
- Named range: HsGetVariable("myprivateconnection_Sample_Basic","CurMonth")

> **Note**
>
> An ampersand (&) is generally used to refer to a substitution variable, but is optional in this function.

> **Note**
>
> HsGetVariable does not support non-ASCII variable values.

HsGetSharedConnectionURL

Describes the Smart View function, HsGetSharedConnectionURL.

Data source types: All

Description

Use the HsGetSharedConnectionURL function to quickly identify the shared connection data source that is being used. This can be helpful when you are unsure whether you are connected, for example, to a production or test environment.

To use the HsGetSharedConnectionURL function, type the function name in any cell and press the Enter key. The shared connection URL is instantly displayed in the cell.

```
=HsGetSharedConnectionURL()
```


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You can also enter the function by starting to type the function name into a cell.

=hs

In the drop-down list of functions, double-click HsGetSharedConnectionURL. In the formula bar or directly in the cell in the grid, add the close parenthesis,), and then press Enter to display the shared connection URL.

> **Note**
>
> After using the function, you may the delete the URL from the cell if it is no longer needed.

Syntax

HsGetSharedConnectionURL()

For detailed syntax information, see Creating Functions Manually.

Example

Enter:

HsGetSharedConnectionURL()

Result: This example shows the URL for a cloud connection to multiple Oracle Fusion Cloud Enterprise Performance Management business processes on the same domain.

https://<your_serviceURL>/HyperionPlanning/SmartView

Common Function Error Codes

These are some common error codes displayed in functions.

#NO CONNECTION - You are not connected or logged on to a data source.

#Cube Not Selected - You are not connected at cube level.

#INVALID - Invalid metadata. Invalid cells that contain a value display the value as zero.

#LOCKED - The cell is locked.

#NO ACCESS - You do not have access to this cell.

#NO DATA - The cell contains NoData. You can select to display zeros instead of NoData. Cells use the Replacement text that you specify in the Options dialog box.

#INVALID INPUT - The HsSetValue data value is not valid, for example, a text string.

#READ ONLY - This is for the HsSetValue function only when the cell is Read-only.

#NEEDS REFRESH - Data needs to be refreshed.

#INVALID DIMENSION - An invalid dimension is specified in the function.

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#INVALID MEMBER - An invalid dimension member name is specified in the function.

#NAME - Excel does not recognize text in a formula. When you forward a worksheet that contains functions to a user who does not have Oracle Smart View for Office, they can view the same data as the functions on the worksheet. When the user edits or refreshes the function, it changes to #Name.

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IPM Insights

Related Topics

- Using IPM Insights in Smart View
  You can now insert and use Intelligent Performance Management (IPM) Insights in Microsoft Office applications of Excel, Word, and PowerPoint using Oracle Smart View for Office.
- Viewing Insights in Smart View
  You can view the list of available insights in the IPM Insights dialog, along with their details.
- Inserting Insights in Smart View
  You can insert insights in a Microsoft Excel sheet, a Microsoft Word document, and a Microsoft PowerPoint slide.
- Inserting Functions
  You can insert function to extract and display only the properties related to the insight, without inserting the chart or the data table.
- Analyzing Insights in Ad Hoc Grids
  You can insert only the data table associated with the insight and analyze it using various ad hoc analysis operations.
- Viewing Insight Metadata in Sheet Information
  You can view sheet information for insights in the **Sheet Information** dialog.
- Saving and Refreshing Insights
  You can save the Excel sheet, Word document, or PowerPoint slide in which you have inserted insights as chart or function, and refresh the insights to get the latest data.

Using IPM Insights in Smart View

You can now insert and use Intelligent Performance Management (IPM) Insights in Microsoft Office applications of Excel, Word, and PowerPoint using Oracle Smart View for Office.

Data source types: Planning, Enterprise Profitability and Cost Management, FreeForm, Tax Reporting

IPM Insights analyzes past data and predicted data, helping you find patterns and insights into data that you might not have found on your own. With IPM Insights, you can reduce time spent in data analysis, improve forecast accuracy, detect trends early, and minimize biases, thus encouraging informed decision making.

Service Administrators configure and schedule IPM Insights to define what you view on the Insights dashboard in the web application. You can view the same insights in Smart View and insert them in Microsoft Office applications of Excel, Word, and PowerPoint.

IPM Insights provides the following types of insights:

- **Forecast variance and bias:** This insight reveals hidden bias in forecasts submitted by planners by analyzing historical data. For example, Actual Electronic Sales are 24.15% higher than forecast.

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- **Prediction:** This insight uncovers significant deviations in forecasts compared to predicted values. For example, Predicted Utility Expenses are 20.06% lower than forecast.
- **Anomaly:** This insight detects outliers and unusual patterns in data that deviate from expected results. For example, Actual Manufacturing Expenses are 44% higher in Jun FY23.

You can use IPM Insights in Smart View in the following ways:

- **View available insights:** You can view the list of available insights in the IPM Insights dialog, along with their details. See Viewing Insights in Smart View.
- **Insert insights:** You can insert an insight in an Excel sheet, a Word document, and a PowerPoint slide. See Inserting Insights in Smart View.
- **Insert function:** This action is available only in Excel. You can insert function to extract and display only the details related to the insight, without the chart or the data table. See Inserting Functions.
- **Analyze insight:** This action is available only in Excel. You can insert only the data table associated with the insight and analyze it using various ad hoc analysis operations. See Analyzing Insights in Ad Hoc Grids.
- **View metadata associated with insights:** This action is available only in Excel. After you insert an insight or function in a sheet, you can view additional details and metadata associated with the insight in the Sheet Information dialog. See Viewing Insight Metadata in Sheet Information.
- **Save and refresh inserted insights:** You can save the Excel sheet, Word document, or PowerPoint slide in which you have inserted insights, and refresh the insights to get the latest data. See Saving and Refreshing Insights.

For more information on configuring insights and accessing them through the web application, see the following topics:

- **Planning**: Configuring IPM in *Administering Planning* and Using IPM Insights to Inform Your Decision-Making in *Working with Planning*
- **FreeForm**: Configuring IPM Insights in *Administering FreeForm* and Using IPM Insights to Inform Your Decision-Making in *Working with FreeForm*
- **Enterprise Profitability and Cost Management**: Configuring IPM Insights and Using IPM Insights to Inform Your Decision-Making in *Administering and Working with Enterprise Profitability and Cost Management*
- **Tax Reporting**: Configuring IPM Insights in *Administering Tax Reporting* and Using IPM Insights to Inform Your Decision-Making in *Working with Tax Reporting*

Viewing Insights in Smart View

You can view the list of available insights in the IPM Insights dialog, along with their details.

To view IPM Insights in Oracle Smart View for Office:

1. Open a Microsoft Excel sheet, a Microsoft Word document, or a Microsoft PowerPoint slide and connect to your business process that has IPM Insights.
2. In the Smart View Panel, right-click the application name and then click **IPM Insights**.

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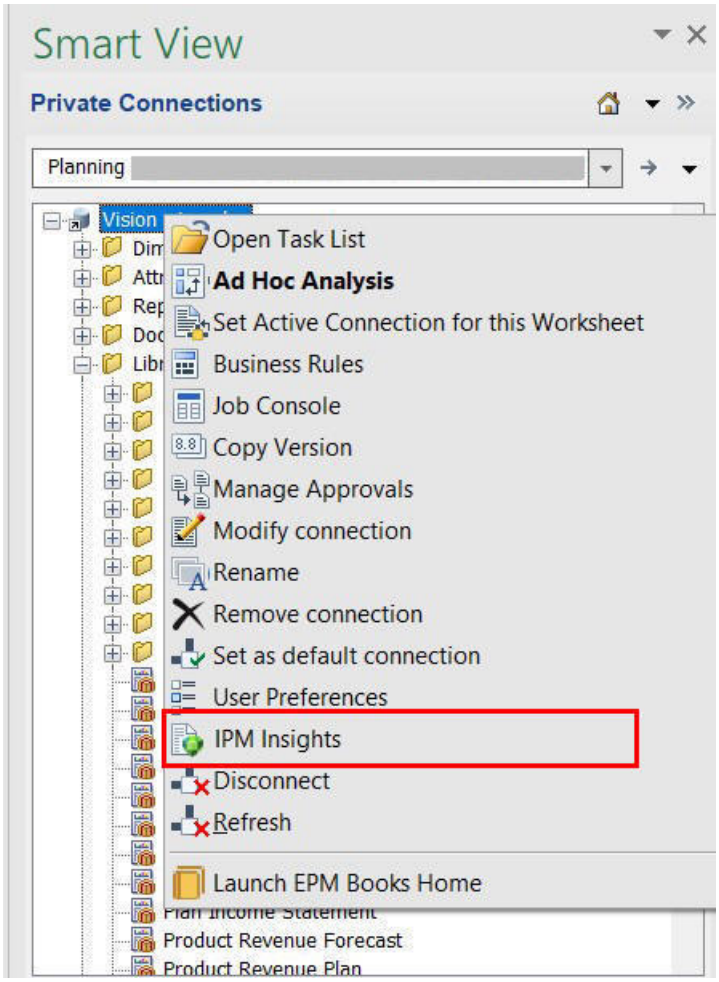

Alternatively, you can also click **More** in the Action panel and then click **IPM Insights**. The **IPM Insights** dialog displays all the available insights generated in the application.

3. View the list of available insights generated for the application in the **IPM Insights** dialog, along with the following details:
   - **Impact:** Indicates the relative amount of deviation or impact from the usual value in percentage.
   - **Values:** Displays the absolute value of the deviation for an insight.
   - **Details:** Describes the insight statement in brief.
   - **POV:** Indicates the POV values involved in the insight.
   - **Type:** Indicates the type of insight — Anomaly, Prediction, or Forecast Variance and Bias.
   - **Priority:** Indicates the category of insight — High, Medium, or Low priority.
   - **Status:** Indicates the status of insight — Open or Closed.

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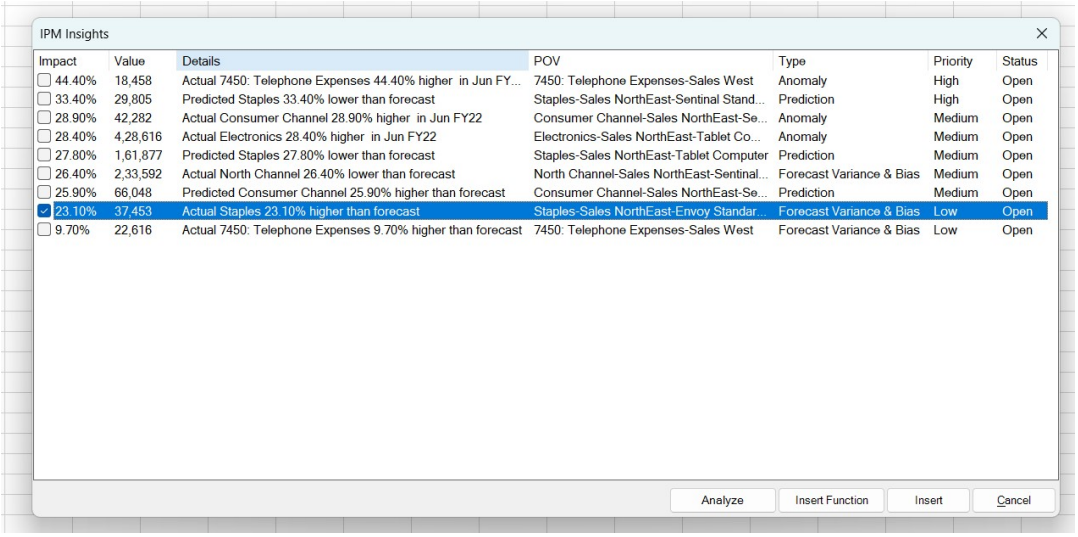

In Word and PowerPoint, you can select an insight by clicking a row. In Excel, you can select multiple insights by selecting the respective check boxes.

4. Proceed with inserting insights, inserting functions, or analyzing insights data in ad hoc grids. For more information, see the following topics:
   - Inserting Insights in Smart View
   - Inserting Functions
   - Analyzing Insights in Ad Hoc Grids

Inserting Insights in Smart View

You can insert insights in a Microsoft Excel sheet, a Microsoft Word document, and a Microsoft PowerPoint slide.

To insert insights:

1. Open an Excel sheet, a Word document, and a PowerPoint slide and connect to your business process that has IPM Insights.
2. In the Smart View Panel, right-click the application name and then click **IPM Insights**. Alternatively, you can also click **More** in the Action panel and then click **IPM Insights**. The **IPM Insights** dialog displays all the available insights generated in the application.
3. In the **IPM Insights** dialog, select an insight and click **Insert**.

> **Note**
>
> In Word and PowerPoint, you can select an insight by clicking a row. In Excel, you can insert multiple insights at the same time by selecting the check boxes next to the required insights.

The insights are inserted in the following way in an Excel sheet, a Word document, and a PowerPoint slide:

- Inserting Insights in Microsoft Excel
- Inserting Insights in Microsoft Word

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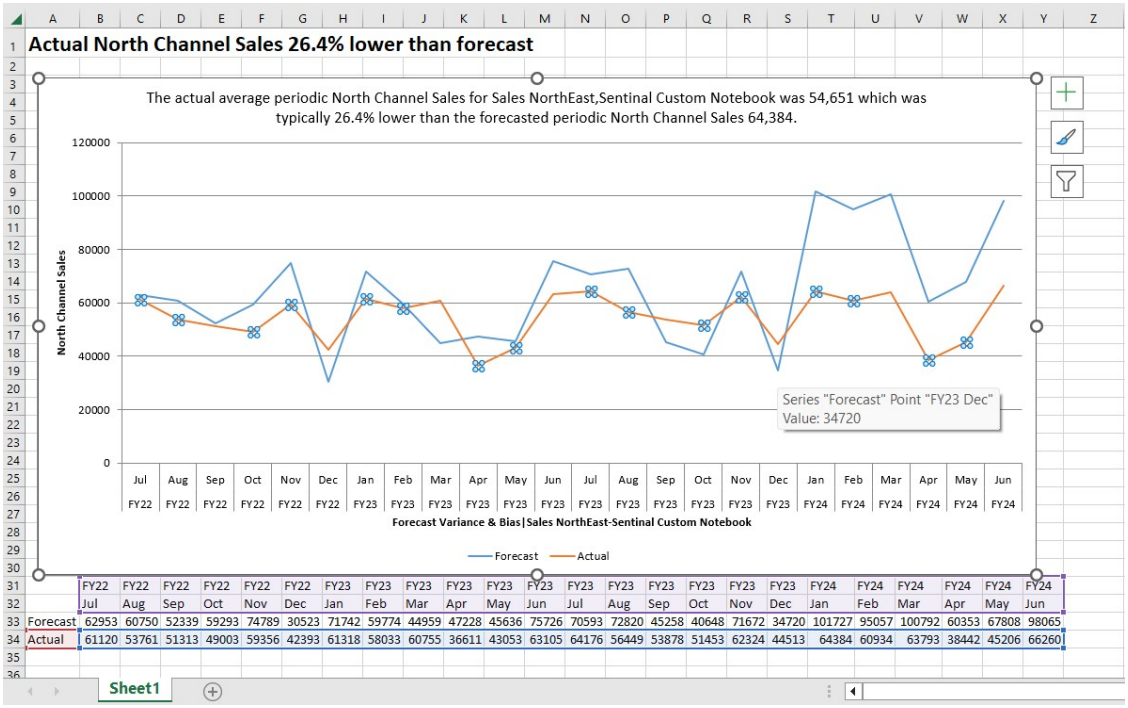
- Inserting Insights in Microsoft PowerPoint

4. **Optional:** You can save the sheet and refresh the inserted insights to display the latest values. See Saving and Refreshing Insights.

Inserting Insights in Microsoft Excel

In Excel, the insight is inserted as a chart along with the insight statement and the data table associated with the insight.



	FY22 Jul	FY22 Aug	FY22 Sep	FY22 Oct	FY22 Nov	FY22 Dec	FY23 Jan	FY23 Feb	FY23 Mar	FY23 Apr	FY23 May	FY23 Jun	FY23 Jul	FY23 Aug	FY23 Sep	FY23 Oct	FY23 Nov	FY23 Dec	FY24 Jan	FY24 Feb	FY24 Mar	FY24 Apr	FY24 May	FY24 Jun
Forecast	62953	60750	52339	59293	74789	30523	71742	59774	44959	47228	45636	75726	70593	72820	45258	40648	71672	34720	101727	95057	100792	60353	67808	98065
Actual	61120	53761	51313	49003	59356	42393	61318	58033	60755	36611	43053	63105	64176	56449	53878	51453	62324	44513	64384	60934	63793	38442	45206	66260

You can view the following details:

- **Chart:** The chart shows a brief description of the insight at the top, and the insight type and POV on the axis. You can hover on the chart to view the specific data points. You can also click a line chart to view the associated row highlighted in the data table.
- **Data Table:** The data table displays the scenario members in the table header, unlike the web application which displays both scenario members and insight type in the header.

Note the following considerations about inserting insights in Excel:

- You can insert only one insight per sheet. If you try to insert insight on a sheet that already has an existing insight, form, or ad hoc grid, then the existing content and metadata are cleared before inserting the new insight.
- In Excel, you can insert multiple insights at the same time by selecting the check boxes next to the required insights. If multiple insights are selected while inserting, each insight is inserted on a separate sheet within the workbook.
- If there are any negative values to be plotted in the insight chart, the plotted axis is anchored at 0 (zero) and may possibly show up above the plotted lines.
- For **Prediction** type of insight, you can update the forecast values in the data table to the predicted values by changing the relevant cell values. The chart also gets updated to reflect the changed values. You can submit the changed values to update the forecast,

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provided the POV associated with the cells is writable. The **Submit Data** action works similar to the **Update Forecast** action available in the web application.

Not all data cells can be updated and submitted. If you update a cell that is not supposed to be updated, it will display the changed value for the moment, but on submitting data, it will revert to its original value.

- You can view additional details and metadata associated with the insight in the Sheet Information dialog. See Viewing Insight Metadata in Sheet Information.

Inserting Insights in Microsoft Word

In Word, the insight is inserted as a chart along with the insight description. The chart shows a brief description of the insight at the top, and the insight type and POV on the axis. You can hover on the chart to view the specific data points.

Note the following considerations about inserting insights in Word:

- You can insert only one insight at a time in Word.
- If there are any negative values to be plotted in the insight chart, the plotted axis is anchored at 0 (zero) and may possibly show up above the plotted lines.

Inserting Insights in Microsoft PowerPoint

In PowerPoint, the insight is inserted as a chart along with the insight description. The chart shows a brief description of the insight at the top, and the insight type and POV on the axis. You can hover on the chart to view the specific data points.

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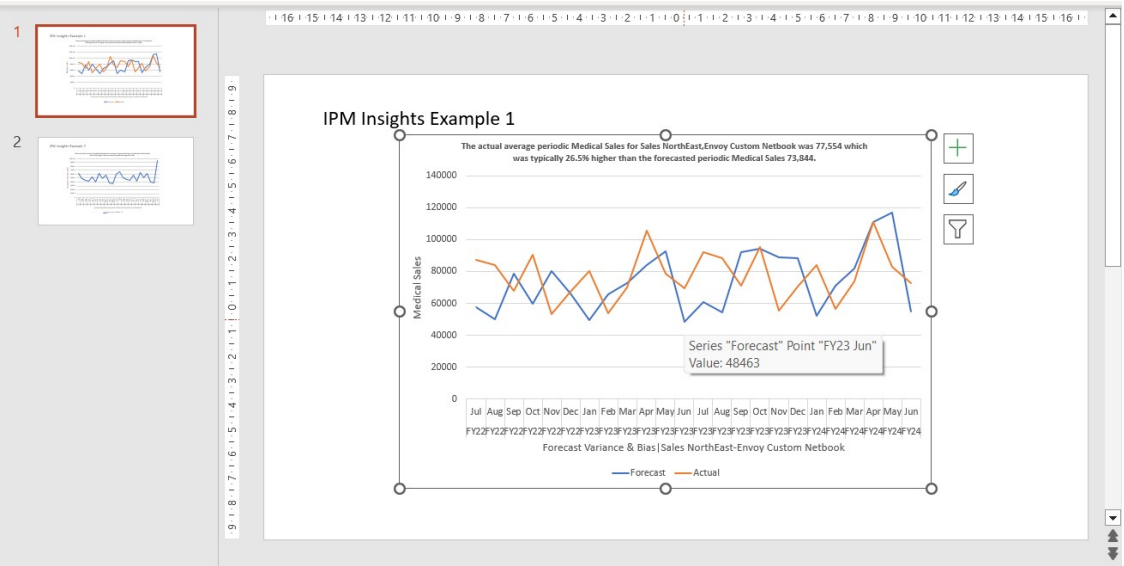

Note the following considerations about inserting insights in PowerPoint:

- You can insert only one insight at a time in PowerPoint.
- As a best practice, it is recommended to insert only one insight per slide to avoid information clutter.
- If there are any negative values to be plotted in the insight chart, the plotted axis is anchored at 0 (zero) and may possibly show up above the plotted lines.

Inserting Functions

You can insert function to extract and display only the properties related to the insight, without inserting the chart or the data table.

Inserting functions to display insight details is available only in Microsoft Excel.

To insert function for displaying insight details:

1. Open an Excel sheet and connect to your business process that has IPM Insights.
2. In the Smart View Panel, right-click the application name and then click **IPM Insights**. Alternatively, you can also click **More** in the Action panel and then click **IPM Insights**. The **IPM Insights** dialog displays all the available insights generated in the application.
3. In the **IPM Insights** dialog, select an insight and click **Insert Function**
   A #NEED_REFRESH message appears in the cell.
4. Click **Refresh** in the Smart View ribbon.
   The following properties are displayed in a tabular format:
   - **Detail:** Describes the insight statement in brief.
   - **Type:** Indicates the type of insight — Anomaly, Prediction, or Forecast Variance and Bias.
   - **POV:** Indicates the POV values involved in the insight.
   - **Impact %:** Indicates the relative amount of deviation or impact from the usual value in percentage. This value is displayed in the number format with decimals instead of the percentage format (for example, 0.44 instead of 44%). You can apply formatting to the value, if required.

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- **Impact Value:** Displays the absolute value of the deviation for an insight.
- **Priority:** Indicates the category of insight — High, Medium, or Low priority.
- **Anomaly Point / Bias:** Indicates the data point where the anomaly / bias is identified.

Observe that the formula bar displays the **HsGetInsight** function which is used to retrieve the details related to the insight. The syntax is as follows:

```
=HsGetInsight("URL|Application","2")
```

> **Note**
>
> If you are using Microsoft Excel 2019, the **HsGetInsight** function can be used to insert only one insight property at a time. The Detail property is inserted by default, instead of the full list of properties mentioned above. This happens because Excel 2019 does not support dynamic array output, which is required to insert the full list. If you want to insert any other property, use the process mentioned in the below step.

5. **Optional:** To insert only a specific property from the above list, you can modify the **HsGetInsight** function in the formula bar.
For example, you want to insert only the POV, add a third parameter **"pov"** before the closing bracket as follows:

```
=HsGetInsight("http://<servername:port>|Vision","2","pov")
```

> **Note**
>
> - Ensure that you type the correct spelling of the parameter. For example, if you type **"details"** instead of **"detail"**, the incorrect parameter is ignored, and the default function output is displayed.
> - If you insert the **HsGetInsight** function in an ad hoc sheet, only a single parameter gets inserted. It is recommended not to insert function in an ad hoc sheet. If you must, then modify the function in the formula bar to include only a single specific parameter that you require. If more than one parameter is required, consider inserting multiple **HsGetInsight** functions with a specific parameter defined for each function.

6. **Optional:** You can save the sheet and refresh the inserted functions to display the latest values. See Saving and Refreshing Insights.

Analyzing Insights in Ad Hoc Grids

You can insert only the data table associated with the insight and analyze it using various ad hoc analysis operations.

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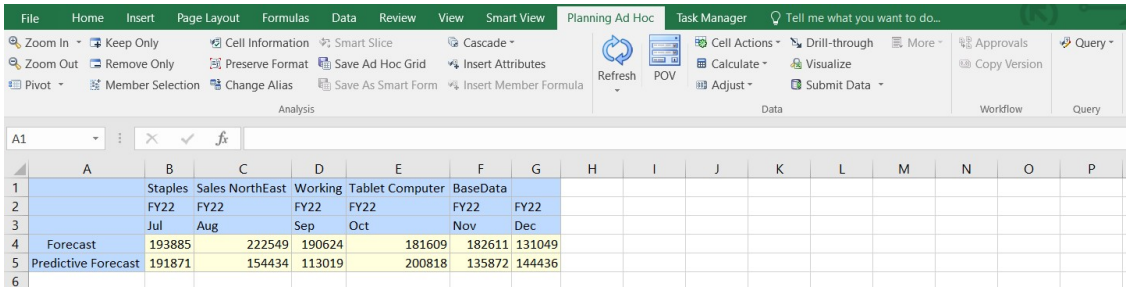
> **Note**
>
> - Analyzing insights in an ad hoc grid is available only in Microsoft Excel.
> - Ad hoc analysis of insights is supported only in Standard mode applications.

To analyze the data table associated with an insight:

1. Open an Excel sheet and connect to your business process that has IPM Insights.
2. In the Smart View Panel, right-click the application name and then click **IPM Insights**. Alternatively, you can also click **More** in the Action panel and then click **IPM Insights**. The **IPM Insights** dialog displays all the available insights generated in the application.
3. In the **IPM Insights** dialog, select an insight and click **Analyze**.
   The data table associated with the insight opens in the ad hoc analysis mode. If the current sheet is blank, then it opens in the same sheet. However, if the current sheet has existing content like a form or an ad hoc grid, then the data table opens as ad hoc grid in a new sheet.

   You can analyze it using the options available on the provider ad hoc ribbon.



	A	B	C	D	E	F	G
1		Staples	Sales NorthEast	Working	Tablet Computer	BaseData	
2		FY22	FY22	FY22	FY22	FY22	FY22
3		Jul	Aug	Sep	Oct	Nov	Dec
4	Forecast	193885	222549	190624	181609	182611	131049
5	Predictive Forecast	191871	154434	113019	200818	135872	144436
6							

Viewing Insight Metadata in Sheet Information

You can view sheet information for insights in the **Sheet Information** dialog.

Viewing insight metadata in sheet information is available only in Microsoft Excel. After you insert an insight or function in a sheet, you can view additional details and metadata associated with the insight in the **Sheet Information** dialog.

To view sheet information:

1. Insert an insight in a sheet or open an existing sheet with insights.
2. From the Smart View ribbon, click **Sheet Info**.
3. Review the sheet information in the **Sheet Information** dialog:
   For a sheet with insights, the following details are displayed in the **IPM Insights** section:
   - **ID:** Indicates the ID of the insight.
   - **URL:** Indicates the URL string of the data source provider to which the sheet is connected.
   - **Application:** Indicates the application to which the sheet is connected.
   - **Plan Type:** Indicates the plan type to which the sheet is connected.

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- **Description:** Describes the insight statement in brief.
- **Type:** Indicates the type of insight — Anomaly, Prediction, or Forecast Variance and Bias.
- **POV:** Indicates the POV values associated with the insight.
- **Creation Time:** Indicates the time when the insight was created or generated.
- **Status:** Indicates the status of insight — Open or Closed.
- **Impact Percentage:** Indicates the relative amount of deviation or impact from the usual value in percentage.
- **Impact Value:** Displays the absolute value of the deviation for an insight.

For a sheet with insight inserted as function, only the **Sheet Type** is displayed with the value as **Function** in the **General** section.

4. **Optional:** Select the following options as needed.
   - **Delete:** Provides these options for deleting Oracle Smart View for Office information, referred to as "metadata":
     - Delete worksheet metadata
     - Delete workbook metadata
     - Delete all metadata (deletes workbook metadata and all worksheets)
   - **Save:** Saves the **Sheet Information** content to an Excel spreadsheet.
5. **Optional:** To copy a selected item in the list to the clipboard, press **Ctrl+C**.
   To copy the entire **Sheet Information** list, ensure that no items are selected in **Sheet Information**, then press **Ctrl+C**. If you have already selected an item in the list, then close **Sheet Information**, reopen it, and press **Ctrl+C**.
6. Click **Close**.

Saving and Refreshing Insights

You can save the Excel sheet, Word document, or PowerPoint slide in which you have inserted insights as chart or function, and refresh the insights to get the latest data.

For example, if you change a percentage value in the insight statement, you can refresh the insight to retrieve the original value.

> **Note**
>
> It may happen that an insight no longer exists or it has been deleted by the service administrator. In Oracle Smart View for Office, currently when you refresh insights, Smart View continues to display deleted insights, even after refreshing. A workaround is to check the IPM Insights dashboard in your web application and then delete such insights from your sheet, document, or slide.

To refresh insights:

1. Open the saved Excel sheet, Word document, or PowerPoint slide containing insights or insight functions.
2. Connect to your data source from Smart View.
3. From the Smart View ribbon, click **Refresh**.

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The insights are refreshed in the following way:

- **Excel:** The active sheet is refreshed. If you have multiple sheets with insights, then click **Refresh All Worksheets** to refresh insights in all sheets at the same time.
- **Word:**: The charts in the document are refreshed.
- **PowerPoint:** The active slide is refreshed. To refresh insights on other slides, open each slide and click **Refresh**.

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Smart Query

Related Topics

- About Smart Query
  A Smart Query is a multidimensional analysis and reporting tool constructed from multiple sets of members and filters.
- Creating a Smart Query
  Create a Smart Query by defining one or more sets of members from the dimensions in an application.
- Opening a Smart Query
  You can open a Smart Query from a new worksheet or from an existing Smart Query worksheet.
- Copying and Pasting
  In Excel, you can copy an entire Smart Query definition from one worksheet to another, and sets and filters to other Smart Queries.
- Sharing Smart Query Definitions
  You can share Smart Query definitions with other users.
- Executing a Smart Query
  Execute saved Smart Queries in the **Manage and Execute Queries** dialog box.
- Deleting a Smart Query
  You can delete Smart Queries from the list in the **Manage and Execute Queries** dialog box.

About Smart Query

A Smart Query is a multidimensional analysis and reporting tool constructed from multiple sets of members and filters.

Data source types: Oracle Essbase

Related Topics:

Creating a Smart Query

Opening a Smart Query

Copying and Pasting

Creating a Smart Query

Create a Smart Query by defining one or more sets of members from the dimensions in an application.

To each member set, you can define and apply composite filters to further refine the data to be returned by the Smart Query. Using these sets and their filters, you can create a highly complex query by defining unions, complements, and intersections of data from the different sets.

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Once a Smart Query is created, you can use it for ad hoc reporting and analysis. Use the ad hoc reports created from Smart Queries to submit data. Smart Queries can be saved, reused, and shared. Sets and filters can be saved individually for use in other Smart Queries.

You cannot submit data directly from a Smart Query.

Creating a Smart Query involves performing the following procedures:

1. Defining Sets
2. Defining Set Filters
3. Building the Smart Query
4. Completing the Smart Query

Defining Sets

To define a set:

1. From the Smart View ribbon, select **Panel** to open the Smart View Panel.
2. From the Smart View Panel, connect to an Oracle Essbase cube or application.
3. From the Action Panel, select **New Smart Query Sheet** to display the Smart Query Panel in place of the Smart View Panel.

   You can select the arrow next to to return to the Smart View Panel.

   Default dimensions for the connection are displayed in the Smart Query Panel and on the worksheet. The Smart Query ribbon is displayed.
4. **Optional:** Pivot dimensions by dragging them from one area of the Smart Query Panel to another.
5. Select the name of a dimension under **Row**, **Column**, or **Point of View** to display it under **Sets for...**, where you define the set.

   If the dimension exists in Row, Column, or Point of View , you can also start typing the dimension name in order to select it.
6. In **Sets for ...,**, click the arrow next to the dimension name and choose **Select Base Members.**

   For POV dimensions, the members you specify in this step are available for selection from drop-down menus in the Point of View section. You can also enter these names directly.
7. From the popup menu, select a member level to include in the set or select **Other** to open the **Member Selector**, where you can select specific members.
8. Click the arrow next to the dimension name and select **Add Custom Members** (not available to Point of View dimensions).
9. Select from among specified values for the set.

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> **Note**
>
> When working with very long member names in Essbase, the Smart Query attempts to verify that the name works with Essbase. During the verification process, a numeric (for example, (1), (2), etc.) is appended to the long member name, signifying the number of verification attempts, up to 10 attempts. With each verification attempt, the numeric is incremented by one. Once the 10 attempts are completed, Smart Query proceeds with the last attempt, (9), so you can expect to see (9) appended to the member name.

Optional: Select **Other** to define members with MDX expressions (see the Essbase documentation) in **Custom Member Expression**.

MDX queries must be at least three characters long to accommodate the simplest member expression; for example, two operands and an operator. The **OK** button here is enabled only after the expression entered is validated.

Queries are given default names, but if you choose to rename an MDX query, do not use the following characters:

- Brackets ([ ])
- Double quotation marks (" ") or their XML-encoded representation (""", """, """, """, """)
- Single quotation marks (') or their XML-encoded representation ("'","'","'","'","'")

10. **Optional:** To allow duplicate members in the set, click the arrow next to the set name and select **Allow Duplicates in Set** (not available to Point of View dimensions).

    This setting applies only to the set for which it is selected. When there are multiple sets in a Smart Query, members are displayed in the grid for all sets in which they are selected even if **Allow Duplicates in Set** is *not* selected. For example, if Jan, Feb, and Mar are selected as members for one set, and Level 0 members of Year are selected in another set in the same query, then Jan, Feb, and Mar will each appear twice in the grid because they are members of both sets.

11. **Optional:** To rename the set, click the arrow next to the set name and select **Rename**.
12. To save a set, click the arrow next to the set name, then select **Repository**, and then **Save Set**.
13. In **Repository Item**, enter a name and description for the member set and click **OK**.
14. **Optional:** To add additional member sets for this dimension, click the arrow next to a set name and select **Add New Set** and repeat the procedure.
15. Select other dimensions from the Smart Query Panel and repeat the procedure as necessary to add members for other dimensions.

Related Topics:

Defining Set Filters

Building the Smart Query

Defining Set Filters

To define filters for a set:

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1. From **Sets for...**, click the arrow next to a set name and select **Add Filter**.

   A new filter is displayed under **Filters for Set...**
2. Click the arrow next to the filter name and select one of the following to define the filter:
   - Select Top/Bottom
   - Select Based on Value
   - Select Based on Value Specified by Members
   - String Match (This option does not support qualified member names.)
3. Repeat this procedure as necessary to add more filters to the set.

When you have created the sets and filters that you want to compose the Smart Query, proceed to Building the Smart Query.

Building the Smart Query

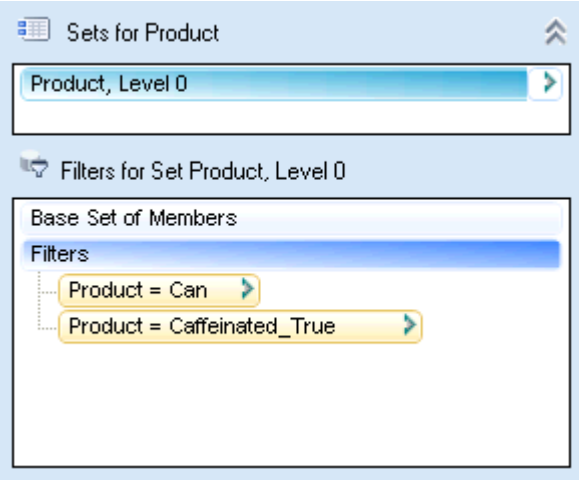
To build a Smart Query, you apply composite filters to select unions, complements, and intersections of members from the different sets. Unions are selections of members that belong to either but not both of two sets. Intersections are selections of members that belong to all specified sets. Complements are selections of members of one specified set that are not members of another specified set.

You can use sets and composite filters in any combination to create highly complex Smart Queries.

Union of Sets

To select members that belong to either but not both sets, define two or more filters as described in Defining Set Filters from the dimension in **Sets for...**. For example, in Figure 1, the query will return only Product, Level 0 members that are *either* packaged in cans (Product = Can) *or* are caffeinated (Product = Caffeinated_True).

Figure 20-1 Union of Sets



Intersection of Sets

Intersections include only the members that are common to all specified sets.

To select members common to all specified sets:

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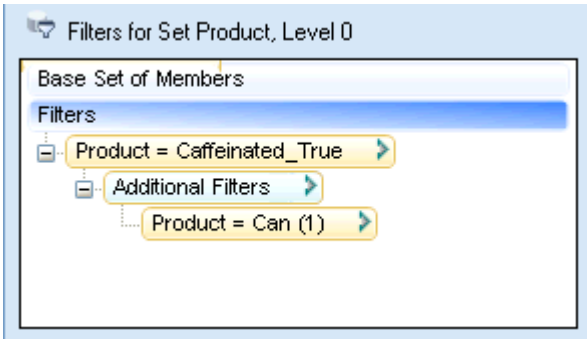
1. Define a filter for a set as described in Defining Set Filters.
2. Click the arrow next to the filter name and select **Add Filter**.
3. **Additional Filters** and a subset filter are displayed.
4. Define the second filter.

In Figure 2, the query will return only Product, Level 0 members that are caffeinated *and* packaged in a can.

Figure 20-2 Intersection of Sets



Complement of Sets

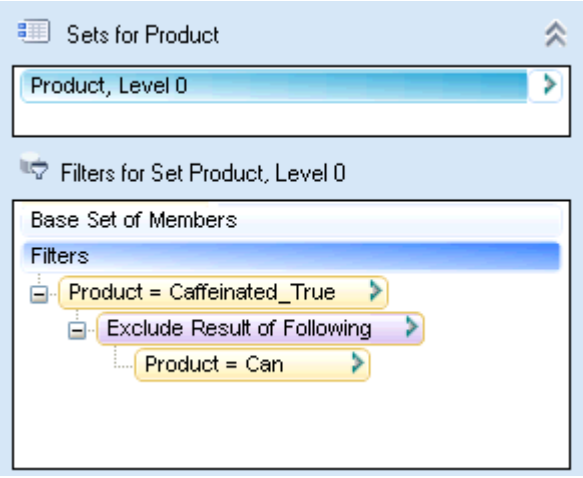
To select only members of a set that are *not* members of another specified set.

1. From **Filters for...**, click the arrow next to a filter name and select **Add Filter**.

   Additional Filters and a subset filter are displayed.
2. Define the second filter.
3. Click the arrow next to **Additional Filters.** and select **Exclude**.

In Figure 3, the query will return only Product, Level 0 members that are caffeinated but are not packaged in a can.

Figure 20-3 Complement of Sets



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When you have built the Smart Query, proceed to Completing the Smart Query.

Completing the Smart Query

To complete the Smart Query:

1. From the Smart Query ribbon, select options for the Smart Query as follows:
   - Indentation (see Member Options)
   - Show Distinct Member Names (see Member Options)
   - Suppress Rows with No Data (see Data Options)
2. **Optional:** Select **Change Alias** to select an alias table.

   The full names of duplicate and shared members are shown regardless of the selected alias table (if any). All other member names are shown according to the selected alias table.
3. To save the entire Smart Query definition, from the Smart Query ribbon, select **Save**.
4. In **Repository**, enter a name and description for the Smart Query.
5. Click **OK**.

   Smart Queries are also saved within the workbook, so when you save a workbook, Smart Queries within it are also saved.
6. **Optional:** To perform ad hoc analysis, from the Smart Query ribbon, select **Analyze**.

Opening a Smart Query

You can open a Smart Query from a new worksheet or from an existing Smart Query worksheet.

Opening from a New Worksheet

To open Smart Query from a new worksheet:

1. From the Smart View ribbon, select **Panel** to open the Smart View Panel.
2. From the Smart View Panel, click the arrow next to , and then select **Smart Query.**
3. From the Smart Query Panel, select **Open Definition** to display the **Repository** list of available Smart Queries.
4. Select a Smart Query from the list.
5. Click **OK**.

Opening from an Existing Smart Query Worksheet

To open an existing Smart Query:

1. From the Smart Query ribbon, select **Open** to display the **Repository** list of available Smart Queries.
2. Select a Smart Query from the list.
3. Click **OK**.
4. When asked if you want to discard the existing Smart Query on the worksheet, click **Yes**.

   The Smart Query is opened on the current worksheet.

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Copying and Pasting

In Excel, you can copy an entire Smart Query definition from one worksheet to another, and sets and filters to other Smart Queries.

Copying Smart Query definitions can be used as a means of sharing queries between users.

Related Topics:

Copying Smart Query Sets and Filters

Copying Smart Query Reports to Word and PowerPoint

Sharing Smart Query Definitions

Copying Smart Query Definitions in Excel

You can copy a Smart Query definition to a different worksheet in the current workbook or in another workbook. If the worksheet into which you want to paste the definition already contains a Smart Query definition, it will be replaced by the pasted definition.

To copy a Smart Query definition from one worksheet to another:

1. Open the Smart Query worksheet that you want to copy.
2. From the Smart Query ribbon, select **Copy**.
3. Open a new worksheet.
4. Do one of the following:
   - To copy the entire definition to a *blank* worksheet, from the Smart Query Panel, select **Paste**.
   - To replace a Smart Query definition, from the Smart Query ribbon of the worksheet to be replaced, select **Paste**.

Copying Smart Query Sets and Filters

To copy a set, under **Sets for...**, click the arrow next to a set name and select **Copy Set**. You can then copy the set within the current Smart Query or to a different Smart Query using **Paste Set** from the same menu.

To copy a filter, under **Filters for Set...**, click the arrow next to a filter name and select **Copy Filter**. You can then copy the set within the current Smart Query or to a different Smart Query using **Paste Filter** from the same menu.

Copying Smart Query Reports to Word and PowerPoint

You cannot copy a Smart Query definition from Excel to Word or PowerPoint directly, but you can copy a grid or partial grid defined by a Smart Query from Excel to Word or PowerPoint. To do so, from the Smart Query ribbon, select **Analyze**. Then copy data as described in Copying Data Between Excel, Word, and PowerPoint.

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Sharing Smart Query Definitions

You can share Smart Query definitions with other users.

The Smart Query definition includes definitions for rows, columns, POV, dimension sets, filters, sorting, and custom members.

The methods for sharing a Smart Query are:

- Email Sharing
- Workbook Sharing

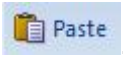
The following topics explain each method.

Email Sharing

To share a Smart Query definition with other users via email:

1. In Excel, open the Smart Query worksheet containing the definition that you want to copy.
2. From the Smart Query ribbon, select **Copy**.
3. Open a blank email message and press **Ctrl-V**.

   When pasted into an email message, the query definition will resemble a long line of alphanumeric characters.
4. Send the email message to the users you are sharing with.
5. Recipients of the Smart Query definition then perform the following tasks:
   a. In the email, select the Smart Query definition string and copy it to the Windows clipboard (use **Ctl+C** or the **Copy** command).
   b. Open a blank worksheet in a new or existing workbook.
   c. **Optional:** Connect to the appropriate data source.

      If you do not connect to a data source, you will prompted to do so when you paste the definition in the next step.
   d. From the Smart View ribbon for the active worksheet, click 

.

      The Smart Query populates the worksheet.

Workbook Sharing

To share a Smart Query in a workbook:

1. Save the Excel workbook that contains the Smart Query to share.
2. Send the Excel workbook to the users you are sharing with or place the workbook file in a shared network location and notify those users.
3. Recipients of the workbook containing the Smart Query definition then perform the following tasks:
   a. Open the workbook either directly from the email or from the shared network location.

      The Smart Query populates the worksheet.
   b. In the Smart View ribbon, click **Refresh** to be prompted for login credentials in the **Connect to Data Source** dialog box.

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Executing a Smart Query

Execute saved Smart Queries in the **Manage and Execute Queries** dialog box.

To execute a Smart Query:

1. In Excel, connect to an Oracle Essbase data source.
2. From the Essbase ribbon, select **Manage and Execute Queries** to display the **Manage and Execute Queries** dialog box.
3. Select a Smart Query from the list in the left frame and click **Execute**.

   The dialog box closes automatically and the Smart Query results appear on the sheet.

Deleting a Smart Query

You can delete Smart Queries from the list in the **Manage and Execute Queries** dialog box.

To delete a Smart Query:

1. In Excel, connect to an Oracle Essbase data source.
2. From the Essbase ribbon, select **Manage and Execute Queries**
3. From the list in the left frame of the **Manage and Execute Queries** dialog box, select a Smart Query to delete.
4. Click the **Delete Query** button .
5. Click **Yes** at the prompt to confirm the delete request.
6. Click the **X** in the upper right corner or click **Cancel** to close the dialog.

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Smart Slices

Related Topics

- About Smart Slices
  A Smart Slice is a reusable perspective of a data source.
- Creating Reports with Smart Slices
  Smart Slices are stored centrally and are available to users from the Smart View Panel.
- Smart Slices, Ad Hoc Analysis, and Forms
  You can perform ad hoc analysis on a Smart Slice in Excel.
- Creating Smart Slices
  Administrators and database administrators can create, modify, and delete Smart Slices.

About Smart Slices

A Smart Slice is a reusable perspective of a data source.

Data source types: Oracle Essbase

It can be composed of a single member, a combination of single members, filters, or combination of single members and filters in any order. These components serve as boundaries to the data that users can view and work with in the Smart Slice. Any operation that can be done in Oracle Smart View for Office can be done within the confines of a Smart Slice.

An organization can have as many different Smart Slices as it needs to accommodate the specific data requirements of its users. For example, Smart Slices can be created for different sales geographical regions, different product lines, different time frames, or a combination of any of these dimensions.

You can view and work with any data within the boundaries of a Smart Slice, but not with data outside its boundaries. For example, in a Smart Slice that limits sales data to the Western region, you could drill down to data for California or Los Angeles, but could not navigate across to New York.

Creating Reports with Smart Slices

Smart Slices are stored centrally and are available to users from the Smart View Panel.

Data source types: Oracle Essbase

An entire report is associated with an Excel workbook, a Word document, or a PowerPoint presentation. One report is associated with an Excel worksheet, a Word page, or a PowerPoint slide. For PowerPoint presentations, Oracle recommends one report type per slide.

You can create reports from entire Smart Slices or from subsets of data in a Smart Slice. Reports can then be displayed on an Excel spreadsheet, Word document, or PowerPoint slide. You can display as many reports from as many data sources as space will permit on one sheet.

To create a report from a Smart Slice:

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1. From the Smart View ribbon, select **Panel**.
2. From the Smart View Panel, select a Smart Slice.
3. In the Action Panel, do one of the following.
   - To work with the Smart Slice as is, click **Insert Smart Slice into report**. The Smart Slice is displayed in Document Contents in the lower portion of the Smart View Panel.
   - To create a subset of the Smart Slice for local storage, click **Modify Smart Slice and insert into report** and use the Smart Slice Designer as described in Creating Smart Slices.

   > **Note**
   >
   > If you use **Modify Smart Slice** to create a Smart Slice, you must select the newly-created Smart Slice from the Smart View Panel tree list before performing ad hoc analysis.

4. Click to refresh the **Document Contents** tree.
5. Select the Smart Slice in **Document Contents**, right-click and select **Insert New Reporting Object/Control**.
6. From the **Insert New Reporting Object/Control** dialog box, select one of these report types to place on the grid:
   - **Function Grid** — a dynamic grid format

     Function grids can be used with Word, PowerPoint, and Excel. When you refresh a function grid, data cells are refreshed; members are not. To refresh both data and members, you must reinsert the function grid into the sheet. For this reason, function grids are most useful for reports in which members remain reasonably static. For reports whose members may change more often, tables and charts are better report types. Although you can have multiple reports on a worksheet, you can have only one function grid.

     You can use Excel formulas, for example SUM, with function grids. To retain such formulas as part of the function grid, you must leave one empty row between the grid and the cell containing the formula and include the empty row in the range of cells selected for the formula definition. This permits retention of the formula when refreshing the data results in a different number of rows in the grid.

     To format a function grid, use Excel formatting capabilities.
   - **Office Table**

     Office tables can be used with Word and PowerPoint. Office tables display results in native Microsoft Office table format. When you refresh an Office table, both members and data are refreshed.

     Office tables look and feel like part of the Word or PowerPoint document, but the members and data in the table cells are connected to the Oracle Smart View for Office provider. With Office tables, you can work with the Word or PowerPoint table formatting and styles that you are accustomed to. Insert a POV object into the report and you can change the POV of the Office table. Refresh the Office table after changing formatting or POV and the new POV is reflected in the results and custom formatting is retained.

     You cannot zoom in or out in an Office table object, and you cannot perform other ad hoc operations or use free form.

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- **Table**

  Tables can be used with PowerPoint and Excel. Table reports display results in a grid format that floats on the document and can be moved and re-sized. When you refresh a table, both members and data are refreshed. Tables are useful for displaying large grids in a smaller space; their scroll bars enable you to quickly access rows and columns.

  You can zoom in and out in a table report, but you cannot perform other ad hoc operations or use free form.

- **Chart**

  Charts can be used with PowerPoint and Excel. In PowerPoint, contents of charts and tables are visible only in presentation mode. Chart reports display results in a chart format that floats on the document and can be moved and re-sized. When you refresh a chart, both members and data are refreshed.

7. **Optional:** To move or re-size a table or chart, in **Document Contents**, click the down arrow next to , and from the menu, select **Toggle Design Mode**.

   You can now move objects within the sheet, slide, or page.

8. To insert a report control, select the Smart Slice in **Document Contents**, right-click and select **Insert New Reporting Object/Control**.

9. From the **Insert New Reporting Object/Control** dialog box, select one of these report control types:

   - **POV** — a report can contain only one POV
   - **Slider** — a report can contain multiple sliders. See Sliders.

   A report can contain a POV or sliders, but not both.

10. Refresh.

11. **Optional:** To create a separate report for any or all of the members of one dimension in the report and cascade these reports separately across the worksheets of the workbook, see Cascading Reports and Ad Hoc Grids.

> **Note**
>
> In reports that contain a chart and a table, cascading may cause the chart and table to overlap the next time you open the workbook.

Deleting Reports or Report Objects

To delete a report:

1. In **Document Contents**, click

2. Select the object to delete from the link in **Document Contents**; for example, select a function grid or POV.

   Selecting a report also deletes all its report objects.

3. At the bottom of the **Document Contents** pane, select **More**, then select **Delete**.

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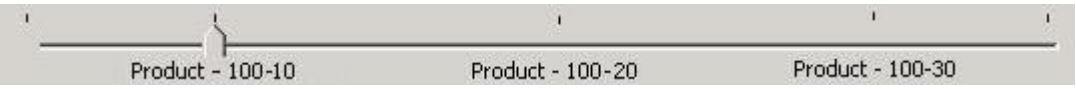
Sliders

Figure 1 shows a slider. The slider displays a selected set of dimension members from a query; when you drag the slider marker to a member, its data is displayed in all reports associated with the query on the sheet. Sliders can contain dimensions from more than one query in the Report Designer if the dimensions have the same boundaries.

Figure 21-1 Slider



Related Topics:

- Creating a Slider from One Query
- Creating a Slider from Joined Queries

Creating a Slider from One Query

To create a slider:

1. Ensure that one or more report type is inserted in the worksheet for the query for which you want to create the slider.
2. From the report designer, click **Query View** and select **Query View**.
3. In the Report Designer, select the query on which to base the slider.
4. Click

and select **Slider** to open **Member Selection**.
5. Select a dimension, members, and filters for the slider and click **OK**.

   The slider is displayed on the sheet.
6. **Optional:** To move or re-size the slider, click and then move or re-size.

Creating a Slider from Joined Queries

You can create a slider that contains dimensions from multiple queries if, and only if, the dimensions from the different queries have the exact same boundaries.

To create a slider using a dimension from multiple queries:

1. Ensure that one or more report type is inserted in the worksheet for the query for which you want to create the slider.
2. Click **Query View** and select **Dimension View**. Notice that the Report Designer tree view is grouped by dimensions rather than by queries. Under each dimension are the queries that contain that dimension. If the dimensions do not contain the same boundaries, multiple sliders will be created to accommodate each of them. For example, if the Market dimension in one query contains a children filter and the Market dimension from another query contains a descendents filter, two Market sliders would be created.
3. In the Report Designer, select the dimension on which to base the query.

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4. Click and select **Slider** to open **Member Selection**.
5. Select dimension members, and filters for the slider and click **OK**.

   The slider is displayed on the sheet.
6. **Optional:** To move or re-size the slider, click and then move or re-size.

Smart Slices, Ad Hoc Analysis, and Forms

You can perform ad hoc analysis on a Smart Slice in Excel.

Data source types: Oracle Essbase

Select the Smart Slice in the Smart View Panel and click **Ad Hoc Analysis** in the Action Panel. Data and POV from the Smart Slice is entered into the worksheet, and you can perform ad hoc analysis.

> **Note**
>
> For Oracle Essbase, multiple-grid worksheets are not supported for Smart Slices.

To use a form, select the Smart Slice in the Smart View Panel and click **Open Form** in the Action Panel. Only forms enabled by the administrator may be used for ad hoc analysis.

If you want to locate the Smart Slice source of the data in an ad hoc grid, click and select **Locate Worksheet Connection**. The Smart Slice is highlighted in the Smart View Panel.

Creating Smart Slices

Administrators and database administrators can create, modify, and delete Smart Slices.

Data source types: Oracle Essbase

In Oracle Essbase, if enabled by the administrator, all users can create, modify and delete Smart Slices.

Creating Smart Slices involves Setting Smart Slice Data Boundaries and Setting Smart Slice Preferences.

Setting Smart Slice Data Boundaries

Data source types: Oracle Essbase

To create a Smart Slice:

1. From the Smart View ribbon, select **Panel**.
2. Open the Smart View Panel and connect to a data source.
3. Do one of the following:
   - From the Action Panel, click **Create New Smart Slice**, then select an alias table from the list of alias tables.
   - With an ad hoc grid open, from the data source ribbon, select **Smart Slice**.

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The Smart Slice Designer and a **New Smart Slice – Design** worksheet are displayed. You design the Smart Slice from the Smart Slice Designer; results are displayed on the worksheet.

On the Smart Slice Designer are **Rows**, **Columns**, **POV**, and **Attributes** sections for row, column, POV, and attribute dimensions.

4. From the Smart Slice Designer, use any of the following operations to create boundaries for the Smart Slice.
   - To select members for row or column boundaries, drag members from the **POV** to **Rows** or **Columns** as needed on the Smart Slice Designer. To remove row or column members, drag them to the **POV**. Changes are reflected immediately on the grid.
   - To select members for dimensions under **Rows**, **Columns**, or **Attributes**, section, click the name of the dimension to open the Member Selection dialog box.
   - To select members for the **POV** on the Smart Slice Designer, click the arrow next to the dimension name and select the ellipsis to open the **Member Selection** dialog box.
5. Click **Options** and set preferences as described in Setting Smart Slice Preferences.
6. Click **Done**; **Member Selection** is displayed.
7. In **Member Selection**, select a dimension member to use as the default POV and click **OK**.
8. In the Smart View Panel, in **Enter a new name**, enter a name for the Smart Slice.
9. Click **OK**. The Smart Slice is displayed in the tree view of the Smart View Panel under its data source.

Setting Smart Slice Preferences

The preferences that you specify are stored as part of the Smart Slice definition, and they override the global preferences set in the Options dialog box.

To specify Smart Slice preferences:

1. From the Smart Slice Designer, click **Options**.
2. For each option, enter or select the preference from the drop-down menu.

   Users can select the options that are enabled here. See Smart View Options for descriptions of the options.

> **Note**
>
> Replacement labels for missing data and other preferences specified in the Smart Slice **Options** dialog box in this step are not applied to function grids based on the Smart Slice (as described in Creating Reports with Smart Slices). Instead, the options specified by Oracle Smart View for Office users in the **Options** dialog box are applied to function grids.

> **Note**
>
> Smart View does not support number formatting of Function Grids imported from Smart Slices.

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Query Designer and MDX Queries

Related Topics

- Working with Query Designer
  Use the Oracle Smart View for Office Query Designer to design the layout of a report.
- Working with MDX Queries
  Create and manage MDX query commands using the Manage and Execute Queries dialog box.

Working with Query Designer

Use the Oracle Smart View for Office Query Designer to design the layout of a report.

Related Topics

- About the Query Designer
- Creating Queries
- Editing Queries and Rerunning Reports
- Filtering Data
- Analyzing Time-Related Data in Query Designer

About the Query Designer

Data source types: Oracle Essbase, Planning, Financial Consolidation and Close

The Query Designer is an Oracle Smart View for Office tool from which you can design the layout of a report by selecting dimensions, members, and attributes for rows, columns, and the POV from one interface. You can use the Query Designer to create a query from a blank connected worksheet, which uses the default report as a starting point, or extract a query from a saved report. The Query Designer is available only for ad hoc worksheets.

Creating Queries

Data source types: Oracle Essbase, Planning, Financial Consolidation and Close

To create a query report:

1. Open a worksheet or an existing report in Excel and connect to a data source.

   > **Note**
   >
   > Workbooks can contain Query Designer worksheets from multiple data sources. However, only one data source can be associated with each worksheet.

2. From the data source ribbon, select **Query**, then **Query Designer**.

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The Query Designer and a query worksheet named "*Sheetname* - Query" (for example, Sheet1 – Query) are displayed. You design your query on this worksheet.

The following operations are disabled on the query sheet, but are re-enabled after you run the report:

- Formulas
- Asymmetric reports
- Comments
- Blank rows or columns
- Changes to alias tables
- Ad hoc actions such as zoom in and out, keep and remove only, and double-click

The following operations are unavailable in both query sheet and report sheet:

- Filtering of column members
- Changing data sources

If you are working with a duplicate member database, qualified member names are displayed on the query sheet, but only the member names are displayed after you run the report.

3. Use any of the following operations to design your query:
   - To select members for the **Rows** and **Columns** dimensions displayed on the Query Designer, click the dimension name to open the Member Selection dialog box.
   - To select members for **POV** dimensions displayed on the Query Designer, click the arrow next to the dimension name and select the ellipsis to open the Member Selection dialog box.
   - To move a dimension from the **POV** to the grid, drag and drop it from the **POV** section to the **Columns** or **Rows** section in the Query Designer.
   - To remove a dimension from the grid, drag and drop the dimension from the Columns or Rows section to the POV section in the Query Designer.
   - To add or remove an attribute dimension, select a dimension from the Attributes drop-down menu and drag and drop to the **Rows** or **Columns** section of the Query Designer.
   - Enter members directly into the grid.

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> **Note**
>
> When working with databases that support duplicate member names, avoid using member names containing periods. Oracle Smart View for Office detects periods (.) as delimiters in Query Designer, resulting in an unknown member error. If the dimension or member names in your query contain a period, the member will be interpreted as two members, parent and child. For example, the member:
>
> abcd.wxyz
>
> would be interpreted as:
>
> abcd
> wxyz

4. From the Query Designer, click **Apply Query**. The resulting report is displayed in a new report sheet called "*Sheetname* - Report" (for example, Sheet1 – Report). Operations temporarily disabled in step 2 are re-enabled.

   The report sheet replaces the query sheet, but you can retrieve the query sheet by repeating step 2.

5. To save the report, save as an Excel .xls or .xlsx file.

> **Note**
>
> In Oracle Essbase, .xls or .xlsx files can be used as a data load data source.

> **Note**
>
> The Query Designer is not designed to work with Smart Slices.

Editing Queries and Rerunning Reports

Rerunning queries regenerates the report; any changes to the original report, such as zooming, comments, and formulas are lost. Formatting is also lost.

You can refresh reports, but this only refreshes the data. It does not rerun the report.

To edit a query and rerun a report:

1. Open the Query Designer query sheet to edit. If the query sheet is hidden, from the data source ribbon, select **Query** and then **Query Designer**.
2. Edit the query.
3. Select **Query** then **Run the Report**.

   The report is updated.

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Filtering Data

Data source types: Oracle Essbase

Filtering data limits the amount of data returned to a specified top or bottom criterion. Top or bottom ranking enables you to view, for example, the top 10 products in sales for a given region.

To filter data:

1. In the Query Designer report worksheet, select a dimension.
2. From the Oracle Essbase ribbon, select **Query** and then **Data Filter**.
3. From **Data Filter**, under **Count**, select **Top** or **Bottom** and specify a number.
4. Under **Set**, click .
5. From **Member Selection**, select a row member for ranking, and click **OK** to return to **Data Filter**.
6. Under **Value**, click
7. From **Member Selection**, select a column member to run the ranking against, and click **OK** to return to the **Data Filter** dialog box.
8. Click **OK**.

   An MDX query in the form TopCount({ [Qtr3] }, 10, [Measures].[Profit]), that represents your data filtering settings is inserted into the grid. The example returns the top 10 most profitable products in quarter 3.
9. Click **Apply Query** to display query results.

Analyzing Time-Related Data in Query Designer

Data source types: Oracle Essbase

Filtering data limits the amount of data returned to a specified top or bottom criterion. Top or bottom ranking enables you to view, for example, the top 10 products in sales for a given region.

Using Oracle Smart View for Office, you can analyze flash metrics such as sales of cost of goods sold against time-based metrics. This enables you to look for trends, find averages for different time periods, and so forth. To do this, you use linked attributes which enable periodicity of members. Periodicity is a shared pattern among time dimension members that make them meaningful for time-based analysis (January and April share periodicity as first months of quarters, for example). Day by month, day by week, and week by year are examples of linked attributes. You can also set ranges for linked attributes and apply filters.

To analyze time-related data in Query Designer:

1. Create a query.
2. From the Query Designer toolbar, select **Date-Time** dimension and drag it to the grid or within the toolbar.
3. Click **Date-Time** in the Query Designer toolbar to open **Member Selection**, where you can select members and apply Period, Range, and other filters.

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4. Under **Attributes** on the Query Designer toolbar, select an attribute or linked attribute in the drop-down menu, then drag it to the grid or within the toolbar. Repeat as necessary for other attributes.
5. To select members and apply filters to an attribute, click the attribute name on the Query Designer toolbar to open **Member Selection**.
6. Click on the POV toolbar.

Working with MDX Queries

Create and manage MDX query commands using the Manage and Execute Queries dialog box.

Related Topics

- About Working with MDX Queries
- Creating and Saving an MDX Query
- Executing MDX Queries
- Modifying Query Connection Information
- Changing the Query List Display
- Deleting MDX Queries

About Working with MDX Queries

Data source types: Oracle Essbase

MDX users can bypass the Query Designer interface and create and manage MDX query commands using the **Manage and Execute Queries** dialog box.

In **Manage and Execute Queries**, you can perform the following tasks:

- Create a query
- Modify an existing query
- Save a query
- Modify a query's connection information
- Delete a query
- Execute a query

  You can execute one MDX statement per query.

  To execute multiple MDX queries at once, Essbase must create an MDX script, described in the *Oracle Essbase Technical Reference*. Oracle Smart View for Office users then run the script from the **Calculation Scripts** dialog, as described in Running Essbase Calculations.

Creating and Saving an MDX Query

You can create an MDX query in the **Manage and Execute Queries** dialog box.

See the Oracle Essbase documentation for information on MDX syntax.

To create an MDX query:

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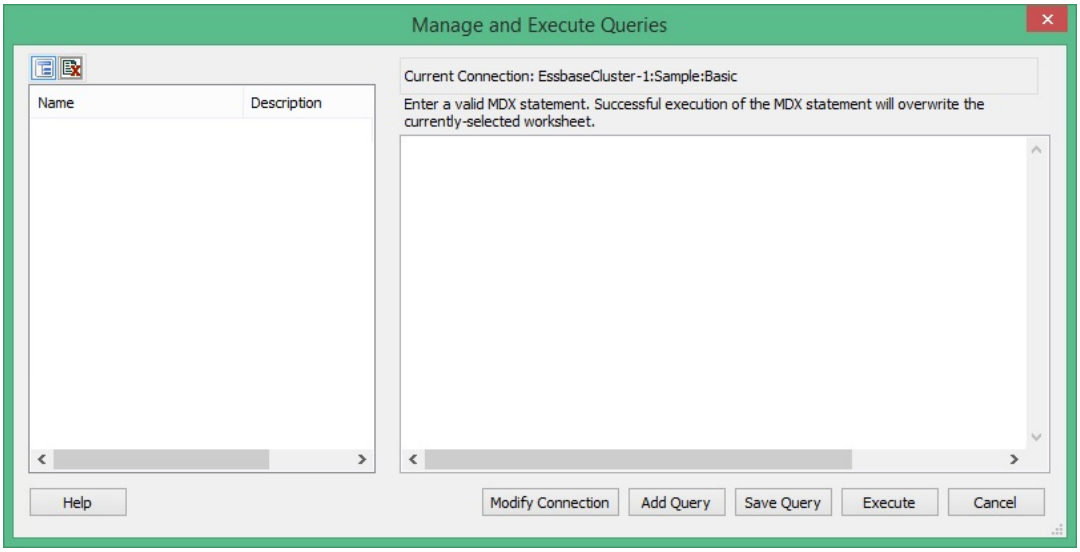
1. In Excel, connect to an Essbase data source.
2. From the Essbase ribbon, select **Manage and Execute Queries** to display the **Manage and Execute Queries** dialog box.

Figure 22-1 Manage and Execute Queries Dialog Box

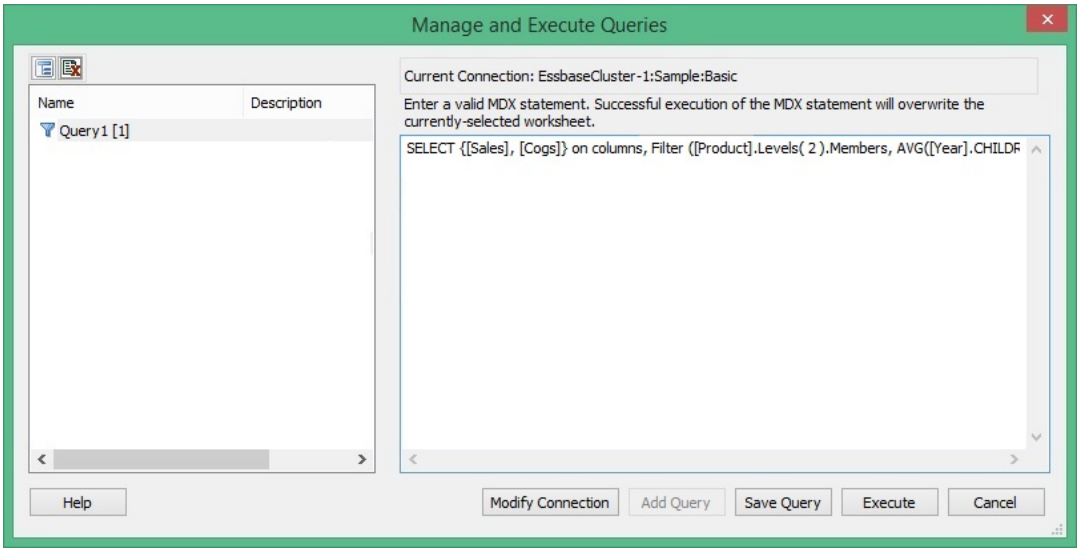


3. Click **Add Query** and type a valid MDX statement in the text box at the right.

   For example:

   SELECT {[Sales], [Cogs]} on columns, Filter ([Product].Levels(2).Members, AVG([Year].CHILDREN, 9001.0) > 9000.00) on rows

Figure 22-2 MDX Query Syntax Entered in the Manage and Execute Queries Dialog Box



4. Click the **Save Query** button and, in the **Save Query** dialog box, enter a name and optional description for the query.

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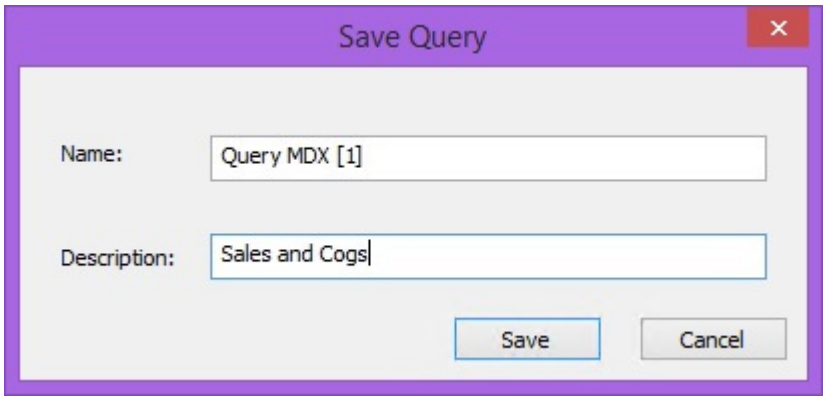
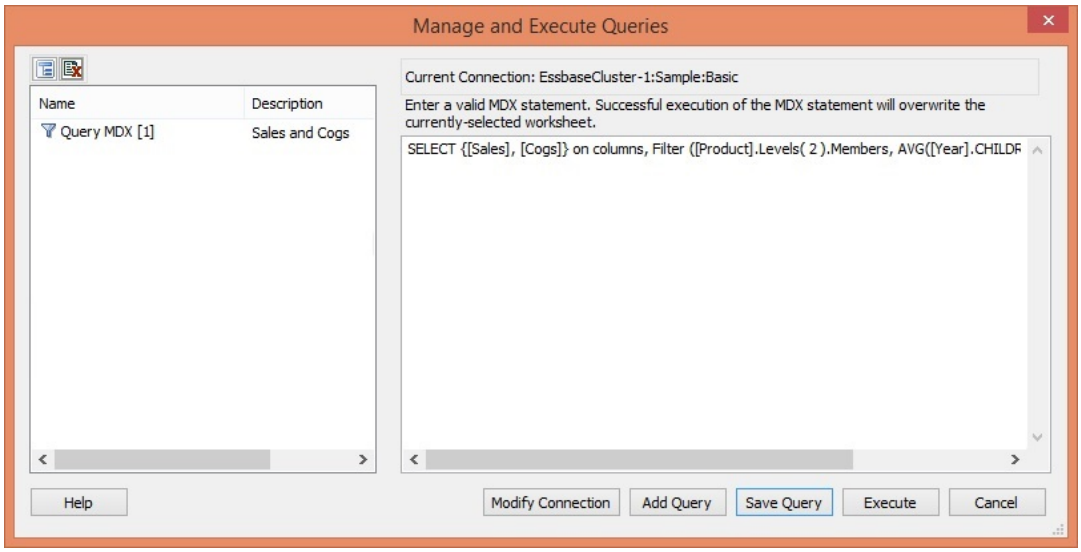
The default name for queries is Query1 [*n*]. You can change this name.



5. Click **Save** to save the query.

   The newly-saved query is now listed in the left text box of the **Manage and Execute Queries** dialog box.

Figure 22-3 Newly-Saved MDX Query Listed in the Manage and Execute Queries Dialog Box



You may continue by executing this query or modifying the syntax or connection information.

Executing MDX Queries

You can execute saved MDX queries or instantly execute a query you have just entered.

To execute an MDX query:

1. In Excel, connect to an Oracle Essbase data source.
2. From the Essbase ribbon, select **Manage and Execute Queries** to display the **Manage and Execute Queries** dialog box.

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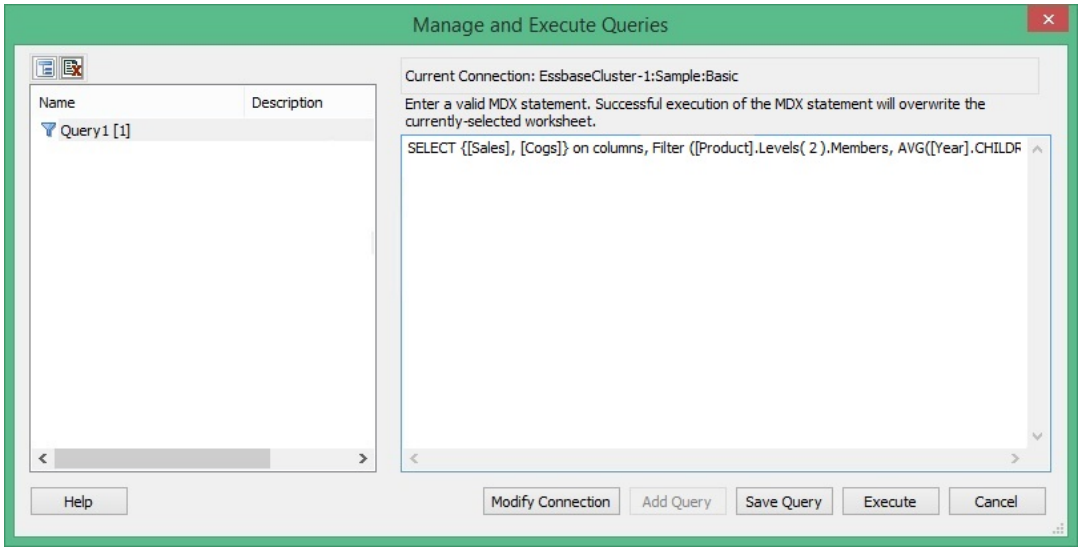
Figure 22-4 Manage and Execute Queries Dialog Box



3. Perform an action:
   - To execute a saved MDX query, select the query from the list in the left frame and click **Execute**.
   - To execute an MDX query dynamically, click **Add Query**, type the MDX query in the text box at the right, and click **Execute**.

     The query you enter dynamically will not be saved.

   The dialog box closes automatically and the query results appear on the sheet.

> **Note**
>
> When executing an MDX query with a calculated member (WITH MEMBER...) in Excel, the calculated values appear successfully, but, if the grid is refreshed, then the column is converted to a comment column and all calculated values are lost. This occurs whether you are using the **Execute MDX** command in the **Essbase** ribbon, or the VBA function, HypMDXExecute.

Modifying Query Connection Information

You can modify the connection information associated with a given query to connect it to a different application and database.

To modify query connection information:

1. In Excel, connect to an Oracle Essbase data source.
2. From the Essbase ribbon, select **Manage and Execute Queries**
3. In the **Manage and Execute Queries** dialog box, click **Modify Connection**.
4. In the **Edit Connection - URL** page, edit the URL as required, and then click **Next**.

   Optionally, select the **Set as default connection** check box, and then click **Next**.
5. In the **Edit Connection - Application/Cube** page, and navigate the tree to the new application and cube, select it, and then click **Finish**.

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Alternatively, select the **Advanced Setup** check box and manually enter the new connection information in the **Server**, **Application**, and **Cube/Database** text boxes, and then click **Finish**.

Changing the Query List Display

Use the **Change View** button to change how queries are listed in the in the left pane of the **Manage and Execute Queries** dialog box.

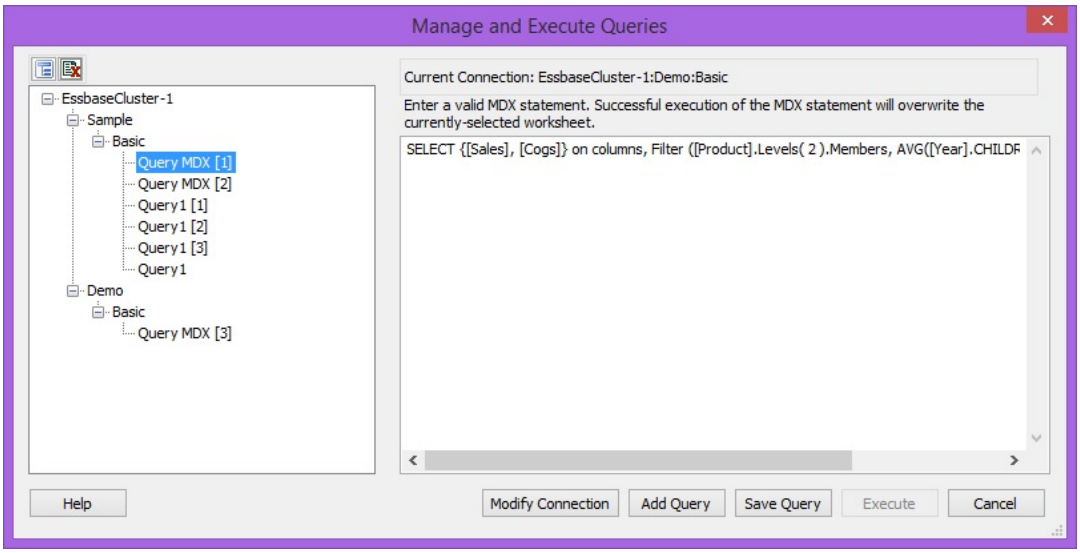
The query list display can be toggled from a flat alphabetical list of all queries associated with the connection, to a tree view where queries are listed by their associated applications and database.

To change the query list display:

1. In Excel, connect to an Oracle Essbase data source.
2. From the Essbase ribbon, select **Manage and Execute Queries**
3. In the **Manage and Execute Queries** dialog box, click the **Change View** button, .

   The default display is a flat alphabetical list. Clicking changes the query list to a tree view, where queries are listed by their associated applications and databases, as shown in Changing the Query List Display

Figure 22-5 Queries Listed in Tree Format by Application and Database



4. **Optional:** Click again to toggle the view back to an alphabetical list.

Deleting MDX Queries

You can delete MDX queries from the list in the **Manage and Execute Queries** dialog box.

To delete an MDX query:

1. In Excel, connect to an Oracle Essbase data source.
2. From the Essbase ribbon, select **Manage and Execute Queries**

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3. From the list in the left frame of the **Manage and Execute Queries** dialog box, select a query to delete.
4. Click the **Delete Query** button .
5. Click **Yes** at the prompt to confirm the delete request.
6. Click the **X** in the upper right corner or click **Cancel** to close the dialog.

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23

Smart View and Cloud EPM

Related Topics

- About Smart View and Cloud EPM
  Oracle Smart View for Office supports several Oracle Fusion Cloud Enterprise Performance Management features.
- Viewing Member Formula
  You can view the underlying formula in cells that contain a formula.
- Viewing Localized Artifact Labels
  You can view localized labels and descriptions set in the web application for artifacts such as cubes, forms, folders, task lists, and so on, in Oracle Smart View for Office.
- Working with Business Rules
  In forms and ad hoc grids, you can use business rules to calculate data in the database.
- Working with Supporting Details
  Supporting details serve as a built-in calculator for developing data that is not in the member outline.
- Spreading Data
  You can spread data for time periods, spread values using grid spread, and spread values using mass allocation.
- Performing Calculations Without Having to Submit Your Changes (Calc on the Fly)
  You can perform quick calculations on the fly, without having to save or submit the changes to see the results.
- Accessing Ancestor Members in Ad Hoc Grids
  In ad hoc grids and **Member Selection**, Smart View users can access ancestor members, including shared members, to which they otherwise would not have access, when the Service Administrator configures the application setting, **Default Ancestor Access**.
- Managing Planning Approvals
  Planning approvals is the submission, review, and approval process of a planning unit.
- Monitoring Job Status
  Use the Job Console to monitor the execution status of jobs in Oracle Fusion Cloud Enterprise Performance Management and delete them if needed.
- Dashboards
  Dashboards give you an overview to key information and let you change and save data.
- Opening Composite Forms
  You can open Oracle Fusion Cloud Enterprise Performance Management composite forms in Oracle Smart View for Office.
- Copying Versions
  Service Administrators can copy data from one bottom-up or target version of a selected scenario to another bottom-up or target version within the same scenario.
- Searching for a Page in Cloud EPM Forms
  If an administrator sets up multiple page dimensions for a form, select the page with the required data from the page drop-down menu.

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- Displaying Formatting in Forms
  Smart View users can save and display native Excel formatting back to the Cloud EPM business process as part of a form. Additionally, form designers can specify formatting rules, which Smart View users can display when working with Forms 2.0.
- Working with Multiple-Grid Worksheets in Cloud EPM
  In Oracle Smart View for Office, you can retrieve multiple ad hoc grids on one worksheet. The grids can all be connected to the same data source, or each grid can be connected to a different data source.
- Setting User Preferences
  You can set user preferences for an application.
- Smart View Behavior Options in Cloud EPM
  Your administrator can set options in the web interface that affect Oracle Smart View for Office behavior.

About Smart View and Cloud EPM

Oracle Smart View for Office supports several Oracle Fusion Cloud Enterprise Performance Management features.

Cloud EPM includes the following data sources:

- Planning
- Planning Modules
- Enterprise Profitability and Cost Management
- Financial Consolidation and Close
- FreeForm
- Tax Reporting

This guide provides information about the Cloud EPM features that Smart View supports. For detailed information on the above Cloud EPM data sources, see the documentation and videos available on the Oracle Help Center.

Viewing Member Formula

You can view the underlying formula in cells that contain a formula.

Such cells can be indicated on the grid by a cell style specified in the Oracle Smart View for Office **Options** dialog box, **Cell Styles** tab.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

> **Note**
>
> In the Oracle Fusion Cloud Enterprise Performance Management web interface, the **Member Formulas** property must be enabled in the form before you can view formulas in Smart View. Users with the proper permissions should open the form for editing in the web, go to the **Layout** tab, then **Dimension Properties**, and then select **Member Formula**.

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To view a member formula:

1. Open a form.
2. Select the member whose formula you want to view.
3. From the provider ribbon, select **More**, and then **Member Formula**.

   Details of the formula are displayed.

> **Note**
>
> When a formula is used to reference a member on another sheet, no data is returned. For example, if the period is in the column on another sheet, and all other sheets reference that cell, no data is refreshed on the other sheets. In order to display the data that references a member on another sheet, the Excel cell format for the member formula cell should be set to "General."

Viewing Localized Artifact Labels

You can view localized labels and descriptions set in the web application for artifacts such as cubes, forms, folders, task lists, and so on, in Oracle Smart View for Office.

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

Artifacts labels include various properties such as name, description, or instructions that can be customized and set in different languages that users work in to provide them with meaningful information. For example, the artifact label of a form named "turnover" in English can be set to "chiffre d'affaires" for French language users.

For each artifact, you can add artifact labels in different languages in the Oracle Fusion Cloud Enterprise Performance Management web application. If no artifact label is defined for an artifact, then the default label is displayed. For more information, see Adding Languages and Defining Localized Artifact Labels.

> **Note**
>
> Viewing artifact labels in Smart View requires Cloud EPM update 24.04 or later.

The artifact labels supported in the web application are listed in Which Artifact Labels Can be Localized?. In Smart View, artifact labels are supported for the following artifacts:

- Business Rules
- Cubes
- Dashboards
- Documents
- Folders
- Forms
- Prompts
- Reports

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- Smart Lists
- Tasks and Task Lists
- Templates
- User Variables

Once added, you can see the localized artifacts labels in multiple places within Smart View such as the tree view in Smart View Home panel, the POV toolbar and POV Manager, the Sheet Information dialog, the list of search results, the right-click menus and menu items, and the Recently Used list.

The localized artifact labels in Smart View are displayed based on the language set in the **Advanced** tab of Smart View **Options**.

> **Note**
>
> Users working in different languages on a saved workbook may see artifact labels for Smart List values in a different language than what is selected in their Smart View language settings. For example, a user saves a form with Smart List artifact labels in Spanish in a workbook. If this saved workbook is opened by another user who has set the Smart View language as English, the user will continue to see the Smart list values in Spanish, instead of English. This happens because when a workbook containing forms or ad hoc grids with Smart List is saved, the list is not updated unless it has been updated or modified in the server. In such cases, users must open such forms or ad hoc grids in a new workbook to see the Smart List artifact labels in their selected language.

Working with Business Rules

In forms and ad hoc grids, you can use business rules to calculate data in the database.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, FreeForm, Tax Reporting

Some business rules prompt you to enter information, called a *runtime prompt*. Others, called *template-based business rules*, prompt you to enter parameter information using a guided wizard.

Video

Your Goal	Watch This Video
Learn about using basic Oracle Smart View for Office functionality related to Planning, including a brief discussion of business rules.	Entering and Saving Plan Data in Smart View with Oracle Planning and Budgeting Cloud

Related Topics:

Launching Business Rules in Excel

Entering Runtime Prompts

Executing the Calculate Form and Calculate Currencies Business Rules

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Launching Business Rules in Excel

Data source types: Planning, Financial Consolidation and Close, Tax Reporting

To launch a business rule in Excel:

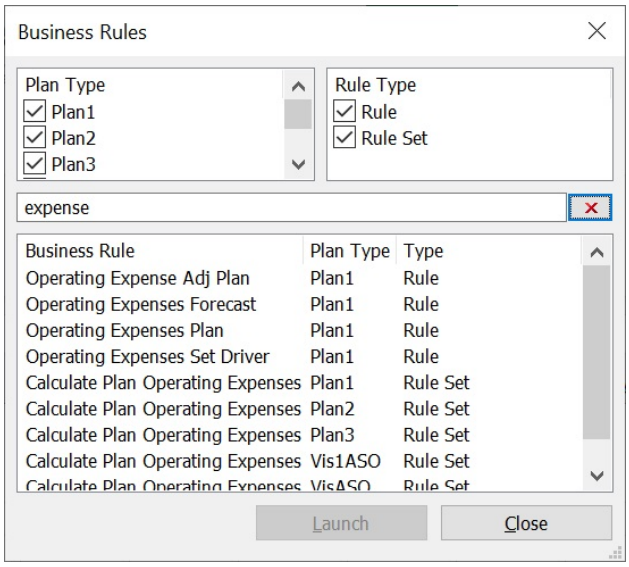
1. Open an ad hoc grid or form (single or composite).
2. Save any unsaved data.

   Unsaved data is lost when you launch a business rule.
3. From the provider ribbon, select **Calculate**, and then **Business Rules**.
4. **Optional:** Use the check boxes under **Plan Type** and **Rule Type** to filter rules by cube and rule type.

   All cubes and rule type options are selected by default. To narrow the search, clear the check boxes for cubes and rule types that you do not need to see. The list is filtered according to your selections. For example, selecting only Plan1 and all Rule Types, we would see business rules of all types that apply to only the Plan1 cube.
5. **Optional:** Use the Search field, under **Plan Type** and **Rule Type**, to search for rules by name or by part of a name.

   Type your search criteria in the Search field, and then press **Enter** or click the **Search** button, , at the right of the Search field.

   For example, you may search for all rules and rule sets that contain the string expense. After pressing **Enter** or clicking , the results list shows all business rules or rule sets that contain "Expense" anywhere within the name: beginning, middle, or end.



> **Note**
>
> You can use the check boxes described in the previous step to filter the results even further.

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To clear the search and restore all business rules and rule sets, click .

The Search field is available in Smart View 23.200+.

6. From **Business Rules**, under **Plan Type**, select the cube associated with the rule you want to use.
7. Select a rule from the rules listed for that cube, and then click **Launch**.

> **Note**
>
> - For business rules that include runtime prompts, enter the information described in Entering Runtime Prompts.
> - For template-based business rules, you define rule parameters using a guided wizard.
> - **Planning only:** Starting in Planning 20.03, users can add dynamic members, also known as "members on-the-fly," from Oracle Smart View for Office. To add dynamic members, manually type the new member name in the **Runtime Prompts** text box, and then click **Launch**.

If the calculation is successful, the values in the database reflect the results of the calculation.

> **Tip**
>
> Administrators: During form design in Planning, rules with runtime prompts directly attached to a composite form with **Run on Save** enabled are not supported in Smart View. You should always attach rules to a simple form, enable **Run on Save**, then attach the business rules from the simple to the composite form. This way, all runtime prompt values are picked up correctly from the form context and the business rules launch successfully.

8. Click **Close**.
9. From the Smart View ribbon, select **Refresh**.

Related Topics:

Entering Runtime Prompts

Executing the Calculate Form and Calculate Currencies Business Rules

Entering Runtime Prompts

Data source types: Planning

If you are unfamiliar with Planning, see the Planning documentation and videos available on the Oracle Help Center.

When launched, a business rule can prompt you to enter variable information, called a *runtime prompt*. The business rule designer sets up runtime prompts.

To enter a runtime prompt:

1. Launch a business rule having a runtime prompt.

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2. Enter or select the input type specified by the runtime prompt, summarized in the following table:

Table 23-1 Runtime Prompts and Expected Input

Icon	Expected Input Type
	One member selection To add dynamic members, manually type the new member name in the **Runtime Prompts** text box, and then click **Launch**.
	Multiple member selections
	Numeric value (either entered or selected from cell drop-down menu)
	Text value—Use only with enhanced calculation scripts, not with graphical scripts
	Dimension from the database—Use only with enhanced calculation scripts, not with graphical scripts
	For Calculation Manager business rules only: A member or member combination that includes only one member from each dimension the designer has set for this runtime prompt (for example: Sales -> Actual -> Jan refers to the member intersection of Sales, Actual, and January)
	For Calculation Manager business rules only: A range of members, selectable from each dimension the designer has set for this runtime prompt (for example: IDescendants("Marketing"),FY08)

Ensure that the runtime prompts are valid. You cannot launch a business rule until all runtime prompt values are valid.

3. Click **Launch**.

If the calculation is successful, the values in the database reflect the calculation results.

Related Topics:

Launching Business Rules in Excel

Executing the Calculate Form and Calculate Currencies Business Rules

Executing the Calculate Form and Calculate Currencies Business Rules

Data source types: Planning

The Calculate Form business rule is created for each form to calculate subtotals. The Calculate Currencies business rule is created for forms that include multiple currencies in a row, column, or page to enable the conversion of values among available currencies.

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The order in which business rules are launched is important and may affect the data. If you plan to launch both Calculate Form and the Calculate Currencies business rules, always run the conversions before subtotaling the form.

To launch the Calculate Form and Calculate Currencies business rules in Excel:

1. Open a form.

   Any data that is not saved on the spreadsheet is lost when you launch the business rule.
2. From the Planning ribbon, select **Calculate**, and then **Rules on Form**.

   The business rules associated with the form are displayed in the Business Rules dialog box.
3. Complete one or both of the following actions:
   - To convert currencies, select **Calculate Currencies**
   - To calculate subtotals, select **Calculate Form**
4. Click **Launch**.

   If the calculation is successful, the values in the database reflect the results of the calculation.

Related Topics:

Launching Business Rules in Excel

Entering Runtime Prompts

Running Groovy Rules in Forms

Data source types: Planning, Planning Modules, Financial Consolidation and Close, FreeForm, Tax Reporting

Forms with Groovy rules associated with them can be opened in Oracle Smart View for Office for further exploration. You can select any number of contiguous or non-contiguous cells on the form, right-click to access theSmart View context menu, and then select the Groovy rule to run on the selected cells.

> **Note**
>
> - As a prerequisite, the form must have Groovy rules attached in order receive the information of cells selected in Smart View. To associate Groovy rules with a form, create the Groovy rule, and in the form definition, in the **Business Rules** tab, add a Groovy business rule to **Selected Business Rules**.
> - This feature requires Oracle Fusion Cloud Enterprise Performance Management 22.10 or later.

When running Groovy business rules from the right-click context menu in a form, the selected cells are available in the Groovy rule using the isSelected() method on the grid cells. The information about the selected cells is included when the Groovy rule is invoked as part of the right-click menu. This enhancement also helps Groovy rule designers to access and use the information of selected cells in the Groovy logic.

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> **Note**
>
> - The ability to select cells and use their information for processing Groovy rules is available forms opened in Smart View.
> - This ability is not available when Groovy business rules are launched and run from the Business Rules dialog opened from the Smart View ribbon.
> - Any Groovy rule attached to the form can utilize information from the selected cells.

To run a Groovy rule in a Smart View form:

1. Open a form with an associated Groovy rule.
2. Select the cells on which to run the Groovy rule.
3. Right-click the cells and, in the context menu, select **Smart View**, and then select the Groovy rule to run.

   After the rule is processed successfully, note the updated values in the selected cells.

Working with Supporting Details

Supporting details serve as a built-in calculator for developing data that is not in the member outline.

It can include text, values, and operators that define how data aggregates.

Data source types: Planning, Enterprise Profitability and Cost Management, FreeForm

Related Topics:

Adding Supporting Details

Working with the Supporting Details Hierarchy

Viewing or Changing Supporting Details

Synchronizing Supporting Details with the Cube

Adding Supporting Details

Data source types: Planning, Enterprise Profitability and Cost Management, FreeForm

Use the **Supporting Details** dialog to set how detail items aggregate to cell values in a form.

> **Note**
>
> Forms 2.0 does not allow adding supporting details to formula cells or to a range of selected cells if it contains a formula cell.

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Video

Your Goal	Watch This Video
Learn about using basic Oracle Smart View for Office functionality related to Planning, including adding supporting details.	Entering and Saving Plan Data in Smart View with Oracle Planning and Budgeting Cloud

To add supporting details that calculates values in a form or ad hoc grid:

1. Open a form, and then select the cells.

   You can select one cell or a range of contiguous cells in a row or column. The selection cannot include a combination of rows and columns. Select cells that are in the local currency so that you can write to them.

2. From the provider ribbon or provider ad hoc ribbon, select **Cell Actions** and then **Supporting Details**.

   The **Supporting Details** dialog reflects your cell selection.

3. Enter a description over the initial "untitled" text.

   The text and its associated operator must be unique among children of the same parent. By default, you can enter up to 1,500 characters.

4. Use the buttons to create or change the indented hierarchy to reflect the desired structure and calculations.

   For example, click **Add Child** to add a line item directly below the selected item.

5. Set the mathematical relationships among the line items by selecting an operator for each of them.

   Select from these operators:

Operator	Function
+	Add
-	Subtract
*	Multiple
/	Divide
~	Ignore

6. Enter data to set or calculate.

   Enter numbers using the same scaling that was set up for the form.

7. Click **Submit**.

   Values are dynamically calculated and aggregated before the data is submitted. Data on the form is also submitted.

Working with the Supporting Details Hierarchy

Data source types: Planning, Enterprise Profitability and Cost Management, FreeForm

The supporting details hierarchy should reflect the type of information that supports the cell values and the mathematical operators that create the relationships.

To create or change the supporting details hierarchy:

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1. In a form, select the cells with supporting detail.
2. From the provider ribbon or provider ad hoc ribbon, select **Supporting Details**.
3. Create or change the rows in the hierarchy that provide the detail for the data values by putting the cursor on an item and clicking the options in this table:

Table 23-2 Supporting Details options and their results

Option	Result
Add Child	Adds an item one level below the selected cell. You can add an unlimited number of children, but consider its potential performance impact.
Add Sibling	Adds an item at the same level as the selected cell. You can add an unlimited number of siblings, but consider its potential performance impact.
Delete	Removes the selected item
Delete All	Simultaneously removes all supporting details
Promote	Moves the selected item to the next-higher level
Demote	Moves the selected item to the next-lower level
Move Up	Moves the selected item to before its sibling predecessor
Move Down	Moves the selected item to after its sibling successor
Duplicate Row	Adds a row below the selected item, duplicating its structure (text, operator, and values)
Fill	For rows, copies the data from the current cell to the cells to its right
Refresh	Gets the latest stored database values, restoring the previously saved values, and possibly overwriting changes you just made.

4. Click **Submit**.

   The submit operation stores the detail text, values, and aggregate values.

Viewing or Changing Supporting Details

Data source types: Planning, Enterprise Profitability and Cost Management, FreeForm

Cells that contain supporting details can be indicated on the grid by a cell style specified in the Options dialog box.

To view or change calculations or supporting data:

1. Open a form, and select the cells for which to view or add detail.

   You can select one cell or a range of contiguous cells in a row or column. The section cannot include a combination of rows and columns. Select cells that are in the local currency so that you can write to them.
2. From the provider ribbon or provider ad hoc ribbon, select **Supporting Details**.
3. View or change the line items or calculations that aggregate the data in the selected cells.

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Synchronizing Supporting Details with the Cube

Data source types: Planning

In Oracle Fusion Cloud Enterprise Performance Management applications, when you delete supporting details for a cell, you affect the associated value in the relational database. You specify how to handle the stored database value. You can set it to #Missing or leave it as it was before the supporting details was deleted. This feature is useful if you want to use supporting details as a scratch pad or calculator.

To synchronize supporting details with the database:

1. Open a form.
2. In the form, click the cell that has the supporting details you want to remove.
3. From the provider ribbon or provider Ad Hoc ribbon, select **Supporting Details**.
4. In the **Supporting Details** window, delete the information, and then click **OK**.
5. Select an option from the displayed message to specify how to handle the aggregate value of the deleted supporting detail stored in the cube:
   - To delete the value from the cube, click **Yes, set the value(s) to #Missing**.
   - To leave the data value in the cube as is, click **No, leave the value(s) as is**.

Spreading Data

You can spread data for time periods, spread values using grid spread, and spread values using mass allocation.

Data source types: Planning

- Spreading Data for Time Periods
- Spreading Values Using Grid Spread
- Spreading Values Using Mass Allocation

Spreading Data for Time Periods

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

In a form, the spreading rules for time periods are set in the application as part of the as part of the dimension property settings. When you work with a form in Excel, and depending on how the form was set up by the administrator, data values can be spread, or distributed, in several ways:

- Spread the value of a summary time period to its base time periods or to the first parent or first child of the parent time period
- Spread values among children and parents proportionally, based on existing distribution
- Spread values based on the weekly distribution of a quarter, which could be 4-4-5, 5-4-4, 4-5-4, or None (as set up by the budget administrator)
- Temporarily lock the values of certain cells while spreading data over time periods (see Spreading Data with Cell Locking)

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- Spread values for different time periods using a different spreading rule for each separate time period on the same row or column dimension. For example, FY2013 can have formula fill, and FY2014 can have flow.

Notes

- You cannot spread data in a summary time period that includes members with mixed currency types.
- Excel formulas in child cells are ignored during spreading.

To spread data for time periods:

1. Open a form.
2. Select a cell and enter a new value.

   The value is distributed according to the rules described in "Adjusting and Spreading Data" in the *Working with Planning*
3. Click **Submit** to save the new values.

Related Topics:

Spreading Data with Cell Locking

Spreading Values Using Grid Spread

Spreading Values Using Mass Allocation

Spreading Data with Cell Locking

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

When spreading data over time periods, you can temporarily lock the values of one or more cells to preserve their values when other values are recalculated. You can spread data across time periods based on various calculations and visually review the changes before committing them to the database. For examples of spreading with cell locking, see the *Working with Planning*.

To temporarily lock values:

1. Open a form.
2. In the form, select the cell or group of cells that you want to lock.
3. From the provider ribbon, select **Lock**.

   A color change indicates that a cell is locked. You can now spread or manipulate data in the other cells however you want, without affecting the locked cells.
4. To unlock a cell, refresh the grid.

Related Topics:

Spreading Values Using Grid Spread

Spreading Values Using Mass Allocation

Spreading Values Using Grid Spread

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

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If your administrator has enabled Grid Spread, you can specify an amount or percentage to increase or decrease values across multiple dimensions on the grid, based on the existing values in the target cells. When calculating the spread data, read-only and locked cells and cells having supporting detail are ignored. Data integrity is ensured because values can be spread only to cells to which you have access.

To spread values using Grid Spread:

1. Put the cursor in the Subtotal or Total source cell whose value you want to spread to target cells.
2. From the provider ribbon or provider ad hoc ribbon, select **Adjust**, and then **Grid Spread.**
3. From the drop-down menu, select one of these options:
   - **Value** to increase or decrease values by a specified amount
   - **Percentage** to increase or decrease values by a percentage
4. Select **Increase By** or **Decrease By** and enter a value or percentage.
5. In **Spread Value**, enter the actual spread value that you want.

   For example, if the **Current Value** is 100 and you want the spread value to be 125, enter 125 directly in **Spread Value** and do nothing with the **Increase By**/**Decrease By** options or text box in step 4.

   Alternatively, you can enter 25 in **Increase By**, and 125 will be displayed in **Spread Value**.

   > **Note**
   >
   > Entering a value in **Spread Value** has no effect on the **Increase By**/**Decrease By** text box. But when you enter a value in **Increase By**/**Decrease By**, the spread value is reflected in the **Spread Value** text box.

6. Select a spreading pattern:
   - **Proportional Spread** to spread the value proportionally, based on the existing values in the target cells (the default)
   - **Evenly Split** to spread the value evenly among the target cells
   - **Fill** to replace the value in all target cells

   Your administrator can add other spreading patterns.
7. Click **Spread**. The specified value or percentage is spread across the target cells, replacing former values with new ones.
8. To save the new values, click **Save**.

Related Topics:

Spreading Data with Cell Locking

Spreading Values Using Mass Allocation

Spreading Values Using Mass Allocation

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

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Using mass allocation, you can spread data to all descendents of a source cell and across all dimensions. Spreading by mass allocation spreads data to cells not displayed on the grid and does not require that you have access to the target cells.

Mass allocation is available only for forms, which must be enabled for mass allocation by the administrator. You must be provisioned with the Mass Allocate role to use mass allocation.

> **Note**
>
> Mass allocation cannot be undone.

To spread values by mass allocation:

1. Put the cursor in the Total or Subtotal cell whose value you want to spread.
2. From the Planning ribbon, select **Adjust**, and then **Mass Allocate**.
3. Enter a new value in **Spread Value** to replace the current value, or from the drop-down menu, select one of the following options:
   - **Value** to increase or decrease values by a specified amount
   - **Percentage** to increase or decrease values by a percentage
4. Select **Increase By** or **Decrease By** and enter a value or percentage.
5. In **Spread Value**, enter the actual spread value that you want.

   For example, if the **Current Value** is 100 and you want the spread value to be 125, enter 125 directly in **Spread Value** and do nothing with the **Increase By**/**Decrease By** options or text box in step 4.

   Alternatively, you can enter 25 in **Increase By**, and 125 will be displayed in **Spread Value**.

   > **Note**
   >
   > Entering a value in **Spread Value** has no effect on the **Increase By**/**Decrease By** text box. But when you enter a value in **Increase By**/**Decrease By**, the spread value is reflected in the **Spread Value** text box.

6. Select the **Spread Type** for allocating the specified value or percentage across the target cells:
   - **Proportional Spread** to spread the value proportionally, based on the existing values in the target cells (the default)
   - **Evenly Split** to spread the value evenly among the target cells
   - **Fill** to replace the value in all target cells
   - **Relational Spread** to spread into the selected cells based on values that exist in a different source location. Selecting this option displays the currently selected members for each dimension in the **Selected** column.
7. Click **Spread**. The new values are automatically saved.

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Performing Calculations Without Having to Submit Your Changes (Calc on the Fly)

You can perform quick calculations on the fly, without having to save or submit the changes to see the results.

Related Topics

- About Calc on the Fly
  With calc on the fly, you can change data values and see calculated changes instantly, without submitting the updated values.
- Enabling Calc on the Fly
  For ad hoc, service administrators enable calc on the fly in the web application; users enable it in User Preferences. For Forms 2.0, form designers enable calc on the fly in the required forms.
- Performing Calc on the Fly
  You can perform calc on the fly using member formulas during ad hoc analysis and while working on Forms 2.0.
- Viewing Calc on the Fly Formulas
  You can view the member formulas by clicking a data cell containing formulas.
- Supported Functions and Outline Math for Calc on the Fly
  Essbase calculation functions and outline math are supported in the member formulas used for calc on the fly.
- Unsupported Functions and Formulas for Calc on the Fly
  Certain functions and member formulas are not supported for performing calc on the fly.
- Guidelines and Considerations
  Consider the following guidelines while performing calc on the fly on ad hoc grids and Forms 2.0.

About Calc on the Fly

With calc on the fly, you can change data values and see calculated changes instantly, without submitting the updated values.

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

You can perform calc on the fly using member formulas during ad hoc analysis and while working on Forms 2.0 in the web application of your business process as well as in Oracle Smart View for Office. You can enter values or change existing values in the data cells and see the cells with formulas refresh immediately with the calculated values, without actually saving or submitting the changes. You do not need to run any business rules or perform calculation functions to refresh the values in the grids.

With calc on the fly enabled, you can view calculations instantaneously, save calculation time, and make multiple changes to the form or grid, without reloading it every time. When you have completed all your changes and are satisfied with the calculations, you can then submit the changed values to the database. Or you can close without submitting your updated values.

Member formulas are based on Essbase calculation functions. In ad hoc grids, when you insert member formulas, they are fetched from the server, converted into Excel-based formulas, and inserted in the grid in Smart View. In Forms 2.0, the formulas are inserted automatically when

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the **Enable Calc on the Fly** option is enabled for the form. You can view the Essbase formulas and their Excel-converted format as tooltips in both ad hoc grids and Forms 2.0 by clicking the cells with formulas.

Video

Your Goal	Watch This Video
Learn how to perform calc on the fly during ad hoc analysis using member formulas. You can work with calc on the fly either in the web application or with Smart View.	Performing Calc on the Fly with Cloud EPM

Enabling Calc on the Fly

For ad hoc, service administrators enable calc on the fly in the web application; users enable it in User Preferences. For Forms 2.0, form designers enable calc on the fly in the required forms.

Enabling Calc on the Fly for Ad Hoc Grids

Service administrators can enable member formulas for calc on the fly in the web application and users can enable them in users preferences. The member formulas are referred to as "user formulas" in the web application settings. These formulas must be enabled at following levels, so that users can use them for performing calc on the fly.

- **Enable at the application level:** As a service administrator, select the **Yes** option from the **Enable User Formulas in Ad Hoc** list present under **Other Options** in **Settings**. For more information, see:
  - What Application and System Settings Can I Specify? in *Administering Planning*
  - What Application and System Settings Can I Specify? in *Administering FreeForm*
  - Specifying Application Settings in *Administering Financial Consolidation and Close*
  - Specifying Application Settings in *Administering Tax Reporting*
  - Application Settings in *Administering and Working with Enterprise Profitability and Cost Management*
- **Enable at the user preference level:** As a user, select the **Yes** option from the **Enable User Formulas in Ad Hoc** list present under **Display** in **User Preferences**. Note that this user preference setting overrides the application setting set by service administrators. For more information, see:
  - Setting Your Display Preferences in *Working with Planning*
  - Setting Your Display Preferences in *Working with FreeForm*
  - Setting Your Display Preferences in *Working with Financial Consolidation and Close*
  - Setting Your Display Preferences in *Working with Tax Reporting*
  - Display Preferences in *Administering and Working with Enterprise Profitability and Cost Management*

Enabling Calc on the Fly for Forms 2.0

Calc on the fly is available in Forms 2.0 and needs to be enabled in form properties.

- **Enable Forms 2.0:** To work in Forms 2.0, select the **Forms 2.0** option from the **Forms Version** list in **Settings**. For more information, see:

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  - About Forms Versions in *Working with Planning*
  - About Forms Versions in *Working with FreeForm*
  - About Forms Versions in *Working with Financial Consolidation and Close*
  - About Forms Versions in *Working with Tax Reporting*
  - About Forms Versions in *Administering and Working with Enterprise Profitability and Cost Management*
- **Enable Calc on the Fly:** Select the **Enable Calc on the Fly** check box under the **Grid Properties** section in the **Layout** tab of a form. Note that this setting needs to be enabled for each form on which you wish to perform calc on the fly. For more information, see:
  - Setting Form Grid Properties in *Administering Planning*
  - Setting Form Grid Properties in *Administering FreeForm*
  - Setting Form Grid Properties in *Administering Financial Consolidation and Close*
  - Setting Form Grid Properties in *Administering Tax Reporting*

Performing Calc on the Fly

You can perform calc on the fly using member formulas during ad hoc analysis and while working on Forms 2.0.

Related Topics

- Performing Calc on the Fly on Ad Hoc Grids
  While performing ad hoc analysis, you can insert member formulas to get quickly calculated values.
- Performing Calc on the Fly on Forms 2.0
  While working on Forms 2.0, you can change data values to view the calculations quickly in forms containing member formulas.

Performing Calc on the Fly on Ad Hoc Grids

While performing ad hoc analysis, you can insert member formulas to get quickly calculated values.

This topic covers the steps to perform calc on the fly in Oracle Smart View for Office. For information on performing calc on the fly in the web application of your business process, see the following topics:

- Performing Calculations Without Having to Submit Your Changes in *Working with Planning*
- Performing Calculations Without Having to Submit Your Changes in *Working with FreeForm*
- Performing Calculations Without Having to Submit Your Changes in *Working with Financial Consolidation and Close*
- Performing Calculations Without Having to Submit Your Changes in *Working with Tax Reporting*
- Performing Calculations Without Having to Submit Your Changes in *Administering and Working with Enterprise Profitability and Cost Management*

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> **Note**
>
> Before starting with calc on the fly, ensure that it is enabled for ad hoc grids in application settings and user preferences. For more information, see the **Enabling Calc on the Fly for Ad Hoc Grids** section in Enabling Calc on the Fly.

To perform calc on the fly:

1. Connect to your data provider and perform an ad hoc analysis.
2. In the provider ad hoc ribbon, click **Insert Member Formula**.

   The grid is refreshed and green triangle indicators appear on cells containing member formulas.
3. Click the cells with formulas to view the formula in the tooltip, along with the members and mathematical operators involved in the formula.

   For more information, see Viewing Calc on the Fly Formulas.
4. Enter a value or modify an existing value in the data cells that contribute to the formula.

   > **Note**
   >
   > Entering or modifying values manually in cells containing formula is not supported in Smart View. If you do so, the formula gets overwritten with your entered value and you may lose the formula. This is also why formula back spreading does not work in Smart View. As the formula gets deleted on typing in a cell containing formula, it does not update the values of the cells contributing to the formula.
5. Tab out of the modified cells to see the values in the cells with formula refresh immediately, without saving or submitting. The calculations also roll up to parent dimensions of members, if any, and their values are also updated.

   The modified cells become dirty, that is they are indicated with a color change. You can click **Refresh** to return the dirty cells to their original values from the database.
6. Continue to perform calc on the fly and see the calculated values refresh in the cells instantaneously.
7. Once satisfied with the calculations, submit the data by clicking **Submit Data** in the provider ad hoc ribbon.

   Alternatively, you can close the grid without submitting to discard your changes.

Performing Calc on the Fly - Example

Let's take an example to understand how to perform calc on the fly using member formulas on an ad hoc grid.

For this example, let's take a Planning form showing salary calculations for the three months of Q1 and perform ad hoc analysis. The Jan column has data values and you want to fill in the same for Feb and Mar to see the total salary calculations for Q1.

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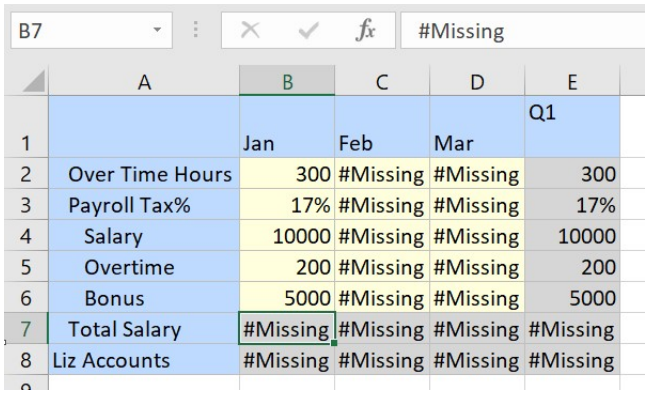
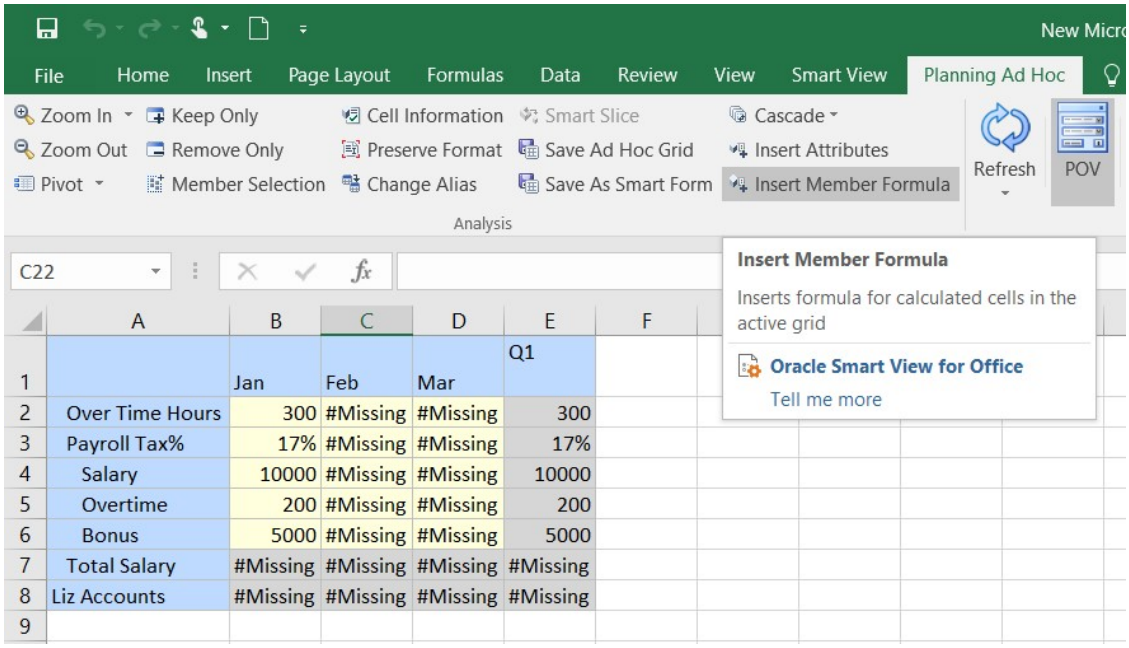
Figure 23-1 Ad hoc grid before inserting member formulas



	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	Over Time Hours	300	#Missing	#Missing	300
3	Payroll Tax%	17%	#Missing	#Missing	17%
4	Salary	10000	#Missing	#Missing	10000
5	Overtime	200	#Missing	#Missing	200
6	Bonus	5000	#Missing	#Missing	5000
7	Total Salary	#Missing	#Missing	#Missing	#Missing
8	Liz Accounts	#Missing	#Missing	#Missing	#Missing

To perform calc on the fly, click **Insert Member Formula** in the Planning Ad Hoc ribbon.

Figure 23-2 Insert Member Formula option in the Planning Ad Hoc ribbon



	A	B	C	D	E	F
1		Jan	Feb	Mar	Q1	
2	Over Time Hours	300	#Missing	#Missing	300	
3	Payroll Tax%	17%	#Missing	#Missing	17%	
4	Salary	10000	#Missing	#Missing	10000	
5	Overtime	200	#Missing	#Missing	200	
6	Bonus	5000	#Missing	#Missing	5000	
7	Total Salary	#Missing	#Missing	#Missing	#Missing	
8	Liz Accounts	#Missing	#Missing	#Missing	#Missing	
9						

The grid is refreshed and the calculated value appears in the **Total Salary** cell for **Jan**. The green triangle indicators also appear on the cells that contain member formulas. You can view the formula in the tooltip and in the formula bar when you click the cells with formulas.

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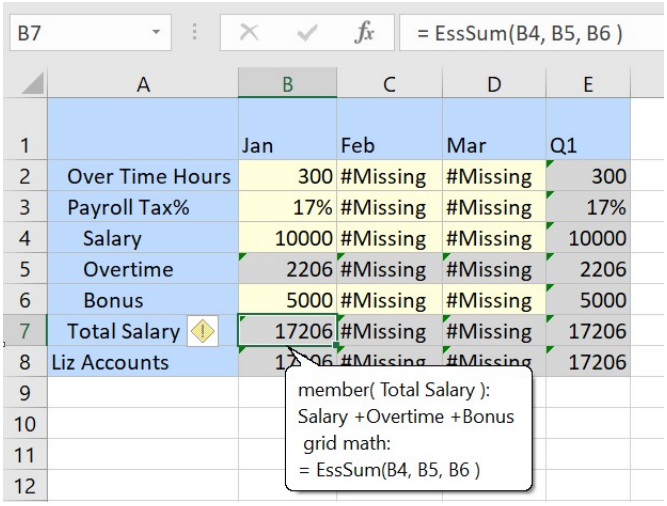
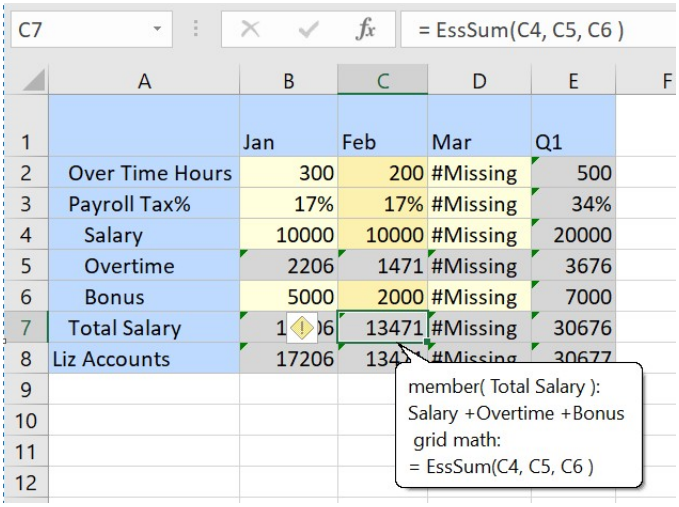
Figure 23-3 Ad hoc grid updated after inserting member formulas



	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	Over Time Hours	300	#Missing	#Missing	300
3	Payroll Tax%	17%	#Missing	#Missing	17%
4	Salary	10000	#Missing	#Missing	10000
5	Overtime	2206	#Missing	#Missing	2206
6	Bonus	5000	#Missing	#Missing	5000
7	Total Salary	17206	#Missing	#Missing	17206
8	Liz Accounts				17206
9					
10					
11					
12					

Now, enter some values in the **Feb** column for the **Over Time Hours**, **Payroll Tax%**, **Salary**, and **Bonus** cells. As soon as you tab out of these cells, the calculated value appears in the **Total Salary** cell for Feb. The calculations also roll up to the parent dimensions and you can see the updated totals in the **Q1** column.

Figure 23-4 Changing values after inserting member formulas



	A	B	C	D	E	F
1		Jan	Feb	Mar	Q1	
2	Over Time Hours	300	200	#Missing	500	
3	Payroll Tax%	17%	17%	#Missing	34%	
4	Salary	10000	10000	#Missing	20000	
5	Overtime	2206	1471	#Missing	3676	
6	Bonus	5000	2000	#Missing	7000	
7	Total Salary	1)6	13471	#Missing	30676	
8	Liz Accounts	17206	134	#Missing	30677	
9						
10						
11						
12						

You can continue adding and modifying values in the grid to perform calc on the fly, without having to wait to save or submit the data or run business rules to fetch the calculations.

Performing Calc on the Fly on Forms 2.0

While working on Forms 2.0, you can change data values to view the calculations quickly in forms containing member formulas.

This topic covers the steps to perform calc on the fly in Oracle Smart View for Office. For information on performing calc on the fly in the web application of your business process, see the following topics:

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- Performing Calculations Without Having to Submit Your Changes in *Working with Planning*
- Performing Calculations Without Having to Submit Your Changes in *Working with FreeForm*
- Performing Calculations Without Having to Submit Your Changes in *Working with Financial Consolidation and Close*
- Performing Calculations Without Having to Submit Your Changes in *Working with Tax Reporting*
- Performing Calculations Without Having to Submit Your Changes in *Administering and Working with Enterprise Profitability and Cost Management*

> **Note**
>
> Before starting with calc on the fly, ensure that it is enabled for the form that you are going to work with. For more information, see the **Enabling Calc on the Fly for Forms 2.0** section in Enabling Calc on the Fly.

To perform calc on the fly:

1. Connect to your data provider and open the required form containing member formulas.
2. Click the cells with formulas to view the formula in the tooltip, along with the members and mathematical operators involved in the formula.

   For more information, see Viewing Calc on the Fly Formulas.
3. Enter a value or modify an existing value in the data cells.

   > **Note**
   >
   > Entering or modifying values manually in cells containing formula is not supported in Smart View. If you do so, the formula gets overwritten with your entered value and you may lose the formula. This is also why formula spreading does not work in Smart View. As the formula gets deleted on typing in a cell containing formula, it does not update the values of the cells contributing to the formula.
4. Tab out of the modified cells to see the values in the cells with formula refresh immediately, without saving or submitting. The calculations also roll up to parent dimensions of members, if any, and their values are also updated.

   The modified cells become dirty, that is they are indicated with a color change. You can click **Refresh** to return the dirty cells to their original values from the database.
5. Continue to perform calc on the fly and see the calculated values refresh in the cells instantaneously.
6. Once satisfied with the calculations, submit the data by clicking **Submit Data** in the provider ribbon.

   Alternatively, you can close the form without submitting to discard your changes.

Viewing Calc on the Fly Formulas

You can view the member formulas by clicking a data cell containing formulas.

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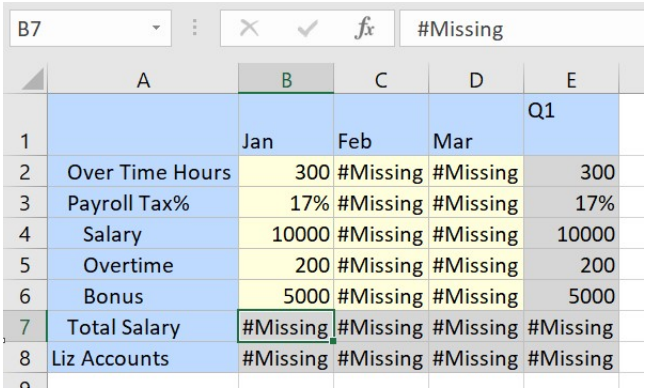
The formula appears in a tooltip on hover. You can also view it in Excel's formula bar at the top of the sheet by clicking a data cell.

Viewing Formulas in Ad Hoc Grids

In ad hoc grids, you need to first insert the member formulas and then view them in the grid.

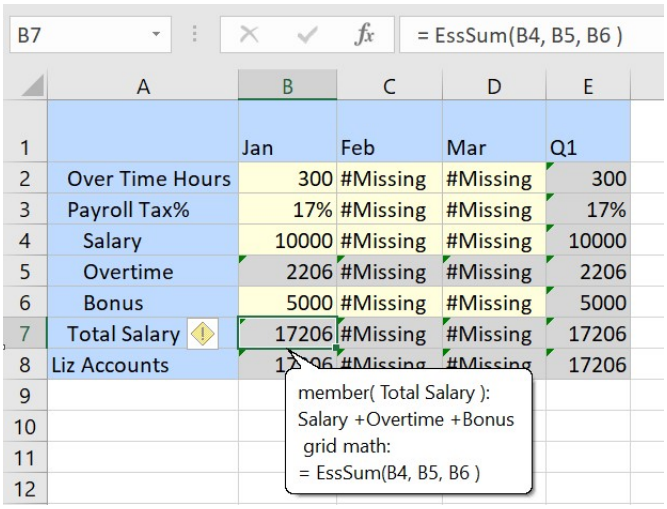
Before inserting the member formulas, the grid cells do not show any formulas in Excel's formula bar or in the tooltip.

Figure 23-5 Ad hoc grid before inserting member formulas



After you insert the member formula, it appears in the tooltip of cells with formulas, along with the member names and mathematical operators.

Figure 23-6 Ad hoc grid updated after inserting member formulas



Viewing Formulas in Forms 2.0

In Forms 2.0, you can directly view the formulas after opening a form and hovering on a formula cell.

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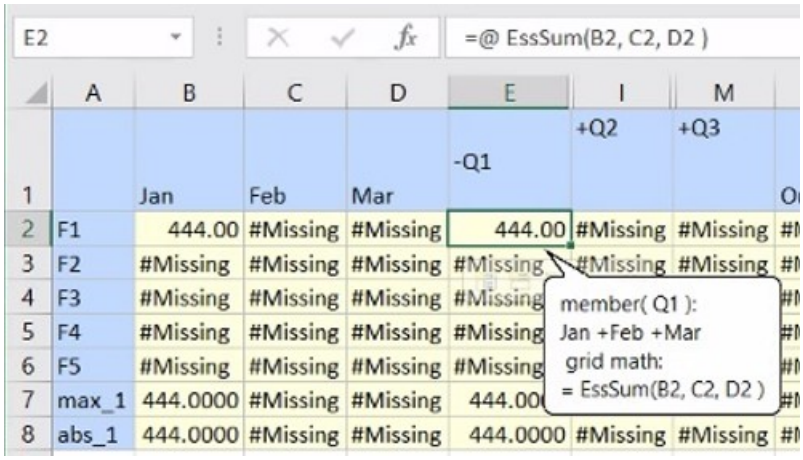
Figure 23-7 Formula tooltip in Forms 2.0



	A	B	C	D	E	I	M	
1		Jan	Feb	Mar	-Q1	+Q2	+Q3	O
2	F1	444.00	#Missing	#Missing	444.00	#Missing	#Missing	#M
3	F2	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#M
4	F3	#Missing	#Missing	#Missing	#Missing			#M
5	F4	#Missing	#Missing	#Missing	#Missing			#M
6	F5	#Missing	#Missing	#Missing	#Missing			#M
7	max_1	444.0000	#Missing	#Missing	444.00			#M
8	abs_1	444.0000	#Missing	#Missing	444.0000	#Missing	#Missing	#M

Formula Details

The tooltip displays the formula in two formats:

- **Member formula format:** Displays the member names and mathematical operators involved in the formula. For example,

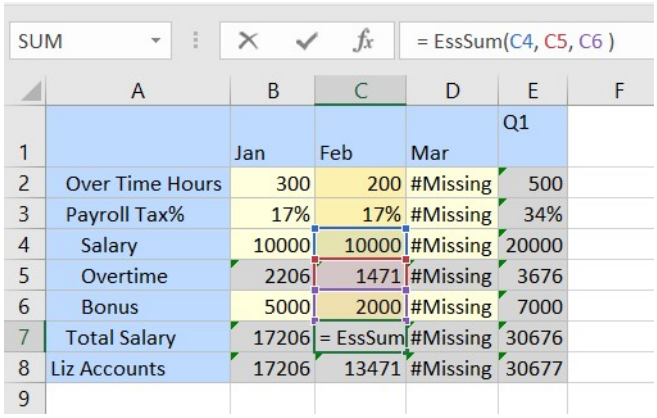
  member (Total Salary): Salary + Overtime + Bonus

- **Excel formula format:** Displays the function name and Excel cell names involved in the formula. For example,

  =EssSum(C4, C5, C6)

In ad hoc grids, the cells containing member formulas are highlighted with a green triangle indicator, but in Forms 2.0, there is no such indicator. In Excel's formula bar, you can click the formula and the cells involved in the formula are highlighted in the grid for easy identification.

Figure 23-8 Viewing cells involved in a formula



	A	B	C	D	E	F
1		Jan	Feb	Mar	Q1	
2	Over Time Hours	300	200	#Missing	500	
3	Payroll Tax%	17%	17%	#Missing	34%	
4	Salary	10000	10000	#Missing	20000	
5	Overtime	2206	1471	#Missing	3676	
6	Bonus	5000	2000	#Missing	7000	
7	Total Salary	17206	= EssSum	#Missing	30676	
8	Liz Accounts	17206	13471	#Missing	30677	
9						

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Supported Functions and Outline Math for Calc on the Fly

Essbase calculation functions and outline math are supported in the member formulas used for calc on the fly.

Supported Outline Math

The following are supported for calc on the fly:

- All outline member consolidation operators as defined in the *Essbase Technical Reference*: add (+), subtract (-), multiply (*), divide (/), and percentage (%).
- Unary operators (+, -, *, /, %, ~) for consolidation: add, subtract, multiply, divide, percentile, and ignore.
- Subvars
- Time Balance calculations: First, Last, Average, SKIP NONE, and SKIP MISSING. Note that Fill is not supported.

Supported Functions

The following Essbase calculation functions are supported in member formulas for calc on the fly in the web application as well as in Oracle Smart View for Office.

> **Note**
>
> - The functions that are not supported for calc on the fly are listed in Unsupported Functions and Formulas for Calc on the Fly.
> - To learn more about the Essbase calculation functions, see Calculation Function List.

The supported functions listed below are grouped as per their function category:

IS Functions:

- @ISACCTYPE
- @ISANCEST
- @ISATTRIBUTE
- @ISCHILD
- @ISDESC
- @ISGEN
- @ISIANCEST
- @ISICHILD
- @ISIDESC
- @ISIPARENT
- @ISISIBLING
- @ISLEV
- @ISMBR

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- @ISMBRUDA
- @ISMBRWITHATTR
- @ISPARENT
- @ISSAMEGEN
- @ISSAMELEV
- @ISSIBLING
- @ISUDA

Numeric Functions:

- @ABS
- @AVG
- @CONCATENATE
- @COUNT
- @EXP
- @FACTORIAL
- @INT
- @LN
- @LOG
- @LOG10
- @MAX
- @MAXS
- @MEDIAN
- @MIN
- @MINS
- @MOD
- @MODE
- @POWER
- @RANK
- @REMAINDER
- @ROUND
- @SUBSTRING
- @SUM
- @TRUNCATE
- @VAR
- @VARPER

Member Selection Functions:

- @ALLANCESTORS
- @ANCEST

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- @ANCESTORS
- @ATTRIBUTE
- @BETWEEN
- @CHILDREN
- @CURRMBR
- @CURRMBRRANGE
- @DESCENDANTS
- @EQUAL
- @EXPAND
- @GENMBRS
- @IALLANCESTORS
- @IANCESTORS
- @ICHILDREN
- @IDESCENDANTS
- @ILANCESTORS
- @ILDESCENDANTS
- @ILSIBLINGS
- @INTERSECT
- @IRDESCENDANTS
- @IRSIBLINGS
- @ISIBLINGS
- @LANCESTORS
- @LDESCENDANTS
- @LEVMBRS
- @LIKE
- @LIST
- @LSIBLINGS
- @MATCH
- @MBRCOMPARE
- @MBRPARENT
- @MEMBER
- @MERGE
- @NAME
- @NEXTSIBLING
- @NOTEQUAL
- @PARENT
- @PREVSIBLING
- @RDESCENDANTS

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- @RELATIVE
- @REMOVE
- @RSIBLINGS
- @SHIFTSIBLING
- @SIBLINGS
- @UDA
- @WITHATTR

Value Functions:

- @ANCESTVAL
- @ATTRIBUTEBVAL
- @ATTRIBUTESVAL
- @ATTRIBUTEVAL
- @CURGEN
- @CURLEV
- @GEN
- @LEV
- @PARENTVAL

Range Functions:

- @XRANGE
- @RANGE
- @ACCUM
- @MAXRANGE
- @MINRANGE
- @NEXT
- @PRIOR
- @SHIFT
- @SUMRANGE
- @MOVSUMX
- @MOVSUM
- @MOVAVG
- @MOVMIN
- @MOVMAX
- @MOVMED
- @AVGRANGE
- @MAXSRANGE
- @MINSRANGE
- @NEXTS

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- @PRIORS
- @RANGEFIRSTVAL
- @RANGELASTVAL

Unsupported Functions and Formulas for Calc on the Fly

Certain functions and member formulas are not supported for performing calc on the fly.

The following are not supported for calc on the fly:

- Members having assignments to themselves or other members are not allowed in member formulas. Only single value formulas are allowed. Multi-statement formulas are not allowed. For example:
  Allowed:

```
if(sales > 100) 10;
 units * 1.01;
else
units + 10;
endif;
```

  Not Allowed:

```
sales = 100 + units *rates;
```

```
If (units > 10)
 10;
endif;
units + 10;
```

- Recursive formulas and circular references, where a formula refers to its own cell directly or indirectly, are not allowed.
- The following list of Essbase calculation functions are not supported for calc on the fly:
  - @TODATE
  - @ISRANGENONEMPTY
  - @MDANCESTVAL
  - @MDPARENTVAL
  - @RETURN
  - @SANCESTVAL
  - @SHARE"
  - @SPARENTVAL
  - @XREF
  - @XWRITE
- MDX formulas are not supported.
- Member formulas that use a Smart List expression are not supported.

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Guidelines and Considerations

Consider the following guidelines while performing calc on the fly on ad hoc grids and Forms 2.0.

- On inserting member formulas, the cells containing the formulas appear read only and their cell styling color also changes accordingly. Further, if you click **Refresh**, the same cells turn dirty displaying the assigned cell style color. To get a clean refresh without cell style color changes, click **Options** on the Smart View ribbon and under the **Member Options** tab, clear the **Preserve Formulas and Comments in Ad Hoc Operations** check box.
- As a best practice, Oracle recommends that you insert member formula only once the ad hoc grid layout is set or finalized. If you perform other ad hoc operations such as Zoom In, Zoom Out, Keep Only, and Remove Only, the formula context becomes invalid and it is removed from the grid. If a formula is missing after performing ad hoc operations, you can manually enter the formula again where required.
- After inserting formulas, if you make any changes to the alias table by refreshing or by clicking **Change Alias** and changing the alias from **Default** to **None**, or vice versa, the formulas are no longer shown in the tooltip when you click cells with formula.
- Careful consideration should be given to combining the use of cell-level security and member formulas. If cell-level security is enabled, the inserted member formulas can give different results in the web application and in Oracle Smart View for Office. To perform calculations, access is required to all cells. So, the cells restricted by Deny Read rule when cell-level security is enabled may give inconsistent results. The #No Access label is shown for the restricted cells. If any formula contains reference to such access restricted cells, the results display either #Missing or an error.
- The operation of inserting member formulas cannot be undone using the **Undo** option on the Smart View ribbon. If you click **Undo** after inserting formulas, the #No Access label appears in cells containing member formulas and the formulas are no longer shown in the tooltip when you click such cells. Instead, to refresh the grid and remove the inserted member formulas, you can use the **Refresh** option on the Smart View ribbon instead. Also, clear the **Preserve Formulas and Comments in Ad Hoc Operations** check box to get a clean refresh. This check box is present in the **Member Options** tab under **Options**.
- If you remove member formulas from an ad hoc grid, you cannot reinsert them back using the **Redo** option on the Smart View ribbon. This is because member formulas are not preserved during the **Undo** or **Redo** operations. To insert member formulas, you can open the ad hoc grid again and click **Insert Member Formula**.
- When the Time Balance property is set to Flow with the Skip option set to Zeros or Missing and Zeroes, the results are not coming as expected. In a grid with January, February, and March columns, the first row has 0, 0, and 0 values, and the second row has 0, #Missing, and #Missing values respectively. In the fourth column of Q1, member formulas are inserted such that in the first row Skip is set to Zero and in the second row Skip is set to Missing and Zeroes. The expected result is #Missing for both rows, but the actual result appears as zero.
- Non-unique or duplicate aliases present in a grid and referenced in formulas can cause duplicate alias error while performing ad hoc in Smart Forms. This happens when you insert member formulas in an ad hoc grid which has duplicate aliases, save it as a Smart Form, and open the Smart Form again in ad hoc mode. On clicking **Refresh**, Smart View shows an error message "Found duplicate aliases or member name conflicting with alias under parent Account. One or more of these aliases or member names need to be modified to resolve the ambiguity".

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- For data with #Missing and zero values, @MAX function calculation may give inconsistent results in web application and in Smart View. This is due to the difference in the way Oracle Essbase and Excel handle these values. In Essbase, a comparison between zero and #Missing might not always be the same, so using @MAXS function is recommended. For more information, see the Notes for @MAX function in *Calculation and Query Reference for Oracle Essbase*. @MAX behaves like @MAXS (SKIPNONE), so when only #Missing and negative values are present in data, #Missing value is considered to be greater than negative value. #Missing is considered as zero while comparing with non-blank values. Smart View uses the #Missing label to denote missing data values in the database, which is different from a zero data value. Excel treats a non-blank label as a string, and strings are treated differently from empty cells and zeros. Due to this difference between Excel and Essbase, the comparison of #Missing and zero data values remains indeterminate.
- When you sort a grid in ascending or descending order, the structure of the grid is changed. This makes the member formulas and functions present in the grid invalid. Now, if you enter or modify values in the cells referenced in a formula or a function, the calculations are not refreshed immediately in the cells containing the formula or function. You need to save the grid to see the calculated or modified values.
- If the cells referenced in a formula contain text strings or dates, then the results obtained from calc on the fly calculations may be different from those calculated in Essbase. This difference happens because Planning stores a numeric index at the cell location for non-numeric data (like text, date, or Smart List) that Essbase uses for calculation, whereas calc on the fly uses the actual displayed value of text, date, or Smart List for calculation and treats non-numeric data as missing.
- Any non-numeric values like text, date, and Smart List options present in cells are treated as missing for the purpose of calculation in Excel. So, if such cells are referenced in functions and formulas, then the result is returned as #missing. This happens because while Essbase can interpret such cells and calculate results correctly, the same ability is not available for calc on the fly calculations.
- If a cell has a formula due to a member formula or outline math, the non-level 0 cell will be writable, because an entered value can be back spread to the writable source cells while performing calc on the fly calculations in the web application. Note that back spreading of formulas is not supported in Smart View.
- For member formulas to display for a cell for calc on the fly, the members contributing to the formula must exist within the grid. Otherwise, the formula does not display in the tooltip.
- If a formula's evaluation always results in a constant value (for example, multiplying by zero or #missing), then the formula is not generated.
- For Forms 2.0, calc on the fly is supported only for BSO and Hybrid BSO cubes. For Smart View, the application setting, **Forms Version**, must be set to Forms 2.0.
- Ensure that design-wise, forms using calc on the fly use only a reasonable and relevant number of members on the grid to ensure quick turnaround time from the ensuing calculations.
- For Forms 2.0, if both calc on the fly and spreading are enabled during form creation, and such a form is opened in Smart View, then the form does not allow you to enter or submit any data due to a conflict between the two operations. To prevent this conflict and enable formula calculations and data submission, spreading is automatically disabled by default when a form with both calc on the fly and spreading enabled is opened in Smart View. In the web application, this conflict does not occur and forms with both calc on the fly and spreading enabled work properly.

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Accessing Ancestor Members in Ad Hoc Grids

In ad hoc grids and **Member Selection**, Smart View users can access ancestor members, including shared members, to which they otherwise would not have access, when the Service Administrator configures the application setting, **Default Ancestor Access**.

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

Starting in 24.03, Service Administrators use the **Default Ancestor Access** option to automate access assignment. Depending on the configuration, Cloud EPM users on the web and in Oracle Smart View for Office can zoom out to ancestors and see the hierarchy in a tree view, whereas previously, they wouldn't have had access to the members at the parent level.

Additionally, enabling **Default Ancestor Access** facilitates the sharing of Excel workbooks between users having different levels of access to members. When access is configured, and users click **Refresh** in Smart View, cells to which they have access will come back with actual data values (or #NoAccess) and the hierarchy structures are maintained.

The available **Default Ancestor Access** options are:

- **None**
- **Read**
- **Write**
- **Display**

The results of setting **Default Ancestor Access** to the above options are described in more detail in the sections that follow. In the ad hoc grid examples are from ad hoc on the web, but the principles demonstrated also apply to Smart View

Service Administrators: See Setting the Default Ancestor Access Option in the Application.

None

This is the default. Users see all their shared members as siblings in, for example, ad hoc grids or the **Member Selector**, rather than in hierarchies, when they do not have read or write access to those ancestors. There is no change from the previous behavior (24.02 and earlier).

Consider the following example, where we have States in the Entity dimension using mostly shared members, and a user with security defined.

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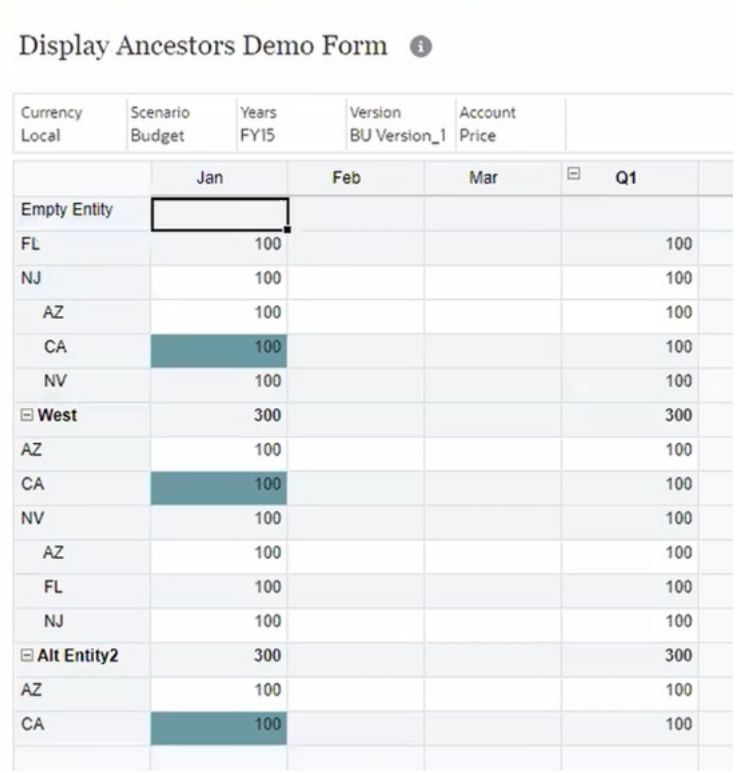
Figure 23-9 Web ad hoc grid showing a hierarchy structure that includes shared members



The user has access to New Jersey, but does not have access to the parent of New Jersey and Florida so those members are listed at the top of the tree instead under their parent member. You can see the same situation for Arizona, California, and Nevada throughout. Access to parent members is preventing users from viewing the entire tree structure and can make data entry difficult.

In the **Member Selection** dialog in Smart View, you see the same structure:

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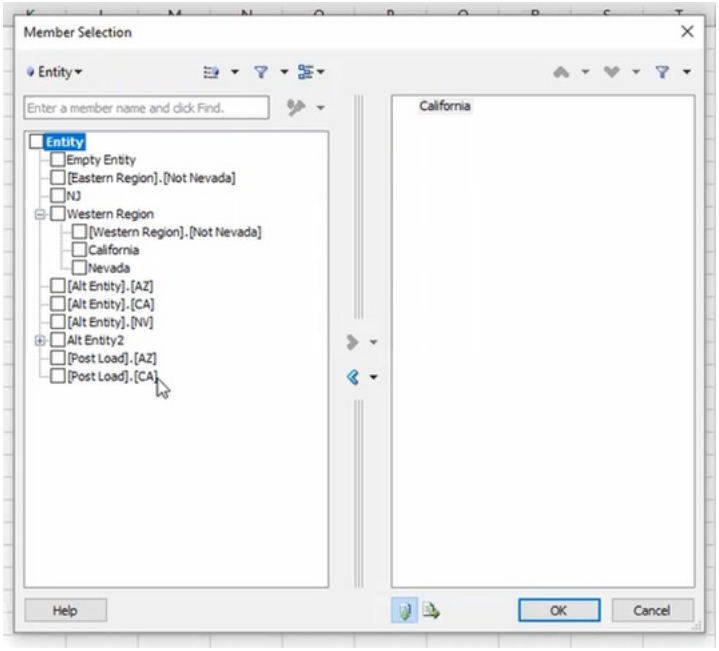
Figure 23-10 Member Selector dialog in Smart View, showing hierarchy structure that includes shared members



Read

By setting the **Default Ancestor Access** option to **Read**, users can view the hierarchies to which they have access, including members and shared members, and view data on the grid, even in the cells of ancestors to which they would not otherwise have access. That is, if the user has access to a member, then all ancestors to which they do not have access will have **Read** access instead. The user is able to view data for cells to which they do not have access, but cannot enter data in those cells.

In the following example, with access set to **Read**, users can now see the entire tree and all the hierarchies: Entity, Alt Entity, and Alt Entity2, and so on. Before, with access set to **None**, only Alt Entity2 was viewable.

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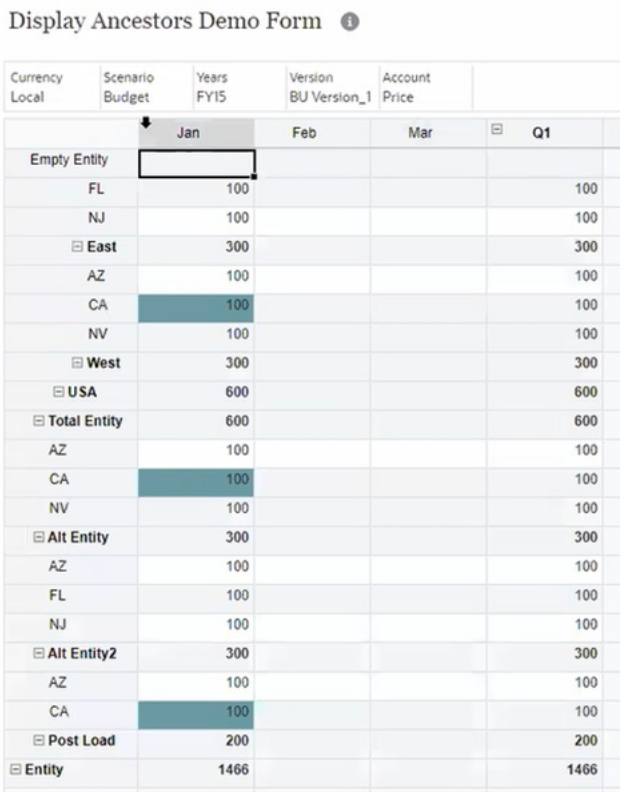
Figure 23-11 Web ad hoc grid showing the full hierarchy structure to which the user has access



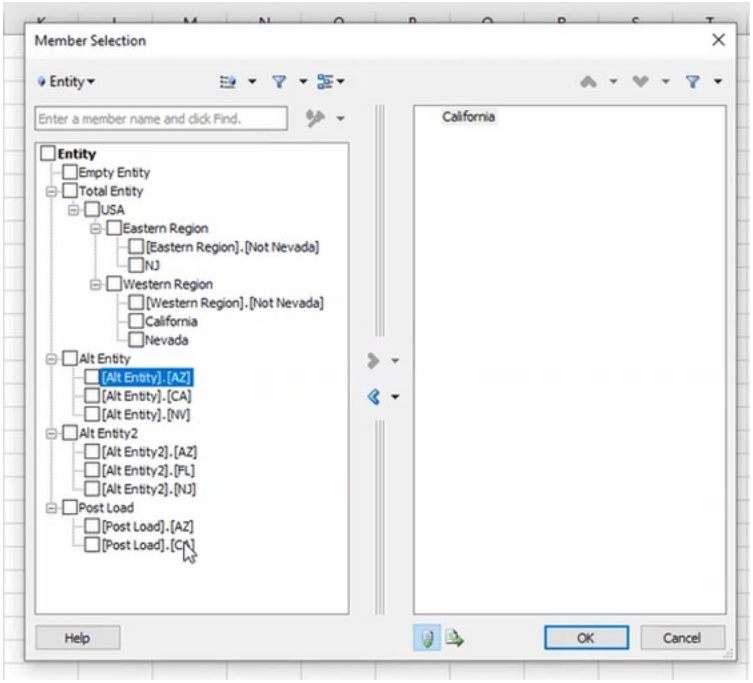
Display Ancestors Demo Form

Currency	Scenario	Years	Version	Account
Local	Budget	FY15	BU Version_1	Price

	Jan	Feb	Mar	Q1
Empty Entity				
FL	100			100
NJ	100			100
East	300			300
AZ	100			100
CA	100			100
NV	100			100
West	300			300
USA	600			600
Total Entity	600			600
AZ	100			100
CA	100			100
NV	100			100
Alt Entity	300			300
AZ	100			100
FL	100			100
NJ	100			100
Alt Entity2	300			300
AZ	100			100
CA	100			100
Post Load	200			200
Entity	1466			1466

The **Member Selection** dialog in Smart View also reflects the change. For example:

Figure 23-12 Member Selector in Smart View showing the full hierarchy structure to which the user has Read access



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Write

With the **Default Ancestor Access** option set to **Write**, users can view the hierarchies to which they have access, including members, shared members, and data. Additionally, they can save data to the cells of ancestors to which they have access. That is, if the user has access to a member, then all ancestors to which they do not have access will have **Write** access instead.

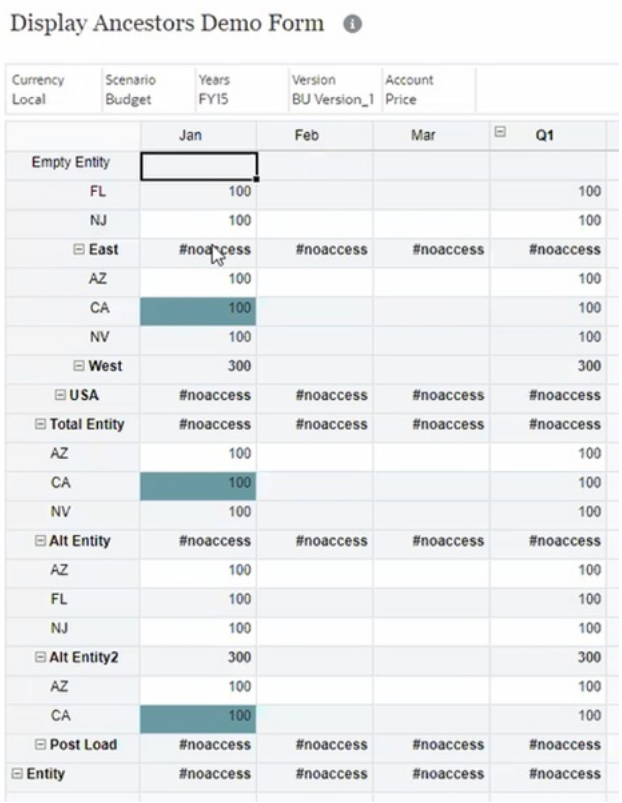
When granted **Write** access, users would see the same hierarchy structures in both the web and Smart View, and in the **Member Selection** dialog, as shown in Figure 3 and Figure 4. Additionally, they can save data in cells to which they normally do not have access.

Display

When **Display** is selected in **Default Ancestor Access**, users can view the hierarchies to which they have access, including members and shared members. They can view data in cells to which they have access. In ancestor cells to which they do not have access, then #NoAccess is displayed in the cell, but the ancestor member name is still displayed (for example, it is not filtered off the grid as it would be if the user had **None** access).

With **Display** access, users are still able to see the hierarchy tree structure, but would see #NoAccess in cells to which they do not have access. For example:

Figure 23-13 Ad hoc grid with Default Ancestor Access set to Display, showing full hierarchy structure and #NoAccess cells



Notice the same hierarchies are still present (just as when **Read** or **Write** was selected). The hierarchy according to the user's access is presented: East, West, USA, Total Entity, Alt Entity, Alt Entity 2, Post Load, and Entity. Note this is not the entire hierarchy, but all the ancestors in which the user has access to at least one member. The parent members, such as East, were

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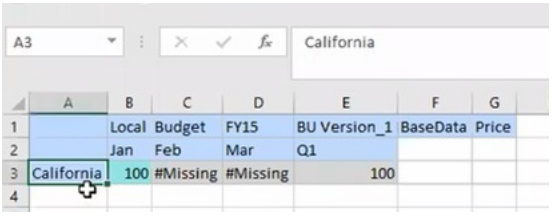
brought in as #NoAccess; whereas West, to which the user did have access, remains readable. The same applies to Alt Entity2, which was present before (when set **Default Ancestor Access** was set to **None**) and is present now with a value of 300. Alt Entity1, which the user did not have access to before, is present so the hierarchy is formed, but the user cannot see the data (the cell contains #NoAccess).

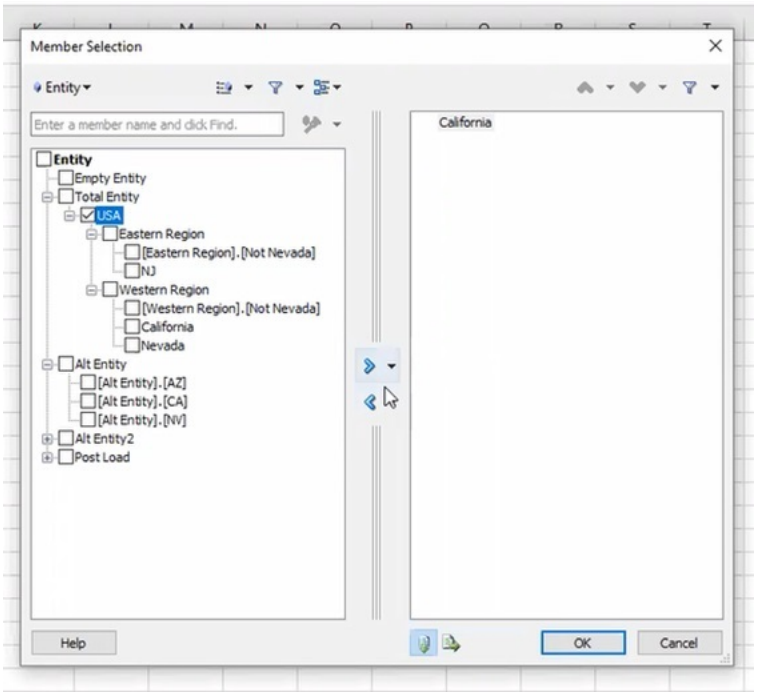
And the same display applies in Smart View. Starting with the initial ad hoc grid:

Figure 23-14 Initial Smart View ad hoc grid with California as the only row member



In the **Member Selection** dialog, notice the full tree that the user has access to, which includes Total Entity, USA, West, East:

Figure 23-15 Member Selector in Smart View, showing the full hierarchy structure to which the user has access



Consider that the user never had access to the USA member. There is now an easy-to-navigate tree view in the **Member Selection** dialog. If the user selects USA for their sheet, those cells will display as #NoAccess, instead of an error. For example:

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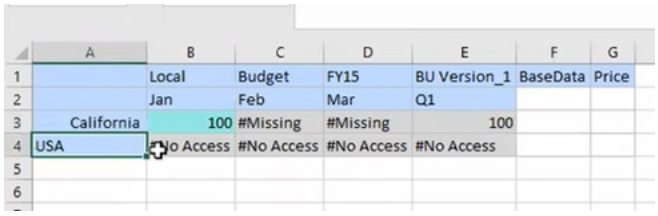
Figure 23-16 Smart View ad hoc grid with the USA member showing #NoAccess cells



	A	B	C	D	E	F	G
1		Local	Budget	FY15	BU Version_1	BaseData	Price
2		Jan	Feb	Mar	Q1		
3	California	100	#Missing	#Missing	100		
4	USA	#No Access	#No Access	#No Access	#No Access		
5							
6							

Setting the Default Ancestor Access Option in the Application

Service administrators: Use the **Default Ancestor Access** option to specify default user access to the ancestor members of members with access other than **None**, including shared members. The **Default Ancestor Access** is listed under **System Settings** in **Application Settings** for supported business processes.

The access option specified in the **Default Ancestor Access** setting enhances existing member security to provide a choice of default access to ancestor members.

This enables users to view the members that they have access to in context of the subhierarchies that they are part of in, for example, ad hoc grids or the Member Selector.

> **Note**
>
> Users will not see subhierarchies unless they have access to at least one descendant member.

The available **Default Ancestor Access** options are:

- **None**—By default, users are not able to see the ancestor members of members that they have access to unless they are explicitly granted access to them. When this option is selected, the system works the same way it did prior to the 24.03 update.
- **Read**—By default, users are granted Read Only access to the ancestor members of members that they have access to unless they are explicitly granted **Write** or **Display** access, which would override this default.
- **Write**—By default, users are granted Write access to the ancestor members of members that they have access to unless they are explicitly granted **Read** or **Display** access, which would override this default.
- **Display**—By default, users are granted Display Only access to the ancestor members of members that they have access to unless they are explicitly granted **Read** or **Write** access, which would override this default.
  Note that members with Display Only access will be displayed, but instead of data values in the cells associated with those members, users will see #NoAccess.

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> **Note**
>
> - **Default Ancestor Access** applies to ancestors after shared member security is evaluated. This allows it to work correctly both whether the **Include Shared Members in Cube Refresh** option is enabled or disabled.
> - Service administrators can set the default access for ancestors to **None**, **Read**, **Write**, or **Display** access in the application. They can also grant **Read**, **Write**, or **Display** access to one or more ancestors in, for example, the Dimension Editor. In these cases, the explicit security assignment made in the Dimension Editor takes precedence, unless access in the Dimension Editor is set to **None**, in which case the **Default Ancestor Access** setting takes precedence.

See the following topics for information on setting the **Default Ancestor Access** option in your business process:

- Enterprise Profitability and Cost Management: System Settings in *Administering and Working with Enterprise Profitability and Cost Management*
- Financial Consolidation and Close: Specifying Application Settings in *Administering Financial Consolidation and Close*
- FreeForm: What Application and System Settings Can I Specify? in *Administering FreeForm*
- Planning, Planning Modules: What Application and System Settings Can I Specify? in *Administering Planning*
- Tax Reporting: Specifying Application Settings in *Administering Tax Reporting*

Managing Planning Approvals

Planning approvals is the submission, review, and approval process of a planning unit.

If you are assigned the Approvals role, you can perform the Approvals functions described here. For information about roles, see the administrator.

Data source types: Planning

> **Note**
>
> If you are unfamiliar with Planning, see the Planning documentation and videos available on theOracle Help Center.

Related Topics:

Changing Planning Unit Status

Finding Planning Units

Planning Unit Promotional Path

Planning Unit Annotations

Out of Office Assistant

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Changing Planning Unit Status

Data source types: Planning

You can change the status of one or more planning units at a time.

To view or change the status of a planning unit:

1. Open the appropriate form.
2. From the Planning ribbon, select **Approvals**.
3. From **Manage Approvals**, select a **Scenario** and **Version**.
4. Click to display the list of planning units to which you have access.
5. **Optional:** From the view mode button, select one of the following:
   - **Flat View** to display planning units as a list.
   - **Tree View** to display planning units as a hierarchy (available only to administrators).

     From the Tree View, you can select **Start** to start a planning unit and **Exclude** to exclude a planning unit from the process.
   - **My Planning Units** to display only the planning units that you own.
6. Select the planning unit or units whose status you want to change. If the list is too long to locate the planning unit easily, you can search or apply filters to the list as described in Finding Planning Units.
7. To view details for the selected planning unit, click **Planning Unit Details**.

   The **Approval Status** tab displays a history of the process status, owner, actions taken, and the date and times the status changed.

   The **Annotations** tab displays any comments that were entered for the planning unit. See Planning Unit Annotations.
8. To change the planning unit status, click **Change Status**.

   > **Note**
   >
   > If you change the status of a parent entity, all of its children change, too, unless they were excluded during the First Pass state or were approved.
9. From **Approvals - Change Entity's Status**, select an action and the next owner for the planning unit.
10. **Optional**: Enter comments under **Enter Annotation**.
11. Click **Submit**.
12. **Optional:** To validate the changed planning unit, click . You can validate only one planning unit at a time.

Related Topics:

Finding Planning Units

Planning Unit Promotional Path

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Planning Unit Annotations

Out of Office Assistant

Finding Planning Units

Data source types: Planning
In **Manage Approval**, you can locate planning units easily by searching or by applying a filter to the list of planning units. You can use an auto filter or select members or generations as filter criteria.

To filter the list of planning units:

1. Open Manage Approval and select a scenario and version as described in Changing Planning Unit Status.
2. Click to enable filtering.

   The filter bar, which contains filtering tools, is displayed just above the planning unit list.
3. Use one of the following procedures:
   - **Search**

     To search for a specific planning unit, enter its name in the **Planning Unit** field and click .
   - **Auto filter**
     a. From the filter bar, click the arrow in the column header for **Approvals Status**, **Sub-Status**, or **Current Owner**.
     b. Select the column value to filter by. You can apply auto filters to more than one of these columns.
   - **Filter by member selection**
     a. From the filter bar, click , and then select **Member selector**.
     b. Click , and then select members for the planning unit list
     c. Click to filter the list.
   - **Filter by generation**
     a. From the filter bar, click , and then select **Generation**.
     b. Click , and then select one or more generations to display in the planning unit list.
     c. Click to filter the list.
     d. Click **OK**.
4. **Optional:** To undo your filter selections before applying the filter, click .

Related Topics:

Changing Planning Unit Status

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Planning Unit Promotional Path

Planning Unit Annotations

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Planning Unit Promotional Path

Data source types: Planning

Planning units move from person to person and department to department based on the following:

- The owners and reviewers assigned to the planning unit
- The planning unit place in the hierarchy

To view the promotional path of a planning unit in graphical form:

1. From the Planning ribbon, select **Approvals**.
2. From **Manage Approvals**, select a **Scenario** and **Version**.
3. Click **Go** to display the list of planning units to which you have access.
4. Select a planning unit.
5. Click .

Related Topics:

Changing Planning Unit Status

Finding Planning Units

Planning Unit Annotations

Out of Office Assistant

Planning Unit Annotations

Data source types: Planning

You can add or view comments about data in a planning unit that is started. Annotations can vary by combinations of scenario, version, and entity members.

To add a planning unit annotation:

1. From the Planning ribbon, select **Approvals**.
2. From **Manage Approvals**, select a **Scenario** and **Version**.
3. Click **Go** to display the list of planning units to which you have access.
4. Select the planning unit for which you want to add an annotation. To filter the list, see Finding Planning Units.
5. **Optional:** To view existing annotations for the selected planning unit, click **Planning Unit Details** and then the **Annotations** tab.
6. Click .

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7. In **Approvals - Add Annotation**, enter a title and annotations (up to 1500 characters). On multibyte systems, Oracle recommends limiting annotations to 750 characters. You can enter URLs and links as well as text.
8. Click **Submit**.

Related Topics:

Changing Planning Unit Status

Finding Planning Units

Planning Unit Promotional Path

Out of Office Assistant

Out of Office Assistant

Data source types: Planning

You can set up the Out of Office Assistant to reassign planning units that arrive while you are out of the office.

To set up the Out of Office Assistant:

1. From the Planning ribbon, select **Approvals**.
2. From **Manage Approvals**, select **Out of Office Assistant**.
3. From **Out of Office Assistant**, select **I am Currently Out of Office**.
4. From Select Action, select an action and next owner for planning units that arrive while you are out of the office.
5. **Optional:** Enter an annotation.
6. Click **Submit**.

Related Topics:

Changing Planning Unit Status

Finding Planning Units

Planning Unit Promotional Path

Out of Office Assistant

Monitoring Job Status

Use the Job Console to monitor the execution status of jobs in Oracle Fusion Cloud Enterprise Performance Management and delete them if needed.

Related Topics

- About the Job Console
  The Job Console displays the status of ongoing and completed jobs in Oracle Fusion Cloud Enterprise Performance Management.
- Checking Job Status
  Check the execution status of jobs in the Job Console.
- Configuring Job Console Autorefresh

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About the Job Console

The Job Console displays the status of ongoing and completed jobs in Oracle Fusion Cloud Enterprise Performance Management.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

In Oracle Smart View for Office, you can do the following in the Job Console based on your role:

- You can view the status and substatus of jobs in the **Job Status** column.
- You can filter the list of jobs as per their job type (for example, Clear Cell Details, Copy Data, Refresh Database, Rules, Data Map, or Smart Push), job name, status (for example, Completed, Completed with Errors, Error, Cancelled, or Processing), user executing the job, and start and end dates of jobs.
- You can view the details of a job.
- You can delete a job from the list, if required.
- You cannot cancel or start jobs from the **Job Console**.

Understanding Job Status and Substatus

Starting Smart View 23.200, along with job status, you can view the substatus for ongoing jobs in the **Job Status** column. With the substatus information, you can:

- Track the real-time progress of a job. This helps you stay informed, especially for jobs that run for long durations.
- Get a better understanding of the ongoing activities. By receiving substantial information about ongoing jobs upfront, you save time and efforts required to open the details of each individual job.
- Easily identify where a job is blocked or running slower than usual. This helps you understand incompatibilities within jobs, take quick actions, and improve job processes.

For jobs with no child jobs, the status appears in the format of Job Status: [Sub_Status]. For example, Processing: Merging Data

For parent-child job relationships, the substatus appears in the following format:

- The parent job displays the ongoing child job. For example:

  Processing: [Executing Child Job 1 Of 1: %CHILD_JOB_NAME%]
- Each child job displays the specific operation being performed as part of its execution. For example:

  Processing: [Step 3 Of 5: Fetching source data]
- If a cube is busy with the current job, a Waiting indicator is appended to the status. For example:

  Processing: [Step 5 Of 5: Clearing and pushing data to target[Waiting].]

After a job is completed successfully, the substatus is cleared. However, if the job encounters any errors, then the job status and substatus where the error occurred continues to display, instead of getting cleared. For example, Error: [Step 2 Of 5: Fetching target data].

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Video

Your Goal	Watch This Video
Learn about basic Smart View functionality related to Planning, including a brief discussion on monitoring job status. Concepts are also applicable to Financial Consolidation and Close and Tax Reporting.	Entering and Saving Plan Data in Smart View with Oracle Planning and Budgeting Cloud

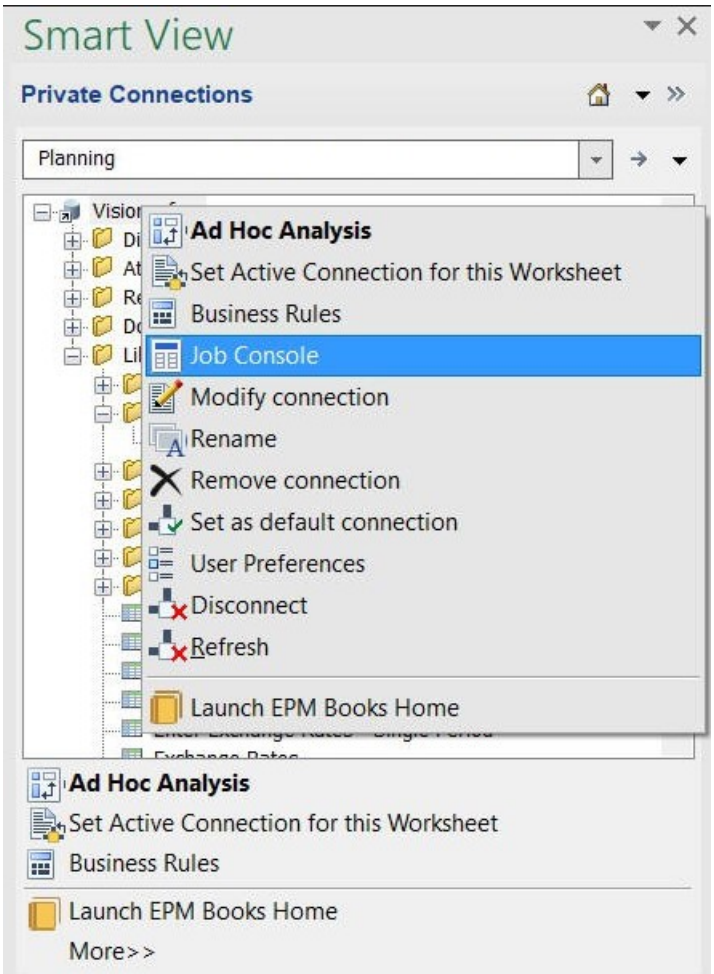
Checking Job Status

Check the execution status of jobs in the Job Console.

To check the execution status of jobs:

1. In the Smart View Panel, right-click the application name and select **Job Console** from the context menu.

   Alternatively, select the application name, and in the Action Panel, select **More**, and then **Job Console**.



   The **Job Console** is displayed.

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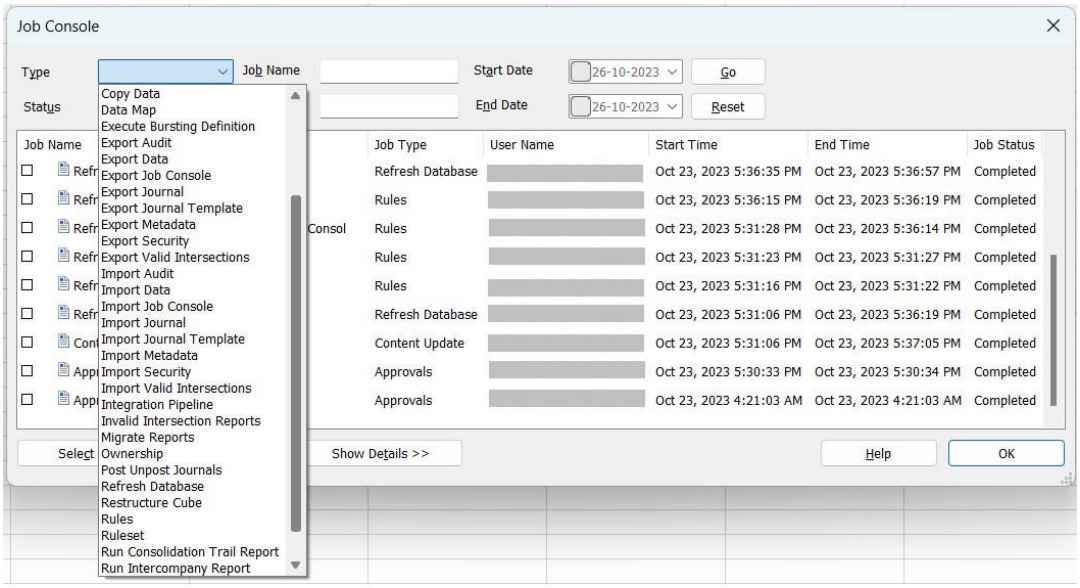
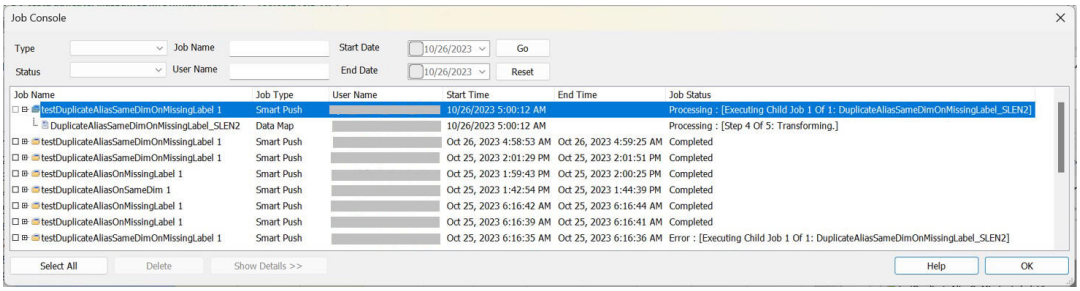


By default, records of all job types and statuses are displayed in the **Job Console** for the previous day.

For ongoing jobs, the job status and substatus are displayed in the **Job Status** column.



2. To filter the list of jobs in the **Job Console**, from the filter criteria area at the top of the dialog, use any of the following job criteria:

   - **Type**—From the drop-down menu, select a job type. For example, some job types are:
     - Clear Cell Details
     - Copy Data
     - Refresh Database
     - Rules
     - Smart Push

     This is a partial list of job types. Your administrator configures the job types available to you. Administrators can view all job types.
   - **Status**—From the drop-down menu, select a job status. For example, some job statuses are:
     - Completed
     - Completed with Errors
     - Error
     - Processing

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This is a partial list of job statuses. Your administrator configures the job statuses available to you. Administrators can view all job statuses.

- **Job Name**—Type a job name.
- **User Name**—Type a user name of the user to whom the job belongs.
- **Start Date** and **End Date**—The dates are defaulted to yesterday and today to have only a one day difference. Click and enter a start date and end date range using the calendar.

3. Click **Go**.

   The **Job Console** displays the jobs matching your selection criteria.

> **Note**
>
> If you have configured the **Job Console** window to autorefresh, then the jobs matching your selection criteria will display after the specified interval. Job Console autorefresh applies to Oracle Smart View for Office 20.200+. See Configuring Job Console Autorefresh for more information.

4. **Optional:** To get more detailed information on job execution, select the job and click **Show Details.**

   To see details for all jobs in the list, click **Select All**, and then click **Show Details.**.

5. **Optional:** To delete a job, select the job and click **Delete**.

   To delete all jobs in the list, click **Select All**, and then click **Delete**.

> **Note**
>
> Deleting a job only deletes it from the list in the **Job Console**. It does not cancel a job.

Configuring Job Console Autorefresh

Starting in Oracle Smart View for Office 20.200, you can configure the Job Console window to autorefresh at the interval you specify in the Windows Registry setting, JobConsoleAutoRefreshInterval.

You can still refresh the Job Console window as often as required using the Go button. However, you can also add the JobConsoleAutoRefreshInterval setting to the Registry and observe the window updating automatically, without clicking Go.

Add the JobConsoleAutoRefreshInterval setting as a new DWORD in the HKEY_CURRENT_USER Registry folder here:

Computer\HKEY_CURRENT_USER\Software\Hyperion Solutions\HyperionSmartView\Preferences

Specify the time interval you require. The minimum is 15 seconds (where Base is set to Decimal, and Value Data is set to 15000).

After adding the setting, leave the Job Console window open in Smart View and note that the window refreshes at the interval specified.

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Anyone with permission to modify their computer's Registry can set configure this setting. See Monitoring Job Status for more information on using the Job Console.

Dashboards

Dashboards give you an overview to key information and let you change and save data.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

You can open Oracle Fusion Cloud Enterprise Performance Management dashboards in Oracle Smart View for Office.

To open a dashboard:

1. Connect to a Cloud EPM data source that contains dashboards.
2. From the Connections tree list, double-click a dashboard (indicated by).

   The dashboard opens in a new Excel workbook with each dashboard object displayed in a separate worksheet.

> **Note**
>
> - Smart View supports grid and chart type dashboard objects. Chart objects are displayed in grid format. All other dashboard types will be ignored.
>
>   For example, a dashboard consists of these components: one grid, one chart, one note, and one image. Open this dashboard in Smart View and notice that the workbook has only two sheets, one for the grid, and one for the chart that is displayed as a grid. The note and image components are ignored.
> - Smart View supports a master form for the dashboard.

For more information on dashboards:

- **Administrators:** See the topics on designing dashboards in the *Administering* guide for your cloud business process.
- **End users:** See the topics on using dashboards in the *Using* guide for your cloud business process.

Opening Composite Forms

You can open Oracle Fusion Cloud Enterprise Performance Management composite forms in Oracle Smart View for Office.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

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> **Note**
>
> Starting in the 21.05 update, Cloud EPM no longer officially supports composite forms. New features added in Cloud EPM from 21.05 and later will not be supported in composite forms. As has been announced in the months before 21.05, you are required to use Cloud EPM dashboards instead. Your existing composite forms will continue to work with supported features up to the 21.04 update.

To open a composite form:

1. Connect to a Cloud EPM data source that contains composite forms.
2. From the Connections tree list, double-click a composite form (indicated by).

   The composite form opens in a new Excel workbook with each subform displayed in a separate worksheet.

> **Note**
>
> Smart View supports master composite forms.

Copying Versions

Service Administrators can copy data from one bottom-up or target version of a selected scenario to another bottom-up or target version within the same scenario.

Data source types: Planning, Planning Modules

> **Note**
>
> Starting in Oracle Fusion Cloud Enterprise Performance Management 21.12, the **Copy Version** command is available only to Service Administrators.

For example, you can create a Best Case version and copy some or all the data in that version to a Worst Case version to quickly create a starting point for the new version.

You can copy between bottom-up and target versions.

- When you copy to a bottom-up version, only the selected level 0 members are copied.
- When you copy to a target version, all selected members are copied.
- To protect data in approved planning units, copying a version does not copy to approved planning units.

> **Note**
>
> To successfully copy data, when specifying the copy data criteria, you must select at least one member for the Scenario, Account, Entity, Period, and Version dimensions.

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To copy a version:

1. Perform an action to access the **Copy Version** dialog box.
   - From a form, in the Planning ribbon, select **Copy Version**.
   - From an ad hoc grid, right-click the application name.
2. From **Scenario**, select the scenario to copy.
3. From **Copy From**, select the source version.
4. From **Copy To**, select the destination version.
5. Click **Go** to display the available entities (planning units) for the selected source version.
6. Use the arrow keys to select entities from **Available Entities.** You can copy entities with a Process Status of Not Started or First Pass.
7. **Optional:** To copy associated information, select any of these options:
   - **Copy Account Annotations**. Only annotations for selected entities are copied. If you are copying to a bottom-up version, only level 0 entities (and their annotations) are copied.
   - **Copy Cell text and Document links**
   - **Copy Supporting Details**
8. Click **Copy Data**.

> **Note**
>
> Wait for the Copy Version completion message before loading another web page.

9. Click **Cancel** to close the **Copy Version** dialog box.

Searching for a Page in Cloud EPM Forms

If an administrator sets up multiple page dimensions for a form, select the page with the required data from the page drop-down menu.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

To search for a page in an Oracle Fusion Cloud Enterprise Performance Management form:

1. Click in the page dimension that you want to search to highlight it.
2. From the drop-down menu, select the page name containing the data with which you want to work.

Displaying Formatting in Forms

Smart View users can save and display native Excel formatting back to the Cloud EPM business process as part of a form. Additionally, form designers can specify formatting rules, which Smart View users can display when working with Forms 2.0.

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Related Topics

- Working with Native Excel Formatting in Cloud EPM Forms
  Oracle Smart View for Office provides a way for users to save native Excel formatting back to Oracle Fusion Cloud Enterprise Performance Management business process as part of a form or ad hoc grid.
- Working with Design-time Formatting in Forms 2.0
  Forms designers may specify formatting for a form at design time. In Oracle Smart View for Office, users can display the design-time formatting when working with Forms 2.0.

Working with Native Excel Formatting in Cloud EPM Forms

Oracle Smart View for Office provides a way for users to save native Excel formatting back to Oracle Fusion Cloud Enterprise Performance Management business process as part of a form or ad hoc grid.

Related Topics

- About Working with Native Excel Formatting in Cloud EPM Forms
- Saving Excel Formatting on a Form
- Viewing Excel Formatting in Smart View
- Clearing Formatting
- Saving Excel Formatting From an Ad Hoc Grid
- Supported Native Excel Formatting
- Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

About Working with Native Excel Formatting in Cloud EPM Forms

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Tax Reporting

Oracle Smart View for Office provides a way for users to save native Excel formatting back to Planning business process as part of a form or ad hoc grid.

Saved formatting is applied in both the business process browser interface and when the form is rendered within Excel. You can then choose how to display the formatting in Smart View. This functionality is in addition to the existing Smart View cell styles functionality, described in Cell Styles.

These formatting options are available in the **Formatting** group of the provider ribbon; for example, the Planning ribbon, as shown in Figure 1.

Figure 23-17 Formatting Options

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> **Note**
>
> The topics in Working with Native Excel Formatting in Cloud EPM Forms apply to Forms 1.0; or Forms 2.0 that do not have design-time formatting rules (Groovy rules, data validation rules, or format-only rules) defined for the form.

Related Topics:

Saving Excel Formatting on a Form
Viewing Excel Formatting in Smart View

Clearing Formatting

Saving Excel Formatting From an Ad Hoc Grid

Supported Native Excel Formatting

Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

Saving Excel Formatting on a Form

To save Excel formatting on a form:

1. Open a form for editing in Oracle Smart View for Office.
2. Use native Excel formatting features to apply the formatting to the sheet.
3. On the provider ribbon (for example, the Planning ribbon), select **Save** from the **Formatting** group.
4. Go to Viewing Excel Formatting in Smart View to choose a viewing option.

Related Topics:

Viewing Excel Formatting in Smart View

Clearing Formatting

Saving Excel Formatting From an Ad Hoc Grid

Supported Native Excel Formatting

Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

Viewing Excel Formatting in Smart View

Once a form is rendered within Excel, Oracle Smart View for Office provides the options to view the formatting on a sheet. These options are accessed from the **Apply** button within the **Formatting** group on the provider ribbon.

> **Tip**
>
> The **Apply** options are *viewing* options only and allow you to display the cell styles and native Excel formatting that were previously saved on a form.

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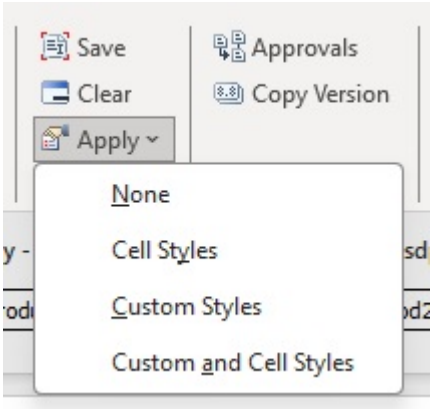
> **Note**
>
> This procedure describes the formatting displayed in Forms 1.0 where no design-time formatting is implemented. If you are working with design-time formatting in Forms 2.0, see Working with Design-time Formatting in Forms 2.0

To switch between formatting view options on a form:

1. Open a form and click the **Apply** button within the **Formatting** group on the provider ribbon; for example, the Planning ribbon.

   The **Apply** options are displayed (Figure 1). The first time using this menu, the initial state before any option is selected is that no option is selected. Once an option is selected, the last option selection will be preserved the next time a form is opened.

Figure 23-18 Apply Options



2. Select an option:

   - **None**—Applies no styles (Excel formatting or Smart View cell styles) to the sheet. Though cell styles or custom styles may exist on the sheet, neither are shown when selecting this option. They are preserved, however, if you want to display them later using the **Cell Styles**, **Custom Styles**, or **Custom and Cell Styles** options.
   - **Cell Styles**—Applies only Smart View cell styles to the sheet, as described in the "Cell Styles" topic.
   - **Custom Styles**—Applies only custom user-defined native Excel formatting to the sheet.
   - **Custom and Cell Styles**—Applies both Excel formatting and Smart View cell styles to the sheet. Note that when you select **Custom and Cell Styles**, cell styles take precedent over custom Excel formatting.

   The option selection is immediately applied to the form.

3. To clear the selection made in the previous step, click the **Clear** button within the **Formatting** group.

   You can also use the **Clear** action to clear any saved formatting, as described in Clearing Formatting for more information.

Related Topics:
Saving Excel Formatting on a Form

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Clearing Formatting

Saving Excel Formatting From an Ad Hoc Grid

Supported Native Excel Formatting

Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

Clearing Formatting

To clear the formatting associated with a form or saved ad hoc grid opened as a form:

Selecting the **Clear** option removes any Excel formatting associated with the form or grid, both within Excel and within the web application. Note that you can still work with cell styles functionality since cell styles are not dependent on any custom formatting that is saved.

1. Open the form.

> **Note**
>
> You must begin with a newly-opened form. If you have already applied a formatting option, then the **Clear** action will revert the display back to the last applied display selection.

2. Select **Clear** from the **Formatting** group in the provider ribbon; for example, the Planning ribbon.

   Selecting the **Clear** option removes any Excel formatting associated with the form or grid, both within Excel and within the web application. Note that you can still work with cell styles functionality since cell styles are not dependent on any custom formatting that is saved.

Related Topics:

Saving Excel Formatting on a Form

Viewing Excel Formatting in Smart View

Saving Excel Formatting From an Ad Hoc Grid

Supported Native Excel Formatting

Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

Saving Excel Formatting From an Ad Hoc Grid

To save formatting from an ad hoc grid:

1. Perform ad hoc analysis to create a grid to save.
2. Use Excel native formatting features to format the grid.
3. From the provider ad hoc ribbon (for example, the Planning Ad Hoc ribbon, select **Save Ad Hoc Grid**.
4. In the **Save Grid As** dialog box, select the **Submit Formatting** option when saving the ad hoc grid.

   You can now open the saved ad hoc grid as a form and choose a viewing option, as described in Viewing Excel Formatting in Smart View.

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Related Topics:

Saving Excel Formatting on a Form

Viewing Excel Formatting in Smart View

Clearing Formatting

Supported Native Excel Formatting

Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

Supported Native Excel Formatting

Table 1 summarizes the native Excel formatting supported by forms in Oracle Smart View for Office, and whether the formatting is supported when the form is viewed in theOracle Fusion Cloud Enterprise Performance Management web application.

Table 23-3 Supported Native Excel Formatting

Formatting	Smart View	Cloud EPM
Font	**Font**	**Font**
Font family	Yes	Yes
Font size	Yes	Yes
Bold	Yes	Yes
Italic	Yes	Yes
Strikethrough	Yes	No
Underline	Only single and Continuous	No
Text color	Red, Green, and Blue	Red, Green, and Blue
Background color	Plain, Solid, and Red, Green, and Blue	Plain, Red, Green, and Blue
Alignment	**Alignment**	**Alignment**
Vertical	Top, Center, and Bottom	No
Horizontal	Left, Center, and Right	No
Indent	Only Left Indent and five levels of indent	No
Word wrap	Yes	No
Borders	**Borders**	**Borders**
Border color	Yes, can be set differently for each cell's four borders, and Red, Green, and Blue	Yes
Border width	Yes, in points	Yes
Border style	None, Solid, double, Dotted, Dash, Dash-Dot, Dash-Dot-Dot	None, Solid
Number and date format	**Number and date format**	**Number and date format**
Number format	Decimal places, negative and positive suffixes and prefixes, negative and positive color, eight colors, Percentage, scientific format, presence of thousand separator	No
Date format	Long and Short Dates, Hours, Minutes, Seconds, AM and PM	No
Miscellaneous	**Miscellaneous**	**Miscellaneous**
Read-only	Yes	No
Column width and row height	Yes, in points	No

Related Topics:

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Saving Excel Formatting on a Form

Viewing Excel Formatting in Smart View

Clearing Formatting

Saving Excel Formatting From an Ad Hoc Grid

Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

Guidelines for Working with Native Excel Formatting and Forms in Cloud EPM

- When designing a grid, care should be taken to avoid conflicts between custom Excel formatting and Oracle Smart View for Office cell styles.
- For some ad hoc analysis operations, not all Excel formatting may be preserved. You may need to reapply formatting after performing certain operations.
- When a saved ad hoc grid is opened, Smart View tries to preserve the formatting that was saved on the Planning server. For further ad hoc operations, existing formatting options apply; for example, **Use Excel formatting** or **Use Cell Styles**.
- To preserve custom Excel formatting on ad hoc operations, select the **Use Excel Formatting** and the **Move Formatting on Operations** options on the **Formatting** page of the **Options** dialog box.
- Formatting can affect performance, especially during ad hoc operations when the **Move Formatting on Operations** option is enabled.
- Saving formatting is not recommended on large forms (for example, forms of 20,000 or more cells).
- There are differences between grids rendered in Smart View and those rendered in the browser in the Oracle Fusion Cloud Enterprise Performance Management business process. When a saved grid is rendered in Cloud EPM, some formatting may not appear exactly as it does in Smart View. The business process will attempt to approximate the Smart View formatting.
- The administrator may have defined certain formatting on a form. End users can overwrite this formatting and save it on the form. It can then be merged with the administrator's formatting based on the option selected for this form by the administrator in the Cloud EPM business process. Refer to the Cloud EPM documentation for more information.
- Save formatting functionality is not supported on composite forms.
- Ad hoc analysis started from a saved grid will inherit the formatting options saved as part of the grid.

  To use Smart View Cell Styles or the Use Excel Formatting option for an ad hoc grid generated from a saved grid, complete the following steps:

  1. Open the saved grid as a form.
  2. In the provider ribbon (for example, the Planning ribbon), **Formatting** group, select **Apply**, and then **None**.
  3. Click **Save** to save the form back to the Cloud EPM business process.
  4. Now use the saved form to perform ad hoc analysis.
- When user variables or substitution variables are on the POV (not on rows or columns), formatting is retained after changing the formatting of any user or substitution variable and refreshing the form.

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- Excel formatting and custom styles are intended for use with static grids. Changes to the grid from the following operations can result in invalid formatting:
  - POV
  - Suppression options
  - Merged cells
  - Enabling or clearing the Repeat Member Labels options
  - Adding members to the form definition
  - Using user variables or substitution variables on rows or columns, and then changing any user or substitution variable.

    After saving the formatting, the form will only retain the formatting from the latest row and column combination.

Supported Native Excel Formatting summarizes the native Excel formatting supported by forms in Smart View, and whether the formatting is supported when the form is viewed in the web application.

Working with Design-time Formatting in Forms 2.0

Forms designers may specify formatting for a form at design time. In Oracle Smart View for Office, users can display the design-time formatting when working with Forms 2.0.

Related Topics

- About Working with Design-time Formatting in Forms 2.0
- Viewing Design-time Formatting in Forms 2.0
- Clearing Formatting in Forms 2.0

About Working with Design-time Formatting in Forms 2.0

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Tax Reporting

In Oracle Smart View for Office, you can display formatting defined in the form when working with Forms 2.0.

> **Note**
>
> This feature requires Smart View 24.200+, Cloud EPM 24.11+, and Forms 2.0.

Administrators can add formatting rules to forms at design time. This is referred to as design-time formatting.

Format rules are defined by Administrators on the **Layout** tab of the Form Designer. Administrators can add Groovy rules, data validation rules, and formatting (format-only) rules to the form. They can add format rules at the grid, row, row metadata cell, column, column metadata cell, or cell level.

Smart View users can apply the formatting rules to forms at runtime using the **Apply** options in the provider ribbon (for example, in the Planning ribbon). These options control how formatting rules are displayed on the form:

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- **Cell Styles**—Applies cell styles defined in Smart View, data validation rules, and Groovy rules. No format-only rules or Excel custom formatting are applied.
- **Custom Styles**—Applies formatting rules that were defined in the **Format/Validation Rule Builder** at design-time, and any Excel custom formatting that was added in Smart View. Cell styles, Groovy rule formatting, and data validation rule formatting are not applied.
- **Custom and Cell Styles**—Applies Groovy rules, design-time formatting rules (data validation and format-only), all cell styles, and custom Excel formatting to the form.

It's possible to have multiple rules specified in the same location on a form which could impact how formatting is displayed. For example, a form could include a Groovy rule, a data validation rule, and custom Excel formatting all at the same location. Therefore, there's an order of precedence for displaying rules in forms.

The order of precedence, where P=Priority, is as follows:

1. (P1) Groovy rule
2. (P2) Data Validation rule in the **Format/Data Validation Rule Builder**

> **Note**
>
> For a cell that inherits data validation rules that are defined in multiple places (grid, row, column, or cell level), the rule that is closest to the location of the rule definition wins priority. So if there is a rule applied at the cell level, that rule wins. Next is column level, then row level, and then grid level.

3. (P3) Smart View cell styles (such as read-only cells, locked cells, supporting detail, and attachments)
4. (P4) Format rule in the **Format/Data Validation Rule Builder**

> **Note**
>
> Same as the note above. For a cell that inherits rules that are defined in multiple places (grid, row, column, or cell level), the rule that is closest to the location of the rule definition wins priority. So if there is a rule applied at the cell level, that rule wins. Next is column level, then row level, and then grid level.

5. (P5) Excel custom formatting (sometimes referred to as "native" Excel formatting) saved to the form in Smart View, described in Saving Excel Formatting on a Form

To view how design-time formatting rules are defined and the effect of the **Apply** option on the form, see the "Format Rule Scenarios" topic in the administration guide of your business process. For example, in *Administering Planning*, see Format Rule Scenarios.

> **Note**
>
> Design-time formatting is not supported in dashboards in Smart View.

Administrators and form designers: For information on setting up design-time formatting in forms:

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- *Administering and Working with Enterprise Profitability and Cost Management*, Working with Data in Forms chapter, Creating and Updating Format Rules in Forms
- *Administering Financial Consolidation and Close*, Managing Forms chapter, Creating and Updating Format Rules in Forms
- *Administering FreeForm*, Managing Data Validation and Format Rules in Forms chapter, Creating and Updating Format Rules in Forms
- *Administering Planning*, Managing Data Validation and Format Rules in Forms chapter, Creating and Updating Format Rules in Forms
- *Administering Tax Reporting*, Managing Forms chapter, Creating and Updating Format Rules in Forms

Related Topics:

Viewing Design-time Formatting in Forms 2.0

Clearing Formatting in Forms 2.0

Tutorial

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Get an introduction to the Design Time Formatting (DTF) options in Smart View. You'll review the differences in runtime on applying the available style options. You'll see the order of precedence for the different types of Rules and Cell Styles in Smart View.	Data Forms in Smart View - Format Display Options

Viewing Design-time Formatting in Forms 2.0

Once a form containing design-time formatting is rendered in Excel, Oracle Smart View for Office provides options for viewing the formatting that is available.

These options are accessed from the **Apply** button within the **Formatting** group on the provider ribbon.

> **Tip**
>
> The **Apply** options are *viewing* options only and allow you to display the formatting specified for the form, including formatting from Groovy rules, data validation rules, and format-only rules, in addition to Smart View cell styles and any custom Excel formatting that the user saved on a form.

To apply styles to forms:

1. Open an Oracle Fusion Cloud Enterprise Performance Management Forms 2.0 form and click the **Apply** button within the **Formatting** group in the provider ribbon; for example, in the Planning ribbon.

   The **Apply** options are displayed, as shown in Figure 1. The initial state before any option is selected is that no option is selected. Once an option is selected, the last option selection will be preserved the next time the form is opened.

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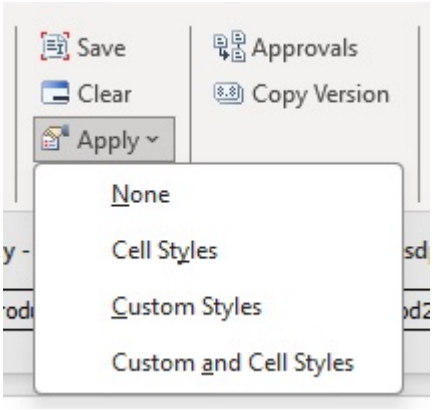
Figure 23-19 Apply Options



2. Select an option:

   - **None**—Applies no styles (design-time formatting, custom Excel formatting or Smart View cell styles) to the sheet. Though design-time formatting, cell styles, and Excel custom styles may exist on the sheet, none are shown when selecting this option. They are preserved, however, if you want to display them later using the **Cell Styles**, **Custom Styles**, or **Custom and Cell Styles** options.
   - **Cell Styles**—Applies cell styles defined in Smart View, data validation rules, and Groovy rules. No formatting rules or Excel custom formatting are applied.
   - **Custom Styles**—Applies formatting rules that were defined in the **Format/Validation Rule Builder** at design-time, and any Excel custom formatting that was added in Smart View. Cell styles, Groovy rule formatting, and data validation rule formatting are not applied.
   - **Custom and Cell Styles**—Applies Groovy rules, design-time formatting rules (data validation and format-only), all cell styles, and custom Excel formatting to the form.

   The option selection is immediately applied and displayed on the form.

   To view how design-time formatting rules are defined and the effect of the **Apply** option on the form, see the "Format Rule Scenarios" topic in the administration guide of your business process. For example, in *Administering Planning*, see Format Rule Scenarios.

Clearing Formatting in Forms 2.0

To clear any Excel formatting associated with a form opened as a form, select **Clear** from the **Formatting** group in the provider ribbon; for example, the Planning ribbon.

Selecting the **Clear** option removes any custom Excel formatting associated with the form. Note that you can still work with any design-time formatting that may be defined for the form, including Groovy rules, data validation rules, and format-only rules, along with cell styles functionality since cell styles are not dependent on any custom Excel formatting that is saved.

Working with Multiple-Grid Worksheets in Cloud EPM

In Oracle Smart View for Office, you can retrieve multiple ad hoc grids on one worksheet. The grids can all be connected to the same data source, or each grid can be connected to a different data source.

Related Topics

- About Multiple Grids on a Worksheet

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- Creating Multiple-Grid Worksheets with Cloud EPM Sources
- Converting Cloud EPM Single-Grid Worksheets to Multiple-Grid Worksheets
- Renaming Ranges on Cloud EPM Multiple-Grid Worksheets
- Changing Connections in Cloud EPM Multiple-Grid Worksheets
- POV Behavior on Cloud EPM Multiple-Grid Worksheets

About Multiple Grids on a Worksheet

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

When connected to supported Oracle Fusion Cloud Enterprise Performance Management data sources, you can create multiple grids on one worksheet. These grids can be connected to the same data source or to different Cloud EPM data sources. For example, one grid can be connected to Planning and another can be connected to Tax Reporting. They can be sourced from cubes or from forms. You can retrieve data in these grids and shift them on the worksheet.

> **Note**
>
> **Administrators:** You enable multiple-grid ad hoc for Oracle Smart View for Office users by setting the **Smart View Ad Hoc Behavior** option to **Standard** in the service application settings. See the administration documentation for your service for more information.

Video

Your Goal	Watch This Video
Learn about using multiple ad hoc grids in a worksheet in Smart View.	Setting Up Multiple Ad Hoc Grids in Smart View

The video references Planning as the data source, but the functionality shown is common to all Cloud EPM providers specified above.

Guidelines and Limitations for Multiple-Grid Worksheets

Note the following guidelines and limitations in worksheets that support multiple grids:

- In order to create ad hoc grids from forms, you must have at least the User role. Check the role requirements for your individual cloud service.
- You can submit data for only one grid at a time.

  If you try to submit data for more than one grid at a time—that is, if you have selected cell ranges in more than one grid—the first range returned by Excel will be used to determine the selected grid and the submit will be performed only on that grid.
- If the member option, **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)** is selected, you can preserve formulas on the sheet using the **Undo** option on the right-click **Smart View** context menu from within the grid. This option is only supported after a refresh has been performed once formulas are added to the sheet, and

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for only one undo action. The **Undo** option on the Smart View ribbon is not enabled for multiple-grid sheets. See Preserving Excel Formulas in Ad Hoc Grids.

- Do not use Microsoft Excel's **Name Manager** or **Name Box** to rename named ranges. Instead, use one of the following methods to rename named ranges:
  - Use the **Rename Range** command in the Document Contents pane of the Smart View Panel. See Renaming Ranges on Cloud EPM Multiple-Grid Worksheets
  - Use the VBA function, HypModifyRangeGridName, described in *Developing Applications for Smart View for Office*.
- On multiple-connection, multiple grid worksheets, ensure that there is enough space between grids to accommodate pivot and zoom operations on the individual grids, especially if working with large grids.

  A loss of metadata may occur on sheets with three or more database connections and where grids are placed too close together.
- While working on multiple-grid worksheets, if a member name and its alias do not match, an error message appears on refreshing the grid stating the row number where the mismatched details are present. In some cases, this row number may not reflect the exact Excel row number where the mismatch occurs. This happens because grids can be placed anywhere on multiple-grid worksheets, thus making the row numbers relative.
- To ensure that you are refreshing the desired range, use the **Document Contents** pane to first select the range, and then click the **Refresh** link in the pane. After refresh, select the range again from **Document Contents** to highlight the updated range.
- Smart View does not support mixing Admin Extension grids and ad hoc analysis grids on a single sheet. When mixing the two grid types on a single sheet, the menu items on the ribbon reflect the last opened grid, regardless of the grid selected in the sheet.
- These items on the Smart View ribbon are disabled:
  - **Undo**
  - **Redo**

  Instead, to access the **Undo** and **Redo** commands when working with a multiple-grid sheet, ensure that your cursor is in the affected grid. (Use the **Document Contents** pane to ensure that you have selected the correct grid.) Then, right-click and select **Smart View** from the context menu, and then select **Undo** or **Redo**, as required.
- These items on the applicable provider ribbon are disabled:
  - **Pivot to POV**
  - **POV**
  - **Preserve Format**
  - **Smart Slice**
  - **Save Ad Hoc Grid**
  - **Save As Smart Form**
  - **Insert Attributes**
  - **Grid Spread**
  - **Mass Allocate**
  - **More**
  - **Approvals**
  - **Copy Version**

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- **Run Report**
- **Data Filter**

Creating Multiple-Grid Worksheets with Cloud EPM Sources

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

To create a multiple-grid worksheet:

1. In Excel, connect to an Oracle Fusion Cloud Enterprise Performance Management data source.
2. From any location in the worksheet, select a range of cells.

   You must select a range rather than only one cell.
3. From the Smart View Panel, perform an action:
   - Right-click a cube, and select **Connect**. Right click the cube again, and select **Ad hoc analysis**.
   - Right-click a form, and select **Ad hoc analysis**.

     You cannot use composite forms or dashboards as sources for ad hoc grids.
4. Select **Yes** at the prompt asking to change the worksheet to support multiple grids.

> **Note**
>
> If you started with an ordinary single-grid worksheet, and want to add other grids to the sheet, see Converting Cloud EPM Single-Grid Worksheets to Multiple-Grid Worksheets.

5. To create another grid on the worksheet:
   a. Select a different range of cells.
   b. From the Smart View Panel, right click a cube or a form, and then select **Ad hoc analysis**.
6. Repeat step 5 as you require to add grids to the worksheet.

Converting Cloud EPM Single-Grid Worksheets to Multiple-Grid Worksheets

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

To convert an existing Oracle Fusion Cloud Enterprise Performance Management single-grid ad hoc worksheet to a worksheet that supports multiple grids:

1. From any location in the worksheet, outside of the existing grid, select a range of cells.

   You must select a range rather than only one cell.
2. From the Smart View Panel, right-click a cube or a form, and then select **Ad hoc analysis**.

   The sheet already contained a grid, so the following dialog is displayed:

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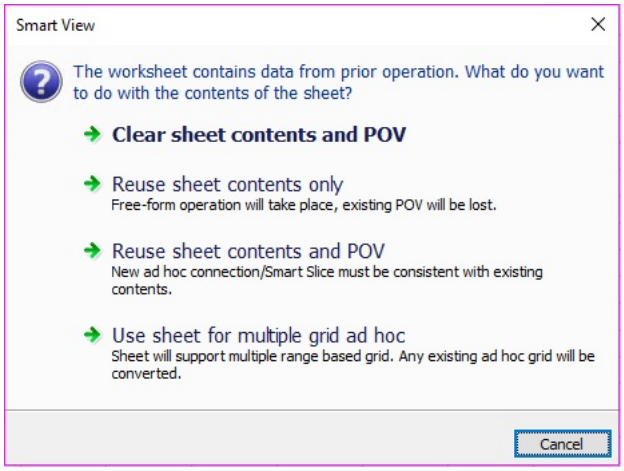

Available options are:

- **Clear sheet contents and POV**
- **Reuse sheet contents only** to reuse sheet contents only. In this case, the sheet content is converted to free-form and the existing POV will be lost.
- **Reuse sheet contents and POV** to reuse sheet content and the POV only if the POV of the new ad hoc connection or Smart Slice is consistent with the existing content.
- **Use sheet for multiple grid ad hoc** to convert the sheet to one that supports multiple range-based grids, retaining any existing ad hoc grid on the sheet.

3. In the dialog, select **Use sheet for multiple grid ad hoc**.

   The second grid is added to the worksheet. The sheet now supports multiple grids.

4. **Optional:** Repeat step 1 and step 2 to add more grids to the sheet.

Renaming Ranges on Cloud EPM Multiple-Grid Worksheets

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

When you place ranges on a multiple-grid worksheet, Excel assigns each range a name by default. The strings used in the name ranges may not be particularly user friendly. For example, a range based on the Vision Plan1 cube might look like this:

```
Vision_Plan1_88CA3264_EDFE_4E99_86B9_FEEEBF95DB42_1
```

A more user-friendly name would be helpful for all users of the workbook, but changing the name using the Excel Name Manager could cause a loss of metadata in Oracle Smart View for Office.

Use the **Rename Range** command in the Smart View Document Contents pane to change the name to a more descriptive or user-friendly name.

> **Note**
>
> To change range names in multiple-grid worksheets, you *must* use the **Rename Range** command in the Document Contents pane.

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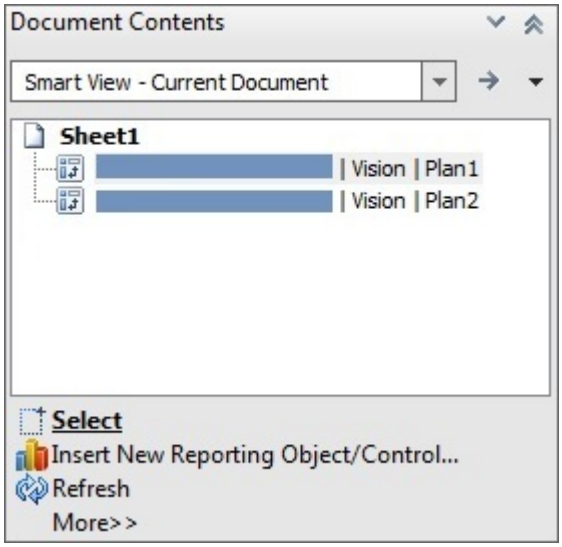
To rename ranges on a multiple-grid worksheet:

1. If not already displayed, open the Document Contents pane.

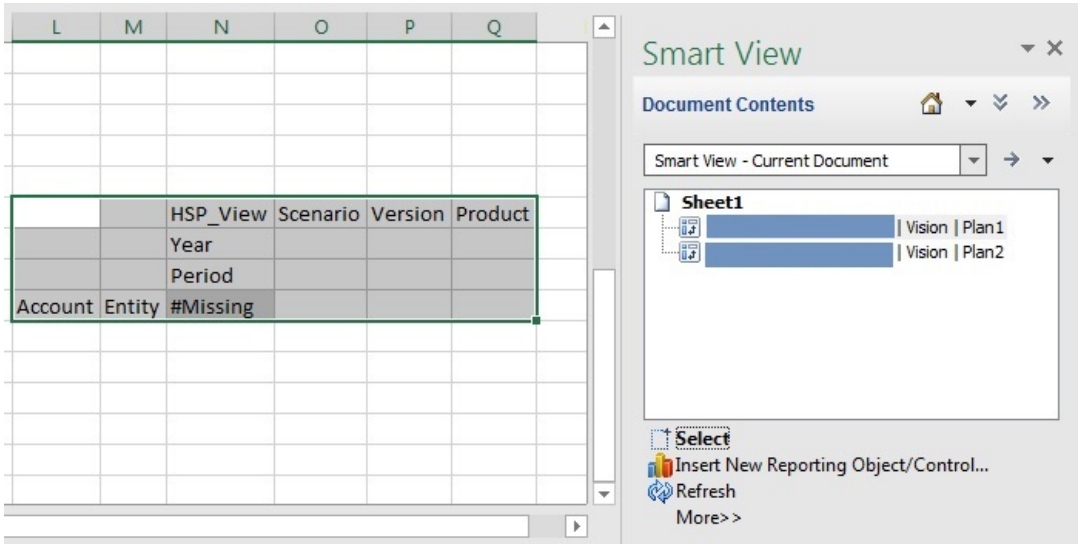
   For instructions on displaying the Document Contents pane, see step 1 in Changing Connections in Cloud EPM Multiple-Grid Worksheets.

2. In the Document Contents pane, highlight the range to rename in the tree, and then click **Select**.

   In the following example, Vision | Plan 1 is highlighted in the tree.



Use the **Select** command to verify that you are working with the correct grid on the sheet. For example, after highlighting Vision | Plan1 and clicking **Select**, the Vision Plan1 grid on the worksheet is highlighted.



3. In the Action Panel, click **More**, and then select **Rename Range**.

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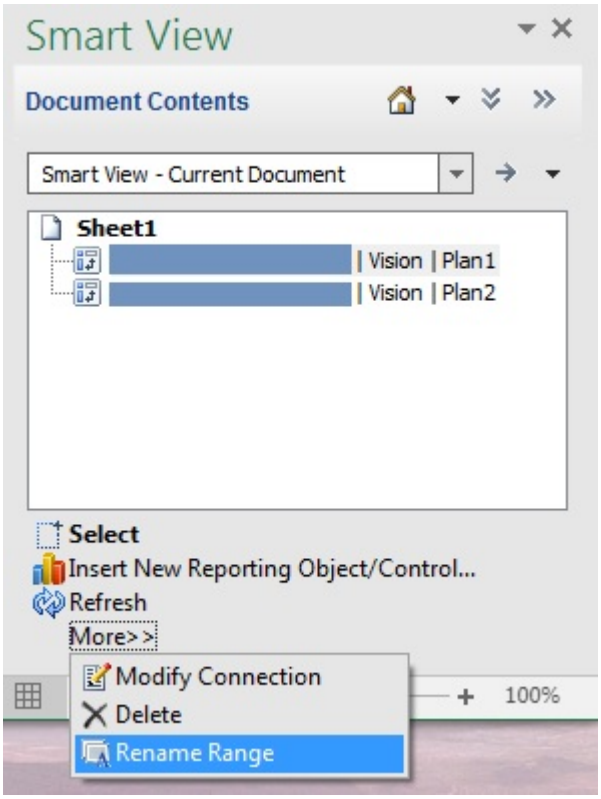
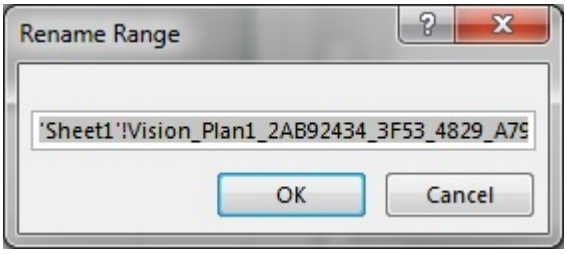
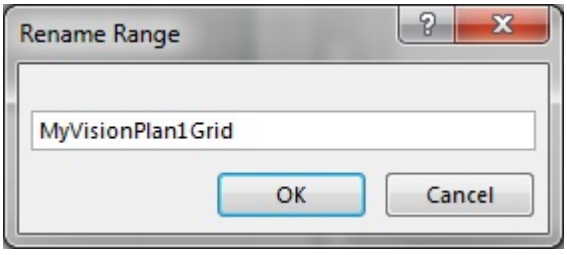


The **Rename Range** dialog box is displayed, showing the default name that was assigned to the range by Excel.



4. In **Rename Range**, type a new range name, and then click **OK**.

   We're renaming the range MyVisionPlan1Grid.



5. Verify that the range name is changed in the **Name Manager** in Excel.

   Here is an example **Name Manager**, accessed from the Formula ribbon in Excel:

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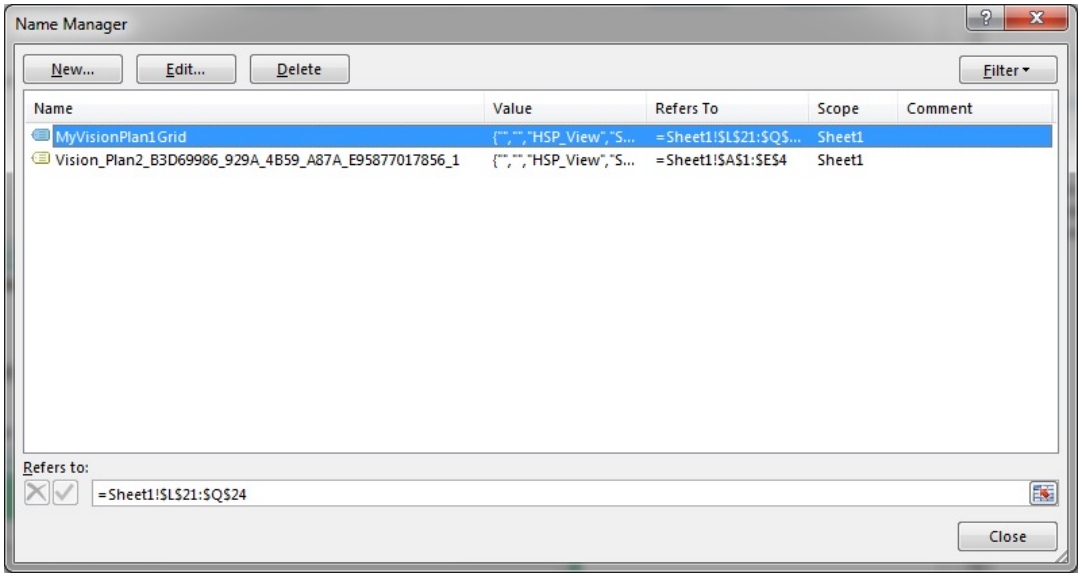
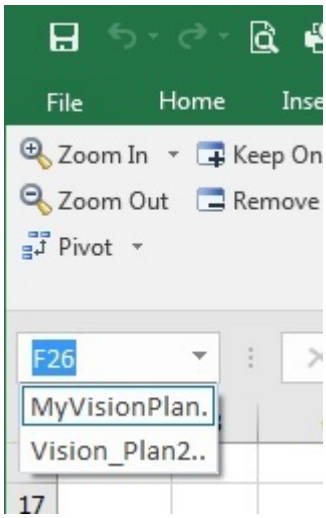


You can also view the changed range name in the Excel **Name Box** drop-down list.



Changing Connections in Cloud EPM Multiple-Grid Worksheets

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

From the Document Contents pane, you can change connections for individual grids within a multiple-grid worksheet. This is useful when sharing a workbook between departments that point to different servers or when moving from a test to a production environment.

You can change the connection properties for all entities in a workbook that share the same connection information (for example, all worksheets or grids that point to the same application and cube on a particular service). Or you can change the connection information sheet by sheet. To do this, see Modifying Connections within an Office Document.

Use this topic to change connections properties on multiple-grid worksheets grid by grid.

To modify connections of a grid in a multiple-grid worksheet:

1. If not already displayed, open the Document Contents pane.

   To open the Document Contents pane:

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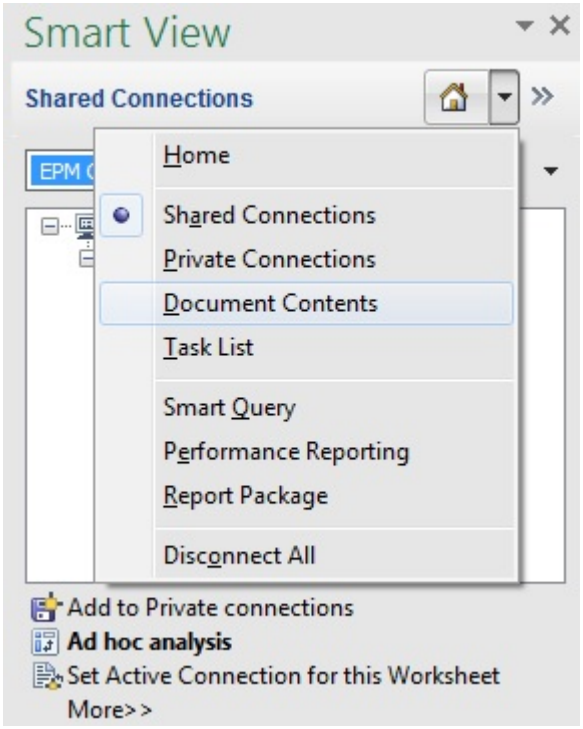
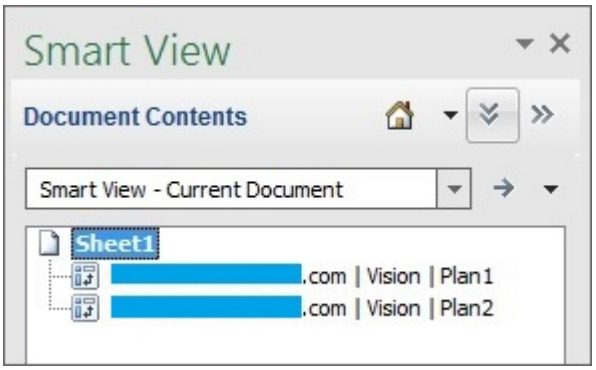
a. In the Smart View Panel, click the arrow next to , and select **Document Contents**.



The Document Contents pane is displayed in the area of the Smart View Panel



b. To display both the library pane and the Document Contents pane in the Smart View Panel, click , located at the top of the panel next to .

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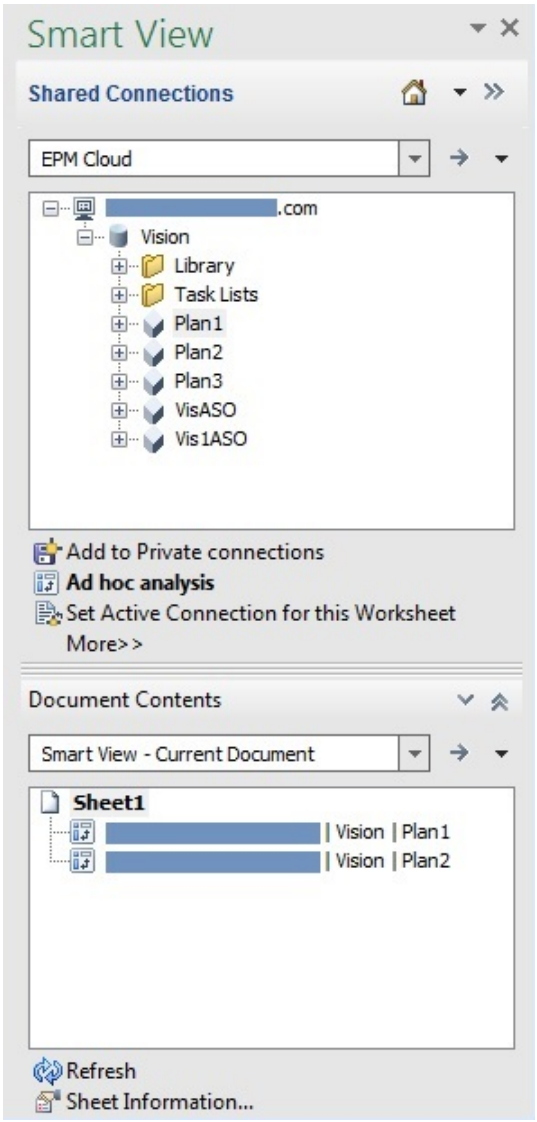

2. In the Document Contents pane, highlight the grid to you want to work with in the tree, and then click **Select**.

   In the following example, Vision | Plan 1 is highlighted in the tree.

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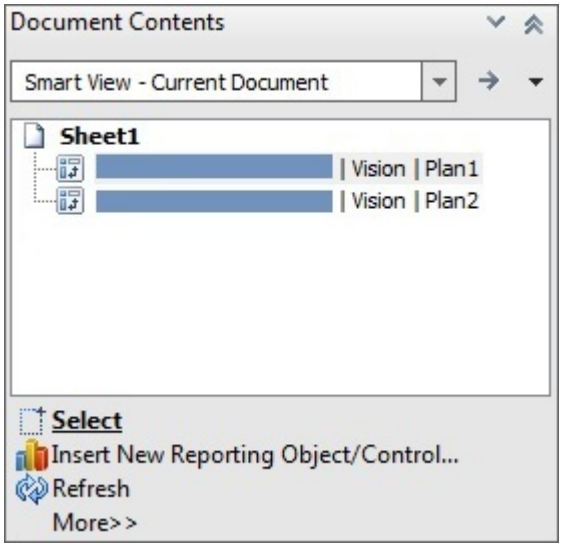
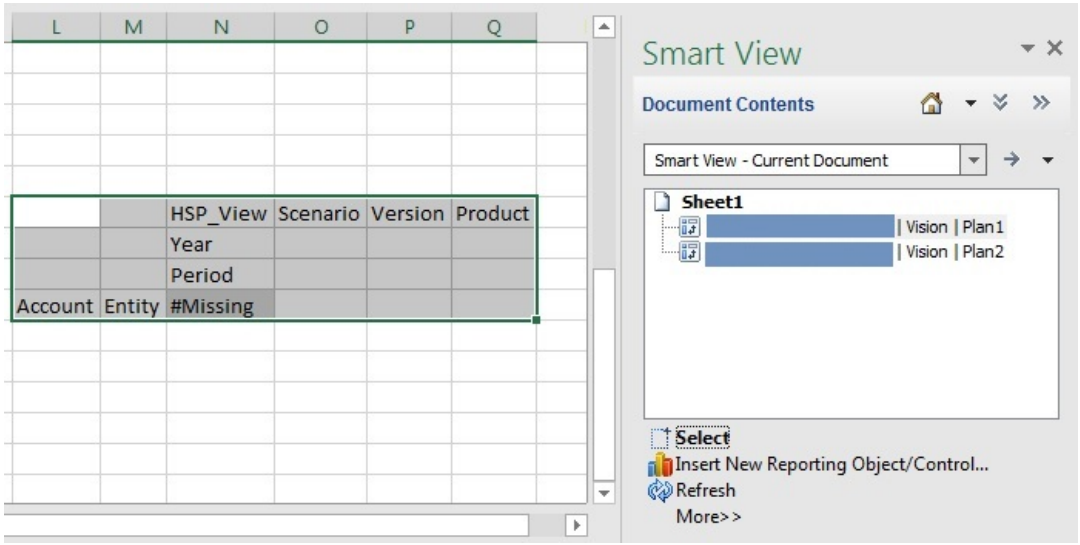


Use the **Select** command to verify that you are working with the correct grid on the sheet. For example, after highlighting Vision | Plan1 and clicking **Select**, the Vision Plan1 grid on the worksheet is highlighted.



3. In the Action Panel, click **More**, and then select the **Modify Connection**.

   Alternatively, right-click a connection name or sheet name and select **Modify Connection**.

   The **Edit Connection - URL** page of the wizard is displayed.

4. In the **URL** drop-down list, select an existing connection or enter a new connection URL, using private connection syntax.

5. Click **Next** and in **Edit Connection - Application/Cube**, expand **Servers**, and navigate to the application and database to which you want to connect, depending upon the provider requirements.

   Alternatively, select the **Advanced Setup** check box and manually enter the information for **Server** (your service URL), **Application**, and **Cube/Database**, as the provider requires.

   For example, Figure 1 shows the entries for connecting to an Oracle Essbase application and cube.

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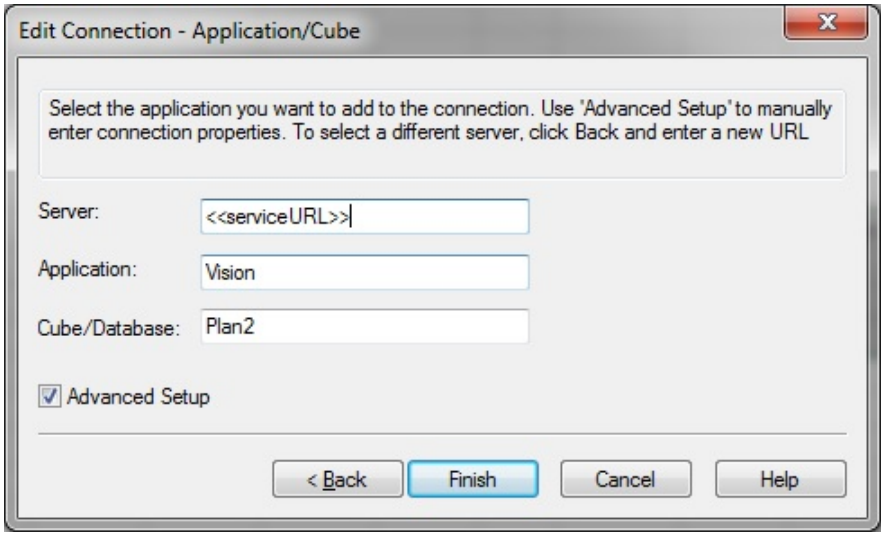
Figure 23-20 Edit Connection - Application/Cube Advanced Setup



6. Click **Finish**.
7. In the Action Panel, click **Refresh**.
8. Repeat this procedure to modify the connection information for any other grids in the workbook.
9. To save the modified connection information, save the workbook.

   The modified connection information is saved when you save the workbook.

POV Behavior on Cloud EPM Multiple-Grid Worksheets

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

The **POV** button is enabled for multiple-grid worksheets that contain only one grid, making it possible for you to toggle the button to show or hide the POV toolbar. The **POV** button remains disabled on multiple-grid worksheets that contain more than one grid.

On multiple-grid worksheets that contain one grid, the POV dimensions are displayed both in the grid and in the toolbar. On regular ad hoc worksheets, POV dimensions are displayed in the grid only if the POV toolbar is hidden.

Setting User Preferences

You can set user preferences for an application.

Data source types: Planning, Planning Modules, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Tax Reporting

To set user preferences for an application:

1. From the tree list in the Smart View Panel, select an application.
2. Right-click, and then select **User Preferences**.
3. In the **Preferences** dialog, specify options for the following
   - **Application Settings:** Manage email options, specify alias settings, set options for approvals, and specify out of office settings.

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- Select the **Use Default** check box to use default application settings for all options in a section.
- Select a check box on the right to use the default application setting for an option.
- Select a check box on the left to override the default application settings for an option.
- Enter the required email address, specify if the application owner needs to be copied, and enable notifications for workflow, task list, and job console.
- For **Alias Table**, select an alias table from the drop-down list on the left to override the default application settings, and then select the check box on the left.

> **Note**
>
> Changes to the alias table require you to restart Oracle Smart View for Office and reconnect to take effect.

- To set up the Out of Office Assistant, click **Out of Office Assistant** and select the **I am Currently Out of Office** check box. Select an action and next owner, and enter annotations, if needed, and click **Submit**.

- **Display Settings:** Set number formatting, page options, and other options.
  - Select the **Use Default** check box to use default application settings for all options in a section.
  - Select a check box on the right to use the default application setting for an option.
  - Select a check box on the left to override the default application settings for an option.
  - For formatting numbers, you can set the formatting for thousands separator, decimal separator, negative sign, and negative color.
  - In page options, you can define settings to remember selected page members, allow a search if the number of pages exceeds a number you specify, and set member indentation.
  - In other options, you can display consolidation operator, set a warning if the data form is largers than the number of specified cells, display a specified number of members on each dimensions page, display a specified number of records on each assign access page, and set a date format.
- **User Variables:** Variables set up by the administrator to help you navigate large forms and grids.
  - To change the selected member for a user variable, click to launch the **Member Selection** dialog.
  - Smart View 21.100+: You can apply an alias table to the members in the **Member Selection** dialog. Click , select **Alias Table**, and then choose an alias table from the list in the popup window. Selecting a table then closes the window. Your alias table selection is now applied to the members in **Member Selection** dialog. Select a member for the user variable, and then click **OK** to close the dialog.
  - Changing the alias table in **Member Selection** affects only the view in the dialog when setting user variables. For more information on using **Member Selection**, see Selecting Members from the Member Selector.

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  - You can also enter the member name directly in the **Selected Member** field. If you enter an incorrect member or do not have access, then an error message warns you that the member does not exist or you do not have access to the member. Click **OK** to return to the **Preferences** and enter or select the correct member.

4. After setting the user preferences, click **OK**.

> **Note**
>
> - User preferences for locale, date format, and decimal and numeric format set on forms from within the web application are not honored on forms in Smart View.
> - You may specify decimal and numeric format for forms in Smart View in the **Options** dialog, **Formatting** tab by enabling the **Use Thousands Separator** option, and setting the **Scale** and **Decimal Places** options. For more information, see Formatting Options.

Smart View Behavior Options in Cloud EPM

Your administrator can set options in the web interface that affect Oracle Smart View for Office behavior.

Data source types: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

The options that affect Smart View behavior are:

- Suppression Mode
- Smart View Ad Hoc Behavior

See the administratration documentation for your business process for instructions on setting these options. For example, for Planning, see What Application and System Settings Can I Specify?

Additionally, review the information in these topics:

- Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids
- Smart View Ad Hoc Behavior Setting and Non-Admin Access to Valid Members
- Smart View Ad Hoc Behavior Setting and Member Selection
- Smart View Ad Hoc Behavior Setting and Row/Column Suppression Options
- Smart View Ad Hoc Behavior Setting and Additional Zoom In Options
- Smart View Ad Hoc Behavior Setting and Multiple-cell Select for Ad Hoc Operations
- Smart View Ad Hoc Behavior Setting and Suppressing Repeated Members
- Smart View Ad Hoc Behavior Setting and Member Name and Alias Display
- Removal of Support of Native Mode Option for Smart View Ad Hoc Behavior Application Setting
- Converting Workbooks from Native Mode to Standard Mode

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Suppression Mode

The **Suppression Mode** application setting works with the suppression options for **No Data/Missing** and **Zero** in Oracle Smart View for Office. In the web application, your administrator can use the **Suppression Mode** setting to change suppression behavior.

In the Smart View **Options** dialog, **Data Options** tab, you select the **No Data/Missing** and **Zero** options for **Suppress Rows**, **Suppress Columns**, or both. The settings you make in Smart View then work with the setting in your web application.

The **Suppression Mode** options in the web application and their effect in Smart View are:

- **Suppress Missing values only**—In the web application, the administrator enables this option to suppress rows, or columns, or both that contain **No Data/Missing**.

  For example, in Smart View, if the **No Data/Missing** option for rows is selected, and a row contains only Missing data, then the row is suppressed; it is *not* displayed. If both the **No Data/Missing** and **Zero** suppression options are selected in Smart View for rows, and a row contains both zeroes and Missing data, then the row is displayed; it is *not* suppressed.

- **Suppress Missing also Suppresses Zero**—In the web application, the administrator enables this option to suppress rows, or columns, or both that contain all **No Data/Missing** or all **Zeros**, or a combination of both.

  In Smart View, you must enable the **No Data/Missing** and **Zero** options for **Suppress Rows**, **Suppress Columns**, or both to see the result in an ad hoc grid.

  For example, in Smart View, if both the **No Data/Missing** and **Zero** suppression options are selected for columns, and a column contains both zeroes and Missing labels, then the column is suppressed; it is *not* displayed. Columns that contain only zeroes, and columns that contain only Missing labels are also suppressed; they are *not* displayed.

See Data Options for general information on the suppression options available in Smart View.

Smart View Ad Hoc Behavior

In 21.08+, all new applications and all recreated applications use only the **Standard** setting for the **Smart View Ad Hoc Behavior** option. In these cases, the **Smart View Ad Hoc Behavior** option is not selectable.

> **Note**
>
> Existing and migrated applications will not experience any change in behavior, and **Native** will remain as the default **Smart View Ad Hoc Behavior** setting, with **Standard** being an option.
>
> The **Native** mode **Smart View Ad Hoc Behavior** setting will eventually be phased out (timeline is yet to be determined). If you are using the Native mode option, Oracle recommends that you plan on switching your **Smart View Ad Hoc Behavior** application setting to **Standard** mode.

In pre-21.08 applications and migrated web applications, your administrator can choose to enable enhanced ad hoc features and behaviors using the application setting, **Smart View Ad Hoc Behavior**. These are the options

- **Native**—Does not enable enhanced ad hoc features.

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- **Standard**—Enables enhanced ad hoc features.

Standard-mode applications give you these ad hoc features and behaviors:

- In-grid POV—POV members are placed on the POV row (usually the first row) of the grid instead of in the POV toolbar.

  See Selecting Members Using the Cell-Based POV.

- **Submit Data**—Using the default **Submit Data** button in the Smart View ribbon, all cells in a grid are submitted, including Smart List values, Text values, and all data cells that have been explicitly modified (made dirty). Once the submit operation is complete, the entire grid will be refreshed.

  If the grid is not in a refreshed state, then Oracle Smart View for Office will attempt to perform a submit data without refresh operation.

  See Submitting Data Without Refreshing.

- Free-form support—Supports empty columns and rows anywhere in a grid and changing the alias table. Additionally, supports member auto-refresh where deleted members are returned to the grid upon refresh.

  See Free-Form Mode.

- Saving ad hoc grids—The **Save Ad Hoc Grid** command is enabled and you can save ad hoc grids; however, the **Submit Formatting** option is not yet available.

  See Saving Ad Hoc Grids and Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids.

- Multiple-grid ad hoc—Supports multiple ad hoc grids on the same Excel worksheet. With multiple-grid ad hoc, you can submit data from any grid on the sheet. Grids based on aggregate storage cubes and block storage cubes are supported on the same sheet. Each grid is independent; for example, if required, you can change the alias table for only one grid on the sheet.

  See Working with Multiple-Grid Worksheets in Cloud EPM.

- Additional Zoom In options—Supports these additional Zoom In options: **Sibling Level**, **Same Level**, and Same Generation.

  See Smart View Ad Hoc Behavior Setting and Additional Zoom In Options.

- Multiple-cell select for ad hoc operations—Supports multiple-cell selection for these ad hoc operations: **Zoom In**, **Zoom Out**, **Keep Only**, and **Remove Only**.

  See Smart View Ad Hoc Behavior Setting and Multiple-cell Select for Ad Hoc Operations.

- Suppress repeated members in an ad hoc grid.

  See Smart View Ad Hoc Behavior Setting and Suppressing Repeated Members.

- Display both member names and their aliases in an ad hoc grid.

  See Smart View Ad Hoc Behavior Setting and Member Name and Alias Display.

- Change the **Smart View Ad Hoc Behavior** setting from **Native** to **Standard**, as Oracle no longer supports Native mode. Then, convert workbooks created in Native mode to Standard mode.

  See Removal of Support of Native Mode Option for Smart View Ad Hoc Behavior Application Setting and Converting Workbooks from Native Mode to Standard Mode.

When the **Ad Hoc Behavior** option is set to **Standard**, the following features and functionality are not supported:

- Create Smart Forms

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- Open a native mode grid in standard mode; open a standard mode grid in native mode (see Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids)
- HSACTIVE is supported on multiple-grid sheets only when using a private connection; HSACTIVE on a multiple-grid sheet using a shared connection is not supported
- Zoom In on Formulas
- Preserve Formula is disabled in multiple-grid sheets

The topics that follow give you more insight into Standard-mode behaviors in Oracle Fusion Cloud Enterprise Performance Management.

- Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids
- Smart View Ad Hoc Behavior Setting and Non-Admin Access to Valid Members
- Smart View Ad Hoc Behavior Setting and Member Selection
- Smart View Ad Hoc Behavior Setting and Row/Column Suppression Options
- Smart View Ad Hoc Behavior Setting and Additional Zoom In Options
- Smart View Ad Hoc Behavior Setting and Multiple-cell Select for Ad Hoc Operations
- Smart View Ad Hoc Behavior Setting and Suppressing Repeated Members
- Smart View Ad Hoc Behavior Setting and Member Name and Alias Display
- Removal of Support of Native Mode Option for Smart View Ad Hoc Behavior Application Setting
- Converting Workbooks from Native Mode to Standard Mode

Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids

The **Smart View Ad Hoc Behavior** option setting for your application affects which saved ad hoc grids users can open and work with.

When administrators switch the **Smart View Ad Hoc Behavior** option setting between **Native** and **Standard**, ad hoc grids built and saved in one mode can be opened with limitations noted in the following table.

Smart View Ad Hoc Behavior Mode Created and Saved In	Smart View Ad Hoc Behavior Mode Opened and Refreshed In	Supported
Standard	Standard	Yes
Standard	Native	No
Native	Standard	Yes
Native	Native	Yes

For example:

- When the **Smart View Ad Hoc Behavior** option is set to **Standard**, users can open and refresh saved ad hoc grids that were created while the service was set to **Standard** or **Native**.
- When the **Smart View Ad Hoc Behavior** option is set to **Native**, users can only open and refresh saved ad hoc grids that were created while the service was set to **Native**.

  Users attempting to open and refresh a grid that was created while the **Smart View Ad Hoc Behavior** option was set to **Standard** will see an error message. To open and refresh an ad hoc grid that was created while the **Smart View Ad Hoc Behavior** option was set to **Native**, ensure that the **Smart View Ad Hoc Behavior** option is set to **Native**.

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Administrators: Set the **Smart View Ad Hoc Behavior** option in the application configuration options page for your service. See the administration documentation for your service for more information.

Smart View Ad Hoc Behavior Setting and Non-Admin Access to Valid Members

In ad hoc grids in Standard mode, when a non-admin user does not have an access to a valid member, then this member will be handled as a comment, and no data is displayed upon refresh. The non-admin user should not be able to distinguish between members to which he or she does not have access and comments.

Consider the following scenarios with multiple dimensions on a row, where C1 is a comment or a member to which a non-admin user does not have access:

1. C1 is placed on the innermost row dimension location. M1 and M2 are actual valid members that the non-admin user has access to. M1 and M2 are placed on the same row as C1. After refresh, the valid members will be removed; for example

   Row dimensions:

   M1 M2 C1

   After refresh

   Blank Blank C1

2. C1 is *not* placed on the innermost dimension location. Instead, a valid member, M3. is placed on the innermost location in this row. The comment, C1, will be removed on refresh and replaced with the previous top valid member on that dimension; for example:

   Row dimensions:

   M1 M2 M3

   M1 C1 M4

   After refresh

   M1 M2 M3

   M1 M2 M4

This approach helps to avoid a mix of valid members and comments on the same row, which could could cause confusion to the user.

Note the following:

- If a row consists completely of blank cells and comments, it will not be changed on refresh.
- The very first row or column is a special case as it controls grid boundaries. Mixing and matching members and comments on that row or column can result in a message about an invalid grid. This is intentional.

Smart View Ad Hoc Behavior Setting and Member Selection

In Smart View, when connected to a Standard mode application (20.09+), the dimension or member from which you invoke **Member Selection** is shown as the selected dimension in the dialog. In Standard mode, there is no need to refresh the grid before selecting a different dimension or member on the grid, and invoking **Member Selection**. The selected dimension will be shown in **Member Selection** by default.

Smart View Ad Hoc Behavior Setting and Row/Column Suppression Options

In Standard mode, certain row and column suppression options in the Options dialog in Smart View are not supported, although they appear as selectable in the dialog.

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- Row Suppression Options not supported in Standard mode:
  - No Access
  - Invalid
  - Underscore Character
- Column Suppression Options not supported in Standard mode:
  - No Data/Missing
  - Zero
  - No Access

> **Note**
>
> Selecting the **No Access** suppression option for rows or columns results in this error message upon refresh:
>
> No Access suppression option is not supported.

Smart View Ad Hoc Behavior Setting and Additional Zoom In Options

In Standard mode, these additional commands are available from the drop-down menu on the **Zoom In** button in the provider ad hoc ribbon:

- **Sibling Level**—Select to retrieve data for the siblings of the selected member or members. For example, in the Vision sample database, a zoom in operation on Jan retrieves Jan, Feb, and Mar.
- **Same Level**—Select to retrieve data for all members at the same level as the selected member or members. For example, in the Vision sample database, a zoom in on Q1 retrieves Q2, Q3, and Q4.
- **Same Generation**—Select to retrieve data for all members of the same generation as the selected member or members. For example, in the Vision sample database, a zoom in on Q1 retrieves Q2, Q3, and Q4.

Smart View Ad Hoc Behavior Setting and Multiple-cell Select for Ad Hoc Operations

In Standard mode, you can select multiple row or column member cells and then perform any of the following actions:

- **Zoom In**, including any of the zoom options, such as Bottom Level or Same Generation.
- **Zoom Out**. Zooming out collapses the view to the next upper level.
- **Keep Only** and **Remove Only**. Note that the integrity and validity of the grid must be maintained. If your selections cause an issue with the grid, Smart View display a warning message informing you of the issue, and no change is made to the grid.

Smart View Ad Hoc Behavior Setting and Suppressing Repeated Members

Grids can contain members that are repeated on multiple rows. To simplify the view and improve readability for users, these repeated members can be suppressed in ad hoc grids when connected to Standard-mode applications.

Prior to 22.08, suppressing repeated members was only supported when connected to Native mode applications.

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To suppress repeated members in ad hoc grids, open an ad hoc grid with repeated members, select the **Repeated Members** check box in the **Suppress Rows** section of the **Options** dialog, **Data Options** tab. Then refresh the sheet and note that the repeated members are no longer seen in the ad hoc grid.

> **Note**
>
> When repeated members are suppressed in an ad hoc grid, any formatting changes done for data cells corresponding to the repeated members cannot be preserved using the **Preserve Format** option and are lost on refreshing the grid.

Smart View Ad Hoc Behavior Setting and Member Name and Alias Display

Starting in 22.08, you can use the **Member Name Display** option, **Member Name and Alias**, to display both the member names and their aliases in separate columns on row dimensions in ad hoc grids when connected to a Standard-mode application.

With **Member Name and Alias** selected, you can create ad hoc grids that display in your worksheet both the database member name, which is often a stock number or product code, and the member's alias name, which can be more descriptive than the member name.

Additionally, the side-by-side display of member names and aliases is a common feature in Essbase ad hoc, which helps in migrating worksheets maintained in Essbase into the FreeForm business process in Cloud EPM.

To display both member names and their aliases in ad hoc grids, open an ad hoc grid, select the **Member Name Display** option, **Member Name and Alias**, in the **General** section of the **Options** dialog, **Member Options** tab. Then refresh the sheet and note that the member names and their aliases are displayed on the sheet.

> **Note**
>
> - When the **Member Name and Alias** option is selected, an error is displayed if duplicate aliases appear in a row or column heading cell, whether they are hand-typed or the result of an ad hoc operation such as Zoom In or Keep Only.
> - The **Member Name and Alias** option is not supported for flex forms.

Removal of Support of Native Mode Option for Smart View Ad Hoc Behavior Application Setting

The **Native** mode option for the **Smart View Ad Hoc Behavior** application setting is no longer supported in Smart View.

While customers can continue using Native mode, this mode is no longer supported for escalations and enhancements.

Standard is the ad hoc mode upon which all enhancements in Cloud EPM are being delivered.

Oracle stopped supporting Native mode at the end of year 2024. Customers on Native mode are advised to convert the **Smart View Ad Hoc Behavior** application setting for their environments to Standard mode and test their use cases.

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Any gaps found should be logged as an enhancement to Standard mode. Enhancements should be logged on the Customer Connect EPM Platform Idea Lab as soon as possible for Oracle to review.

Converting Workbooks from Native Mode to Standard Mode

Perform the following steps to begin working with Standard mode in your test and environment:

1. In **Application Settings**, change **Smart View Ad Hoc Behavior** to **Standard**.
2. In Smart View, open workbooks containing sheets created in Native mode and connect to the data source.
3. Refresh the sheets.
4. Save the workbook.

> **Note**
>
> - The expectation for existing Native mode worksheets is that they will work "as is" when the setting is changed to **Standard**. New ad hoc sheets will only be created in Standard mode using Standard features.
> - Smart Forms are not supported in Standard mode. There is no plan to support them in Standard mode.

For additional information, see Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids.

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24

Smart View and Narrative Reporting

Related Topics

- About Narrative Reporting
  With Oracle Smart View for Office and the Narrative Reporting extension, you use familiar Microsoft Office tools to access and work with data in Narrative Reporting.
- Setting Up Narrative Reporting in Smart View
  You can set up Narrative Reporting in Oracle Smart View for Office.
- Connecting to Narrative Reporting in Smart View
  You can connect to Narrative Reporting anytime you start Microsoft Excel, Word, or PowerPoint.
- Using Narrative Reporting Home
  After you create a connection to Narrative Reporting, you can use Narrative Reporting Home.
- Administering Report Packages in Smart View
  You can administer report packages in Oracle Smart View for Office.
- Authoring Doclets
  As a doclet author, you provide report content in Oracle Smart View for Office.
- Performing Reviews
  Perform reviews by entering comments and providing your feedback in a review instance in Oracle Smart View for Office.
- Working with Distributions
  Distributions enable report package owners to send report content to stakeholders at any point in the report package development.
- Performing Sign Offs
  Signers review the finalized content of a report. They can either sign off on or reject the report.
- Refreshing Report Packages
  You can refresh the contents of a report package by using the Refresh Report Package command in the Library pane of the Smart View Panel.
- Publishing Report Packages, Sections, and Doclets
  You can publish report packages, specific sections, and individual doclets directly from Smart View, in addition to publishing them from the Narrative Reporting web application.
- Saving Office Documents to Cloud EPM in Narrative Reporting in Smart View
  In Oracle Smart View for Office, you can save Microsoft Office documents to the Oracle Fusion Cloud Enterprise Performance Management Library. Documents you save in the Cloud EPM Library can be made accessible to other users. You can also download saved files from the library.
- Working with Reports in Smart View
  Reports is a cloud-based reporting solution for creating Oracle Fusion Cloud Enterprise Performance Management financial and managerial reports. It enables users to insert charts and grids utilizing Cloud EPM sources such as Planning, and other sources such as Oracle Essbase as well as ERP Cloud Financials, into a report.

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- Working with Narrative Reporting Data in Smart View
  You can use Oracle Smart View for Office to copy data from supported on-premises and cloud data sources.

About Narrative Reporting

With Oracle Smart View for Office and the Narrative Reporting extension, you use familiar Microsoft Office tools to access and work with data in Narrative Reporting.

You and your colleagues work in a collaborative environment with static PDF files or with Word, PowerPoint, or Excel files containing refreshable data copied or embedded from Smart View. The Narrative Reporting workflow, consisting of clearly defined assignments and tasks, organizes input from many contributors in one document. Some tasks are performed in the Narrative Reporting web interface, and others are completed in Smart View.

With Narrative Reporting:

- Use the web interface or Smart View to create a *report package* structure consisting of *doclets* of various types. In Smart View, create report packages in two ways
  - From a single Word or PDF document, and add more doclets to it later.
  - From a set of documents consisting of Word documents, PowerPoint presentation slides, Excel workbooks, and PDF files.
- Use the web interface or Smart View to add *regular doclets* to a Word-, PowerPoint-, or PDF-based report package.
- Use the web interface to add *linked regular doclets*, doclets that are linked to an Office document stored in the Narrative Reporting library, to a Word-, PowerPoint-, or PDF-based report package.
- Use the web interface or Smart View to add Excel-based *reference doclets*, containing embeddable content, to a Word-, PowerPoint-, or PDF-based report package.
- Use the web interface to add *supplemental doclets*, such as Word documents, PowerPoint slides, Excel workbooks, and other file types, such as PDF, HTML, and TXT, to the report package.
- Use the web interface or Smart View to add a Word table of contents to a Word- or PDF-based report package.
- Use the web interface to assign user access and responsibilities, including timelines and due dates, for the authoring, review, and approval of each doclet, reference doclet, and supplemental doclet in the report package.

  In Smart View, you also have the option of assigning author responsibilities when creating a report package structure.
- Use Smart View to author Office-based doclet content directly in Microsoft Office. Doclet content is authored in Word or PowerPoint. Embeddable content in reference doclets is authored in Excel. Supplemental doclet content is authored in the appropriate Office application.

  You can work with doclets, reference doclets, and supplemental doclets in Smart View while connected to Narrative Reporting, or you can download doclets of any Office type and work with them locally.

  Note that Office-based supplemental doclets and Excel-based reference doclets follow standard doclet workflow tasks, such as checkout, upload, and checkin.
- Download PDF doclets from the web or Smart View.

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- Leverage Smart View's ability to access various data sources and include individual data points, formatted reports, variables, or embedded content within the doclet.

  You can retrieve data from Narrative Reporting data sources and other supported on-premises and cloud data sources.
- Collaboratively review and comment on assigned review instances either on the web interface or in Smart View.
- Sign off on the entire report package either on the web interface or in Smart View.
- Finalize the report package in the web interface.

When you work with the doclets, reference doclets, Office-based supplemental doclets, and reference files in a Narrative Reporting report package, you can use Smart View to copy and paste or embed data from Narrative Reporting data sources and other supported data sources, including on-premises and cloud data sources.

For example, you can incorporate data from Oracle Essbase and Planning in the same doclet. A doclet in a report package in Word or PowerPoint may contain a profit and loss statement that was created from an Essbase source along with an income statement report created from a Planning source. The data points for the areas that you copy or embed are retained in Word or PowerPoint, so you can refresh the doclet to keep the data up-to-date.

See the Narrative Reporting documentation on the Oracle Help Center for complete descriptions of Narrative Reporting, including overviews and procedural information.

Setting Up Narrative Reporting in Smart View

You can set up Narrative Reporting in Oracle Smart View for Office.

The topics in this section discuss setting up Narrative Reporting in Smart View. This is the workflow:

- Download and run the Smart View installer
- Set up a connection to Narrative Reporting
- Install the Narrative Reporting extension

Videos

Your Goal	Watch This Video
Learn about setting up Smart View.	Setting Up Smart View

Downloading and Running the Smart View Installer

To download and run the Oracle Smart View for Office installer:

1. Start Narrative Reporting in a web browser, and log in with your Cloud EPM user name and password.
2. In the upper-right corner of the Narrative Reporting web interface, select the arrow next to your user name to display the user menu, and then select **Downloads**.

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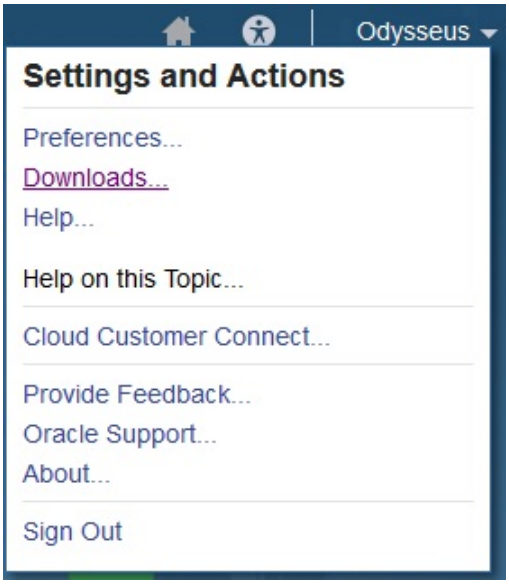

3. On the **Downloads** page, under Smart View, click **Download From Oracle Technology Network**.

   If a popup blocker message prevents you from continuing, follow the steps required for your browser to allow popups to display for the current web address.

4. On the **Oracle Smart View for Office** information page on Oracle Technology Network, click **Download Now**.

   This action take you to the **Oracle Software Delivery Cloud** page.

   If prompted, provide your Oracle login credentials.

5. On the **Oracle Software Delivery Cloud** page:

   a. Review the Oracle Gadgets License Agreement, and then select the **I reviewed and accept the following license agreements** check box.

   b. Select the **Oracle Smart View for Office <version>** check box.

   c. Under **Platforms**, you are required to select an option. However, there is only one Smart View executable file for all platforms, so Oracle recommends selecting the **All** option.

6. Click **Download**, and follow the steps for your browser to download and save the file to a folder on your computer; for example, save the file to the **Downloads** folder.

   An Oracle Software Download Manager EXE file is downloaded to your computer.

7. Double-click the EXE file to launch the **Oracle Download Manager**, then perform these steps:

   a. Under **Destination** click **Browse** and navigate to a folder for the Smart View download ZIP file, and then click **Next**.

   b. In the **Status** window, allow the ZIP file to download, and then click **Open Destination** to open the ZIP download location in File Explorer.

8. In File Explorer, unzip the contents of the ZIP file, and then double-click SmartView.exe or right-click SmartView.exe and select **Run as administrator** to start the installation wizard.

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> **Note**
>
> Whenever possible, Oracle recommends using the **Run as administrator** command when installing Smart View.

9. Select a destination folder for Smart View, and then click **OK**; for new installations, Smart View is installed by default in:

   C:/Oracle/SmartView

> **Note**
>
> If you are upgrading an installation of Smart View, then the installer defaults to the folder where you previously installed Smart View.

10. When installation is complete, click **OK**.

    The tab for the Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

    Continue the setup process with .Creating Connections to Narrative Reporting

The tab for the Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

Continue the setup process with Creating Connections to Narrative Reporting.

Creating Connections to Narrative Reporting

After you install Oracle Smart View for Office, as described in Downloading and Running the Smart View Installer, you can create connections to Narrative Reporting.

Connections require information about your service URL. Your Smart View administrator should provide you with the information that you need to create the connection.

For the connection to Narrative Reporting, use the quick connection method in Smart View.

> **Note**
>
> Use the procedure in this topic to *create* connections.
>
> Once connections are created, use the procedure in Connecting to Narrative Reporting in Smart View for connecting on a routine basis.

To create a private connection to Narrative Reporting using the quick connection method:

1. Open Microsoft Excel, Word, or PowerPoint, and select the Smart View ribbon.
2. From the Smart View ribbon, click **Panel**.
3. From the Smart View Panel, select **Private Connections**.

   Alternatively, from the Smart View Panel, click the arrow next to the **Switch to** button, , and then select **Private Connections** from the drop-down list.

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4. Still in the Smart View Panel, in the text box shown in Figure 1, enter the service URL for the Narrative Reporting.

Figure 24-1 Quick Connection - Enter a URL

The URL syntax:

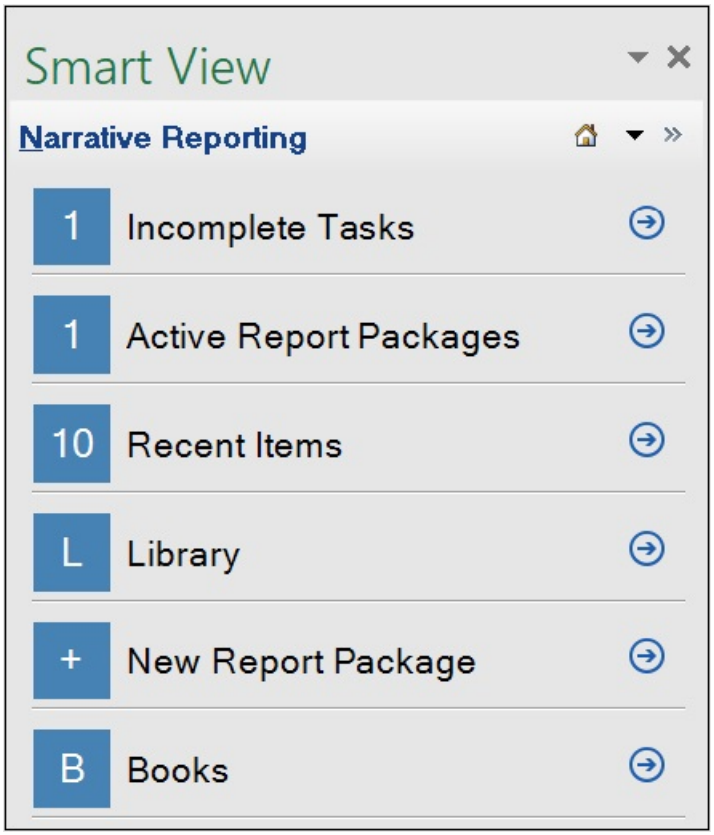
https://*serviceURL*/epm/SmartView

Your Smart View administrator should provide you with the URL for Narrative Reporting

5. Press **Enter**.

Alternatively, click the **Go** button, next to the text box where you entered the service URL.

6. In the login window, enter your Oracle Cloud Identity Service Domain credentials, and click **Sign In**.
7. If the Narrative Reporting Home panel is displayed, select **Library** to launch the Smart View Panel (if the Home panel does not display, skip to the next step).



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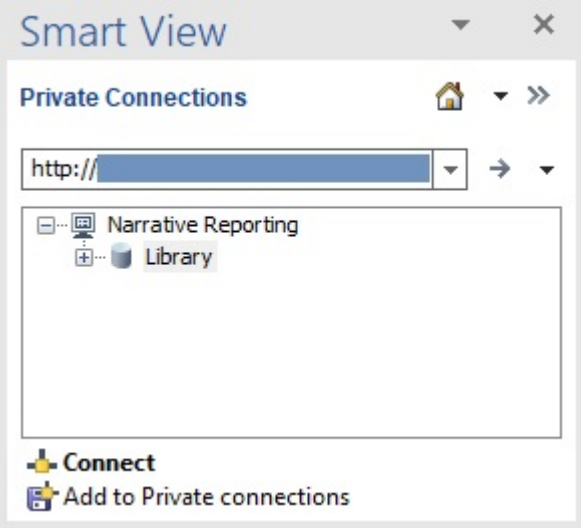
The Narrative Reporting Home panel will display if you have already installed the Narrative Reporting extension, and are creating other connections to Narrative Reporting. For example, an administrator may be creating connections to a test environment and to a production environment.

8. In the Smart View Panel, expand the **Narrative Reporting** node, then select the **Library** node, and then click **Connect**.



9. Perform an action:
   - If the **Extension Alerts** dialog is displayed, then click the **Go to Extension Dialog** button. The **Extension Alerts** dialog informs you of the latest Narrative Reporting extension available for installation. To complete the extension update procedure, see Working with Extension Alerts.
   - If the **Extension Alerts** dialog is *not* displayed, continue with Installing the Narrative Reporting Extension

Installing the Narrative Reporting Extension

This topic covers installing the Narrative Reporting extension from within Oracle Smart View for Office.

Before you begin this procedure, complete the steps in Creating Connections to Narrative Reporting.

> **Note**
>
> You can also install the extension from the Narrative Reporting web interface. To install the extension from the web, see:
>
> - Downloading and Installing Clients in *Getting Started Guide for Administrators*
> - Downloading and Installing Clients in *Getting Started Guide for Users*

To install the Narrative Reporting extension from Smart View:

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1. From the Smart View ribbon, select **Options**, and then **Extensions**.
2. Click the **Check for Updates, New Installs, and Uninstalls** link.
3. In **Select Location for Extension Updates**, select the connections to check for extension updates, and then click **Get Updates**.

   Smart View checks for all extensions that your administrator has made available to you.

   To check for available extensions in all your connections, check **Select All**, and then click **Get Updates**.

   The dialog box expands to display a message window providing you with the progress and status of the extension query.

   > **Note**
   >
   > If you have connections to multiple products from Oracle Enterprise Performance Management System, Oracle Fusion Cloud Enterprise Performance Management, Oracle Business Intelligence Enterprise Edition, and Oracle Analytics Cloud, you may select only the check box that corresponds to your Narrative Reporting connection.

4. Locate the extension named **Narrative Reporting** and click the **Install** link,

, to launch the installer.

   > **Note**
   >
   > In release 25.100+, a message alerts you if a minimum version of Smart View is required and the current Smart View installation is not at the minimum version.
   >
   > You may continue with the installation, however, some features may not be available in the extension being installed.

5. In the popup dialog asking "Apply this extension update?", click **Yes**, and then click **OK** to close the **Options** dialog, **Extensions** tab.

   A dialog display the progress of the extension installation.

6. A message dialog is displayed informing you that the installation is successful and instructing you to restart Office; click **OK** in this dialog, and then close and restart Office.

For more information on extension installation, see the following topics:

- Initially Checking for Available Extensions
- Installing Extensions

After completing the procedure in this topic, you are ready to begin using Narrative Reporting with Smart View.

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Connecting to Narrative Reporting in Smart View

You can connect to Narrative Reporting anytime you start Microsoft Excel, Word, or PowerPoint.

> **Note**
>
> Before you connect to Narrative Reporting, make sure you have completed the procedures in Downloading and Running the Smart View Installer and Creating Connections to Narrative Reporting,

Video

Your Goal	Watch This Video
Learn about setting up Oracle Smart View for Office and connecting to Narrative Reporting.	Setting Up Smart View

To connect to Narrative Reporting:

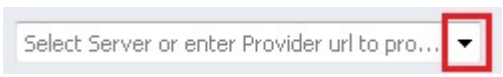
1. Perform an action:
   - If you're working with Narrative Reporting report packages, launch Word or PowerPoint, depending on the content of the report package.

     > **Note**
     >
     > Report packages can consist of either Word documents or PowerPoint slides, but not both.

   - If you're working with Narrative Reporting models and reports, launch Excel.
2. Select the Smart View ribbon, and then click **Panel**.
3. In the Smart View Panel, select **Private Connections**.

   Alternatively, from the Smart View Panel, click the arrow next to the **Switch to** button, , and then select **Private Connections** from the drop-down list.
4. In the text box shown in Figure 1, click the arrow to display the drop-down menu and select your connection.

Figure 24-2 Quick Connection Arrow for Drop-down List



If you created your data source connection using the procedure in Creating Connections to Narrative Reporting, then it should be listed under **Quick Connect URLs** in the drop-down list.

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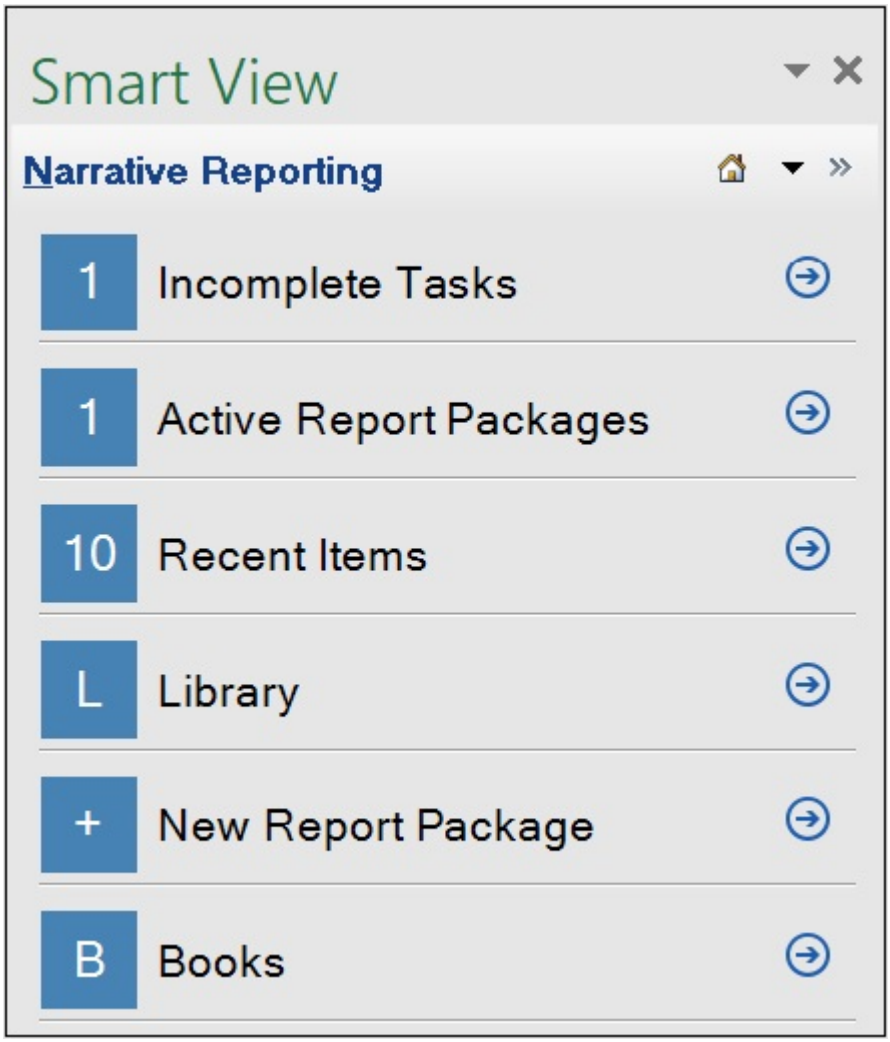
5. In the **Login** window, enter your **User Name** and **Password**, and then click **Sign In**.

   The Narrative Reporting Home panel is displayed. Narrative Reporting Home allows you to quickly access your pending tasks and other work in which you are involved. From the Narrative Reporting Home, you can access:

   - **Incomplete Tasks**—Incomplete tasks assigned to you.
   - **Active Report Packages**—These are the active report packages for which you have outstanding tasks and responsibilities.
   - **Recent Items**—Items you have recently accessed.
   - **Library**—The library of items in Narrative Reporting, including report packages and reporting applications.
   - **New Report Package**—Shortcut to the **New Report Package** dialog, where you define a report package structure.

   Figure 2 shows an example of Narrative Reporting Home.

Figure 24-3 Narrative Reporting Home



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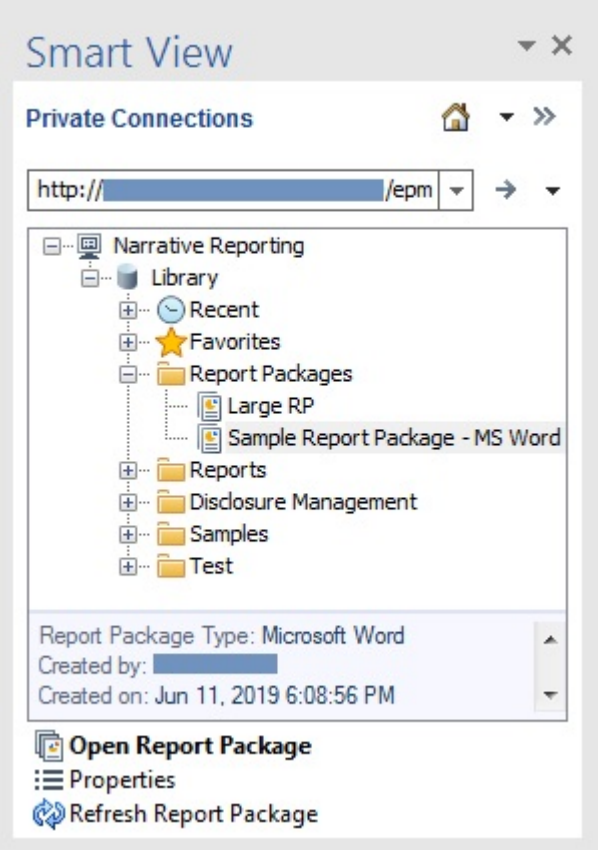
> **Note**
>
> The next step explains how to access a report package or reporting application from the Narrative Reporting Library node by clicking **Library** in Narrative Reporting Home. You can also access report packages and tasks using **Incomplete Tasks**, **Active Report Packages**, and **Recent Items**. Those access methods are described in Using Narrative Reporting Home.

6. Click **Library** and then perform an action:
   - To work with report packages in Word or PowerPoint:
     a. Expand the **Narrative Reporting** node, then the **Library** node, then expand the **Report Packages** folder, and then select a report package.



You can also locate the report package by navigating to:

- The **Recent** folder, if you have recently accessed the report package in the Narrative Reporting web interface
- The **Favorites** folder, if you have designated the report package as a favorite in the Narrative Reporting web interface.
- A user-defined folder, if the report package was saved in a folder created in the Narrative Reporting web interface.

b. In the Action Panel, select **Open Report Package**.

Alternatively, you can right-click the report package name and select **Open Report Package**, or double-click the report package name to open it.

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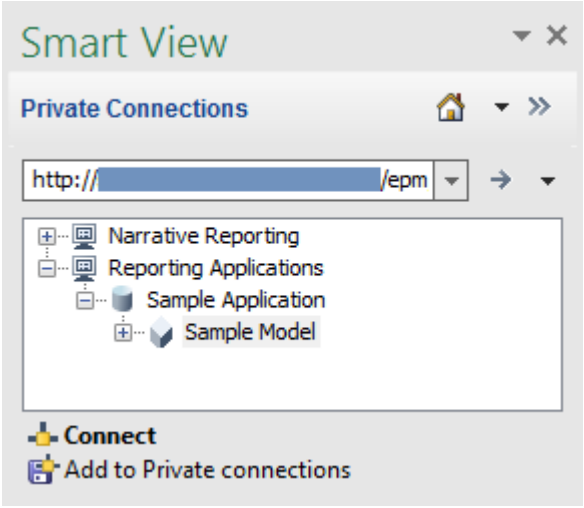
c. To work with report packages, continue with these topics in this chapter:
   - Authoring Doclets
   - Performing Reviews
   - Performing Sign Offs

- To work with Narrative Reporting models in Excel:

  a. Expand the **Reporting Applications** folder, and then expand an application, then select a model.



  b. In the Action Panel, click **Connect**.

     Alternatively, you can right-click the model name and select **Connect**, or double-click the model name to connect.

  c. Refer to Ad Hoc Analysis chapter in this guide for information on working with the Narrative Reporting reporting application or applications from other Oracle providers.

> **Note**
>
> In Excel, you can also navigate in the Smart View Panel to **Narrative Reporting**, then **Library**, and select a report package. Smart View will launch the report package in Word or PowerPoint as applicable.

7. **Optional:** For a brief look at using Narrative Reporting with Smart View, see Example: Working with Narrative Reporting Data in Smart View.

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Using Narrative Reporting Home

After you create a connection to Narrative Reporting, you can use Narrative Reporting Home.

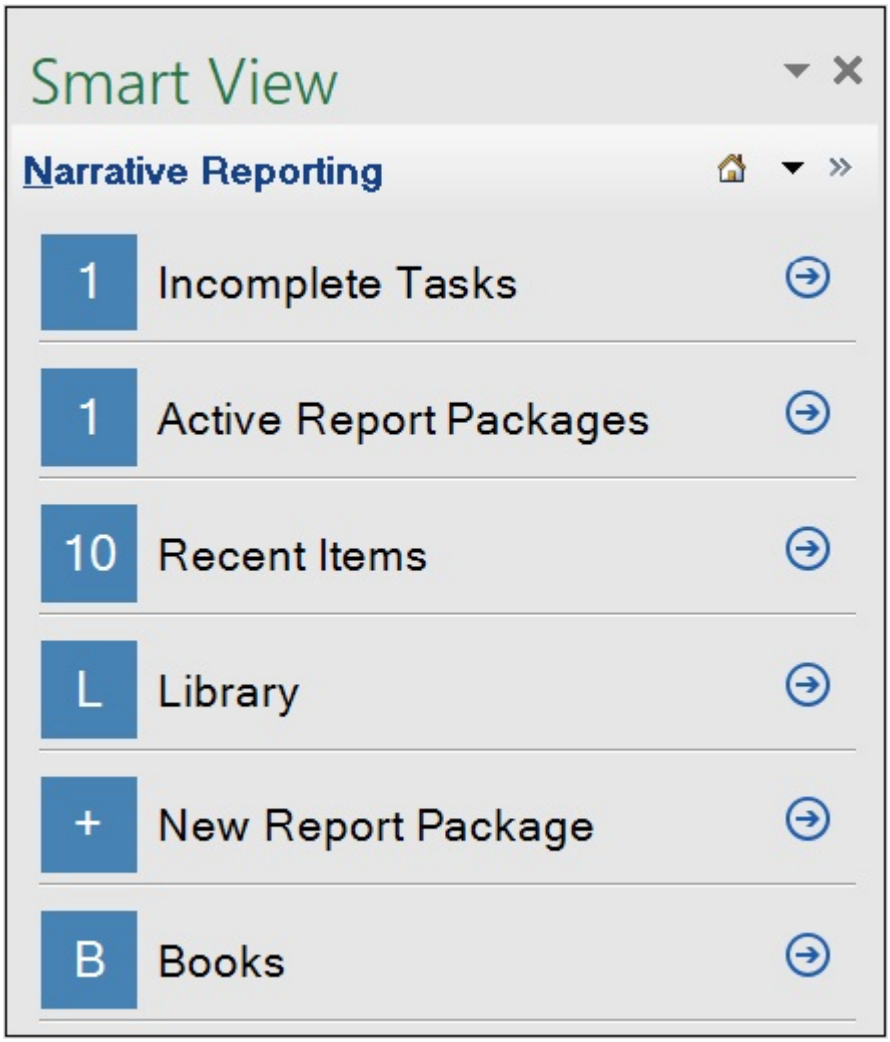
> **Note**
>
> The procedures in this topic assume that you have created a connection to Narrative Reporting as described in Creating Connections to Narrative Reporting, and connected, following the procedure in Connecting to Narrative Reporting in Smart View

To use Narrative Reporting Home:

1. Connect to Narrative Reporting as described in Connecting to Narrative Reporting in Smart View to display Narrative Reporting Home.

   Figure 1 shows an example of Narrative Reporting Home.

Figure 24-4 Narrative Reporting Home



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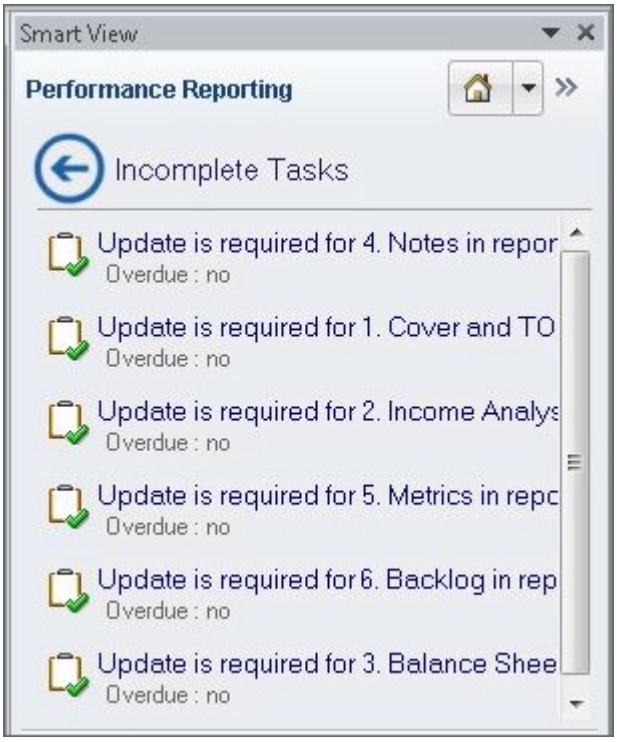
> **Note**
>
> The example in Figure 1 contains a shortcut for **Books**. This shortcut appears when you have installed the EPM Books extension for Oracle Smart View for Office.

2. To access tasks that require your attention:

   a. In Narrative Reporting Home, click **Incomplete Tasks** or click the corresponding .

   Each item in the **Incomplete Tasks** list consists of a link to help you access the task.

Figure 24-5 Narrative Reporting Home Displaying Incomplete Tasks



   b. In the **Incomplete Tasks** list, click a task link to open the **Task Information** dialog box, shown in Figure 3

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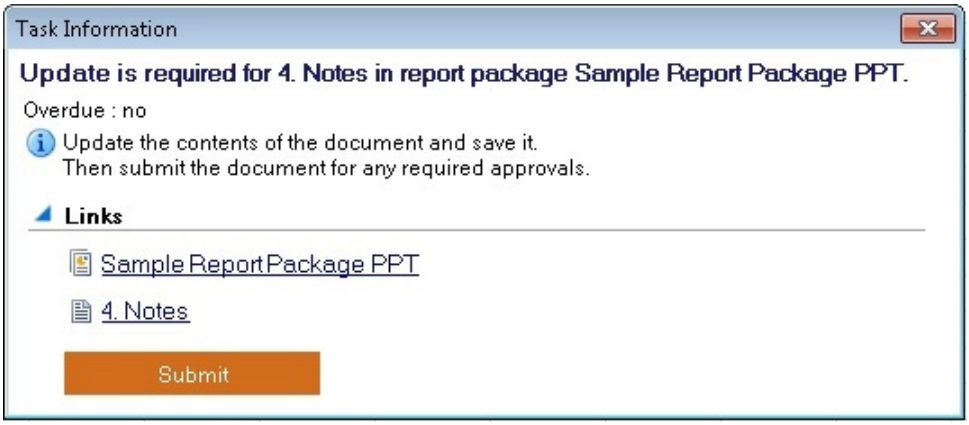
Figure 24-6 Task Information Dialog Box



c. Perform an action:

- In **Task Information**, select either a report package link or a specific doclet or supplemental doclet link.

  The report package, specific doclet, or specific Office-based supplemental doclet is opened for you in the correct Office application in the context of the task you selected. For example, if you are in Word, and click a link for a review task in PowerPoint, then the review instance is opened in PowerPoint.

  Non-Office-based supplemental doclets are downloaded to your download directory where you can open them manually.

- If the doclet shown in **Task Information** is ready to be submitted, click the **Submit** button.

d. To exit **Task Information** without performing any actions, click the X in the top right corner of the dialog box.

e. To return to Narrative Reporting Home from the **Incomplete Tasks** list without performing any actions on tasks in the list, click

3. To access active report packages for which you have a responsibility:

a. In Narrative Reporting Home, click **Active Report Packages** or click the corresponding .

Each item in the **Active Report Packages** list consists of a link to a report package for which you have a responsibility.

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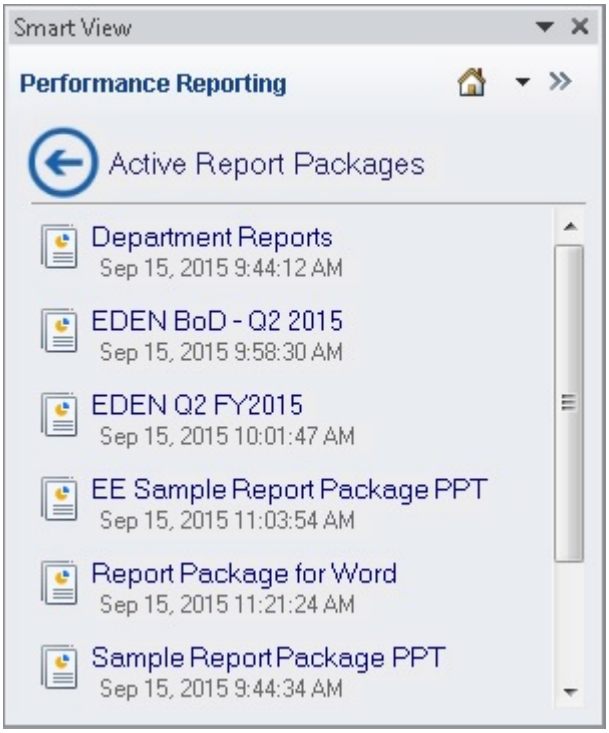
Figure 24-7 Narrative Reporting Home Displaying Active Report Packages



b. In the **Active Report Packages** list, click a link to open a report package.

   The report package is opened for you in the correct Office application in the context of your current responsibility. For example, if you are in Word, and click a report package link for which you have a review task in PowerPoint, then the report package is opened for you in PowerPoint with the review instance ready for you to select in the Report Center.

   Alternatively, to return to Narrative Reporting Home from the **Active Report Packages** list without opening any report packages in the list, click .

4. To access recently-opened items:

   a. In Narrative Reporting Home, click **Recent items** or click the corresponding .

      Each item in the **Recent Items** list consists of a link to a report package that you have recently opened and for which you have a responsibility.

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Figure 24-8 Narrative Reporting Home Displaying Active Report Packages

b. In the **Recent Items** list, click a link to open a report package.

   The report package is opened for you in the correct Office application in the context of your current responsibility. For example, if you are in Word, and click a report package link for which you have a review task in PowerPoint, then the report package is opened for you in PowerPoint with the review instance ready for you work with.

   Alternatively, to return to Narrative Reporting Home from the **Recent Items** list without opening any report packages in the list, click .

5. If you have installed the EPM Books extension: Click **Books** to access the EPM Books panel.
6. To access the Narrative Reporting library, see Connecting to Narrative Reporting in Smart View.

Administering Report Packages in Smart View

You can administer report packages in Oracle Smart View for Office.

Related Topics

- About Administering Report Packages in Smart View
- Creating Report Package Structures
- Adding Doclets to Report Package Structures
- Adding Sections to Report Package Structures
- Editing Report Package, Doclet, and Section Properties

About Administering Report Packages in Smart View

With report packages in Narrative Reporting, you can structure the content of your report, assign responsibilities to content creators and reviewers, and manage their collaboration and workflow to produce a unified document.

Report packages are described in detail in Learning About Report Packages, available in the Narrative Reporting library on the Oracle Help Center.

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In Oracle Smart View for Office, report package owners can complete these report package administration tasks:

- Create report package structures based on either the structure of a folder containing subfolders and files or based on the heading structure of a single document.

  See Creating Report Package Structures from Files in a Folder and Creating Report Package Structures from a File.

- Add doclets, with or without author assignments, and add sections to report packages.

  See Adding Doclets to Report Package Structures and Adding Sections to Report Package Structures.

- Edit the name and description for report packages, doclets, and sections.

  Editing Report Package, Doclet, and Section Properties.

Additionally, report package owners and doclet authors can refresh report packages, including content in regular doclets and reference doclets. See Refreshing Report Packages.

Creating Report Package Structures

Related Topics

- About Creating Report Package Structures in Smart View
- Creating Report Package Structures from Files in a Folder
- Creating Report Package Structures from a File

About Creating Report Package Structures in Smart View

You can easily create a Word-, PowerPoint-, or PDF-based report package structure using Oracle Smart View for Office.

With the **New Report Package** command, available in Narrative Reporting Home, from the New Report Package command in the Action Panel of Narrative Reporting Library, or from the right-click context menu on user folders in the Library, you can use a folder structure or a file as the source of the new report package.

A subset of report package design and creation activities can be performed in Smart View. For example, you use the Narrative Reporting web interface to rearrange doclets in the report package, define development phases, and assign users to those phases. But with Smart View, you can quickly accomplish the task of defining the structure of a report package by adding doclets (regular, supplemental, and reference) and sections in one step.

Smart View provides two methods for creating report packages:

- From a folder

  Create a folder on a local or network drive. Under this folder, place subfolders and files for the report package. The content and structure of the folder, including subfolders and content of subfolders, becomes the doclets and sections of the report package structure. See Creating Report Package Structures from Files in a Folder.

- From a file

  Select a .docx or .pdf file as the basis of your report package structure. The headings in the file become doclets at the root level of the report package. See Creating Report Package Structures from a File.

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With either method, you have the option to specify name, description, and the type for each doclet (regular, supplemental, or reference), and assign author responsibilities, before importing the files to create the report package.

After import, the basic structure and content of your report package is defined. You can further refine the structure from Smart View by adding more doclets or sections to the report package and, optionally, assigning author responsibilities to them. Then continue with the Narrative Reporting web interface to complete the report package definition.

Video

Your Goal	Watch This Video
Learn about creating Narrative Reporting report package structures in Smart View.	Overview: Getting Started With Report Packages in Smart View for Office

Guidelines for Creating Report Package Structures in Smart View

- You must have the Report Admin role to see the **New Report Package** command.
- When creating a report package structure from a folder:
  - Word-, PowerPoint-, and PDF-based report packages are supported.
  - You must supply a style sample document. This can be a file that you plan to add to the report package structure as a doclet, or it can be a file you specially created to be your style sample file. But you need to select a style sample document when creating the report package structure.
  - Files within the folder structure cannot be 0 (zero) KB. A 0 KB file can result when creating a Word or PowerPoint file from Windows Explorer using the right-click menu. Remove any such files from your folder structure.
- When creating a report package structure from a file:
  - You can only create Word-based report packages.
  - Only .docx and .pdf files are supported as the source of the report package.
  - Even if the file selected is a .pdf, the resulting doclets will all be of Word type (.docx). No sections will be created in the resulting report package, and all the generated doclets will appear at the root level.
  - No style sample document is required. Smart View generates a style sample document based on the content of the Word document or PDF file.
- The following conditions will result in an error:
  - If any required fields are missing input in the **New Report Package** dialog
  - Report package type and doclet type mismatch; for example, if you try to define a PowerPoint file as a regular doclet in a Word-based report package.
  - For report package structures based on a folder structure:
    - If any folders in the structure are empty. Remove any empty folders from your folder structure.
    - If any files within the folder structure are 0 (zero) KB. A 0 KB file can result when creating a new Word or PowerPoint file from Windows Explorer using the right-click menu. Make sure the files are valid Office documents of non-zero file size.
  - For report package structures based on a file, if the file is empty, contains invalid content, or is password protected.

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- A report package with the given name already exists in the system; names must be unique.
- The report package creator does not have permission to the specified library folder.

Creating Report Package Structures from Files in a Folder

Use Smart View to create a Narrative Reporting report package structure from files organized in a folder.

> **Note**
>
> Before you begin, launch Oracle Smart View for Office and log in to Narrative Reporting.

To create a report package structure from files in a folder:

1. In Narrative Reporting Home, select **New Report Package** to launch the **New Report Package** dialog.

   Alternatively, in Narrative Reporting Home, click Library, and navigate to the folder where you will save the report package, then right-click the folder and select **New Report Package**.

2. To create a new report package structure from a folder and its contents, click the radio button next to this icon:

3. Enter a **Report Package Name** and optional **Report Package Description**.
4. Select a **Report Package Type**: Word, PowerPoint, or PDF.
5. For **Location to save in Library**, click **Select**, then navigate to the Library folder in which to save the report package, and then click **Select** in the **Report Package Save Location** dialog.
6. For **Report Package Style Sample**, click **Select File**, then navigate to the Word or PowerPoint style sample file and select the file, and then click **Open**.
7. In **Select folder to import**, navigate to the folder that contains the files you want to use as the basis of the report package structure, then select the folder, and then click **OK**.

   In the bottom portion of the dialog, the folder you selected, and its subfolders, is displayed in the left pane; the doclets and sections, which will be created from the files and subfolders, are displayed in the right pane, as shown in Figure 1.

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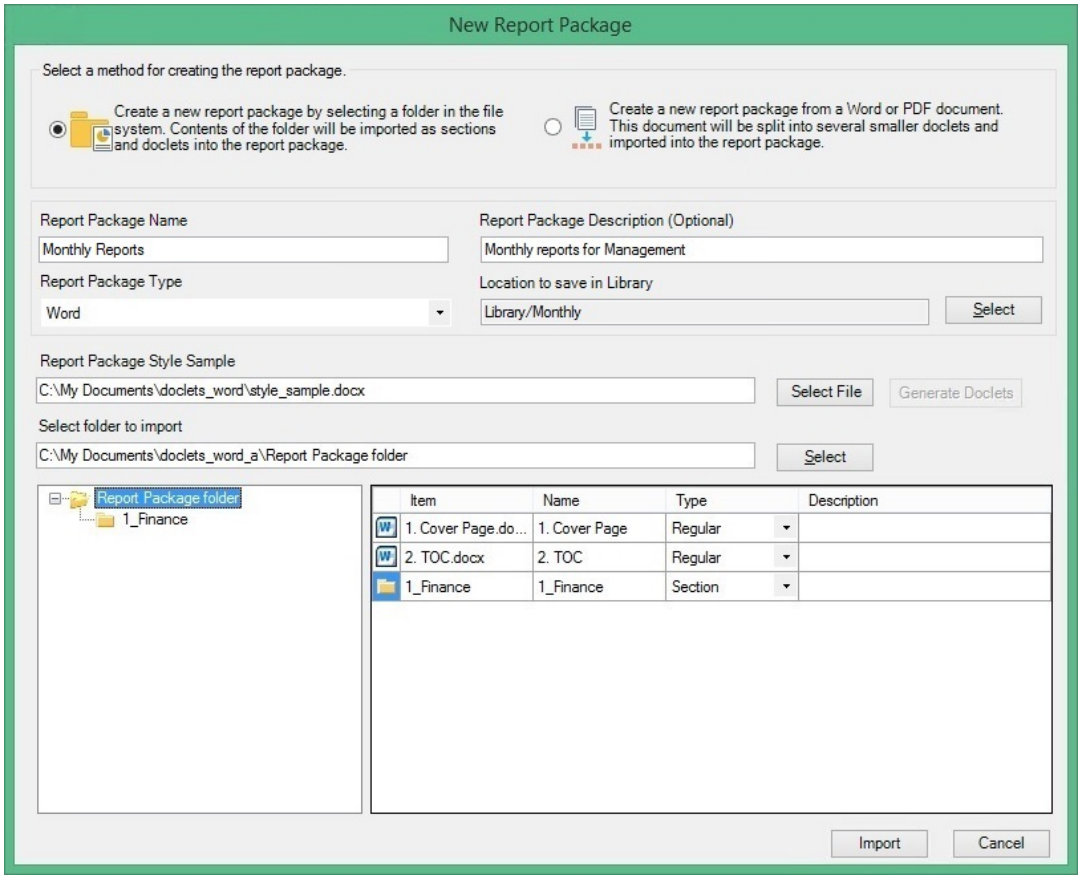
Figure 24-9 Options for Creating a Report Package Structure from a Folder



The example in Figure 1 shows the **New Report Package** dialog before clicking the **Import** button. In the example, we're using the files in the Report Package files folder to create a report package structure that will be stored in the Monthly folder in the Library.

8. At the bottom portion of the dialog, in the right pane, to make any necessary changes to the doclet type, click the arrow in the cells under **Type**, and select a doclet type.

   Use the folder structure in the left pane to drill down into folders, if present, to display more doclets and sections, and then make your changes in the **Type** column.

   For example, after evaluation by Narrative Reporting, a Word document was designated a Regular doclet , but you want to change the designation to Supplemental.

   > **Note**
   >
   > If you change the report package type at this point, Narrative Reporting reevaluates the type of each doclet per the new report package type. You can then make any changes you require as described in this step.

9. **Optional:** At the bottom portion of the dialog, in the right pane, click in the cells under **Name** and **Description** to change doclet and section names, and to add descriptions to the doclets and sections.

   Use the folder structure in the left pane to drill down into folders, if present, to display more doclets and sections, and then make your changes in the **Name** and **Description** column.

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Alternatively, you can change doclet and section names, and add descriptions to the doclets and sections later in Smart View; see Editing Report Package, Doclet, and Section Properties.

10. Verify that the information you entered in the **New Report Package** dialog is correct, and then click **Import**.

    When the import is completed, you are returned to Narrative Reporting Home, where you can click the link provided to open the report package in Smart View.

Figure 24-10 Narrative Reporting Panel with Link to New Report Package

Alternatively, if you invoked the **New Report Package** command by right-clicking on a Library folder, then click to refresh the panel to view the new report package in that folder.

Creating Report Package Structures from a File

Use Smart View to create a Narrative Reporting report package structure from a Word or PDF file.

> **Note**
>
> Before you begin, launch Oracle Smart View for Office and log in to Narrative Reporting.

To create a report package structure from a Word or PDF file:

1. In Narrative Reporting Home, select **New Report Package** to launch the **New Report Package** dialog.
2. To create a new report package structure from a PDF file or Word document, click the radio button next to this icon:

3. Enter a **Report Package Name** and optional **Report Package Description**.

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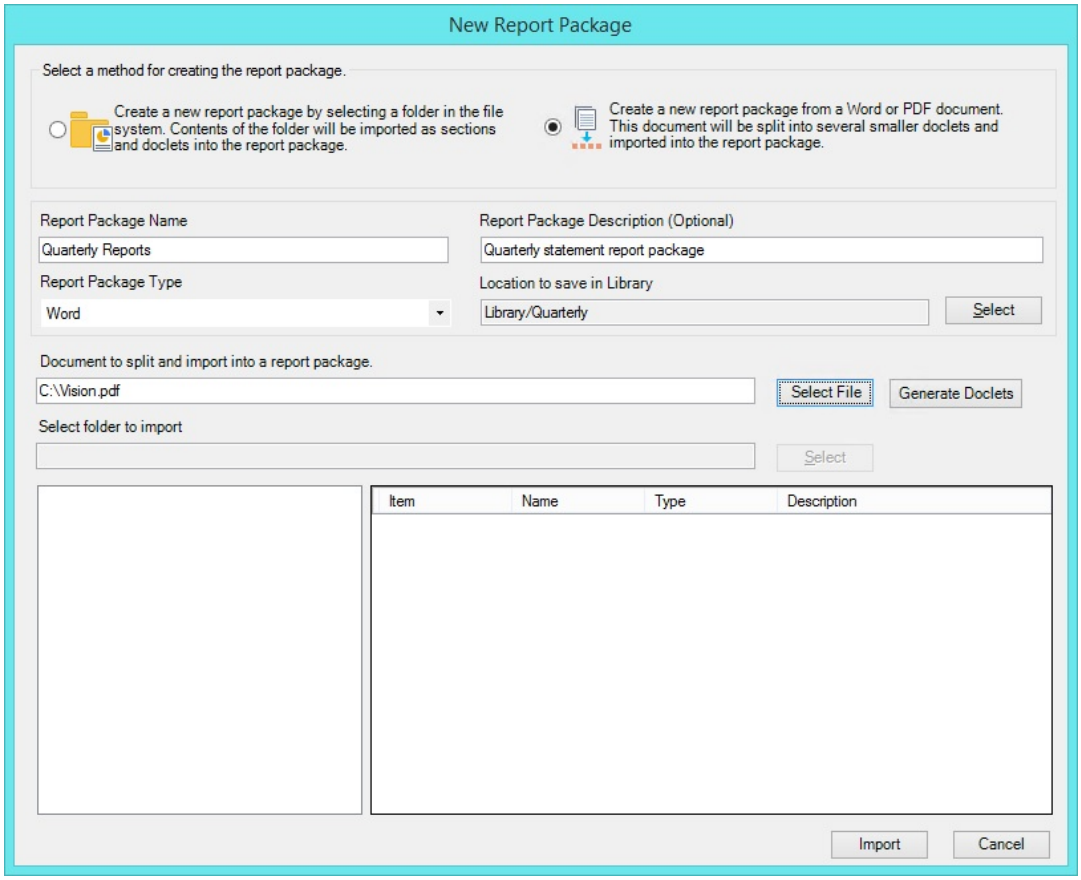
4. In **Report Package Type**, Word is the default and only option available.
5. For **Location to save in Library**, click **Select**, then navigate to the Library folder in which to save the report package and select it, and then click **Select** in the **Report Package Save Location** dialog.
6. For **Document to split and import into a report package**, click **Select File**, then navigate to the file and select it, and then click **Open**.

   Use the filter control at the bottom right of the **Open** dialog to filter by document type: Word (.docx) or PDF (.pdf).

   The example in Figure 1 shows the **New Report Package** dialog with the Vision.pdf file selected for splitting into individual Word files. In the example, the report package structure we're creating will be stored in the Quarterly folder in the Library.

Figure 24-11 Options for Creating a Report Package Structure from a Document, Before Generating Doclets



7. Click **Generate Doclets**.

   A message is displayed informing you that the operation can take some time to complete. To continue, click **Yes** in the message box.

   A second message is displayed informing you that the file will be converted into optimized, editable documents, and that the documents may not look exactly like the original file, but they can be edited later. To continue, click **OK** in the message.

   Once the file generation process is complete, in the bottom of portion of the dialog, the temporary folder where the files are being stored is displayed in the left pane; the files that were created in the right pane, as shown in Figure 2.

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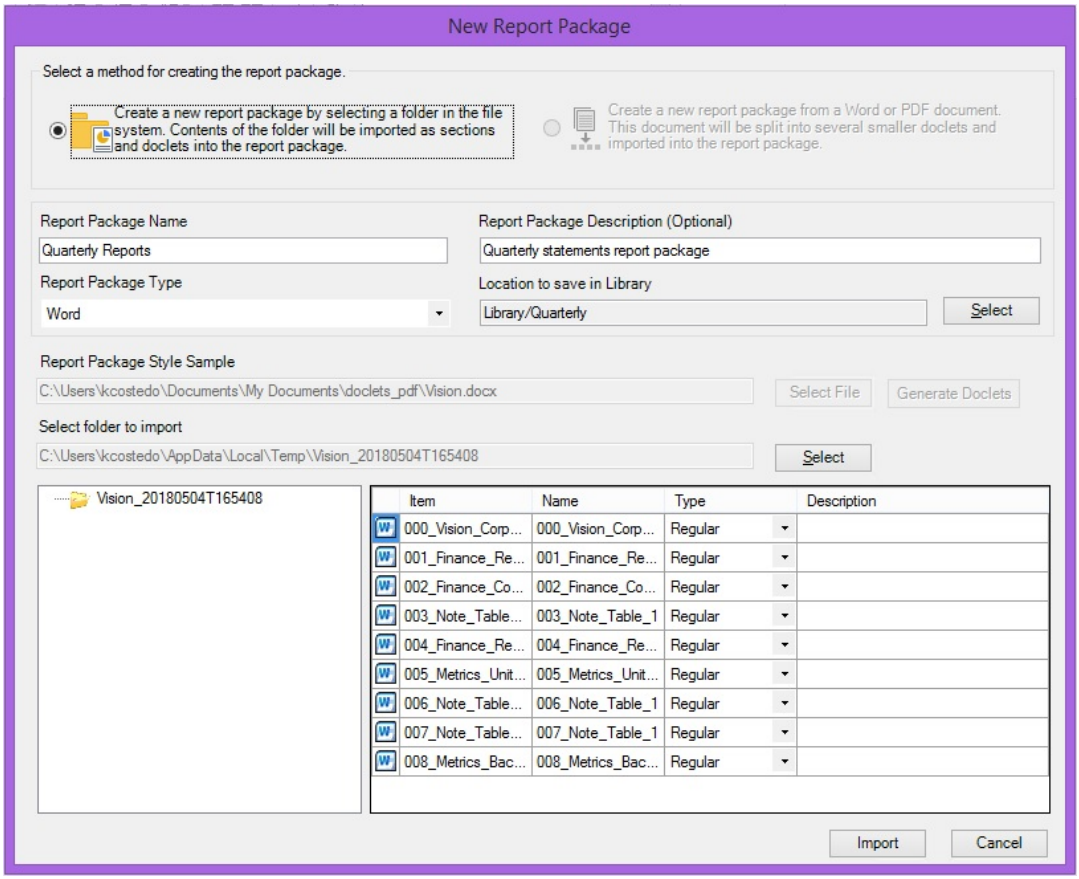
Also, a default style sample is provided based on the file that was just split.

Figure 24-12 Options for Creating a Report Package Structure from a Document, After Generating Doclets



8. At the bottom portion of the dialog, in the right pane, to make any necessary changes to the doclet type, click the arrow in the cells under **Type**, and select a doclet type.

   For example, after evaluation by Narrative Reporting, a Word document was designated a Regular doclet , but you want to change the designation to Supplemental.

9. **Optional:** At the bottom portion of the dialog, in the right pane, click in the cells under **Name** and **Description** to change doclet names and add descriptions to the doclets.

   If required, you can add descriptions to the doclets later in Smart View; see Editing Report Package, Doclet, and Section Properties.

10. Verify that the information you entered in the **New Report Package** dialog is correct, and then click **Import**.

    When the import is completed, you are returned to the Narrative Reporting Panel, where you can click the link provided to open the report package in Smart View.

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Figure 24-13 Narrative Reporting Panel with Link to New Report Package

Alternatively, if you invoked the **New Report Package** command by right-clicking on a Library folder, then click to refresh the panel to view the new report package in that folder.

Adding Doclets to Report Package Structures

You can add doclets to report package structures in the Report Center in Oracle Smart View for Office. In Word-, PowerPoint-, and PDF-based report packages, you can add doclets, supplemental doclets, and reference doclets.

For Word documents, you can add an entire Word file. Or, you can add a selected portion of text in an open Word document. The selected portion becomes the new doclet.

To add a doclet to a report package structure:

1. Open the Office application that corresponds to the Office document type that you will be working with.

   For example,

   - To add a Word document as a regular doclet in a report package, then open Word.
   - To add an Excel workbook as a regular doclet in a PDF-based report package, then open Excel.
   - To add a table of contents, or TOC-type doclet, to a PDF- or Word-based report package, then open Word.
   - To add an Excel workbook as a supplemental doclet in a report package, then open Excel.

2. Connect to Narrative Reporting and open a report package, as described in Connecting to Narrative Reporting in Smart View.

   The report package may already contain doclets of any type, or may be empty.

3. Open the Office document to add to the report package structure.

   You may open a saved Office document, or you may be working on a new Office document that has not yet been saved.

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> **Note**
>
> You can only add documents of the Office Open XML format type .docx, .pptx, and .xlsx.

4. **Optional for Word doclets only:** To create a doclet from a portion of text within a Word document, select that text.
5. In the Report Center panel, perform an action:
   - Select the doclet in the report package structure before which the new doclet will be inserted.

     The doclet will be inserted before the doclet that you select.
   - Select the section folder into which the new doclet will be added.

     The doclet will be added as the last file in the section folder.
   - Navigate into a section folder and select the doclet before which the new doclet will be inserted.
   - If there are no doclets yet in the report package, click **root** in the Report Center panel.

     If there are doclets in the report package, and you click **root**, then the doclet will be added as the last doclet in the report package.
6. In the Action Panel, click the **Add Doclet** link and in **Add Doclet to Report Package**, complete the following:
   - **Name**—Required. You can accept the file name as the doclet name or enter a new name. This is the name that will appear in the report package. Doclet names are limited to 80 characters.
   - **Type**—Required. Select a doclet type from the available options. The options available depend on the report package type. For example, in a Word-based report package, if you are adding a Word doclet, the available types are Regular and Supplemental; for an Excel doclet in a PDF-based report package, the available types are Regular, Supplemental and Reference.
   - **Table of Content Doclet**—Optional. Applies to Word documents in Word- and PDF-based report packages only. Select this check box if you plan to use the currently-opened Word document as a table of contents for the report package.
   - **Description**—Optional. Enter a doclet description.
   - **Suppress Doclet**—Select to suppress a doclet's contents within the report package. The suppressed doclet content will not be included in the report package's output.

     Enable this option when a particular doclet within your report package is not required for the current reporting period. This allows you to keep the doclet definition and structure for future executions of the report package when its contents may be required. After adding the doclet, you can view the option status in the **Properties** dialog of the doclet (see Inspecting Doclets). You can later change the option status in the web; see Editing Properties in *Creating and Managing Report Packages for Narrative Reporting*.
   - **Exclude from Author Phase**—The state of the option (enabled or disabled) depends on whether an author phase has been defined for the report package.

     These are the possible actions:

     If the check box is disabled, then an author phase is *not* defined for the report package. No action is required.

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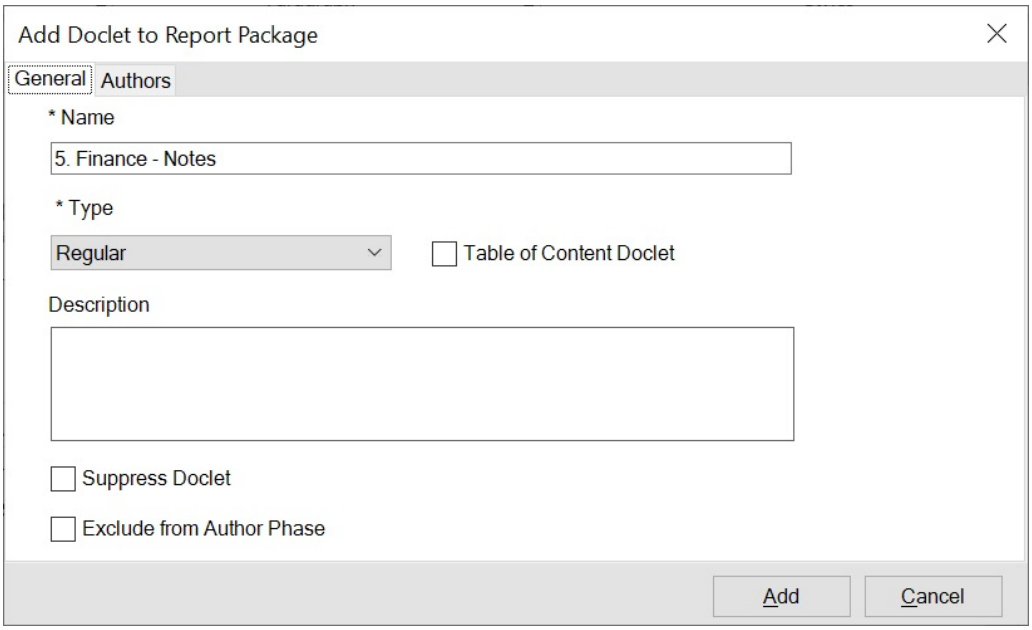
If the check box is enabled, then an author phase *is* defined for the report package. Take an action:

- Select this check box to exclude the doclet from the author phase, and then continue to step 8.
- Clear the check box to assign authors to this doclet. Clearing the check box should automatically take you to the **Authors** tab of the dialog. Continue to the next step to add authors to this doclet.

This is the dialog with the check box enabled and cleared:



- **All Sheets Included**—Optional. Enabled and selected by default when adding an Excel workbook as a regular doclet to a PDF-based report package. Clearing the check box should automatically take you to the **Selected Sheets** tab of the dialog, where all sheets in the workbook are listed. Select the check box next to the sheets that you want to include in the report package.

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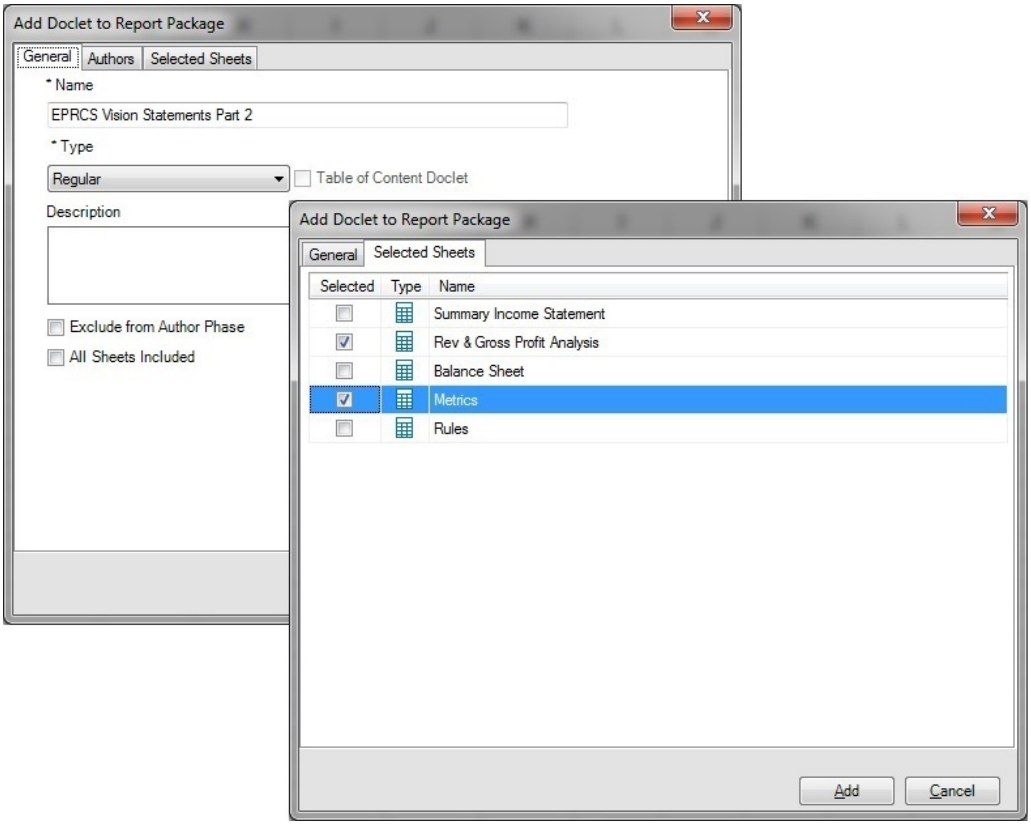


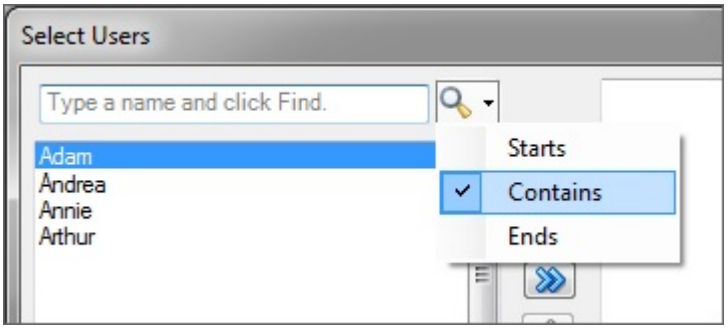
If you're adding authors to this doclet, then continue to the next step. If you're not adding authors to this doclet, then proceed to step 8

Note that only worksheets and chart sheets are valid choices for inclusion in a report package. Hidden sheets, macro sheets, and dialog sheets are not valid choices for sheet selection. A message notifies you if a workbook contains only these sheets.

7. To add authors to this doclet:
   a. In the **Authors** tab, click **Assign Authors** to launch the **Select Users** dialog box.
   b. Select authors in the left pane of the dialog, and click the right arrow to move them to right pane.

      Optional: To search for users, type a user name in the search field and click .

      You can also click the arrow on and use the filter options to narrow the search.



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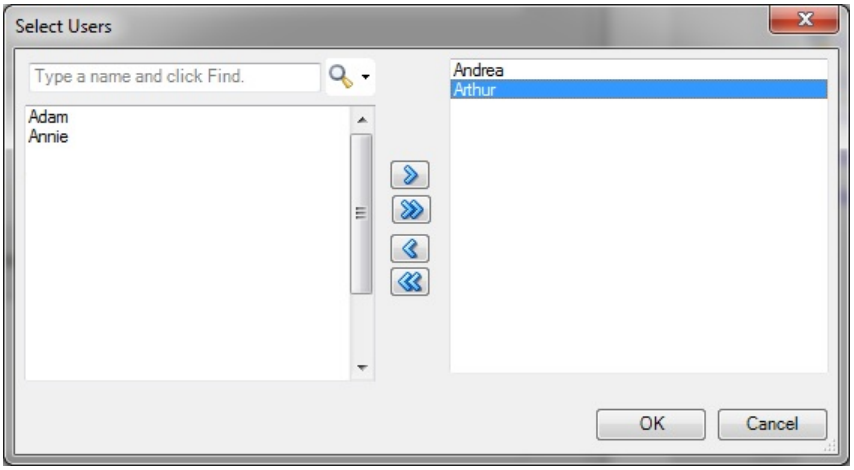
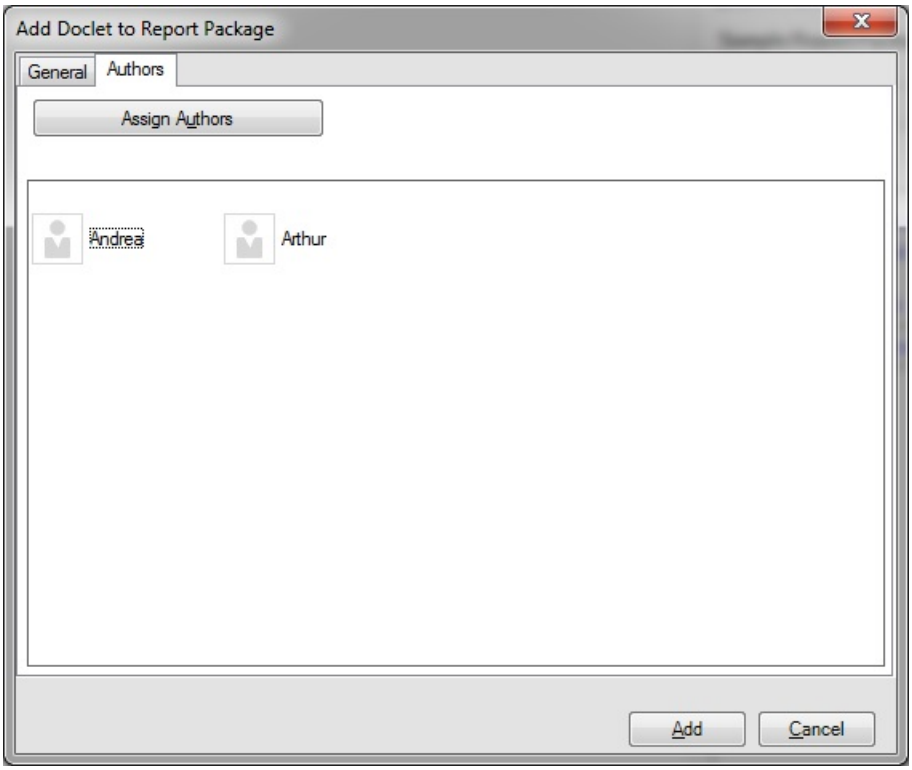
c. After you've selected and moved all required authors to the right pane, click **OK** in the **Select Users** dialog box.



The user selections are now shown in the **Authors** tab of **Add Doclet to Report Package** dialog:



You can click the **Assign Authors** button again to make further changes to the author assignments.

8. Click **Add** to add the doclet to the report package structure.
9. At the prompt, click **Yes** to open the new to doclet for editing; otherwise, click **No**.

   Whether you click **Yes** or **No**, the doclet is added to the report package.

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> **Note**
>
> If you click **Yes** at the prompt, then to edit the doclet, check it out.

Adding Sections to Report Package Structures

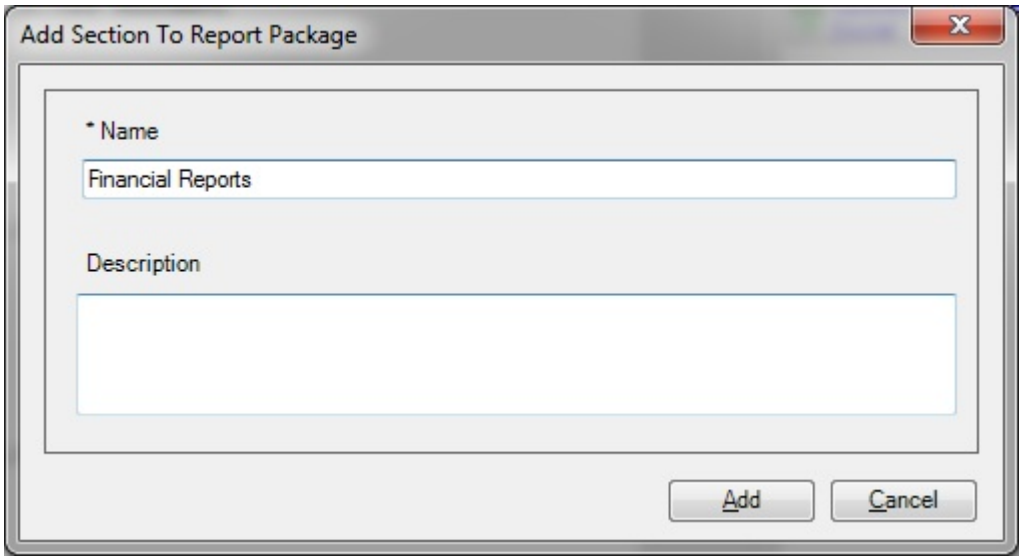
You can add sections to Word-, PowerPoint-, and PDF-based report package structures in the Report Center in Oracle Smart View for Office.

To add a section to a report package structure:

1. Open Office, connect to Narrative Reporting, and open a report package, as described in Connecting to Narrative Reporting in Smart View.
2. In the Report Center, perform an action:
   - Select the doclet or section in the report package structure before which the new section will be inserted.

     The section will be inserted before the doclet or section that you select.
   - Navigate into a section folder and select the doclet before which the new section will be inserted.
   - If there are no doclets or sections yet in the report package structure, click **root** in the Report Center panel.

     If there are doclets or sections in the report package structure, and you click **root**, then the section will be added as the last artifact in the report package.
3. In the Action Panel, click the **Add Section** link and in **Add Section To Report Package**, complete the following:
   - **Name**—Required. Enter a section name. This is the section name that will appear in the report package.
   - **Description**—Optional. Enter a section description.



4. Click **Add**.

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Editing Report Package, Doclet, and Section Properties

You can edit the **Name** and **Description** properties for report packages, doclets, and sections in Oracle Smart View for Office.

To edit properties for report packages, doclets, and sections:

1. Open Office and connect to Narrative Reporting, as described in Connecting to Narrative Reporting in Smart View.
2. To edit report package properties:
   a. From Narrative Reporting Home, select **Library**, and then navigate to the report package in the Library panel and select it, but do not open it.
   b. In the Action Panel, select the **Properties** link.
   c. In **Report Package Properties**, double-click or press F2 in the **Report Package Name** and **Description** fields, and then type your changes.
3. To edit doclet or section properties:
   a. From Narrative Reporting Home, select **Library**, then navigate to the report package in the Library panel, and then open it.
   b. Navigate to the doclet or section and then select it.
   c. In the Action Panel, select the **Properties** link.
   d. In **Properties**, double-click or press F2 in the **Name** and **Description** fields, and then type your changes.
4. Click **Save**.

Authoring Doclets

As a doclet author, you provide report content in Oracle Smart View for Office.

Related Topics

- About the Author Phase Process
- Authoring Doclets in Smart View
- Working with Linked Regular Doclets
- Working with Embedded Content from Reference Doclets
- Working with Embedded Content from Reference Files
- Working with Variables
- Working with Excel Doclets in PDF-based Report Packages
- Working with Server-Initiated Refresh
- Inserting Links and Cross-References to Pages in Doclets
- Working with an Automatic Table of Contents
- Approving or Rejecting Doclets
- Recalling Doclets
- Inspecting Doclets
- Reverting to a Prior Version of a Doclet

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About the Author Phase Process

Report packages are made up of subcomponents called doclets. There are three doclet types: doclets, reference doclets, and supplemental doclets. A report package owner assigns authors and approvers for each doclet of all types in a report package. The authors and approvers provide and approve content for the doclets.

The author phase follows this process:

1. The report package owner initiates the author phase in the Narrative Reporting web interface.
2. Notification messages are sent to authors to begin their work.
3. In Oracle Smart View for Office, authors open and then check out Office-based doclets of any type. They provide content, add content to reference files, embed available content from reference doclets, Reports, and reference files, and then check doclets back in.

   Authors use the web interface to check out and check in PDF doclets and supplemental doclets of non-Office type. From Smart View, authors download PDF doclets and non-Office supplemental doclets.

   See About Doclets and Variables for more information.
4. When authors have finished their work, they submit doclets of all types for approval, if required.
5. If doclet approval is specified, notification messages are sent to approvers to review and either approve or reject doclets.
6. The report package owner marks the author phase complete.

As an author, in Smart View or in the Narrative Reporting web interface, you can work with:

- Doclets in Word, PowerPoint, Excel, or PDF format

  Office doclets can be regular doclets or linked regular doclets.
- Reference doclets in Excel, from which you embed content in Word doclets
- Charts and tables created in the Reports web interface, from which you embed content in Word doclets
- Excel doclets in PDF-based report packages
- Excel-based reference files, which contain content that you may want to embed in a Word doclet
- Office-based supplemental doclets with the appropriate Office application
- PDF doclets and non-Office-based supplemental doclets, such as PDF or TXT files, which you download and open with the appropriate application (using the web interface to check out, upload, and check in)

The topics in this section discuss authoring and working with doclets, reference doclets, supplemental doclets, and reference files in Smart View.

About Doclets and Variables

Report packages are comprised of subcomponents called *doclets*, *reference doclets*, *reference files*, and *supplemental doclets*. Additionally, *variables* can be sourced from reference doclets and reference files.

- **Doclets**

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Doclets (sometimes referred to as regular doclets) contain the content you require for the report that you're creating with a Narrative Reporting report package. A report package can consist of one or more doclets. Word-based report packages contain Word-based doclets; PowerPoint-based report packages contain PowerPoint-based doclets. PDF-based report packages contain Word- and Excel-based doclets, along with PDF files; however, only the Word and Excel doclets can be authored.

Word and PowerPoint documents stored in folders in the Narrative Reporting library can be added to report packages as *linked* regular doclets. A linked regular doclet maintains a persistent link to the source library document. When the library document is updated, Narrative Reporting automatically updates all doclets linked to the library document. Narrative Reporting continues to update the doclet file until the doclet link is deactivated.

Doclets participate fully in report package workflow, including all author phases, review phases, sign off, and report publishing.

- **Reference doclets**

  Reference doclets can be used as containers to store content such as named ranges from an Excel file, or charts and graphs created from Reports, which are consumed by one or more doclets in a report package.

  Excel-based reference doclets are Excel files that serve as supporting files with content such as Oracle Smart View for Office grids or forms, or static Excel content, that you can register and then embed directly into Word-based doclets. You specify the embeddable content using Excel's Name Manager, then register the named ranges in Smart View.

  Reports-based reference doclets consist of tables and charts created and registered as available content in the Narrative Reporting web interface.

  You can then embed content from either type of reference doclet directly into Word-based doclets. Using the embedding process, the layout and format of the content is maintained in the target doclet just as in the source reference doclet.

  Both Excel- and Reports-based reference doclets can be included in Word-based report packages. Embedded content is merged in the combined report and can be commented on during the review phase.

  In Smart View, Excel-based reference doclets support the content management and workflow features of the author phase as follows:

  – Reference doclets can be checked out, modified, uploaded, checked in, submitted for approval, and approved or rejected.
  – Word-based doclets containing embedded content can be checked out, modified, uploaded, checked in, submitted for approval, and approved or rejected.
  – Embedded content can be synced with updates made to named ranges in the reference doclet.
  – Embedded content can be refreshed.

  The workflow for Reports-based reference doclets is maintained in the Narrative Reporting web interface; however, these content management and workflow features of the author phase are supported in Smart View as follows:

  – Word-based doclets containing embedded content can be checked out, modified, uploaded, checked in, submitted for approval, and approved or rejected.
  – Embedded content can be synced with updates made to named ranges in the reference doclet.
  – Embedded content can be refreshed.

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Note that reference doclets themselves are *not* available for commenting in the review or sign off phase; however, in a doclet, you can comment on the embedded content that was sourced from reference doclets, and the embedded content is part of the final published report.

- **Reference files**

  Reference files are Excel workbooks that contain report content that you can embed into a Word doclet. The reference file is not listed as part of the report package in the same way that doclets, reference doclets, and supplement doclets are. Instead, when you embed content from a reference file into a Word doclet, that reference file becomes part of the properties of the doclet. When you check out the target Word doclet, Narrative Reporting tracks any changes you make to the reference file. You can then refresh the content you have embedded in the target Word doclet.

  Note that reference files themselves are *not* available for commenting in the review or sign off phase; however, in a Word doclet, you can comment on the embedded content that was sourced from reference files, and the embedded content is part of the final published report.

- **Supplemental doclets**

  Supplemental doclets are documents which assist in the development of the overall report, such as source and supporting files. Supplemental doclets can be of Office file types, such as Excel, Word, or PowerPoint; or of non-Office file types, such as PDF, TXT, or ZIP. Content from supplemental doclets is not merged into the combined report.

  Supplemental doclets of any file type can be included in both Word-based and PowerPoint-based report packages. For example, Word-based supplemental doclets can be included in Word- or PowerPoint-based report packages.

  In Smart View, supplemental doclets support the content management and workflow features of the author phase as follows:

  – Office-based supplemental doclets can be checked out, modified, uploaded, checked in, submitted for approval, and approved or rejected.

  – For supplemental doclets of non-Office file types, Smart View gives assigned authors easy access to download and view files. However, any other interactions with the files, such as checkout, upload, and checkin, must be performed through the Narrative Reporting web interface.

  Note that supplemental doclets of any file type are *not* available for commenting in the review or sign off phase, and they are *not* part of the final published report.

- **Variables**

  Report Package variables provide centralized maintenance of common text, numbers, dates, and data that are displayed in doclets throughout a report package. Variables can also be used to reference content between doclets, such as inserting Excel data from a reference doclet into a Word doclet.

  Two types of variables are available:

  – *Static variables* use static input that is defined by the user, such as a date labels or a set value, which can be used throughout the report package. These static variables can be easily updated, and all doclet instances of the variable value reflect the change. The static variables help to centrally maintain common dates, numbers and text across the Report Package document content.

  – *Reference variables* are created by referencing another doclet within the report package as the source, and selecting the value for the variable, such as text in a Word paragraph or an Excel cell value. If the source document is subsequently updated, those changes are automatically updated in the inserted instances of the variable in

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the report package. Reference variables can be used to insert Excel cell values into a paragraph in a Word doclet, or to create Excel formulas to implement cross-footing rules for increased data accuracy, or to create directional words for the report narrative, such as "an increase" or "a decrease".

Authoring Doclets in Smart View

As a doclet author, you provide report content in Oracle Smart View for Office. The authoring process follows this workflow:

1. Check out the doclet, reference doclet, or supplemental doclet.
2. Update the doclets.

   Some suggested Smart View content development tasks:

   - Copy and paste data points or data ranges, using Smart View Copy and Paste commands from Office-based documents and doclets into Word-based or PowerPoint-based doclets, as described in Copying Data Between Excel, Word, and PowerPoint.
   - Use the Office copy and paste commands to copy Smart View data and then import Smart View metadata, as follows:
     - Use the PowerPoint copy and paste commands to copy a slide or presentation into a PowerPoint-based doclet or supplemental doclet, then import the metadata from the original slide or presentation into the doclet, as described in Importing Metadata into Copied Worksheets
     - Use the Word copy and paste commands to copy Smart View artifacts from Word documents, then import the metadata from the original document into the doclet, as described in Importing Metadata into Copied Word Documents.
     - Use the Excel copy and paste commands to copy Smart View artifacts from Excel worksheets, and import the metadata from the original worksheet into a reference doclet, as described in Importing Metadata into Copied Worksheets
   - In Excel regular doclets in PDF-based report packages, edit sheet content. Additionally, you can specify the sheets to include in the final report package. See Working with Excel Doclets in PDF-based Report Packages.
   - In Excel-based reference doclets, make embeddable content available to doclet authors by specifying named ranges and registering them as a available content with Narrative Reporting, as described in Adding Available Content to Excel-based Reference Doclets Using the Inspect Button.
   - Embed content from Excel- or Reports-based reference doclets into doclets in Word-based report packages, as described in Embedding Content in a Doclet Using the Ribbon and Dialog.
   - Create static or reference variables, and insert them into doclets, as described in Working with Variables
   - Refresh all Smart View data in individual doclets, reference doclets, and Office-based supplemental doclets using the **Refresh** command on the Smart View ribbon or a provider ribbon, as described in Refreshing from a Ribbon.
   - Refresh specific reports in doclets, reference doclets, and Office-based supplemental doclets individually as you require, as described in Refreshing Individual Reports from Document Contents.
   - Change the POV of a report in a doclet, reference doclet, or Office-based supplemental doclet, as described in POV Manager.

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See Example: Working with Narrative Reporting Data in Smart View for a demonstration on working with Smart View in a Word-based doclet.

3. Upload the doclet, reference doclet, or applicable supplemental doclet back to the report package.
4. **Optional:** Select to override doclet style sample attributes or slide masters.
5. Check in the doclet, reference doclet, or applicable supplemental doclet.
6. Submit the doclet, reference doclet, or applicable supplemental doclet.

Videos

Your Goal	Watch This Video
Learn about authoring doclets in Word-based report packages.	Authoring and Approving Microsoft Word-Based Doclets in Smart View
Learn about authoring doclets in PowerPoint-based report packages.	Authoring and Approving Microsoft PowerPoint-Based Doclets in Smart View

Checking Out Doclets

This topic applies to Office-based doclets of all types, including reference and supplemental. Unless otherwise noted, the term *doclets* refers to all Office-based doclet types.

Only doclets, reference doclets, and Office-based supplemental doclets can be checked out, signified by the following icons in the Report Center.

- indicates a doclet
- indicates a reference doclet
- indicates a supplemental doclet

When you check out a doclet, reference doclet, or Office-based supplemental doclet, it is locked so that nobody else can modify it.

> **Tip**
>
> To safeguard all of your report content, Oracle strongly recommends that you perform a checkout prior to opening a doclet and making any content modifications. This will ensure that any modifications made by you or other users are not inadvertently overwritten.

> **Note**
>
> In Oracle Smart View for Office, you can only download PDF doclets and non-Office-based supplemental doclets. To check out PDF doclets and non-Office supplemental doclets, use the Narrative Reporting web interface.

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Before you begin this procedure, you should have already launched an Office application, connected to Narrative Reporting, and opened a report package, as described in Connecting to Narrative Reporting in Smart View.

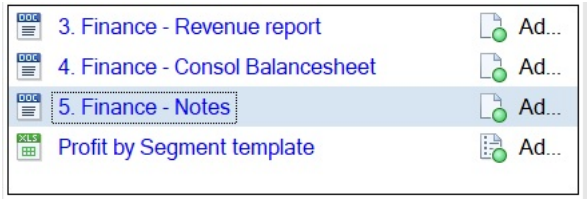
To check out a doclet, reference doclet, or supplemental doclet:

1. In the Report Center, select the doclet to check out.

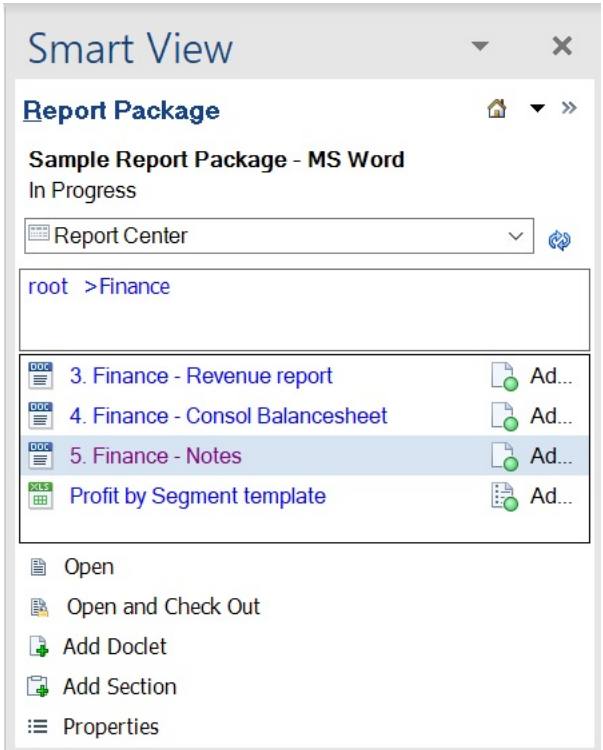
   Note the following when selecting doclets:

   - Clicking the doclet name opens the doclet, but does not check it out.
   - Clicking to the right of the doclet name allows you to select the doclet, but not open it.
   - If you are using the keyboard to navigate the Report Center, use **Ctrl-Tab** to navigate to the first doclet icon in the Report Center list, then **Tab** to the doclet title, and then use the up and down arrow keys to navigate to the doclet to select. Use **Ctrl-Tab** to move to the Action Panel menu items, then use the up and down arrow keys to navigate to an Action Panel option, and then press the spacebar to select an option.

     When a doclet is selected using keyboard navigation, the selected doclet name has a dotted-line box around it:



2. In the Action Panel, select **Open and Check Out**.



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Selecting this option opens the doclet and checks it out in one operation.

Alternatively, double-click the doclet name to open, then continue with step 3.

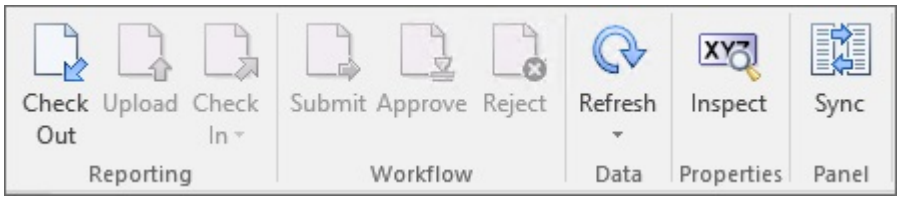
> **Note**
>
> When navigating within the doclet panel, the Action Panel menu items listed are relative to—and can change depending on—the item highlighted in the panel. If you are using the keyboard to navigate the doclet panel, note that even though you may have tabbed to a doclet panel item, it is not highlighted, or selected, until you press the space bar. Pressing the space bar highlights the item with a square border meaning that the item is now selected and in focus. Then, the Action Panel menu items will refresh and display relative to the item you've selected.

The Narrative Reporting ribbon is displayed in the Office application when you open:

- A doclet or linked regular doclet
- A reference doclet
- An Office-based supplemental doclet

Figure 1 shows the Narrative Reporting ribbon for the author phase, in the initial state, before the doclet is checked out.

Figure 24-14 Narrative Reporting Ribbon for Doclet in Author Phase in Initial Unchecked-Out State



> **Note**
>
> The availability of buttons in the Narrative Reporting ribbon depends on the permissions that are assigned to you; the phase that you are in—authoring, review, or sign off; and the operation you are performing.
>
> Additionally, if you check out a linked regular doclet, the **Replace File** button is displayed instead of the **Upload** button.

3. In the Narrative Reporting ribbon, click **Check Out**.

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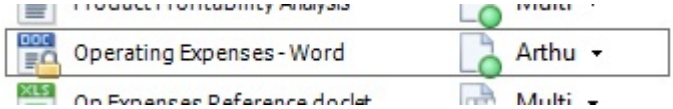
> **Note**
>
> - If an Office-based doclet of any type is already checked out by another user, then the **Check Out** button is disabled.
> - If you have been are viewing an opened doclet for a while prior to checking it out, and the doclet was updated by another user or had embedded content or variables refreshed while you were viewing the doclet, when you perform your checkout, a message notifies you that a more recent version of the doclet exists. Select an option:
>   - **Yes** – Default. Clicking **Yes** closes your working copy of the doclet, then downloads the latest version of the doclet from Narrative Reporting, checks it out, and opens it. You will lose your unsaved changes.
>   - **No** – Ignores the warning and checks out the local version that you have been working on; however, you run the risk of overwriting another user's updates.

The selected doclet is now locked for your use. You can work with it directly in Smart View while connected to Narrative Reporting.

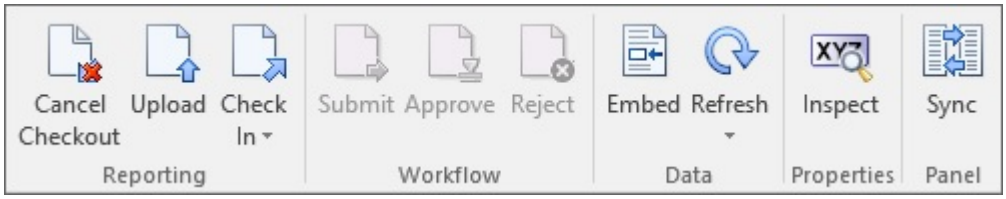
In the doclet responsibilities list in the Smart View Panel, a lock icon and the user name are displayed for the doclet or supplemental doclet that is checked out.



In the Narrative Reporting ribbon, the **Check Out** button is replaced with the **Cancel Checkout** button, and the **Embed** button is added.

Figure 2 shows the Narrative Reporting ribbon for the author phase, after the doclet is checked out.

Figure 24-15 Narrative Reporting Ribbon for Doclet in Author Phase in Checked-Out State



Next steps for working with the checked-out doclets in Narrative Reporting:

- You can undo, or cancel, the checkout if you want to remove your lock on the doclet. Undoing the checkout allows other users to check out and update the doclet. See Undoing Checkouts.
- If you must close Office before you are finished with your authoring changes, you do not need to check in the doclet, but you must upload it to retain the changes in progress. See Uploading and Working with Page Attributes and Slide Masters.

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- If you want to perform a health check *and* refresh a doclet of any Office type (described in Performing a Health Check on Microsoft Office Documents), perform the health check first, and then save the temporary file with the correct doclet name. Next, upload and check in the saved doclet (see Checking In Doclets. Then check out the doclet, perform the refresh, and then upload the doclet and check it in.

Undoing Checkouts

This topic applies to Office-based doclets of all types—regular, reference, and supplemental. Unless otherwise noted, the term *doclets* refers to all Office-based doclet types.

In Narrative Reporting, you can undo a checkout to remove the lock and allow other users to check out and modify the doclet. Changes that you made after checking out the doclet , even if you uploaded it, are discarded when you cancel the checkout. To keep your changes, select **Check In** instead.

To undo a checkout:

1. If the Office-based doclet is not already open, in the Smart View Panel, navigate to the doclet and double-click it.
2. In the Narrative Reporting ribbon, click **Cancel Checkout**.

Uploading and Working with Page Attributes and Slide Masters

- Doclets in Word-based Report Packages
- Doclets in PowerPoint-based Report Packages
- Office-based Supplemental Doclets in Report Packages

> **Note**
>
> When connected to an Oracle Fusion Cloud Enterprise Performance Management OCI (Gen 2) environment where virus scanning is enabled, if a virus is detected in a doclet of any type that you are attempting to upload, then the doclet is not uploaded.

Doclets in Word-based Report Packages

This topic applies to Word doclets in a Word-based report package.

For Microsoft Word-based report packages, you are asked to specify style sample attributes to override during the doclet upload process.

When a Word-based report package is created in Narrative Reporting, a style sample document is uploaded. It contains the page attributes that the report package owner wants in the final report. These attributes include the page header and footer, orientation and size, margins, numbering, and alignment.

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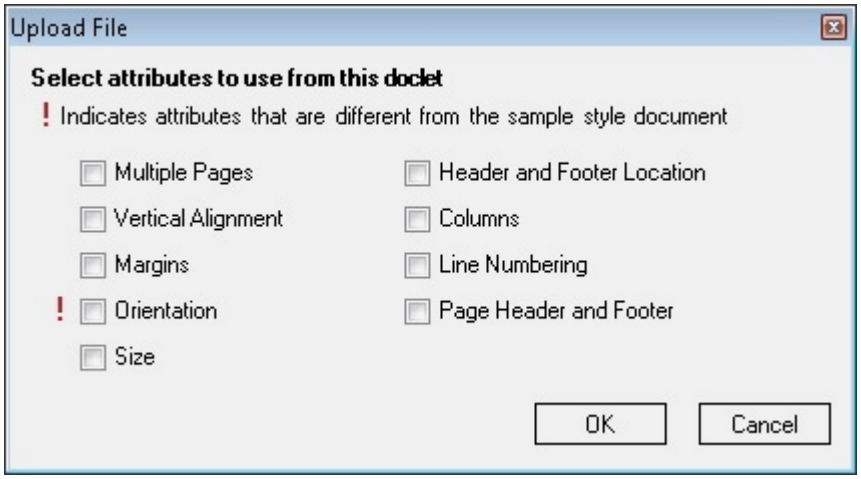
When you upload a doclet, the system checks the doclet against the style sample document to compare the attributes. An alert is displayed next to the attributes that differ from the style sample.

Figure 24-16 Upload File Dialog Box



By default, the system overrides the doclet attributes with the style sample attributes when the doclet is uploaded. For example, if the style sample orientation is portrait mode and the doclet is in landscape mode, then the doclet's orientation will be changed to portrait mode to match the style sample.

Figure 1 shows the **Upload File** dialog box with an alert next to the **Orientation** attribute. To keep the doclet in landscape mode, overriding the style sample, you would select the **Orientation** check box. When you select an attribute, the system uses the attribute from the doclet rather than the attribute from the style sample.

To upload a Word doclet, and review and select style attributes to override:

1. If the doclet is not already open, in the Smart View Panel, navigate to the doclet and double-click the doclet name.

   To upload changes, you must have the doclet checked out.

2. In the Narrative Reporting ribbon, click **Upload**.

   The **Upload File** dialog is displayed (see Figure 1).

   Style attributes in the doclet that differ from the style sample for the report package are noted with an exclamation point.

> **Note**
>
> To view the **Upload File** dialog, where you can review any style sample attribute alerts and choose attributes to override, you must click the **Upload** button. Do not select the **Upload and Check In** action on the **Check In** button.

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3. In the **Upload File** dialog box (see Figure 1), select the check box next to the style attributes that you want to override, and then click **OK**.

   Style attributes in the doclet that differ from the style sample for the report package are noted with an exclamation point.

   You can select only those attributes noted with an exclamation point.

4. Proceed to Checking In Doclets.

   Alternatively, you can continue working on the checked-out doclet and repeat the upload procedure in this topic as many times as you require, and then proceed to Checking In Doclets.

Doclets in PowerPoint-based Report Packages

This topic applies to PowerPoint doclets in a PowerPoint-based a report package.

For Microsoft PowerPoint-based report packages, when a report package is created, a style sample is uploaded that contains the slide masters and slide layouts that the report package owner wants in the final report. These slide masters determine the overall look and format of the presentation. When you upload a doclet, the system scans the doclet and highlights the slide masters in use. An alert icon indicates slide masters that are not in the style sample document.

> **Note**
>
> The doclet slides must be sized the same as the report package style sample slides in order to upload the doclet. For example, if your doclet slides are sized for On-Screen Show (4:3) and the report package style sample slides are sized for On-Screen Show (16:9), you must resize your doclet slides before you can upload the doclet.

To upload a PowerPoint doclet and select a slide master:

1. If the doclet is not already open and checked out, in the Smart View Panel, navigate to the doclet, double-click the doclet name to open it.

   To upload changes, you must have the doclet checked out.

2. In the Narrative Reporting ribbon, click **Upload**.

   The **Upload File** dialog is displayed.

   > **Note**
   >
   > To view the **Upload File** dialog, where you can review any style sample slide master alerts and choose attributes to override, you must click the **Upload** button. Do not select the **Upload and Check In** action on the **Check In** button.

3. If the doclet uses the same slide master as the style sample document, click **OK** in the **Upload File** dialog box, then proceed to step 5; otherwise, proceed to step 4.

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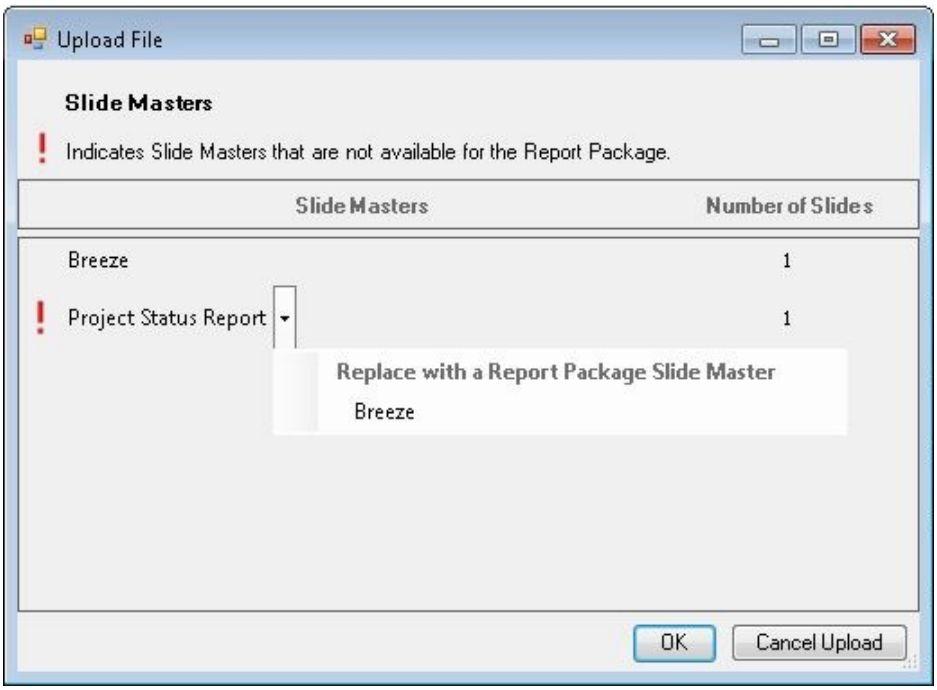
4. If the doclet contains a slide master that is not in the style sample document, perform one of the following actions:

   - To replace the doclet slide master with the report package slide master, click the name of the doclet slide master, and then select the report package slide master to replace it with.



     The system maps the doclet slide layouts to the report package slide master to maintain a uniform look for the presentation.

   - To preserve the doclet slide master, click **OK** to upload the doclet.

     If you preserve the doclet slide master, the system adds it to the merged presentation to ensure that the slides will render correctly. However, that slide master is available for use by the current doclet only. The doclet slide master is not available to other doclets. If you want the doclet slide master to be used by other doclets, the report package owner must add it to the report package style sample document.

5. Proceed to Checking In Doclets.

   Alternatively, you can continue working on the checked-out doclet and repeat the upload procedure in this topic as many times as you require, and then proceed to Checking In Doclets.

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> **Note**
>
> When you upload a doclet to the report package, the system resets all slides to their default layouts. If you have modified any slides from the default slide master layout, those modifications are reset back to the default. For example, if you have changed the size of a text box on a slide to make room for an image, the text box is reset to its original size when you upload the doclet. However, you can add additional layouts to the doclet slide master, and those new layouts are persisted within the doclet. Therefore, if you want to preserve the modified text box size, you must add that layout to the doclet slide master.
>
> As an example, you are working with a doclet with a slide layout called Title and Content that contains a text box that spans the entire slide. You want to resize the text box to cover half of the slide so that you can add an accompanying image. If you were to resize the text box, add the image, and upload the doclet, the system would reset the slide back to the Title and Content default layout, and the text would overlap the image. Instead, add a new slide layout (called, for example, Title, Text, and Image) with the resized text box. When you upload the doclet, the new slide master is copied over and persisted for that doclet.

Office-based Supplemental Doclets in Report Packages

This topic applies to Office-based supplemental doclets.

You upload Office-based supplemental doclets for checking in. However, in the upload process, you do not have to overwrite styles or slide masters. You simply upload.

Other supplemental doclet file types, such as ZIPs or PDFs, are not checked out in Oracle Smart View for Office; they are only opened or downloaded. Therefore, they do not need to be uploaded.

To upload an Office-based supplemental doclets:

1. If the doclet is not already open, in the Smart View Panel, navigate to the doclet and double-click the doclet name.

   To upload changes, you must have the doclet checked out.

2. In the Narrative Reporting ribbon, click **Upload**.

   Alternatively, to upload and check in the doclet, in the Narrative Reporting ribbon, select **Check In**, and then **Upload and Check In**.

   Whether you select the Upload command or the Upload and Check In command, the Upload File dialog is displayed.

3. Proceed to Checking In Doclets.

   Alternatively, you can continue working on the checked-out supplemental doclet, repeat the upload procedure in this topic as many times as you require, and then proceed to Checking In Doclets.

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Checking In Doclets

This topic applies to Office-based doclets of all types, including reference and supplemental. Unless otherwise noted, the term *doclets* refers to all Office-based doclet types.

> **Note**
>
> - If you're working with a linked regular doclet, see Removing the Link in a Linked Regular Doclet.
> - To check in PDF doclets and non-Office supplemental doclets, use the Narrative Reporting web interface.

After you have finished modifying an Office-based doclet, you must check it back in so that your changes are incorporated into the report package and other users can view your changes.

> **Note**
>
> Before you check in a doclet, you must first upload it. You can perform an upload and check-in in one step using the procedure in this topic. To upload only, see Uploading and Working with Page Attributes and Slide Masters.

To check in a doclet, reference doclet, or Office-based supplemental doclet:

1. If not already open, in the Smart View Panel, navigate to the doclet, then double-click it to open it, and then check it out.
2. After making any modifications to the doclet, in the Narrative Reporting ribbon, perform an action:
   - If you have already performed an upload by clicking the **Upload** button, as described in Uploading and Working with Page Attributes and Slide Masters, select the **Check In** button, and then select **Check In**.

   - If you haven't yet uploaded the doclet, select **Check In**, and then **Upload and Check In**.

     When you select this option, any existing page attribute override selections will be maintained.

   After performing either checkin operation, in the Smart View Panel, the lock icon is removed from the doclet in the doclet responsibilities list, indicating that it is no longer checked out.

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> **Note**
>
> - If you want to discard the changes that you made and revert back to the original version of the doclet, click **Cancel Checkout** instead (see Undoing Checkouts).
> - Doclet versioning is optimized to minimize the impact of multiple automated check-ins. When multiple automated check-ins are performed on the doclet due to variable or embedded content changes, the system will update the doclet contents but will not generate a new version.

Submitting Doclets

This topic applies to Office-based doclets of all types, including reference and supplemental. Unless otherwise noted, the term *doclets* refers to all Office-based doclet types.

After finishing their work, authors submit Office-based doclets to the report package owner or, if approval is required, to the doclet approver.

To submit a doclet, reference doclet, or Office-based supplemental doclet:

1. If not already open, in the Smart View Panel, navigate to the doclet and double-click it to open it.
2. In the Narrative Reporting ribbon, click **Submit**.

> **Tip**
>
> In cases where multiple authors are assigned to a doclet, ensure that all authors are finished with their work before submitting the doclet.

If approval is required, the current responsibility for the doclet is updated with the doclet approvers. If no approval is required, the current responsibility field is empty.

> **Note**
>
> If the doclet is not already checked in, then the **Submit** operation also checks it in for you.

After you submit a doclet, you can no longer check it out, although you can still open and inspect it from Oracle Smart View for Office or the Narrative Reporting web interface.

Note that once a doclet is submitted, the report package owner can check it out for further updates.

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Working with Linked Regular Doclets

Related Topics

- About Linked Regular Doclets
- Removing the Link in a Linked Regular Doclet

About Linked Regular Doclets

Linked regular doclets enable you to easily share common library documents across multiple report packages.

Documents stored in folders in the Narrative Reporting library can be added to report packages as *linked* regular doclets. A linked regular doclet maintains a persistent link to the library document. When the library document is updated, Narrative Reporting automatically updates all doclets linked to the library document. Narrative Reporting continues to update the doclet file until the doclet link is deactivated.

Linked regular doclets are an easy way to ensure the consistency of common content across report packages.

> **Note**
>
> - Linked doclets are applicable to regular doclets only.
> - Linked regular doclets are not supported for reference doclets and supplemental doclets.
> - Embedded content and variables are not supported in linked doclets.
> - Workflow activities, such as Submit, Approve, Reject, and Recall, apply to linked regular doclets. These tasks can be completed in Oracle Smart View for Office.
> - The link is deactivated when the doclet is marked complete.

The type of document you can specify as a linked regular doclet depends on the report package type,as shown in Table 1.

Table 24-1 Linked Doclet Support by Report Package Type

Report Package Type	Document Type Supported for Linking
Word	Word
PowerPoint	PowerPoint
PDF	PDF, Word, Excel, Reports

In Smart View, you can:

- View the content of a linked regular doclet in a report package by selecting the doclet and clicking **Open**.
- View the properties of a linked regular doclet by selecting the doclet in the Report Center either selecting **Properties** in the Action Panel or by clicking the **Inspect** button in the Narrative Reporting ribbon.

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- Perform these author phase workflow tasks on a linked regular doclet: **Submit**, **Approve**, **Recall**, **Reject**.
- Replace the linked regular doclet, and thus remove the link, by checking out the linked regular doclet and clicking the **Replace File** button in the Narrative Reporting ribbon. Narrative Reporting warns you that the replacing the file will break the link. After confirming the **Replace File** operation, and checking in the unlinked doclet, the doclet becomes like any other regular doclet in the report package, and can be further authored, uploaded, checked in, submitted, approved, recalled, and rejected.

  Any changes made to the unlinked doclet are reflected only in the doclet in the current report package, and not in the library document that was linked to previously.

  Note that in Narrative Reporting web, the doclet link can also be removed or deactivated when the doclet is marked complete, the author phase is complete, or the report package is marked final.

To remove the link in a linked regular doclet, see Removing the Link in a Linked Regular Doclet.

> **Note**
>
> After removing a doclet link or due to a broken link, if you need to reestablish the link to the library document (relink), you must perform the linking procedure in Narrative Reporting web. This procedure is not supported in Smart View. See Working with Linked Regular Doclets in *Authoring and Approving Doclets for Narrative Reporting* for more information.

Removing the Link in a Linked Regular Doclet

To make modifications to the contents of a linked regular doclet, the updates need to be made in the source library document file. Or, you can remove the link to the library file, thus replacing the linked doclet in the report package with a regular doclet.

Use the **Replace File** button in the Narrative Reporting ribbon to remove the link in a linked regular doclet.

Once the link is removed, the linked regular doclet becomes a regular doclet in your report package, with all the usual workflow tasks associated with a regular doclet. Assigned authors can now make further updates to the doclet, such as modifying the doclet content, inserting variables, and inserting embedded content.

To remove the link in a linked regular doclet:

1. Open a report package, select a linked regular doclet, and, in the Narrative Reporting ribbon click **Open**, and then click **Check Out**.

   Alternatively, select the doclet in the report package, and then select **Open and Check Out** in the Action Panel.

   In Oracle Smart View for Office, you can view the linked doclet file by selecting the doclet in the Report Center and clicking **Open**. However, to remove the link in the linked regular doclet, you must check it out.

   Checking out the linked regular doclet enables the **Replace File** button in the Narrative Reporting ribbon.
2. In the Narrative Reporting ribbon, click **Replace File**.

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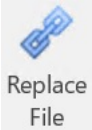

Narrative Reporting displays a message notifying you that the doclet file is linked and replacing the file will break the link.

Once a linked regular doclet is replaced, the doclet becomes a regular doclet. The regular doclet can be authored as you would any other regular doclet. You can perform further authoring tasks on the doclet, such as embedding content or inserting variables, and the doclet can be submitted or approved.

3. Click **Check In** to check in the check in the replaced file.

   Alternatively, instead of clicking the **Replace** button as described in the previous step, click the drop-down arrow on the **Check In** button and select **Replace File and Check In** to complete the replace and check-in with one operation.

4. Assigned authors can continue with authoring tasks on the replaced doclet.

   For example, authors can modify the doclet, embed content, insert variables, upload and check in the doclet; and proceed with the submitting, approving, recalling, or rejecting the doclet, as required.

Working with Embedded Content from Reference Doclets

Embedded content from a reference doclet allows commonly-used report content to be defined and then embedded in one or more doclets within your report package.

Related Topics:

About Embedded Content From Reference Doclets

Adding Reference Doclets to a Report Package

Creating Available Content Using the Available Content Button in Reference Doclets

Creating Available Content from Excel Named Ranges in Reference Doclets

Validating Fonts in Reference Doclets

Embedding Content in a Doclet

Updating Excel-based Reference Doclet Content and Properties

Deleting Available Content from Excel-based Reference Doclets

Previewing Available Content

Refreshing Embedded Content in a Doclet

Viewing Available Content Name in Doclets

Removing Embedded Content from a Doclet

About Embedded Content From Reference Doclets

What is embedded content? Embedded content starts with common report content created by reference doclet authors and contained in a reference doclet. This common content becomes

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available content to doclet authors. Using Oracle Smart View for Office or the web, doclet authors embed content into doclets that are part of the published report in Word- or PowerPoint-based report packages.

As a reference doclet author, you create report content, and then define it as available content. In Excel-based reference doclets, you use Excel's named range functionality. In Reports-based reference doclets, you use the web interface. After upload and checkin, the content is ready for doclet authors to consume.

As a doclet author, you might think of a reference doclet as a data source of embedded content. A report package can contain multiple reference doclets. You can embed the available content from multiple reference doclets in multiple doclets in a report package.

Whenever a reference doclet author checks in a reference doclet, Smart View or the web interface, the system automatically refreshes any doclet that has embedded content.

Whenever a doclet author checks in a doclet that has embedded content, the system automatically refreshes the embedded content in the doclet.

As the underlying data source of the report is updated, you can view the changes the next time you open or refresh the reference doclets and doclets containing embedded content.

> **Note**
>
> For reference doclet authors: Reference doclets are part of a report package, and they are maintained within the report package. Reference doclets have the same support as any other doclet in a report package such as workflow, security, and versioning.

The basic process flow for working with reference doclets and embedded content is as follows:

1. The report package owner adds Excel- and Reports-based reference doclets to the report package.

   The reference doclets can already contain report content and, in the case of Excel-based reference doclets, named ranges. Reference doclet authors and doclet authors can also add named ranges later, during the authoring process.

2. In Smart View or from the web interface, Excel-based reference doclet authors create report content and define named ranges for data and other content, such as tables, graphs, and charts, to include in a report package. They can validate fonts used in the reference doclet to ensure that formatting is retained when content is embedded in doclets.

   In the web interface, Reports-based reference doclet authors can add tables, charts, notes, and text boxes in the report as available content.

   Multiple available content objects can be created within a single reference doclet. For example, you can create more than one named range in a reference doclet.

3. Reference doclet authors upload and check in reference doclets, thus making the report content available to doclet authors.

4. Doclet authors embed content from the reference doclets in their assigned doclets.

In Smart View, you begin the process with Defining Named Ranges in Excel-based Reference Doclets.

For procedures completed in Narrative Reporting web, see Understanding Embedded Content - Doclet Authors in *Authoring and Approving Doclets for Narrative Reporting*.

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Table 24-2 Videos

Your Goal	Watch This Video
Learn about creating available content and embedding content from reference doclets in Smart View. The video uses a Word-based report package for demonstration purposes, but procedures shown also apply to PowerPoint-based report packages.	Embedding Content from Reference Doclets and Reference Files

Adding Reference Doclets to a Report Package

This task is completed by report package owners using the Narrative Reporting web interface.

To begin working with embedded content, the report package owner adds Excel- or Reports-based reference doclets to a report package. Reference doclets are the containers to which reference doclet authors add report content and make it available to doclet authors for embedding.

> **Note**
>
> - You must have report package owner privileges to add reference doclets to a report package.
> - The reference doclets you add can already contain report content and named ranges, or you can add them later, during the authoring process.

To add reference doclets to a report package:

1. In Oracle Smart View for Office, follow the procedure described in Adding Doclets to Report Package Structures.

   Alternatively, to use Narrative Reporting web, see Adding Excel Content to a Reference Doclet.

2. In Smart View, open the report package and verify that the reference doclet is included.

Reference doclet authors are now ready to begin working with the Excel-based reference doclets, as described in Defining Named Ranges in Excel-based Reference Doclets.

To begin embedding content from reference doclets in a doclet, go to Embedding Content in a Doclet Using the Ribbon and Dialog.

Creating Available Content

Related Topics

- Creating Available Content Using the Available Content Button in Reference Doclets
- Creating Available Content from Excel Named Ranges in Reference Doclets

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Creating Available Content Using the Available Content Button in Reference Doclets

You can create available content quickly and easily using the **Available Content** button in the Narrative Reporting ribbon in Oracle Smart View for Office.

Using the **Available Content** button , the underlying named range is automatically created for you based on the range you select in Excel. You have only to apply a name and optional description to the new content.

> **Note**
>
> - This feature requires the 24.02+ version of the Narrative Reporting extension
> - You can also create available content using Excel named ranges that you define, as described in Creating Available Content from Excel Named Ranges in Reference Doclets.

To add available content using the **Available Content** button:

1. Open the report package, and then open the reference doclet.

   Do not check out the reference doclet. The **Available Content** button is enabled only when the reference doclet is checked in.

   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.

2. In the Excel reference doclet, select a range.

   The range can be a table or a graphic, such as a chart. If you select a chart, be sure to select a blank row above and below the chart.

3. Click the **Available Content** button:

   This launches the **Define New Available Content** dialog.

4. In the **Define New Available Content** dialog, provide a name and optional description for the new available content.

   The range you selected is entered by default in the **Excel Range** text box. Or, you can type a valid range.

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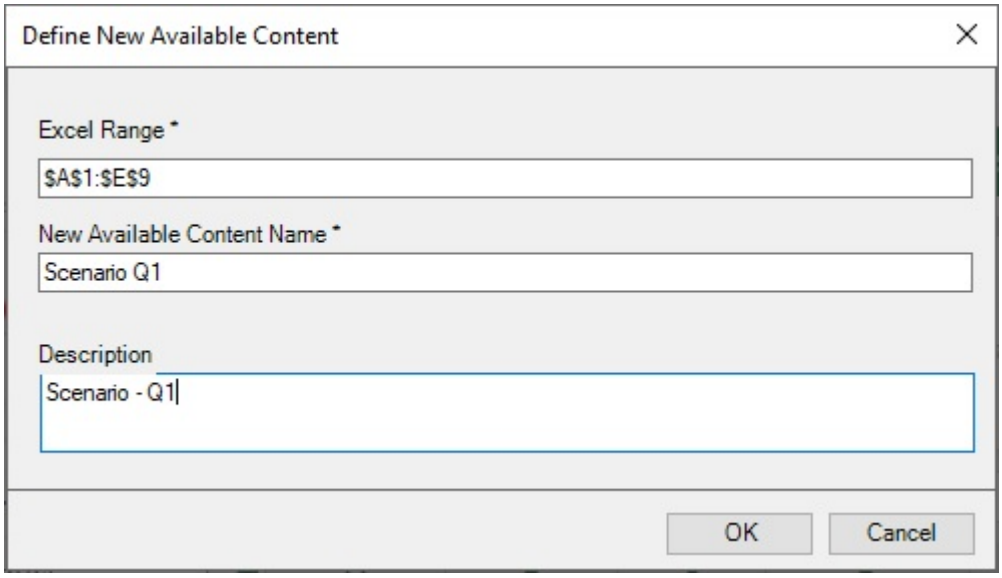

5. Click **OK**.

   The new content is available for embedding in your Word or PowerPoint doclet.

6. **Optional:** To disable the **Automatically Resize Table Contents** option in the newly created available content, see Updating Excel-based Reference Doclets Using the Ribbon.

   The **Automatically Resize Table Contents** option is not displayed to you when creating available content using **Available Content** button. This option applies to content created from an Excel table or grid, not a chart. To disable this option, you must edit the available content and clear the option.

Creating Available Content from Excel Named Ranges in Reference Doclets

Related Topics

- About Creating Available Content from Excel Named Ranges in Reference Doclets
- Defining Named Ranges in Excel-based Reference Doclets
- Adding Available Content to Excel-based Reference Doclets Using the Inspect Button
- Adding Available Content to Excel-based Reference Doclets Using the Panel

About Creating Available Content from Excel Named Ranges in Reference Doclets

The reference doclet author creates report content and then defines named ranges around that content in the reference doclet. In general, range names can be created using the New Name dialog box, accessed either from the Name Manager or the Define Name items on the Formula ribbon of Excel. Find out more about range names in the Microsoft documentation.

Available content is based on the named ranges specified in the reference doclets. Reference doclet authors or approvers can add available content to a reference doclet using either the **Inspect** dialog or the Available Content panel.

To define named ranges in and then add them as available content in reference doclets, see:

- Defining Named Ranges in Excel-based Reference Doclets).
- Add available content using either of the following methods:
  - Adding Available Content to Excel-based Reference Doclets Using the Inspect Button

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– Adding Available Content to Excel-based Reference Doclets Using the Panel

Defining Named Ranges in Excel-based Reference Doclets

This topic applies only to Excel-based reference doclets.

The reference doclet author creates report content and then defines named ranges around that content in the reference doclet. In general, range names can be created using the New Name dialog box, accessed either from the Name Manager or the Define Name items on the Formula ribbon of Excel. Find out more about range names in the Microsoft documentation.

You can define named ranges before adding a reference doclet to a report package.

Alternatively, you can define named ranges during the author phase, as described in this topic.

> **Note**
>
> Prior to beginning this procedure, ensure that the author phase has been initiated.

To define named ranges for Excel-based reference doclets:

1. Open the report package.
2. Open, and then check out the reference doclet.

   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.
3. Create the report content.
4. Add range names to selected report content.

   You can add range names to any or all report content in the reference doclet. You decide which content you want to make available to authors of the report package.

   A named range is valid when the named range:

   - Exists within an Excel workbook.
   - Is not a hidden name.
   - Refers to a range of cells in a worksheet which is not hidden.
   - Is not referring to a formula or constant.
   - Does not have a dynamically calculated reference, for example the reference must point to an absolute range of cells, rather than relying on a reference formula or another named range to dynamically determine the range.
   - Does not contain any errors, for example a "#REF!" error.

   Remember, named ranges become available content in the report package.
5. **Optional:** To enable the "Repeat as header row" option within embedded Microsoft Word tables, edit the Excel Named Range to add the following syntax within the comment field:

   NR_Headings=#

   For example, if there are three rows within the named range which represent the table header rows, then specify:

   NR_Headings=3

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If the named range should span multiple pages when embedded in a Word doclet, then the indicated number of rows will be repeated as column headers on each page that the table spans in the doclet.

6. **Optional:** As you add named ranges and edit content in reference doclets, complete the steps in Validating Fonts in Reference Doclets to ensure that fonts you are using in the reference doclet are also available in the Narrative Reporting service.
7. When you finish adding report content and named ranges to the report, and validating fonts, upload, and then check in the reference doclet.

   The reference doclet must at least be uploaded in order to continue with the next step.
8. Continue with Adding Available Content to Excel-based Reference Doclets Using the Inspect Button.

Adding Available Content to Excel-based Reference Doclets Using the Inspect Button

This topic applies only to Excel-based reference doclets.

In Oracle Smart View for Office, you use the **Properties** dialog box or the Available Content panel to detect the named ranges and specify them as available content. When the reference doclet is checked in to the report package, an automated refresh is performed that updates any changes that were made in the reference doclet and to any doclets that have embedded content that points to the reference doclet.

> **Note**
>
> - Prior to beginning this procedure, ensure that the author phase has been initiated.
> - Doclet authors cannot add available content definitions.

To add available content to a reference doclet in Smart View:

1. Open the report package, and then open and check out the reference doclet.

   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.
2. Click **Inspect** in the Narrative Reporting ribbon to launch the **Properties** dialog box.

   Alternatively, with the reference doclet selected in the report package list, click the **View Properties** link to access the **Properties** dialog box.
3. Select the **Available Content** tab.

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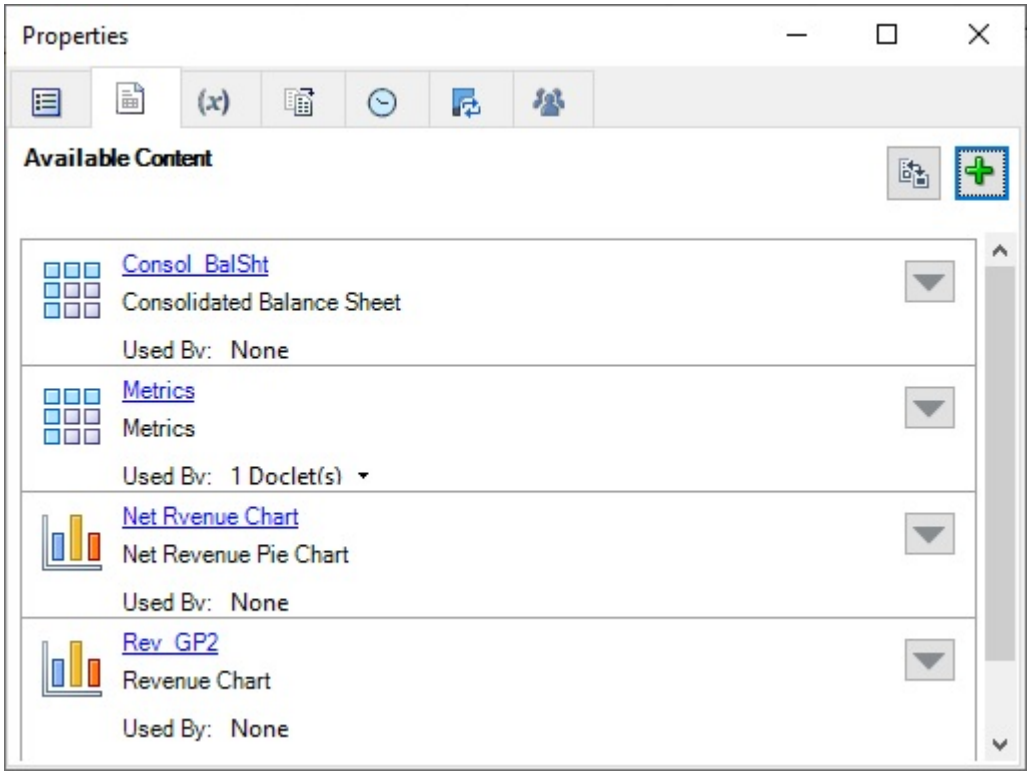
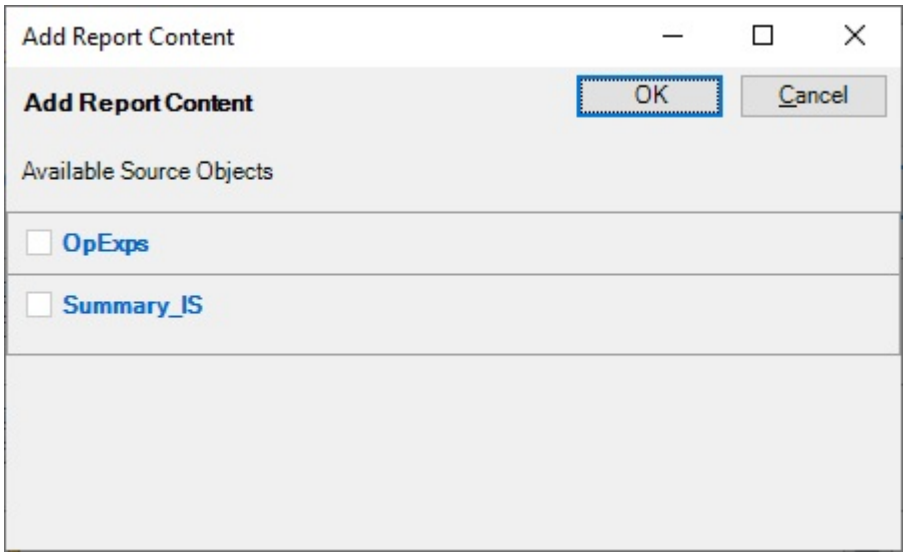
Figure 24-17 Properties Dialog Box - Available Content Tab



4. Click the **Add** button, , to launch the **Add Report Content** dialog box.

   In **Add Report Content**, all named ranges that have not already been selected as available content in the current reference doclet are displayed under **Available Source Objects**. Figure 2 shows two available source objects, OpExps and Summary_IS.

Figure 24-18 Add Report Content Dialog Showing Two Available Source Objects



5. Click the link for the content which you want to make available for embedding later.

   For example, in Figure 3, the link for the available range, "OpExps" is selected.

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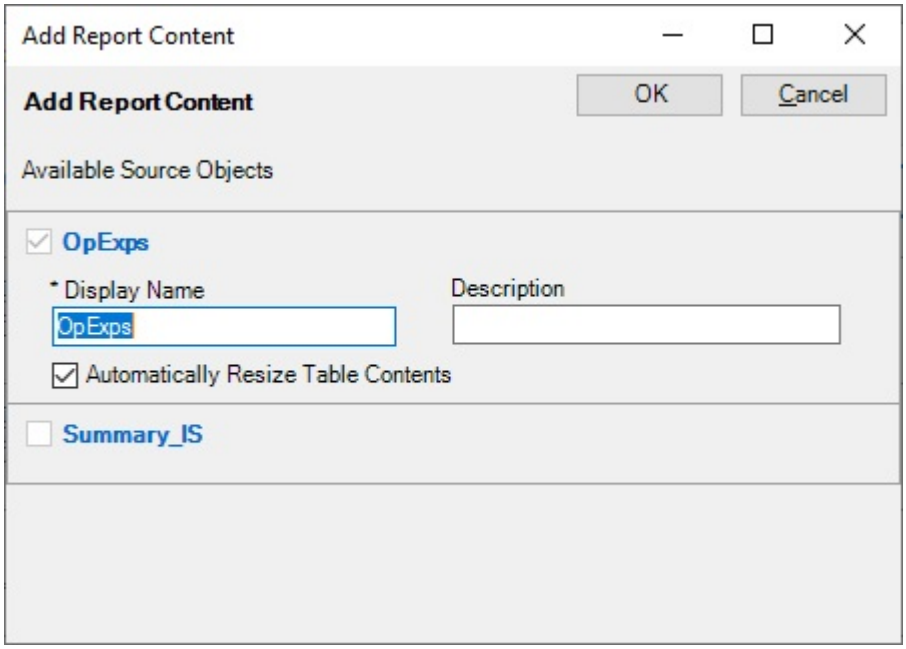
Figure 24-19 Add Report Content Dialog Box



6. **Optional:** Edit as you require:
   - **Display Name**
   - **Description**
   - **Automatically Resize Table Contents**—Selected by default. Applies to Excel ranges. Word tables have a default option, Automatically Resize Table Content, which adjusts the column widths and row heights for optimal rendering. This resizing may introduce discrepancies between the embedded table in a Word doclet and the source table or grid.

     Clear the **Automatically Resize Table Contents** check box to minimize the variations between the embedded Word table and the source reference table or grid.
7. Click **OK** to go back to the **Available Content** tab of the **Properties** dialog box.

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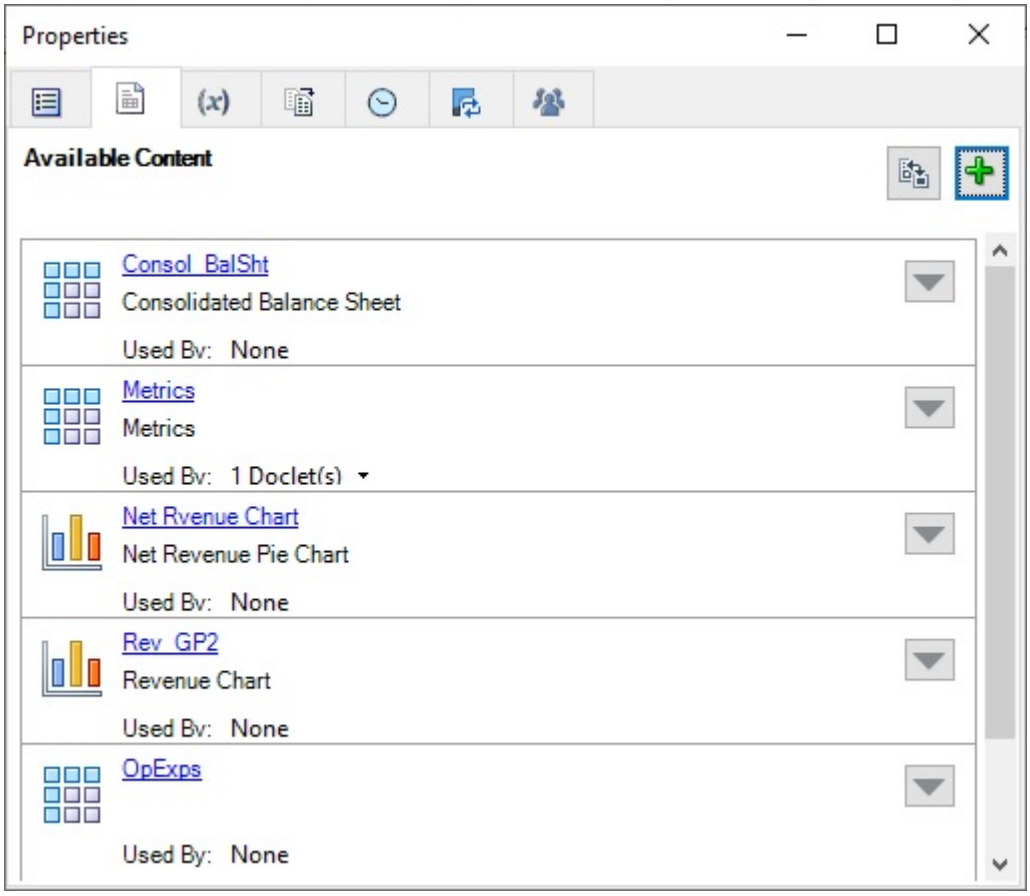
Figure 24-20 Properties Dialog Box - Available Content Tab with Content Added



8. Click the **X** in the upper right corner of the dialog to close it.
9. Upload, and then check in the reference doclet.

   The content you just added is now available for embedding into doclets.
10. **Optional:** Repeat this procedure for any reference doclets that contain named ranges that you want to add as available content.
11. Continue with Embedding Content in a Doclet Using the Ribbon and Dialog.

    Optionally, to maintain or delete content in the reference doclet, continue with Updating Excel-based Reference Doclets Using the Ribbon or Deleting Available Content from Excel-based Reference Doclets Using the Ribbon and Dialogs.

Adding Available Content to Excel-based Reference Doclets Using the Panel

1. Open the report package, and then open and check out the reference doclet.

   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.
2. In the Report Package panel, select **Available Content** from the drop-down menu (see Figure 1).

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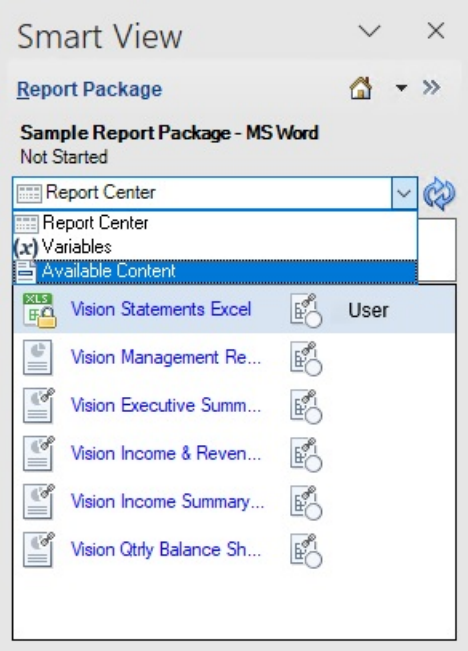
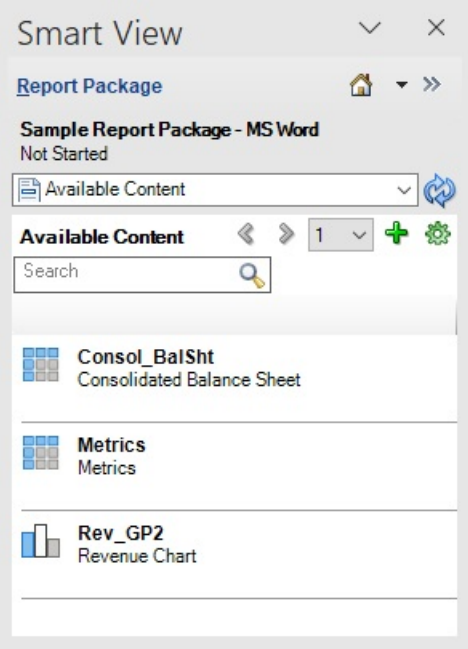
Figure 24-21 Available Content Option Selected in the Report Package Panel



The Available Content panel is displayed, as shown in Figure 2.

Figure 24-22 Available Content Panel



3. In the Available Content panel, click ✚ to launch the **Add Report Content** dialog.
4. Click the link for the report content name to add as available content, then click **OK**.

   In xxx, the link for the report content "Net Income" is selected, and you can view the **Display Name** and **Description** fields. You may add an optional description at this time.

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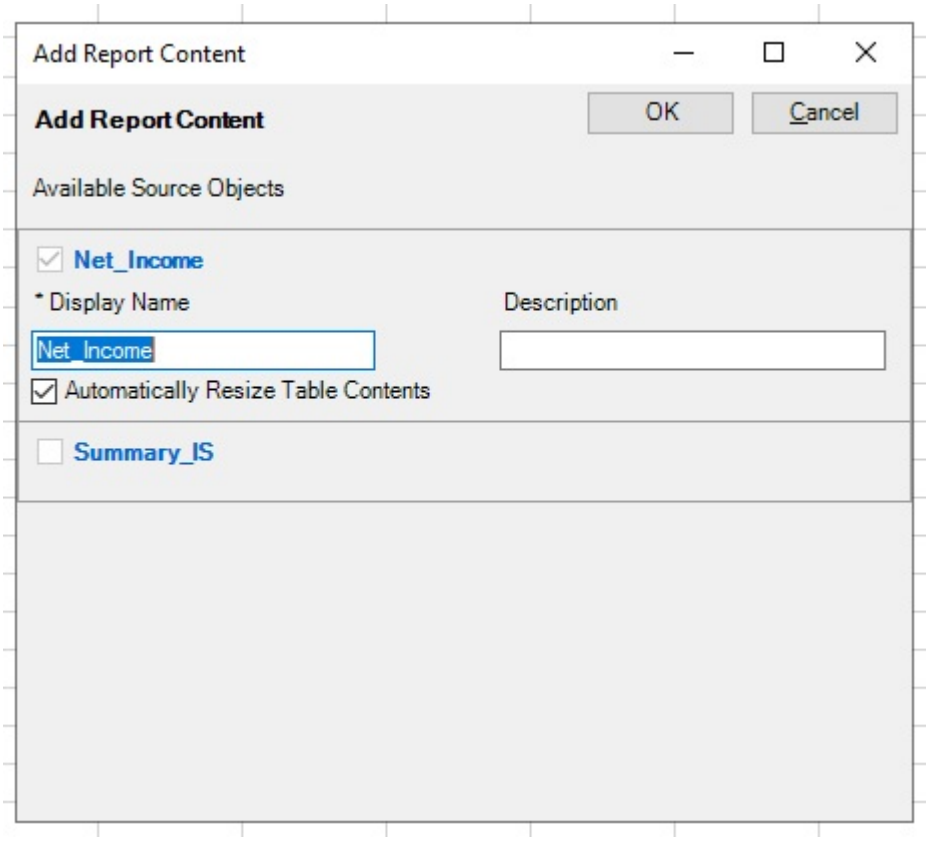
The **Automatically resize Table Contents** check box is selected by default, and you may clear the check box at this time.

Figure 24-23 Add Report Content Dialog Showing Details for Net_Income



5. Click

next to the content selector drop-down to refresh the panel and view the newly added available content.

Figure 4 shows the new content we added in the previous step, Net_Income, displayed in the Available Content panel.

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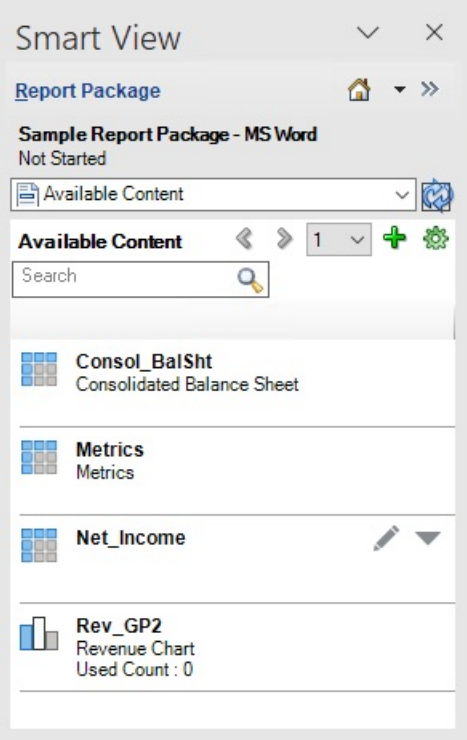
Figure 24-24 New Available Content, Net_Income, Added to List



6. Upload, and then check in the reference doclet.

   The content you just added is now available for embedding into doclets.

7. **Optional:** Repeat this procedure for any reference doclets that contain named ranges that you want to add as available content.

8. Continue with Embedding Content in a Doclet Using the Ribbon and Dialog.

   Optionally, to maintain or delete content in the reference doclet, continue with Updating Excel-based Reference Doclets Using the Ribbon or Deleting Available Content from Excel-based Reference Doclets Using the Ribbon and Dialogs.

Validating Fonts in Reference Doclets

The Font Validation command, available on the Narrative Reporting ribbon, provides a quick and easy way to confirm that the tables within your Excel reference doclets will render properly when inserted into a doclet as embedded content.

All fonts used in tables within your reference doclets must be installed to your Narrative Reporting service. If a font is not available within the service, the system uses a substitute font. This substitution can introduce significant visual differences when the content is either viewed online or inserted into another doclet.

With the Font Validation command, you are informed if any of the fonts used in the Excel reference doclet are not available in Narrative Reporting. You can then notify your service administrator to install the missing font files. A message also notifies you if all font files are in sync.

To validate fonts in a reference doclet:

1. From the report package, open a reference doclet.

   You may check out the doclet, but it's not required to validate fonts.

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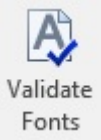
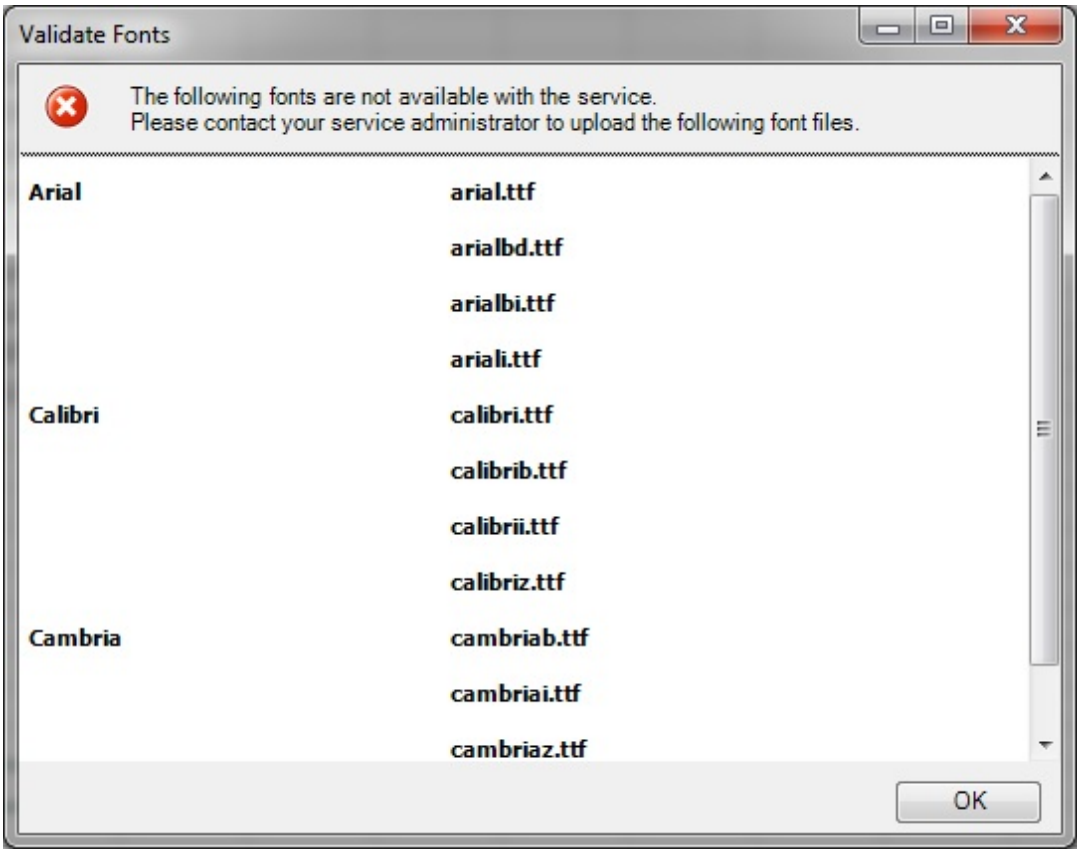
2. Click the **Validate Fonts** icon:



If there is a discrepancy between the fonts used in the doclets and the fonts available in the service, the following dialog is displayed, listing the missing fonts:



3. Take note of the missing fonts, and click **OK**.
4. Request that your service administrator installs the missing fonts in your service.

> **Note**
>
> In some cases, the fonts listed are not used in the reference doclet. These are usually the default Excel fonts; for example, Arial, Calibri, and Calibri Light. If you know you are not using those fonts, you can use your discretion about notifying your service administrator to install them.

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Embedding Content in a Doclet

Related Topics

- About Embedding Content in a Doclet
- Embedding Content in a Doclet Using the Ribbon and Dialog
- Embedding Content in a Doclet Using the Panel

About Embedding Content in a Doclet

Once Excel- and Reports-based reference doclets are added to a report package, report content has been created and named ranges defined, and available content has been identified, this content can be embedded. You can embed content in Word or PowerPoint doclets. For example, among the available content in the report package, there may be a chart, grid, Note, or Text box that an author wants to add to a doclet.

You can embed content in a doclet using either of the following methods:

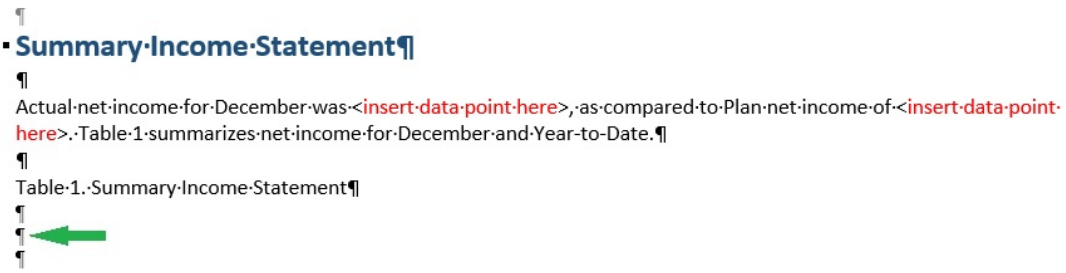
- Embedding Content in a Doclet Using the Ribbon and Dialog
- Embedding Content in a Doclet Using the Panel

> **Note**
>
> Before you begin:
>
> - Ensure that the doclet author phase is initiated.
> - Review the information in Guidelines for Embedding Content in a Doclet

Guidelines for Embedding Content in a Doclet

- In Word, you can display paragraph markers in order to precisely see where the position to which you're embedding content. In Figure 1, the solid green arrow shows the insertion point for the embedded content in a Word doclet.

Figure 24-25 Example Target Word Doclet with Cursor at Insertion Point



An example of embedded content in a Word doclet is shown in Figure 2. This figure assumes that in the Home ribbon in Word, the **Show/Hide** button in the **Paragraph** group is enabled.

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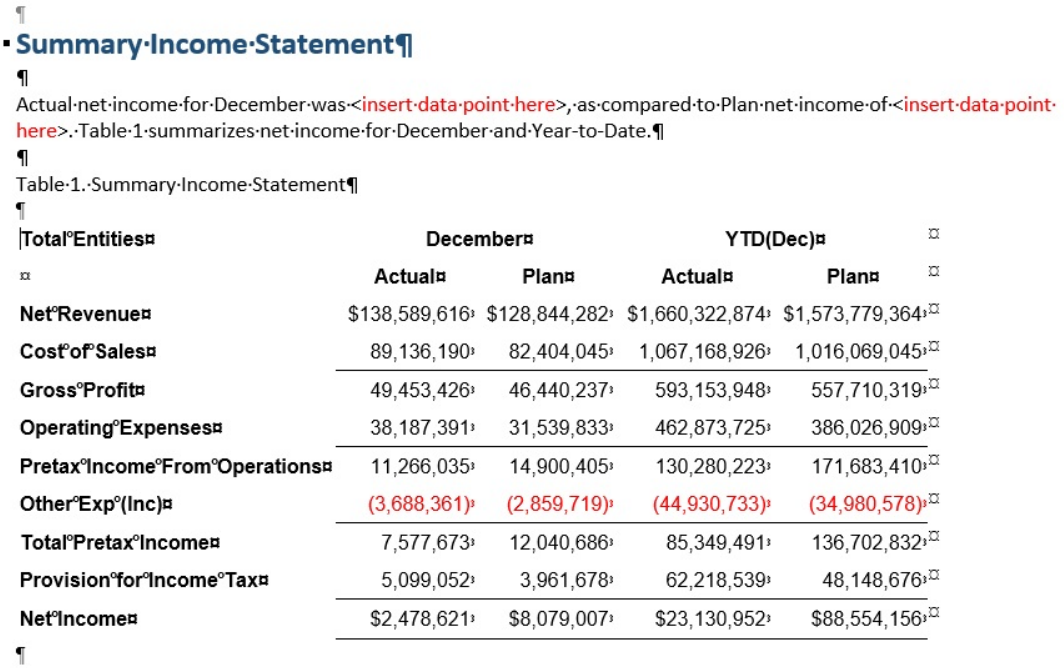
Figure 24-26 Example Target Doclet After Embedding Content



Summary Income Statement

Actual net income for December was <insert data point here>, as compared to Plan net income of <insert data point here>. Table 1 summarizes net income for December and Year-to-Date.

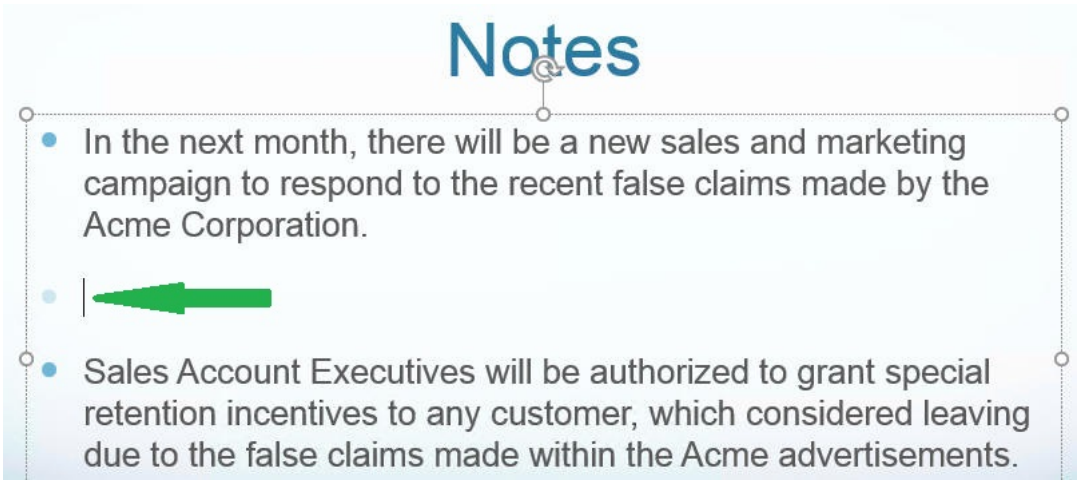
Table 1. Summary Income Statement

Total Entities	December		YTD(Dec)	
	Actual	Plan	Actual	Plan
Net Revenue	$138,589,616	$128,844,282	$1,660,322,874	$1,573,779,364
Cost of Sales	89,136,190	82,404,045	1,067,168,926	1,016,069,045
Gross Profit	49,453,426	46,440,237	593,153,948	557,710,319
Operating Expenses	38,187,391	31,539,833	462,873,725	386,026,909
Pretax Income From Operations	11,266,035	14,900,405	130,280,223	171,683,410
Other Exp (Inc)	(3,688,361)	(2,859,719)	(44,930,733)	(34,980,578)
Total Pretax Income	7,577,673	12,040,686	85,349,491	136,702,832
Provision for Income Tax	5,099,052	3,961,678	62,218,539	48,148,676
Net Income	$2,478,621	$8,079,007	$23,130,952	$88,554,156

Note any extra blank paragraph markers before and outside of the embedded content. You can delete any extra markers to give the doclet a more polished look, if required.

- In a PowerPoint slide, depending on the slide format, you may be embedding a table or graph onto a slide containing no other text or graphics. In that case, you can simply click anywhere in the slide. If your embedded content must be inserted at a certain point in a slide within text, then position the cursor at the insertion point, as shown in Figure 3

Figure 24-27 Example Target PowerPoint Doclet with Cursor at Insertion Point



- **Word:**
  - If you place embedded content at the beginning of a Word doclet (the first line and first space of the Word document), you cannot embed content before the already-embedded content. You may embed content immediately after the already-embedded content, but not before it. To work around this:

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    - Delete the embedded content and then re-embed the content in the correct order. To delete the embedded content, add a blank line after the embedded content, then select the blank line along with the embedded content, then right-click and select **Remove Content Control** from the context menu. Next, select the blank line and embedded content again, and then press **Delete**.
    - Place a blank line at the beginning of the Word document to ensure that, if necessary, you can insert embedded content before the first instance of embedded content.
  - If you embed content consisting of a multiple line grid at the beginning of a Word doclet (the first line and first space of the Word document), you cannot delete only the embedded content. Note that you can delete a single line grid that was embedded at the beginning of a Word doclet.

    To work around this, add a blank line after the embedded content, then select the blank line along with the embedded content, then right-click and select **Remove Content Control** from the context menu. Next, select the blank line and embedded content again, and then press **Delete**.

- **PowerPoint:**

  If you resize the embedded content, the revised height of the image on the slide will be retained on refresh, and the refreshed image will have the same aspect ratio as the source object.

Embedding Content in a Doclet Using the Ribbon and Dialog

Use the ribbon and dialog interface elements to embed content in a doclet.

> **Note**
>
> Before you begin, ensure that the doclet author phase is initiated.

To embed content in a doclet using the ribbon button and dialog:

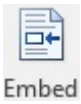
1. Open the doclet and check it out.

   This is the "target" doclet.

2. Place the cursor at the point in the target doclet where the embedded content should be inserted.

   For information on selecting the point for embedding content, see Guidelines for Embedding Content in a Doclet.

3. From the target doclet, click the **Embed** button in the Narrative Reporting ribbon.

   The **Embed Contents** dialog box is launched.

4. **Optional:** Select a filter option to narrow the list of available content:
   - **All**—The default. Shows all available content.
   - **Current Doclet**—Displays available content from any reference files that are registered with the current doclet.

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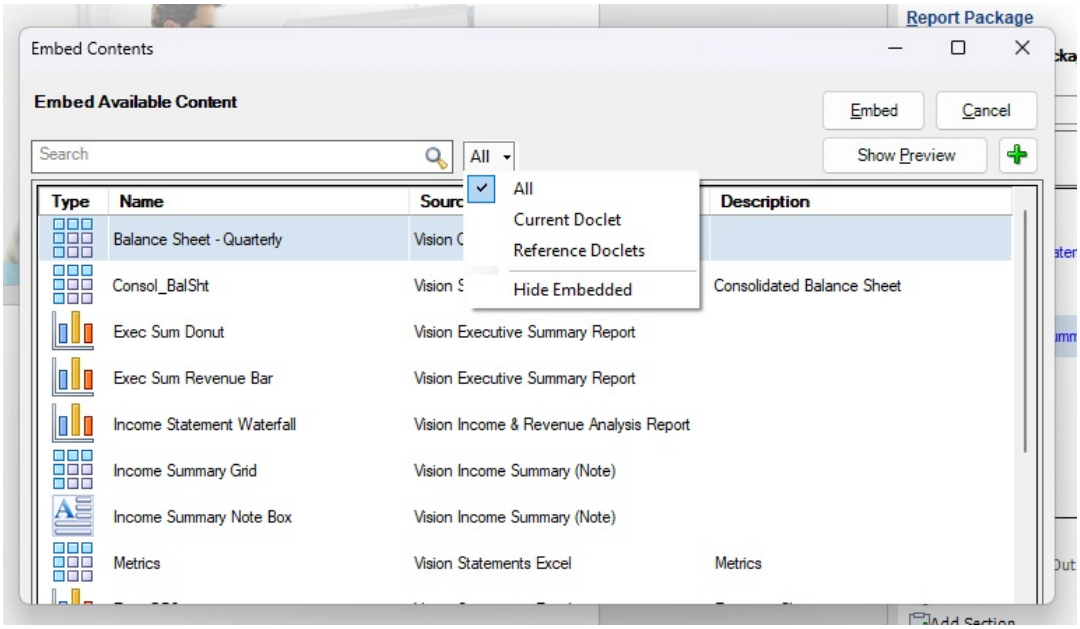
- **Reference Doclets**—Displays available content from all reference doclets in the report package.
- **Hide Embedded**—Hides available content that has already been embedded in the current doclet.



5. **Optional:** Enter a term in the Search field and click the magnifying glass icon to narrow the list of available content.

> **Note**
>
> Wildcards are not required. Narrative Reporting searches for the term any where in the available content name.

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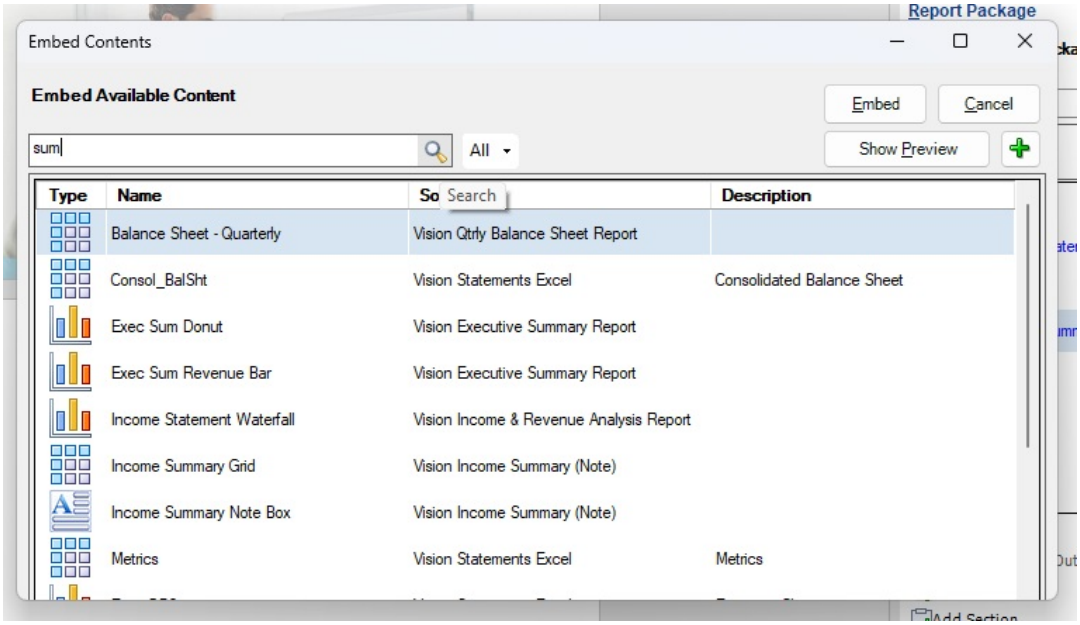

In the above example, we entered the term, sum. Narrative Reporting searches for and returns all available content that contains sum anywhere in the content name.

Note that when you click the magnifying glass icon, it changes to an **X**:

Use the **X** icon in the Search field to clear the search term and return the list of available content to the original state.

> **Note**
>
> You can also use the filtering options (described in the previous step) on the search results.

6. In **Embed Contents**, select the available content to embed.

   Optionally, click the **Show Preview** button to view a preview of the selected available content, as described in Previewing Available Content Using the Ribbon and Dialog

   In the example in Figure 1, we see both Excel- and Reports-based content in the list. We'll select **Summary Income Statement**, which happens to be Reports-based content.

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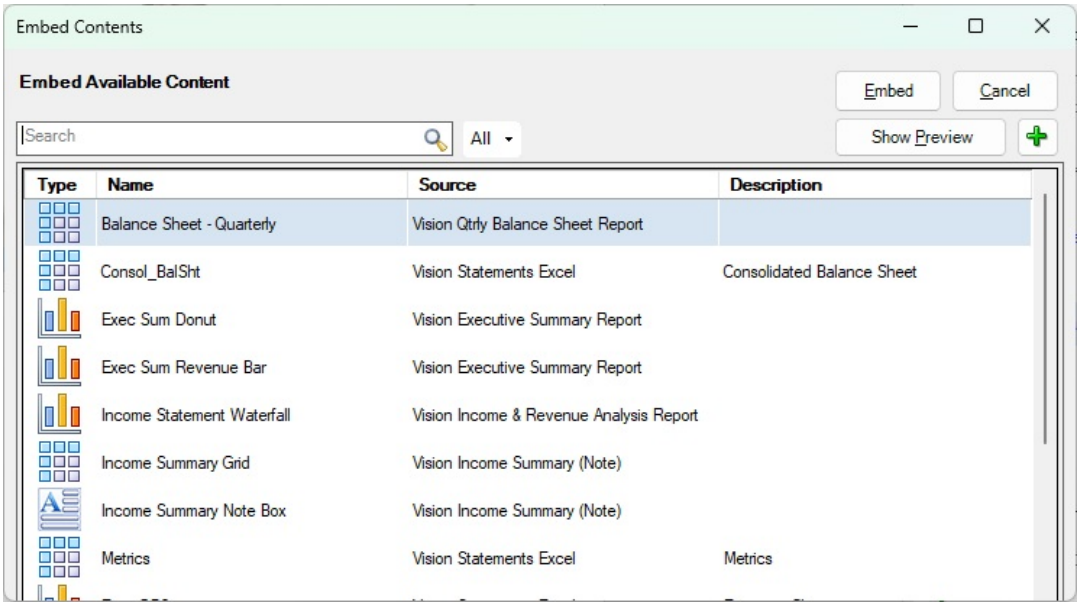
Figure 24-28 Embed Contents Dialog Box



7. Click **OK**.

   The selected available content is inserted, or embedded, into the doclet.

   > **Note**
   >
   > In PowerPoint, you can relocate and resize the embedded content on the slide. Once resized, the revised height of the image on the slide is retained on refresh, and the refreshed image will have the same aspect ratio as the source object.

   Note any extra blank paragraph markers before and outside of the embedded content. You can delete any extra markers to give the doclet a more polished look, if required.

8. **Optional:** Select an embedded content on the doclet to view its available content name, as described in Viewing Available Content Name in Doclets.

9. Repeat the steps above for all content you want to embed in the currently opened and checked-out target doclet.

   > **Note**
   >
   > Embedded content must not overlay or overlap other instances of embedded content.

10. When your work is completed in the current doclet, upload it, and then check it in.

11. To refresh embedded content, see Refreshing Embedded Content in a Doclet.

Embedding Content in a Doclet Using the Panel

Use the panel interface elements to embed content in a doclet.

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> **Note**
>
> Before you begin, ensure that the doclet author phase is initiated.

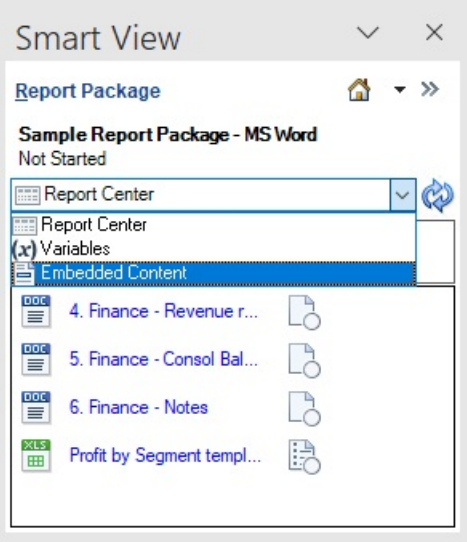
To embed content in a doclet using the Embedded Content panel:

1. Open a report package, and then open and check out a doclet.

   This is the "target" doclet.

2. In the Report Package panel, select **Embedded Content** from the drop-down menu (see Figure 1.

Figure 24-29 Embedded Content Option Selected in the Report Package Panel



The Embedded Content panel is displayed.

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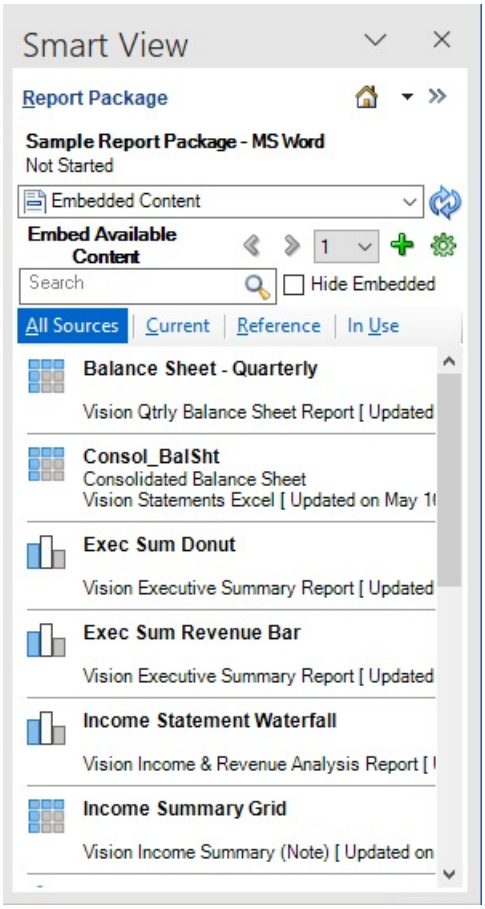
Figure 24-30 Embedded Content Panel



In the Embedded Content panel, all available content is listed.

3. Place the cursor at the point in the target doclet where the embedded content should be inserted.

   For information on selecting the point for embedding content, see Guidelines for Embedding Content in a Doclet.

4. In the Embedded Content panel, locate the available content to embed.

   You can use these methods to help you locate the available content:

   - Use the Search field. If you know the name or portion of the name of the available content, type the string to search on in the Search field, then click .

     > **Note**
     >
     > Wildcards are not required. Narrative Reporting searches for the term any where in the available content name.

     Click to cancel the search.

   - Scroll down the panel. If there are multiple pages of available content, use the **Page Number** drop-down menu to jump to the other pages.

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With either method, you can use filters—**All**, **Current**, **Reference**, or **In Use**—to narrow your search:

- **All Sources**—Includes available content sourced from reference doclets and Reports
- **Current**—Displays available content from any reference files that are registered with the current doclet.
- **Reference**—Includes available content sourced from the reference doclets in the report package.
- **In Use**—Includes available content that is in use in the currently-opened doclet.

5. **Optional:** Preview the available or embedded content using the **Preview** button, , described in Previewing Available Content Using the Panel.
6. From the list, select the available content to insert.

   When you select an available content in the list, the **Insert** button, , is displayed, as shown in Figure 3.

Figure 24-31 Available Content Selected with Insert and Preview Buttons Displayed

7. Click to insert the available content in the target doclet at the point you selected point in step 3.
8. **Optional:**

   Select an embedded content on the doclet to view its available content name, as described in Viewing Available Content Name in Doclets.
9. Repeat the steps above for all content you want to embed in the currently opened and checked-out target doclet.

> **Note**
>
> Embedded content must not overlay or overlap other instances of embedded content.

10. When your work is completed in the current doclet, upload it, and then check it in.
11. To refresh embedded content, see Refreshing Embedded Content in a Doclet.

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Updating Excel-based Reference Doclet Content and Properties

Related Topics

- About Updating Excel-based Reference Doclet Content and Properties
- Updating Excel-based Reference Doclets Using the Ribbon
- Updating Excel-based Reference Doclets Using the Panel

About Updating Excel-based Reference Doclet Content and Properties

This topic and the following procedures apply only to Excel-based reference doclets.

As the author or approver of Excel-based reference doclets, you can update and modify the available content in reference doclets during the author phase.

For example, you can refresh data or reformat content. Or, you may find that the available content that you defined needs to be remapped to different report content within the reference doclet. This may occur if the doclet source was updated, or if a named range was renamed or deleted, or if the wrong content was selected previously.

> **Note**
>
> - Prior to beginning this procedure, ensure that the author phase has been initiated.
> - To update Reports-based content, use the Narrative Reporting web interface.

Updating Excel-based Reference Doclets Using the Ribbon

To update reference doclet content using the Narrative Reporting ribbon:

1. Open the report package.
2. Open, and then check out the reference doclet.

   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.
3. **Optional:** Perform Oracle Smart View for Office tasks, such as refresh the data points or change the POV in a report.
4. **Optional:** Perform Excel tasks, such as reformat a grid or chart.
5. **Optional:** Change the name, optional description, or table column resize option of available content:
   a. In the Narrative Reporting ribbon, click **Inspect**.
   b. In the **Properties** dialog box, select the **Embedded Contents** tab.
   c. Under **Available Content**, click the link for the content properties you want to change.

      For example, to add a description to the Ops_Exps content, click the **OpExps** link:

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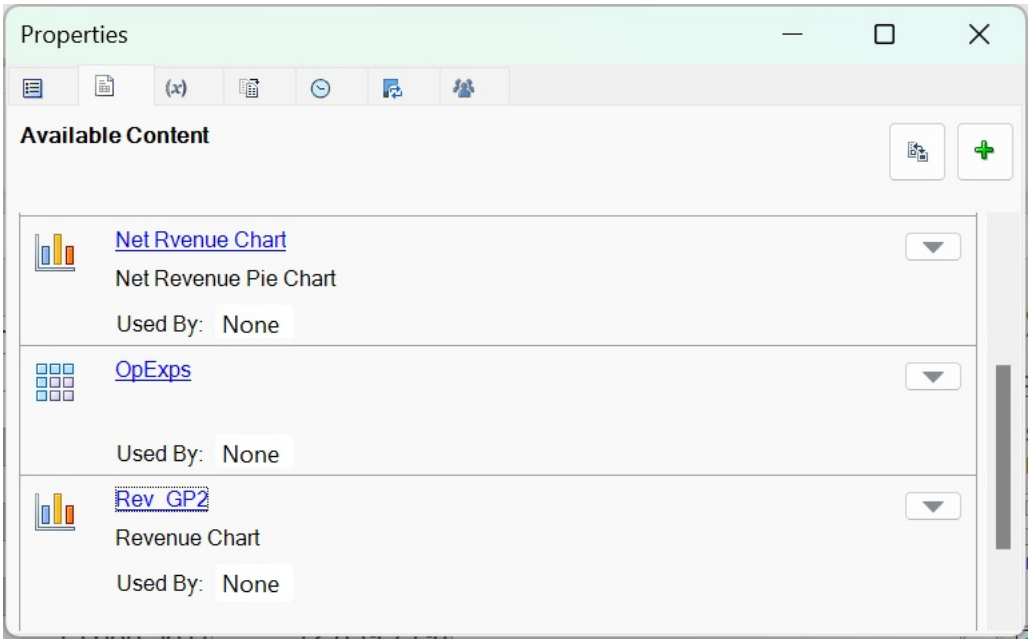
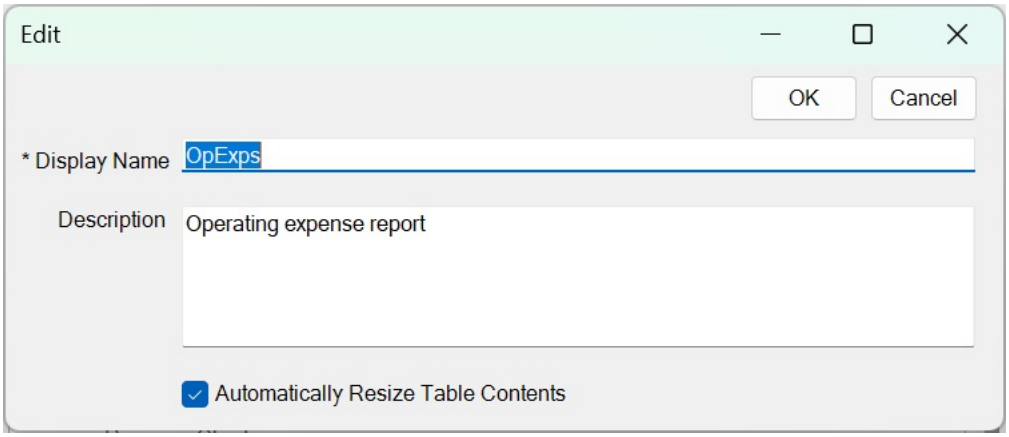


The **Edit** dialog box is displayed, where you can change the content name, optional description, and table column resizing option.

d. **Optional:** In the **Edit** dialog, make any necessary changes to the **Display Name** and optional **Description** fields.

In the following example, we've added a description:



e. **Optional:** Enable or clear the **Automatically Resize Table Contents** check box, as you require.

Disable the **Automatically Resize Table Contents** option to minimize the variations between the embedded Word table and the source reference table or grid.

This option is enabled by default when you create available content by using the **Available Content** button.

f. When finished, click **OK** to close the **Edit** dialog.

In the following example, the updated description now appears in the list under **Available Cotent** in the **Properties** dialog:

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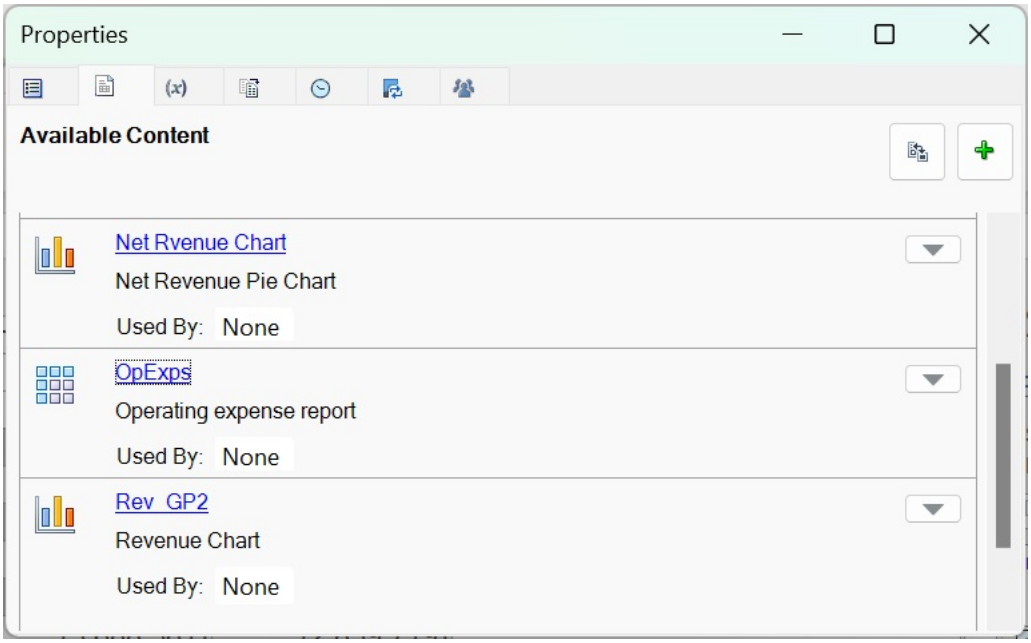


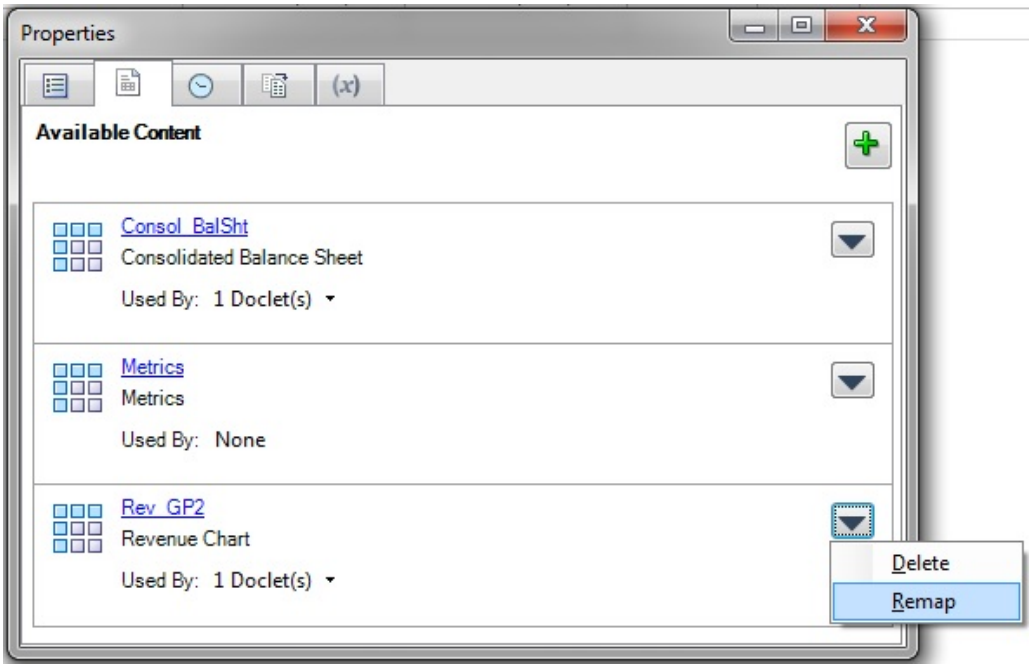
g. Repeat to make changes to any other content in the list.

6. **Optional:** To remap available content within a reference doclet:

a. In the Narrative Reporting ribbon, click **Inspect**.

b. In the **Properties** dialog box, select the **Available Contents** tab.

c. Click next to the content to remap and select **Remap** from the drop-down menu. For example, below we are selecting to remap Rev_GP2.



The **Remap** dialog is displayed.

d. In the **Remap** dialog, click on the associated **Select** link for the content to remap.

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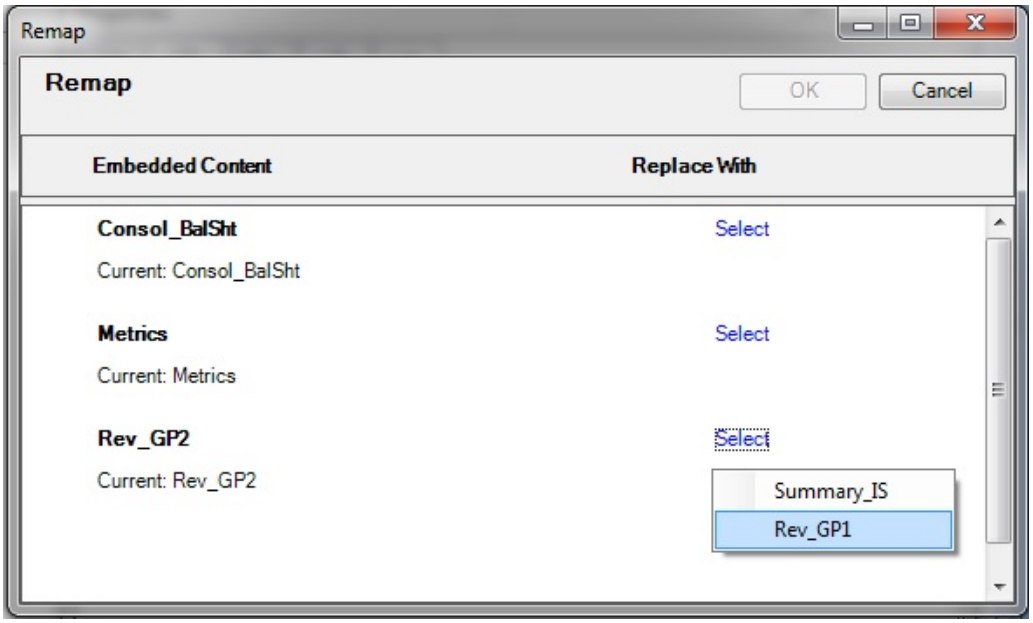
A list of available content that is not already mapped is displayed. In the following illustration, the list contains two item, Summary_IS and Rev_GP1.

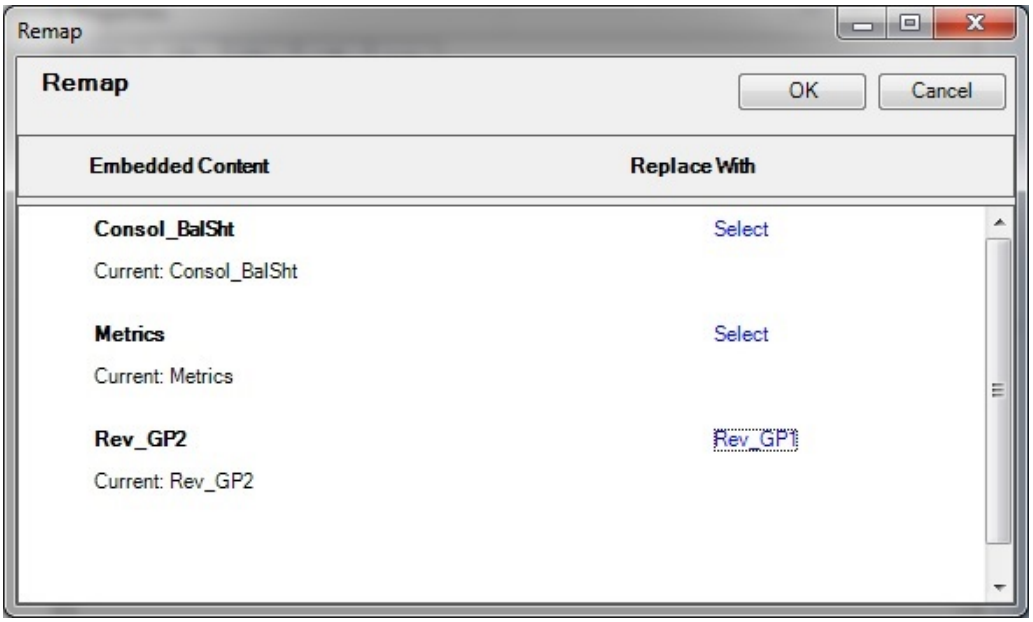
Rev_GP2 is currently mapped to available content called Rev_GP2. We want to remap to the unmapped content called Rev_GP1.



e. From the **Select** drop-down list, select an available content item to remap to.

After you make a selection, the range you chose is shown in the **Replace with** column.

In the following example, the Rev_GP1 range is now showing in the **Replace with** column.



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f. Repeat step 6.c. through step 6.e. for each available content item that you want to remap.

g. When you're finished remapping content, click **OK** to close the **Remap** dialog.

7. Click **X** in the upper left corner of **Properties** to close the dialog.

8. When finished with all updates to the reference doclet, upload it and check it in.

Updating Excel-based Reference Doclets Using the Panel

To update reference doclet content using the Narrative Reporting ribbon:

1. Open the report package.

2. Open, and then check out the reference doclet.

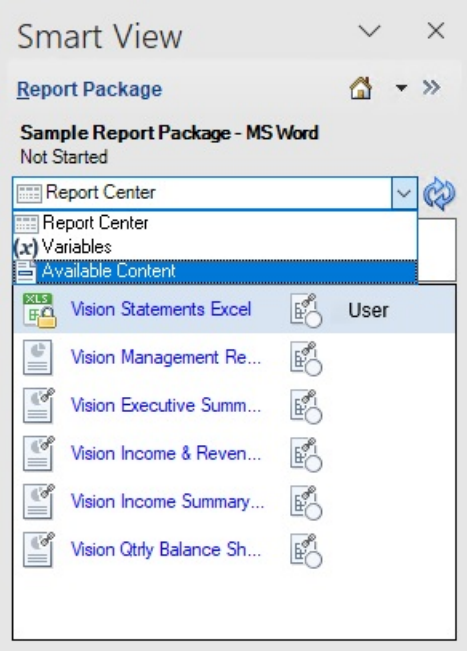
   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.

3. **Optional:** Perform Oracle Smart View for Office tasks, such as refresh the data points or change the POV in a report.

4. **Optional:** Perform Excel tasks, such as reformat a grid or chart.

5. In the Report Package panel, select **Available Content** from the drop-down menu (see Figure 1.

Figure 24-32 Available Content Option Selected in the Report Package Panel



The Available Content panel is displayed, as shown in Figure 2. The **Edit Content** button, , and **More Actions**, are displayed when you hover over an available content.

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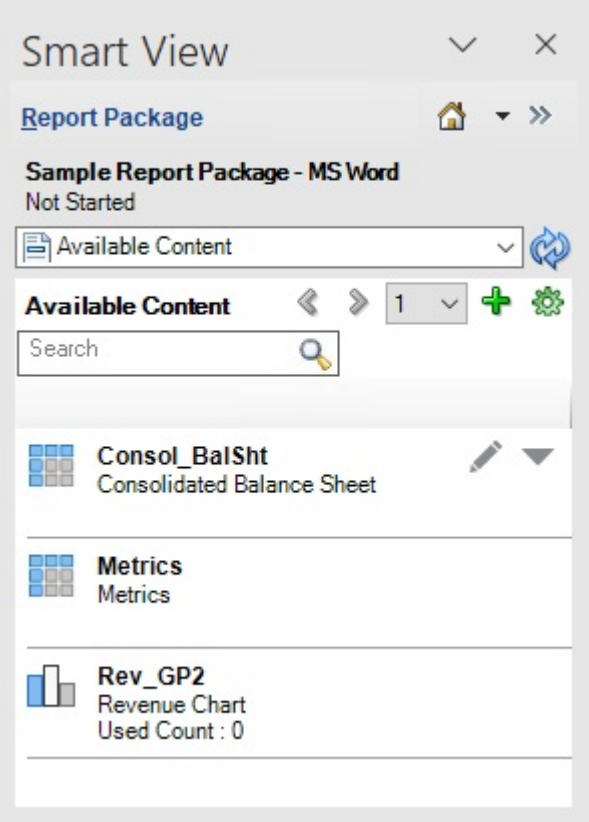
Figure 24-33 Available Content Panel



6. **Optional:** Change the name, optional description, or table column resize option of a selected available content.

   a. Select an available content in the list.

   b. **Optional:** To edit the available content name or description, click for the selected content and, in the panel, make any necessary changes to the name description fields.

      Figure 3 shows the current name and description of the selected content. Type directly in these fields to change the name or description.

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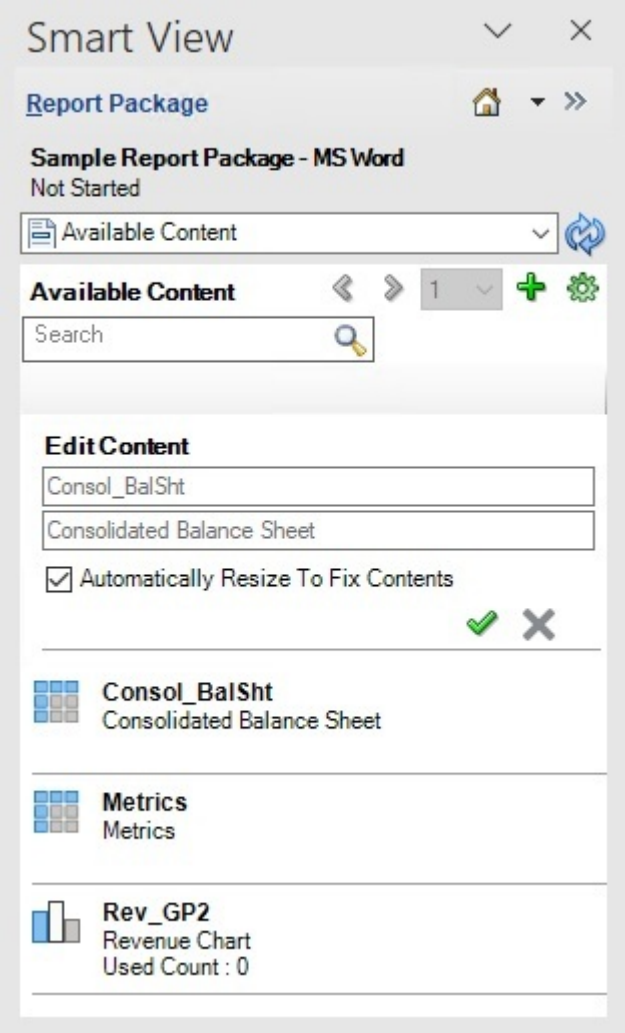
Figure 24-34 Available Content Panel Showing the Edit Options



c. **Optional:** Enable or clear the **Automatically Resize Table Contents** check box, as you require.

   Disable the **Automatically Resize Table Contents** option to minimize the variations between the embedded Word table and the source reference table or grid.

   This option is enabled by default when you create available content by using the **Available Content** button on the Narrative Reporting ribbon.

d. When finished, click ✔ to accept the changes and collapse the edit fields for the selected available content.

   To discard changes, click the **Cancel** button, ✖.

7. **Optional:** To locate available content within a reference doclet, click the **More Actions** button, ▼, and select **Locate**, as shown in Figure 4.

   Figure 4 shows the options available when selecting ▼: **Locate**, **Remap** and **Delete**.

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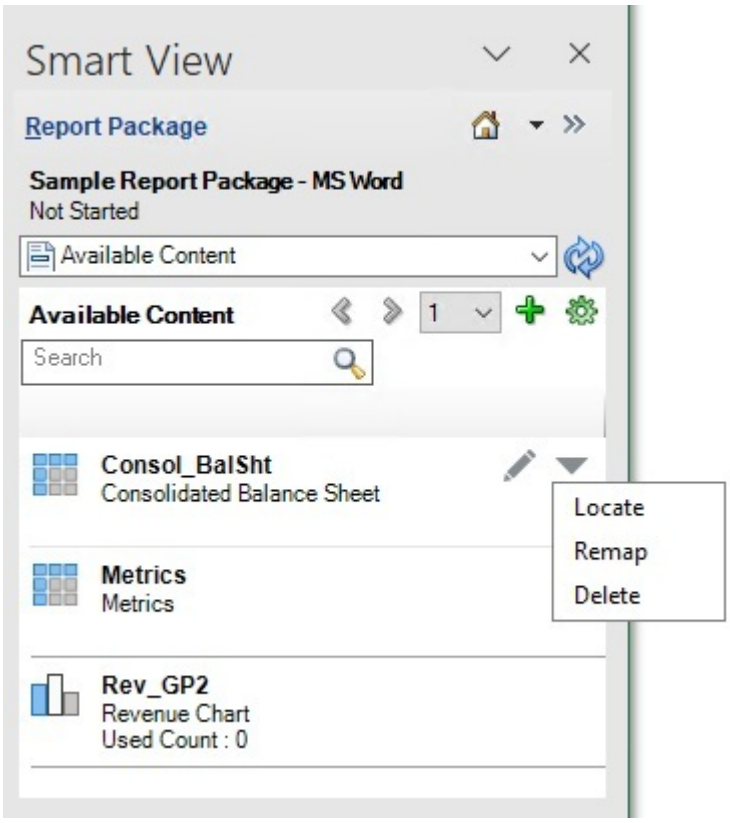
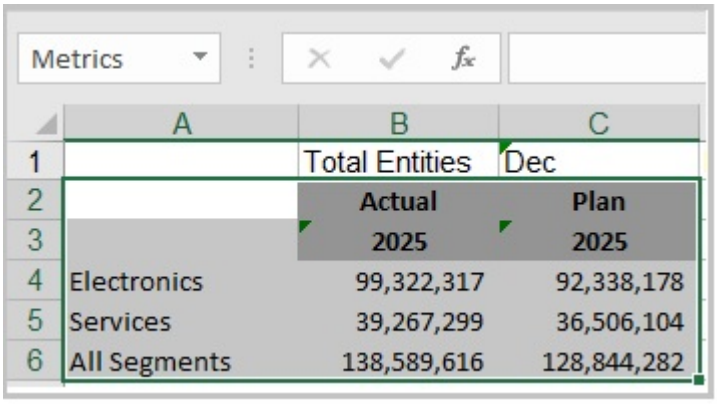
Figure 24-35 Available Content Panel Showing the Action Menu Options, Locate, Remap, and Delete



For example, using the Vision sample, when you select the **Locate** action for the "Metrics" available content, the range that makes up the available content is highlighted. As shown in Figure 5, the range is highlighted in gray and outlined in green.

Figure 24-36 Range for Sample Available Content "Metrics" Highlighted on the Sheet



8. **Optional:** To remap available content within a reference doclet:
   a. Select an available content in the list.
   b. Click the **More Actions** button, ▼, and select **Remap**, as shown in Figure 4.

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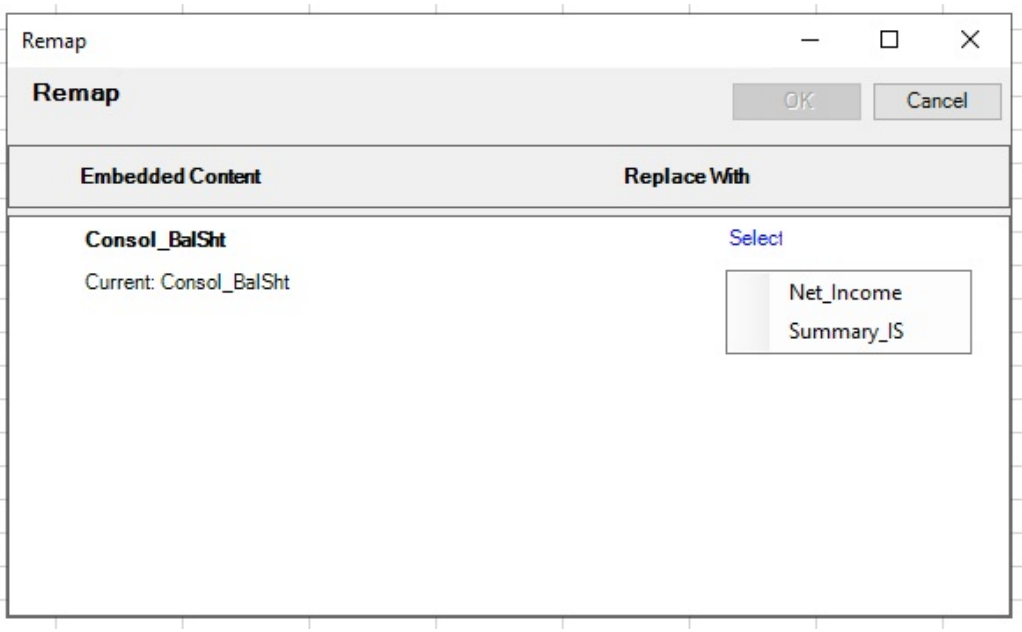
c. In the **Remap** dialog, click on the associated **Select** link for the content to remap.

A list of available content that is not already mapped is displayed. In Figure 6, the list for Consol_BalSht contains two items, Net_Income and Summary_IS.

Figure 24-37 Remap Dialog Showing Drop-down with Available Content Not Already Mapped



d. From the **Select** drop-down list, select an available content item to remap to, and then click **OK**.

After you make a selection, the range you chose is shown in the **Replace with** column.

In the following example, the Net_Income range is now showing in the **Replace with** column.

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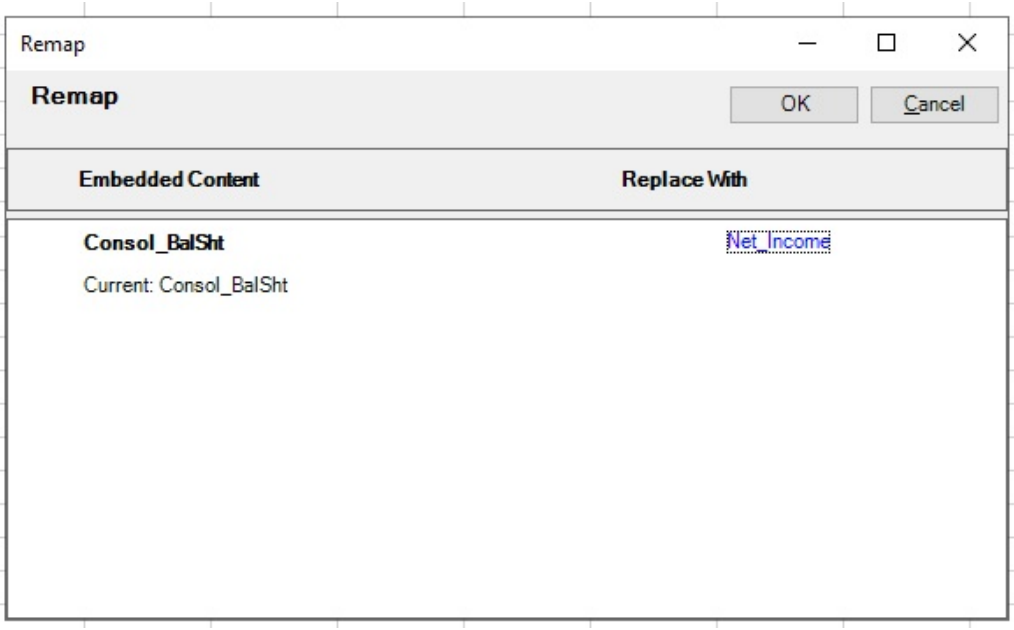
Figure 24-38 Remap Dialog After Making Selection from Drop-down



e. **Optional:** Repeat 8.a through 8.d for each available content item that you want to remap.

f. When finished with all updates to the reference doclet, upload it and check it in.

Deleting Available Content from Excel-based Reference Doclets

Related Topics

- About Deleting Available Content from Excel-based Reference Doclets
- Deleting Available Content from Excel-based Reference Doclets Using the Ribbon and Dialogs
- Deleting Available Content from Excel-based Reference Doclets Using the Panel

About Deleting Available Content from Excel-based Reference Doclets

This topic and the following procedures apply only to Excel-based reference doclets.

In the reference doclet, you can remove content from the list of available content, without deleting the range on which it was based. This way, if you need to add the content back at later, you can do so.

Be aware that if the available content is in use as embedded content in any doclets in the report package, deleting it from the reference doclet will cause broken links in those doclets.

To delete available content from a Reports-based reference doclet, use the Narrative Reporting web interface.

You can delete available content from Excel-based reference doclets using either of the following methods:

- Deleting Available Content from Excel-based Reference Doclets Using the Ribbon and Dialogs
- Deleting Available Content from Excel-based Reference Doclets Using the Panel

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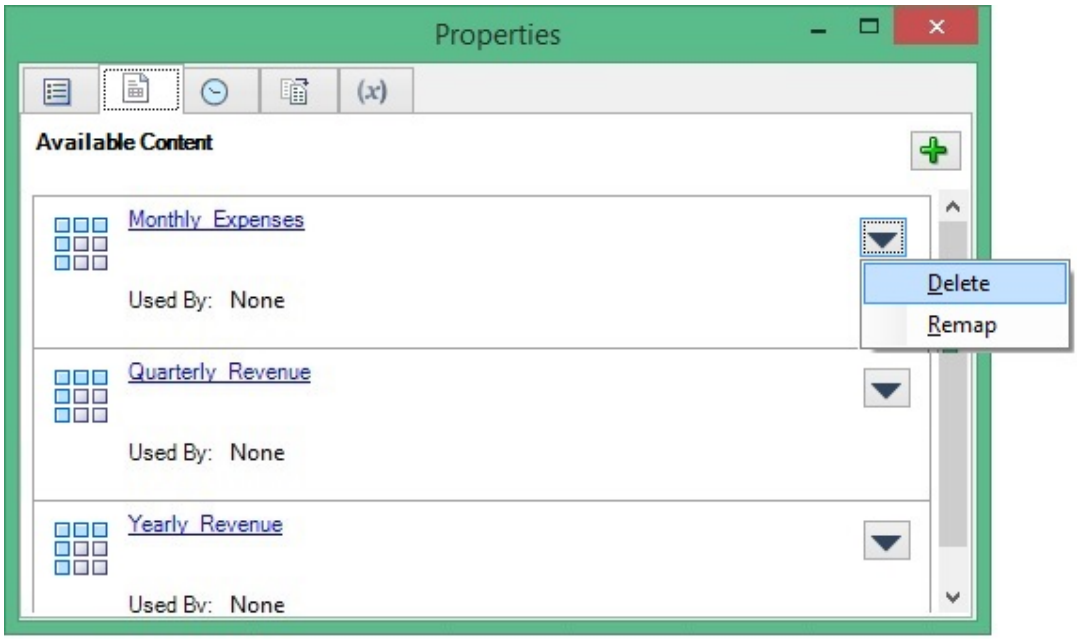
> **Note**
>
> Before you begin, ensure that the doclet author phase is initiated.

Deleting Available Content from Excel-based Reference Doclets Using the Ribbon and Dialogs

To delete available content from the reference doclet using the ribbon and dialogs:

1. Check out the reference doclet.
2. In the Narrative Reporting ribbon, click **Inspect** to launch the **Properties** dialog box.
3. In **Properties**, select the **Available Contents** tab.

   In the example below, there are three ranges listed as available content. We'll remove one of them Yearly_Revenue.



4. In **Available Content**, click the **Delete** button, for the content to delete.

   The content is removed from the list of available content.

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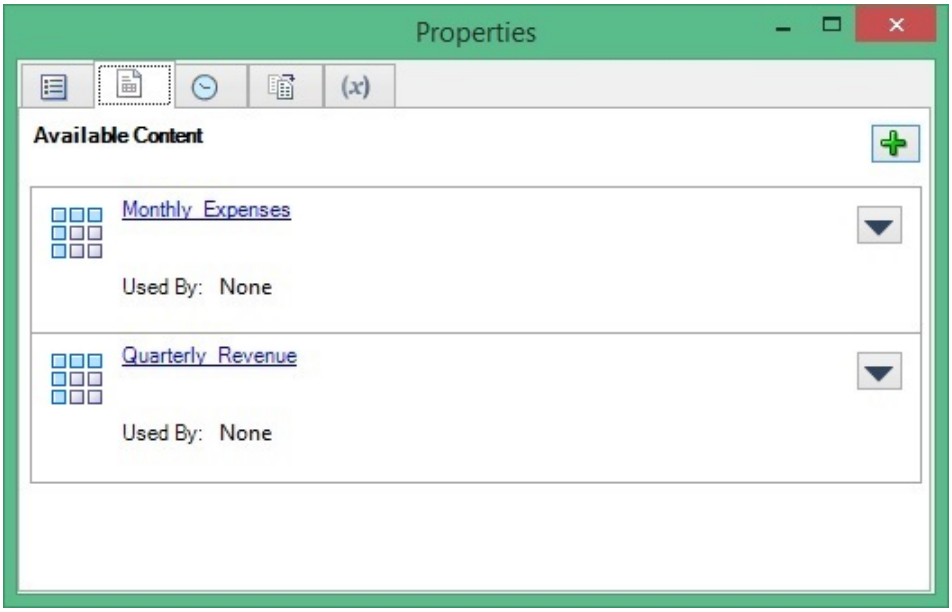

5. Repeat these steps for any other content to delete.
6. Click **X** in the upper left corner of **Properties** to close the dialog.
7. When finished, upload it and check it in.

You can always add content back to the reference doclet by following the procedure in Adding Available Content to Excel-based Reference Doclets Using the Inspect Button.

Deleting Available Content from Excel-based Reference Doclets Using the Panel

To delete available content from the reference doclet using the panel:

1. Open the report package.
2. Open, and then check out the reference doclet.

   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.
3. In the Report Package panel, select **Available Content** from the drop-down menu (as shown in Figure 1 in Updating Excel-based Reference Doclets Using the Panel).

   The Available Content panel is displayed, as shown in Figure 2 in Updating Excel-based Reference Doclets Using the Panel.
4. Select an available content in the list.
5. Click the **More Actions** button, ▼, and select **Delete**.

   In Figure 1, the **Delete** action is selected.

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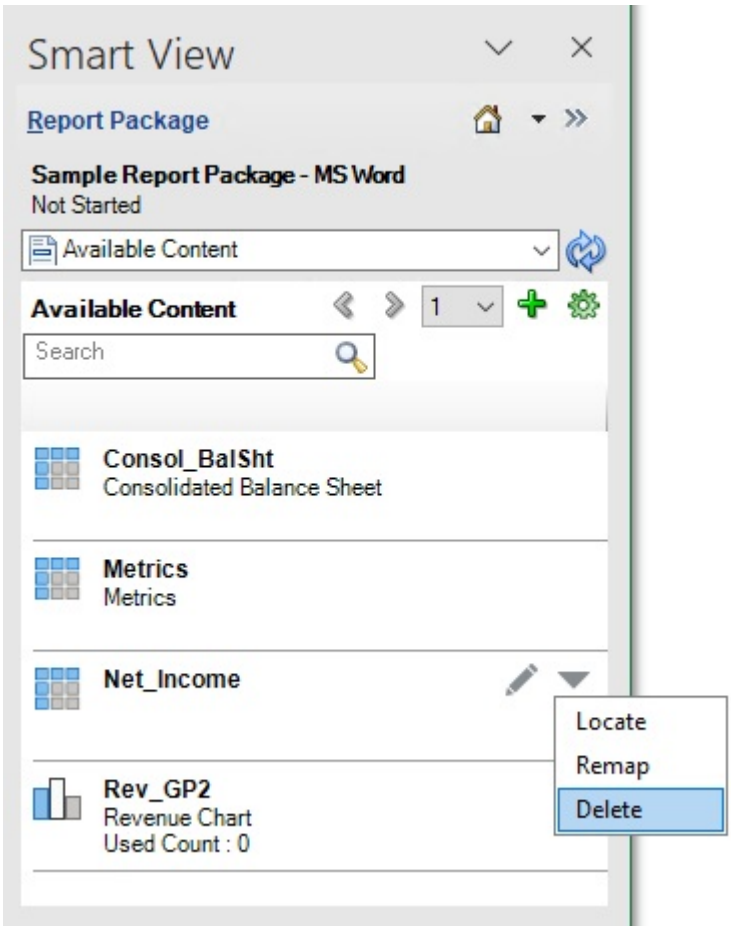
Figure 24-39 Available Content Panel Showing the More Actions Menu Delete Option Selected



The selected available content is removed from the list.

6. When finished with all updates to the reference doclet, including deleting available content, upload it and check it in.

Previewing Available Content

Related Topics

- About Previewing Available and Embedded Content
- Previewing Available Content Using the Ribbon and Dialog
- Previewing Available Content Using the Panel

About Previewing Available and Embedded Content

Before inserting available content or after embedding content into a doclet, authors can preview content from Excel- and Reports-based reference doclets and reference files.

You can preview available or embedded content in a report package using either of the following methods:

- Previewing Available Content Using the Ribbon and Dialog

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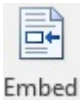
- Previewing Available Content Using the Panel

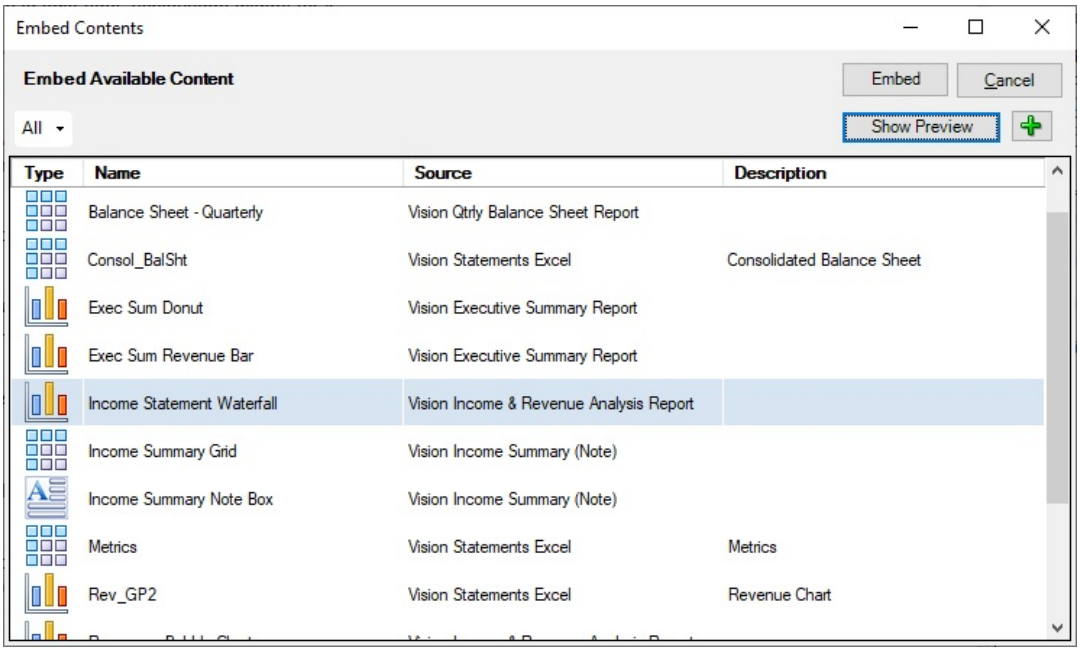
Previewing Available Content Using the Ribbon and Dialog

To preview available content using the ribbon and dialog controls:

1. Open a doclet and check it out.
2. From the Narrative Reporting ribbon, click the **Embed** button:



The **Embed Contents** dialog box is launched. In the following example, the available content, "Income Statement Waterfall" is selected.



3. In the **Embed Contents** dialog, select an item from the list of available content and click the **Show Preview** button.

   From the example shown in the previous step, after selecting Income Statement Waterfall and clicking **Show Preview**, an image of the Income Statement Waterfall chart is displayed in the preview pane in the lower half of the dialog:

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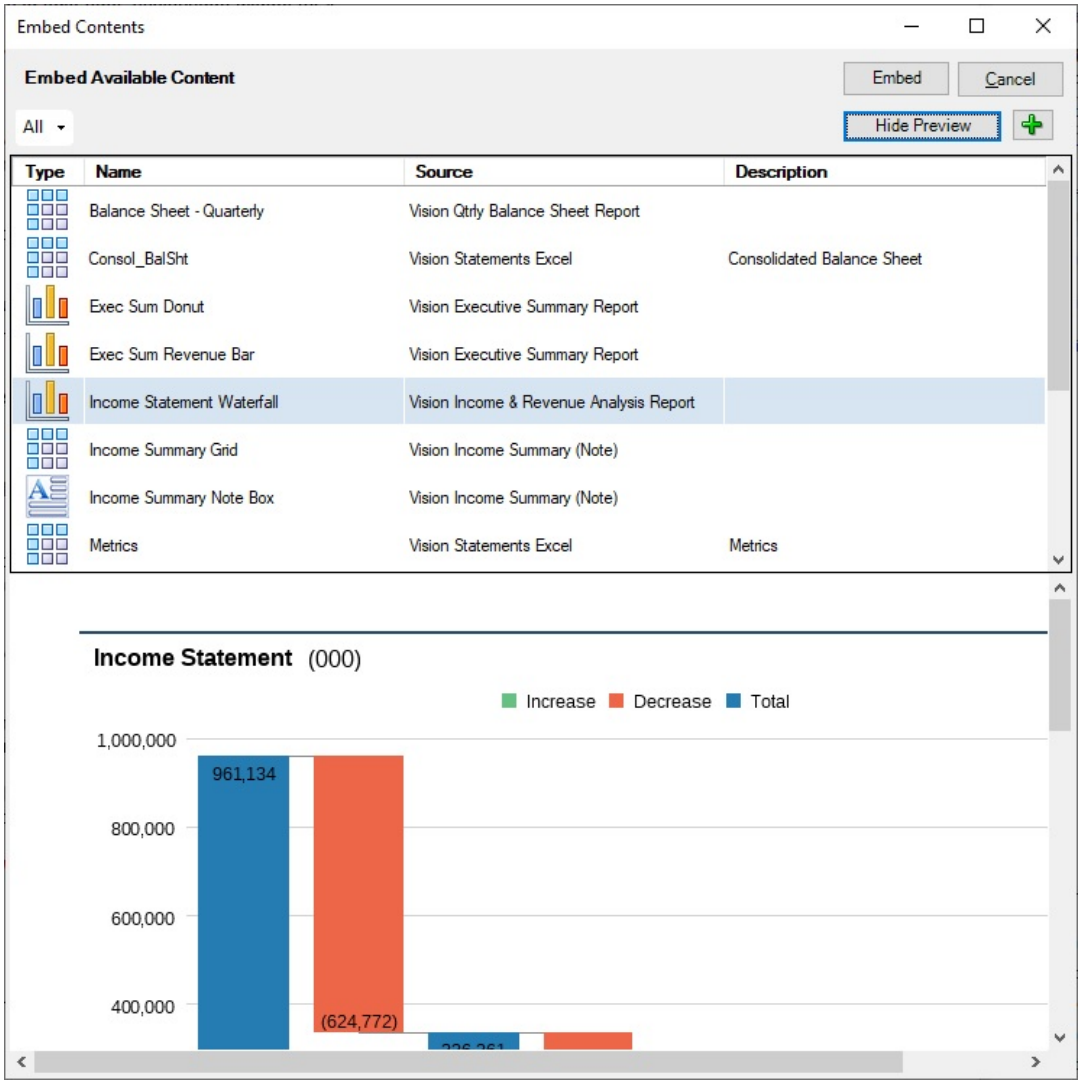

> **Note**
>
> The **Embed Contents** dialog is not resizable. Use the scroll bars to view parts of the image that are not immediately visible.

4. **Optional:** Select other available content titles in the list to instantly view a preview.

   In the following example, we selected Consol_BalSht. A preview image of the Consol_BalSht table is displayed:

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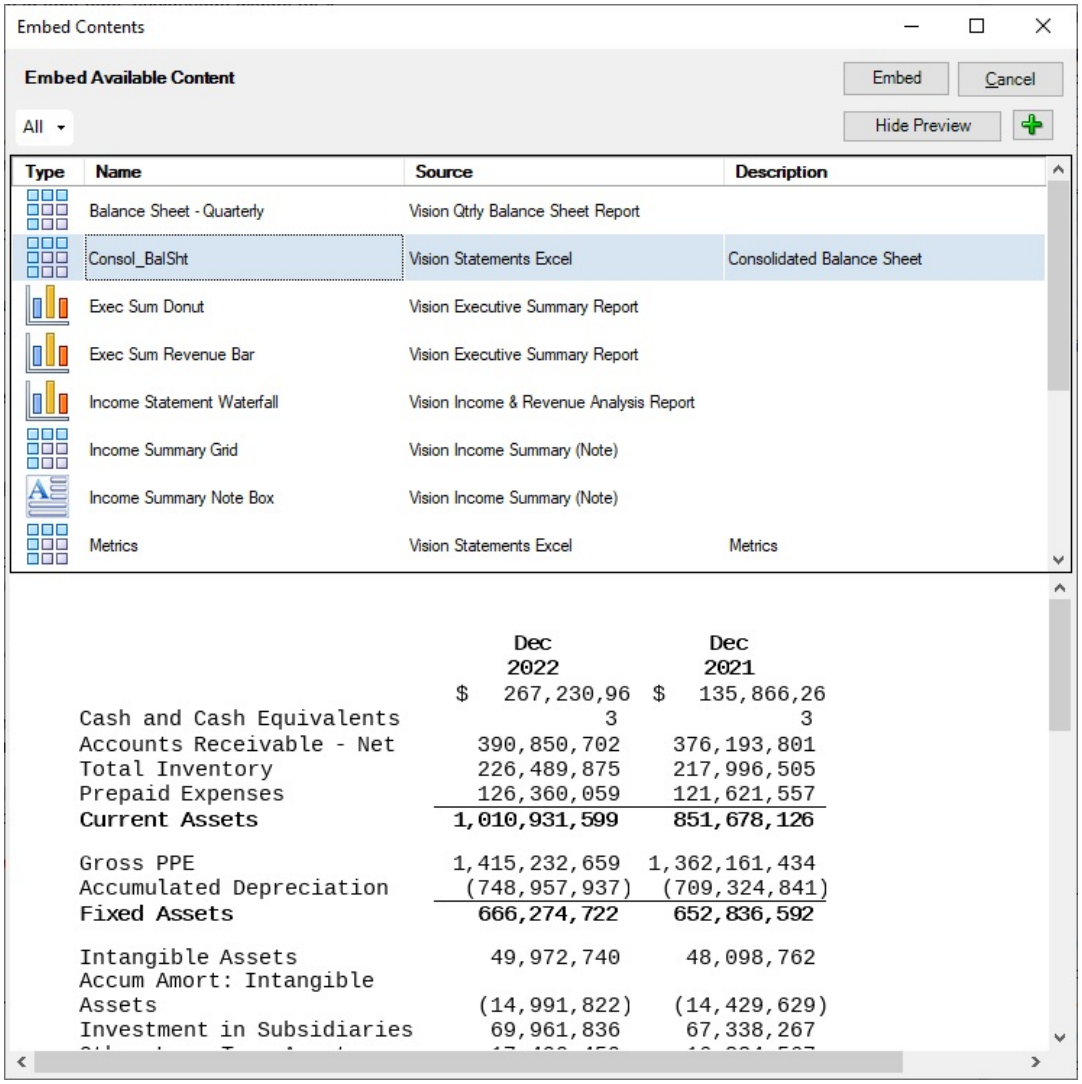

You can select one available content at a time to preview.

5. **Optional:** To close the preview pane of the dialog at any time, click the **Hide Preview** button.
6. Once you locate the available content to embed into the doclet, click the **Embed** button at the top of the dialog.

   This action inserts the selected available content in the document or slide, and then closes the dialog.

> **Note**
>
> - You must first check out a doclet in order to see the **Embed** button on the Narrative Reporting ribbon. Click the **Embed** button to launch the **Embed Contents** dialog.
> - The **Embed Contents** dialog displays best when your system's **Display settings**, under **Scale and layout**, is set to 100%.

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Previewing Available Content Using the Panel

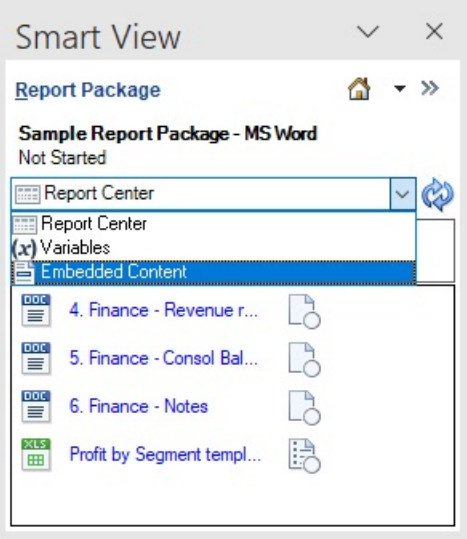
Use the panel interface elements to embed content in a doclet.

1. Open a report package, and then open a doclet.

   You do not need to check out the doclet in order to use the preview feature in the panel.

2. In the Report Package panel, select **Embedded Content** from the drop-down menu (see Figure 1 .

Figure 24-40 Embedded Content Option Selected in the Report Package Panel



The Embedded Content panel is displayed.

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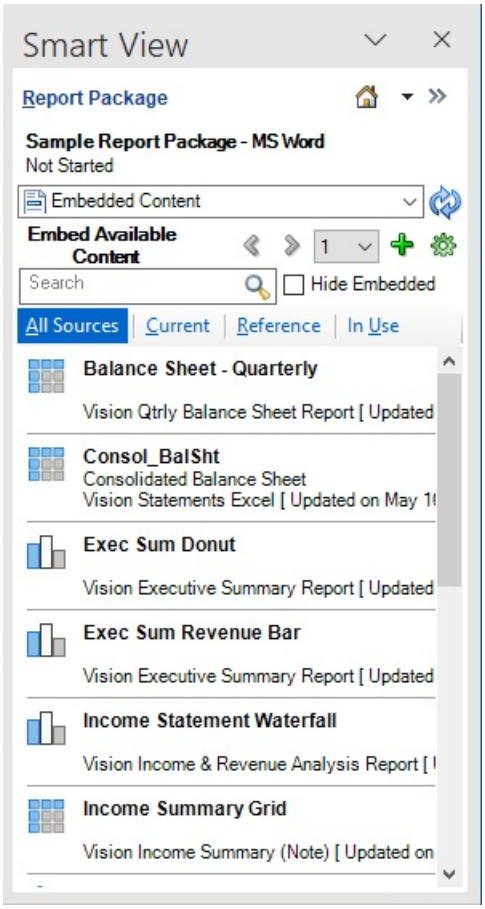
Figure 24-41 Embedded Content Panel



In the Embedded Content panel, **All** tab, all available content is listed.

3. **Optional:** Preview an available content using the **Preview** button, .

   When you select an available content in the list, the **Preview** button, , is displayed, as shown in Figure 3.

Figure 24-42 Available Content Selected with Insert and Preview Buttons Displayed

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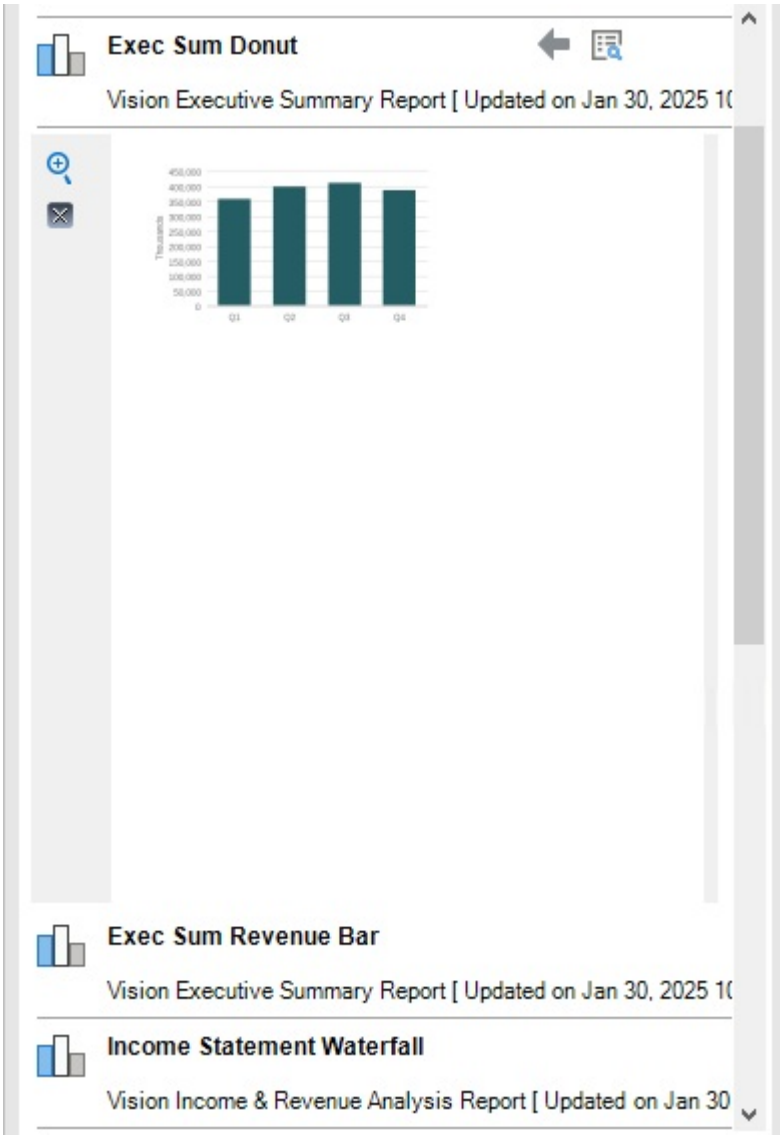
After you click , a thumbnail image of the available content is displayed in the panel, just above the available content name. For example, clicking for the Exec Sum Revenue Bar available content renders the following thumbnail image in the panel:



4. **Optional:** Click next to the thumbnail image to enlarge it.

   The enlarged image is launched into a separate dialog. You can stretch the dialog right to left or up and down to enlarge even further.

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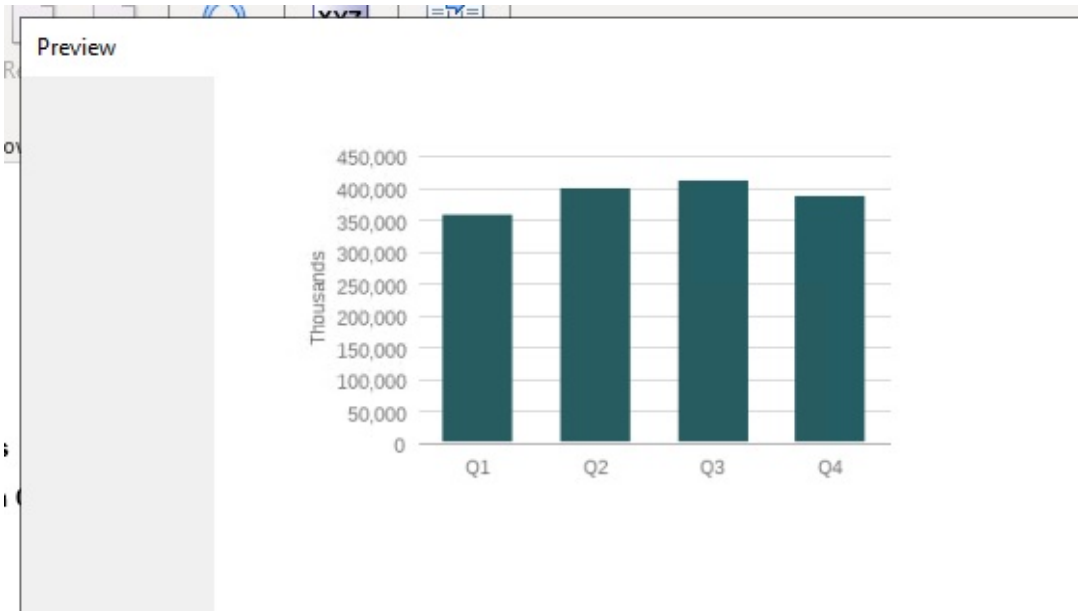
Figure 24-43 Portion of Preview Dialog Showing Enlarged Image of Available Content



Click anywhere in the **Preview** dialog or click the **X** in the upper right corner of the dialog to close it.

5. Click to close the thumbnail image in the panel.

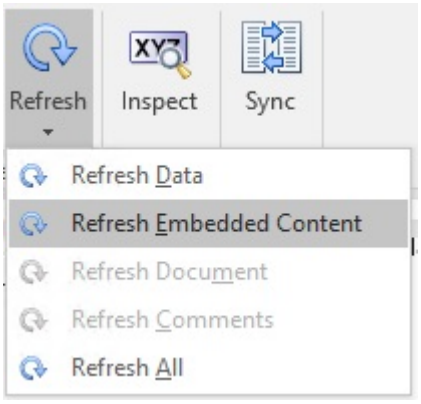
Refreshing Embedded Content in a Doclet

As a doclet authors, you can refresh the embedded content in your doclets to keep them in sync with the content in the reference doclets and the underlying data source. For example, source data can be updated or content can be reformatted.

To refresh embedded content in a doclet:

1. Open, and then check out the doclet that contains the embedded content.
2. Perform an action:
   - To refresh embedded content only, without uploading in the same operation:

     In the Narrative Reporting ribbon, select the arrow in the **Refresh** icon, and then **Refresh Embedded Content**.



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You do not have to select the embedded content to refresh it. The **Refresh Embedded Content** command will refresh all embedded content in the checked-out doclet.

When you've finished the refresh, and made any other changes to the doclet, click **Upload**.

- To refresh and upload the doclet immediately:

  In the Narrative Reporting ribbon, click **Upload**.

  The upload action automatically refreshes any embedded content in the target doclet.

> **Note**
>
> **PowerPoint:** If you have resized embedded content, the revised height of the image on the slide is retained on refresh, and the refreshed image will have the same aspect ratio as the source object.

3. Check in the doclet.

> **Note**
>
> When closing a doclet, particularly if the embedded content consists of an image, you may encounter a message informing you that there is content left in your clipboard, and confirming that you want to close the doclet. You may select Yes in this message; however, if you want to keep the content of the Office clipboard, ensure that you have pasted the content into another Office document before proceeding.

Viewing Available Content Name in Doclets

When you are embedding available content in your Word or PowerPoint doclet using Smart View, the available content name, or title, is available to display. This allows you to quickly identify the available content when working in a doclet.

The available content name is displayed when you select an embedded content in a doclet. For example, in Word, the name is displayed above the embedded content:

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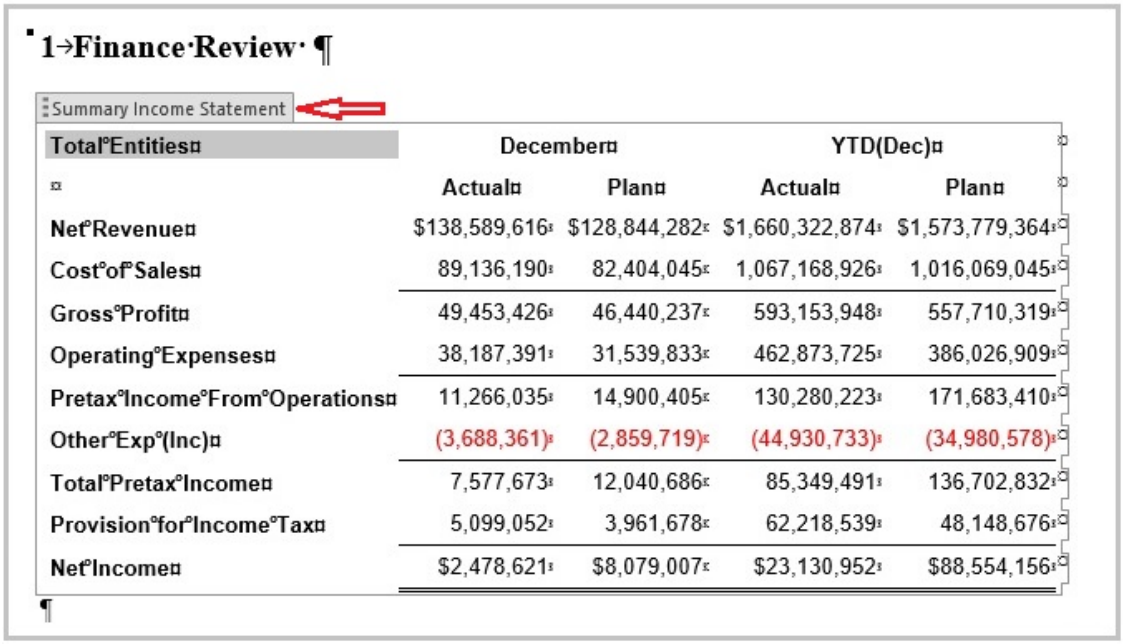

1→Finance·Review· ¶

Summary Income Statement

Total°Entities¤	December¤		YTD(Dec)¤	
¤	Actual¤	Plan¤	Actual¤	Plan¤
Net°Revenue¤	$138,589,616	$128,844,282	$1,660,322,874	$1,573,779,364
Cost°of°Sales¤	89,136,190	82,404,045	1,067,168,926	1,016,069,045
Gross°Profit¤	49,453,426	46,440,237	593,153,948	557,710,319
Operating°Expenses¤	38,187,391	31,539,833	462,873,725	386,026,909
Pretax°Income°From°Operations¤	11,266,035	14,900,405	130,280,223	171,683,410
Other°Exp°(Inc)¤	(3,688,361)	(2,859,719)	(44,930,733)	(34,980,578)
Total°Pretax°Income¤	7,577,673	12,040,686	85,349,491	136,702,832
Provision°for°Income°Tax¤	5,099,052	3,961,678	62,218,539	48,148,676
Net°Income¤	$2,478,621	$8,079,007	$23,130,952	$88,554,156

¶

In PowerPoint, to view an embedded content name, select the embedded content, right-click and, depending on your Office version, select **View Alt Text** or **Edit Alt Text**. The title of the embedded content appears in the **Alt Text** panel.

When available content is embedded using the Narrative Reporting extension 23.10+, you can view the name whenever you select an embedded content within a doclet.

If you have content that was embedded in a Word or PowerPoint doclet using a Narrative Reporting extension version earlier than 23.10, or embedded using the Narrative Reporting web interface, the available content name is not included so the names are not displayed in the doclet. Complete the following procedure to display the embedded content names.

To display the titles of existing embedded content in a doclet:

1. Open a doclet containing existing embedded content and check it out.
2. In the Narrative Reporting ribbon, click the drop-down menu on the **Refresh** button, and select **Refresh Embedded Content**.
3. Upload the doclet and check it in.
4. When the refresh, upload, and checkin is complete, select any embedded content in the doclet to view its name.
5. **Optional:** Perform a checkout to continue working on the doclet.

> **Note**
>
> You must open and check out a doclet in Smart View, perform a **Refresh Embedded Content**, then upload and check in the doclet to ensure that the available content name displays correctly in these situations:
>
> - When content is embedded in a Word or PowerPoint doclet from Narrative Reporting web
> - After changing the name of an available content from Narrative Reporting web or from Smart View

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Removing Embedded Content from a Doclet

As a doclet author, you can remove embedded content from doclets using the Cut command in Word or PowerPoint, or the Delete key on your key board.

To remove embedded content from a doclet:

1. Open the doclet that contains the embedded content, and check it out.

   This is the target doclet, not the reference doclet or any other doclet. The target doclet was discussed in Embedding Content in a Doclet Using the Ribbon and Dialog.

2. To remove embedded content from a PowerPoint doclet:

   a. In the target doclet, click on the embedded content to highlight it, and then press the **Delete** key.

   b. Edit the slide to make any adjustments to surrounding text, if required.

3. To remove embedded content from a Word doclet:

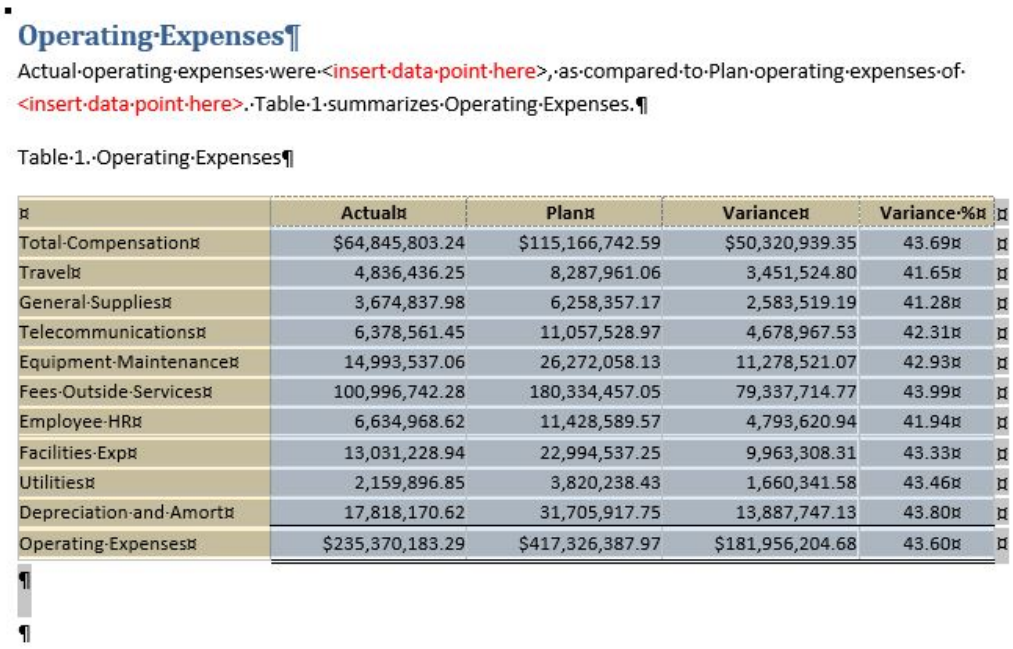
   a. add a blank carriage return either before or after the embedded content.

      You will need an extra bit of plain text, such as an empty paragraph marker, when selecting the embedded content to delete.

   b. Select the embedded content, along with the blank paragraph marker you created in the previous step.

      Select the embedded content and the blank paragraph marker, in the same way that, using Word, you would select a table along with a line of text above or below it.

      In the following image, the embedded content and the paragraph marker below it are selected. An extra blank paragraph marker at the bottom of the image is not selected.



Operating·Expenses¶

Actual·operating·expenses·were·<insert·data·point·here>,·as·compared·to·Plan·operating·expenses·of·<insert·data·point·here>.·Table·1·summarizes·Operating·Expenses.¶

Table·1.·Operating·Expenses¶

¤	Actual¤	Plan¤	Variance¤	Variance·%¤	¤
Total·Compensation¤	$64,845,803.24	$115,166,742.59	$50,320,939.35	43.69¤	¤
Travel¤	4,836,436.25	8,287,961.06	3,451,524.80	41.65¤	¤
General·Supplies¤	3,674,837.98	6,258,357.17	2,583,519.19	41.28¤	¤
Telecommunications¤	6,378,561.45	11,057,528.97	4,678,967.53	42.31¤	¤
Equipment·Maintenance¤	14,993,537.06	26,272,058.13	11,278,521.07	42.93¤	¤
Fees·Outside·Services¤	100,996,742.28	180,334,457.05	79,337,714.77	43.99¤	¤
Employee·HR¤	6,634,968.62	11,428,589.57	4,793,620.94	41.94¤	¤
Facilities·Exp¤	13,031,228.94	22,994,537.25	9,963,308.31	43.33¤	¤
Utilities¤	2,159,896.85	3,820,238.43	1,660,341.58	43.46¤	¤
Depreciation·and·Amort¤	17,818,170.62	31,705,917.75	13,887,747.13	43.80¤	¤
Operating·Expenses¤	$235,370,183.29	$417,326,387.97	$181,956,204.68	43.60¤	¤

¶

¶

   c. Press the **Delete** key on your keyboard.

      Alternatively, you can use the **Cut** command from the Home ribbon in Word or PowerPoint.

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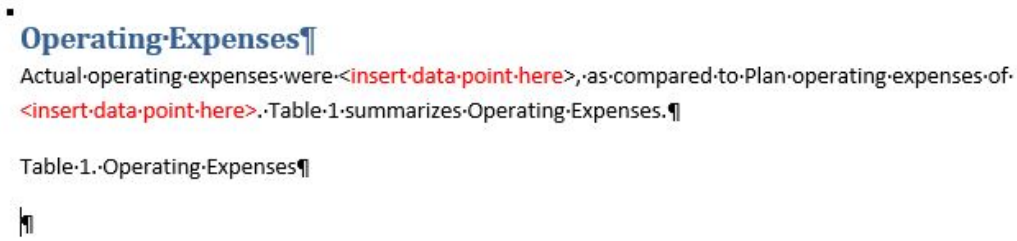
The following image shows the selected embedded content and paragraph marker removed; one blank paragraph marker at the bottom of the image remains.



4. Repeat these steps for all embedded content to remove from the current target doclet.
5. When your work is completed in the current doclet, upload it, and then check it in.

Working with Embedded Content from Reference Files

Embedded content from a reference file allows report content to be sourced from and defined in your own local or network Excel files, *outside* of the report package, and then embedded in one or more doclets within your report package.

Related Topics:

About Embedding Content from Reference Files

Creating Available Content Using the Available Content Button in Reference Files

Embedding Reference File Content in a Doclet

Adding and Embedding Available Content from Reference Files

Managing Named Ranges for Reference Files

Updating Available Content in a Reference File

Remapping Content within Reference Files

About Embedding Content from Reference Files

A doclet author can create their own stylized report content in Microsoft Office Excel, such as grids and charts, and insert that content into doclets using reference files. The Excel report content is automatically updated in the associated doclet whenever the Excel file is modified. You identify embeddable content in the reference file using Excel's named ranges functionality. The named range can then be embedded in a doclet. The reference file is attached and saved to a doclet and is associated only with that doclet.

Reference files are similar to reference doclets in that you can define embeddable content in them. The difference is that a reference file is available to and associated with a single doclet only whereas a reference doclet is available to all doclet authors with access to the reference doclet. A single doclet can be associated with multiple reference files.

To summarize this feature in Narrative Reporting, a doclet author can:

- Develop stylized reports within a Microsoft Office Excel workbook, using Oracle Smart View for Office or other data access methods
- Define named ranges in the workbook; the named ranges become embeddable content candidates
- Integrate named ranges within doclets

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- Easily update the reference file in Excel, which automatically updates the Microsoft Office Excel report content in the doclet with which it is associated
- Incorporate multiple ranges from the same or different reference files in a doclet

Table 24-3 Videos

Your Goal	Watch This Video
Learn about creating available content and embedding content from reference files in Oracle Smart View for Office. The video uses a Word-based report package for demonostration purposes, but procedures shown also apply to PowerPoint-based report packages.	Embedding Content from Reference Doclets and Reference Files

Creating Available Content Using the Available Content Button in Reference Files

You can create available content from a reference file quickly and easily using the **Available Content** button in the Narrative Reporting ribbon in Oracle Smart View for Office.

Using the **Available Content** button , the underlying named named range is automatically created for you based on the range you select in Excel. You have only to apply a name and optional description to the new content.

> **Note**
>
> - This feature requires the 24.02+ version of the Narrative Reporting extension
> - You can also create available content using Excel named ranges that you define, as described in Creating and Embedding Available Content from Excel Named Ranges in Reference Files.

To add available content using the **Available Content** button:

1. Before you begin:
   - You must have at least one named range in the Excel file you plan to use as a reference file. The range can be as simple as a single cell. It does not have to be any range that you plan to use as available content. See Defining Named Ranges in Reference Files for information on defining named ranges.
   - If you have not already done so, register the Excel file with the doclet, as described in Registering Reference Files with a Doclet, omitting step 6. You do not need to perform this step if you use the procedure in this topic to create available content.
2. Open the report package, and then open the doclet to which the reference file is registered.

   Do not check out the doclet. The **Available Content** button is enabled only when the doclet is checked in.

   The reference doclet should open in Excel. If you opened the report package in Word or PowerPoint, Excel is launched when opening the reference doclet.
3. Click **Inspect** in the Narrative Reporting ribbon to open the **Properties** dialog box.

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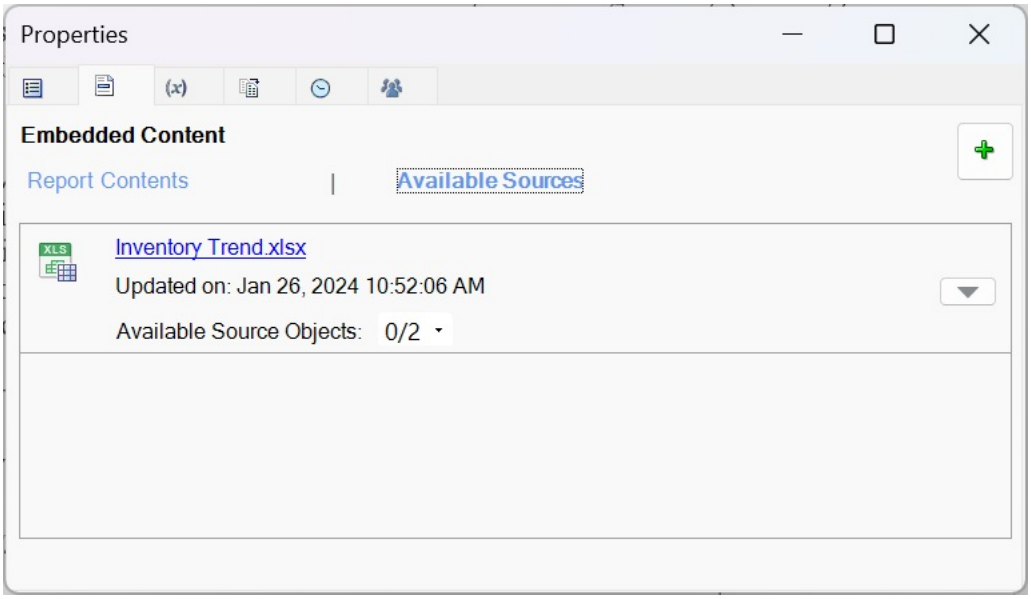
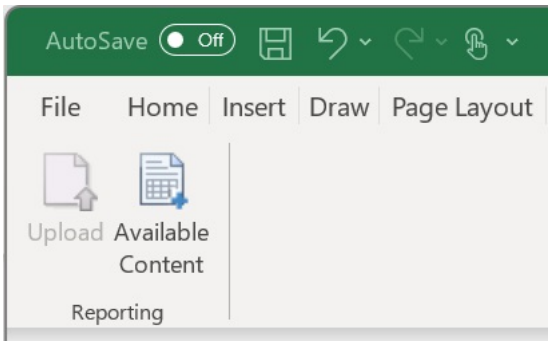
You can also select the doclet in the report package panel, and then click **Properties** to open the **Properties** dialog box.

4. In **Properties** , select the **Embedded Content** tab, , and then click on **Available Sources**.
5. Under **Available Sources**, click on the reference file name to launch the Excel file.

   In the following example, clicking on **Inventory Trend.xlsx** launches the Excel file named Inventory Trend.xlsx.



In the Narrative Reporting ribbon, notice that only two buttons are displayed: **Upload**, which should be disabled because doclet from which you launched the reference file should not be checked out; and the **Available Content** button, which is enabled.



If the **Available Content** button is not enabled, ensure that the doclet to which the reference file is registered is checked in, and then close Excel and repeat the previous steps.

6. Once the Excel reference file is launched, and the **Available Content** button is enabled, then, in the Excel reference file, select a range.

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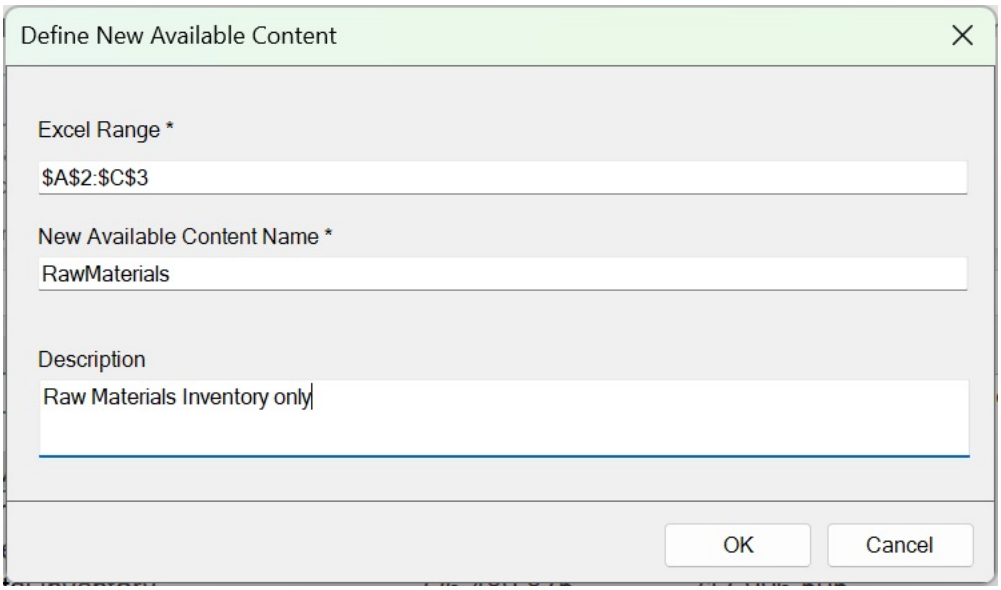
The range can be a table or a graphic, such as a chart. If you select a chart, be sure to select a blank row above and below the chart.

7. Click the **Available Content** button.

   This launches the **Define New Available Content** dialog:



8. In the **Define New Available Content** dialog, provide a name and optional description for the new available content.

   The range you selected is entered by default in the **Excel Range** text box. Or, you can type a valid range.

9. Click **OK**.

   The new content is available for embedding in your Word or PowerPoint doclet.

10. **Optional:** To disable the **Automatically Resize Table Contents** option in the newly created available content, see Updating Excel-based Reference Doclets Using the Ribbon.

    The **Automatically Resize Table Contents** option is not displayed to you when creating available content using **Available Content** button. This option applies to content created from an Excel table or grid, not a chart. To disable this option, you must edit the available content and clear the option.

Creating and Embedding Available Content from Excel Named Ranges in Reference Files

Related Topics

- Defining Named Ranges in Reference Files
- Registering Reference Files with a Doclet
- Embedding Reference File Content in a Doclet
- Adding and Embedding Available Content from Reference Files

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Defining Named Ranges in Reference Files

The reference file is an Excel file that can be located in a folder on a local drive or network drive, outside of the report package.

The doclet author creates Excel report content and then defines named ranges around that content. In general, range names can be created using the New Name dialog box, accessed either from the Name Manager or the Define Name items on the Formula ribbon of Excel. Find out more about range names in the Microsoft documentation.

This Excel file is a potential reference file.

Define named ranges in your reference file before you begin working with them in a doclet.

To define named ranges for reference files:

1. In Excel, create the report content.
2. Add range names to selected report content.

   You can add range names to any or all report content in the reference file. You decide which content you want to make available.

   A named range is valid when the named range:

   - Exists within an Excel workbook.
   - Is not a hidden name.
   - Refers to a range of cells in a worksheet which is not hidden.
   - Is not referring to a formula or constant.
   - Does not have a dynamically calculated reference, for example the reference must point to an absolute range of cells, rather than relying on a reference formula or another named range to dynamically determine the range.
   - Does not contain any errors, for example a "#REF!" error.

   Remember, named ranges from your reference file become candidates for embedded content to you as the doclet author.
3. **Optional:** To enable the "Repeat as header row" option within embedded Microsoft Word tables, edit the Excel Named Range to add the following syntax within the comment field:

   NR_Headings=#

   For example, if there are three rows within the named range which represent the table header rows, then specify:

   NR_Headings=3

   If the named range should span multiple pages when embedded in a Word doclet, then the indicated number of rows will be repeated as column headers on each page that the table spans in the doclet.
4. Save the Excel file.

Registering Reference Files with a Doclet

There is a two-part process for registering a reference file with a checked-out doclet, and then, separately, embedding the available content as needed throughout a doclet.

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The procedure in this topic covers registering content from a reference file with a checked-out doclet. See Embedding Reference File Content in a Doclet for instructions on embedding content from the registered reference file.

> **Note**
>
> Before you begin, you should have established ranges in the target reference file using Excel's Name Manager feature, as described in Defining Named Ranges in Reference Files. The Excel file should be closed when performing the procedure in this topic.

You can also register available content and then embed the content in one procedure. For more information, see Adding and Embedding Available Content from Reference Files.

To register a reference file with a doclet:

1. If you have not already done so, open the report package, and then open and check out the doclet to which you want to register a reference file.
2. Click **Inspect** in the Narrative Reporting ribbon to open the **Properties** dialog box.

   You can also select the doclet in the report package panel, and then click **Properties** to open the **Properties** dialog box.
3. In **Properties** , click the **Embedded Content** tab, , and then click the **Available Sources** link.
4. On the **Available Sources** tab of the **Embedded Contents** dialog, click , and then in the **Add Reference File** dialog, click

   .
5. Navigate to the Excel file to register as a reference file, select it, and click **Open** to return to the **Add Reference File** dialog.

   Under **Source Objects**, the named ranges in the Excel file are listed. These ranges can be selected as available content, which can later be embedded. For example, in Figure 1, the Excel file that was selected, Current Data.xlsx, contains five named ranges; therefore, these named ranges can be selected as available content and later, they can be embedded in the doclet.

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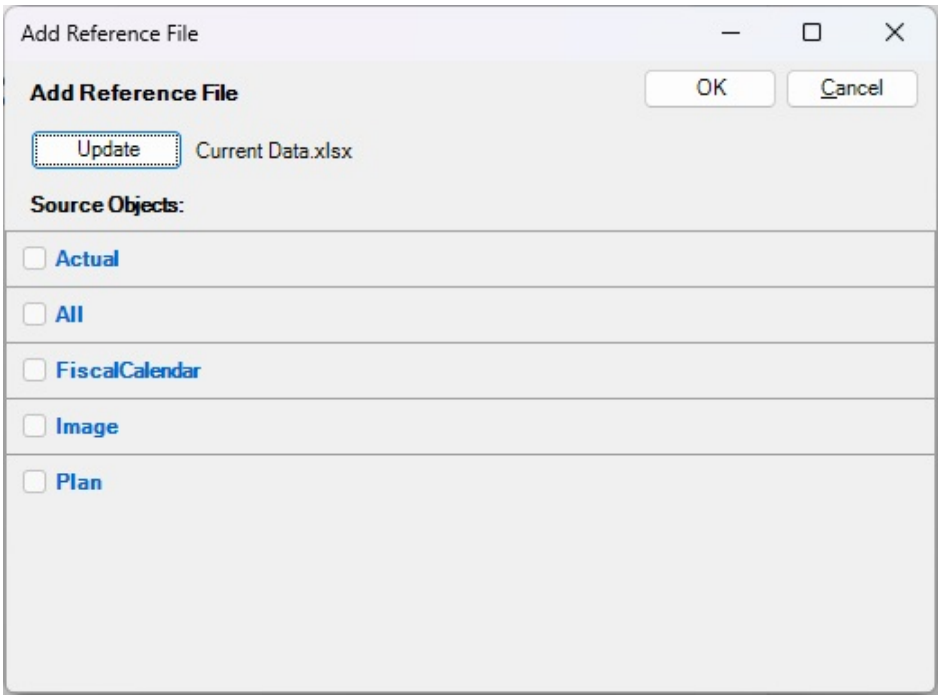
Figure 24-44 The Add Reference File Dialog Box Listing Named Range Source Objects



Remember, the ranges listed above were specified as named ranges earlier in Defining Named Ranges in Reference Files.

6. Click the range names (not the check box) that you want to make available for embedding in the doclet.

   The check mark that appears next to the range name you click shows that the range is now registered with the doclet. For example, in Figure 2, we selected the range named "Actual" to register with the doclet.

   You can choose any number of ranges listed under **Source Objects**, but in this scenario, we are selecting only one.

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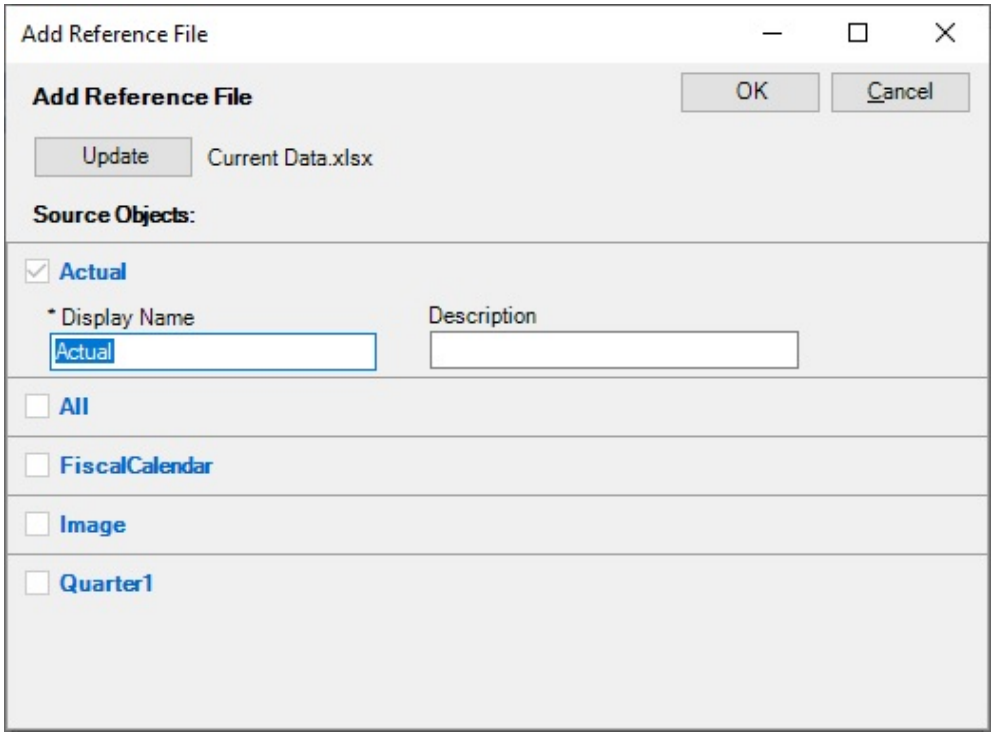
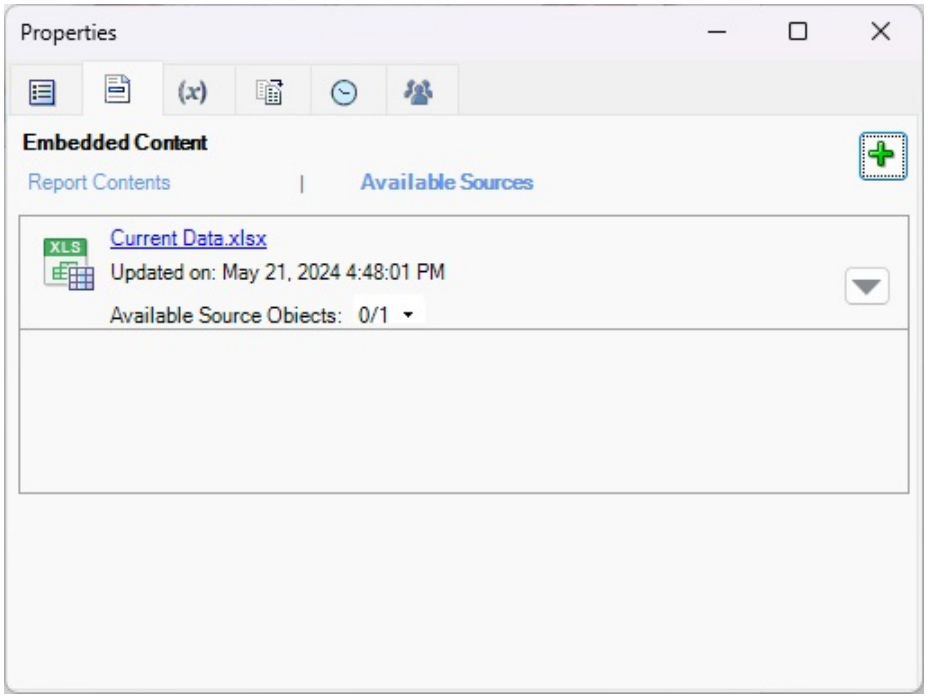
Figure 24-45 The Add Reference File Dialog After Clicking on a Range Name



7. Click **OK** to close the **Add Reference File** dialog box.

   You are returned to the **Embedded Contents** tab of the **Properties** dialog. The reference file is now registered with the doclet, as shown in Figure 3.

Figure 24-46 Properties Dialog, Embedded Content Tab, Showing Registered Reference File



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Note that you can choose to embed content in the doclet at this point, from this dialog box. But the procedure in this topic is looking at registering content only. See Embedding Reference File Content in a Doclet for instructions on embedding available content from the registered reference file.

8. **Optional:** Repeat the steps starting from step 3 for any other reference files you want to register with the current doclet.
9. When finished registering Excel files as reference files with the current doclet, click the **X** in the upper-right corner of the **Properties** dialog to close it.
10. Upload the doclet and check it in.
11. **Optional:** Repeat this entire procedure to register reference files with other doclets in the report package.

    Continue with Embedding Reference File Content in a Doclet.

Embedding Reference File Content in a Doclet

In Registering Reference Files with a Doclet, you registered named ranges as available content from an Excel file that was outside of the report package, making that Excel file a reference file. The reference file can be located on a network drive or a local drive.

Now we will embed content from the reference file into a doclet. The process is the same whether you are embedding content into a Word or a PowerPoint doclet.

To embed content from a reference file into a doclet:

1. Open the report package and, if you have already not done so, open and check out the doclet to which you previously registered a reference file.

   > **Note**
   >
   > You must embed reference file content in the doclet to which you registered the content. You cannot embed the content into other doclets.

2. In the doclet, place your cursor at the point in the text where you want to embed the available content from the reference file.
3. In the Narrative Reporting ribbon, click the **Embed** button to launch the **Embed Contents** dialog.
4. **Optional:** In the **Embed Contents**, click the filter button next to the Search field ti select a filter option to narrow the list of available content:
   - **All**—The default. Shows all available content.
   - **Current Doclet**—Displays available content from any reference files that are registered with the current doclet.
   - **Reference Doclets**—Displays available content from all reference doclets in the report package.
   - **Hide Embedded**—Hides available content that has already been embedded in the current doclet.
5. **Optional:** Enter a term in the Search field and click the magnifying glass icon to narrow the list of available content.

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> **Note**
>
> There is no need to enter wildcards. Narrative Reporting searches for the term any where in the available content name.

Use the **X** icon in the Search field to clear the search term and return the list of available content to the original state.

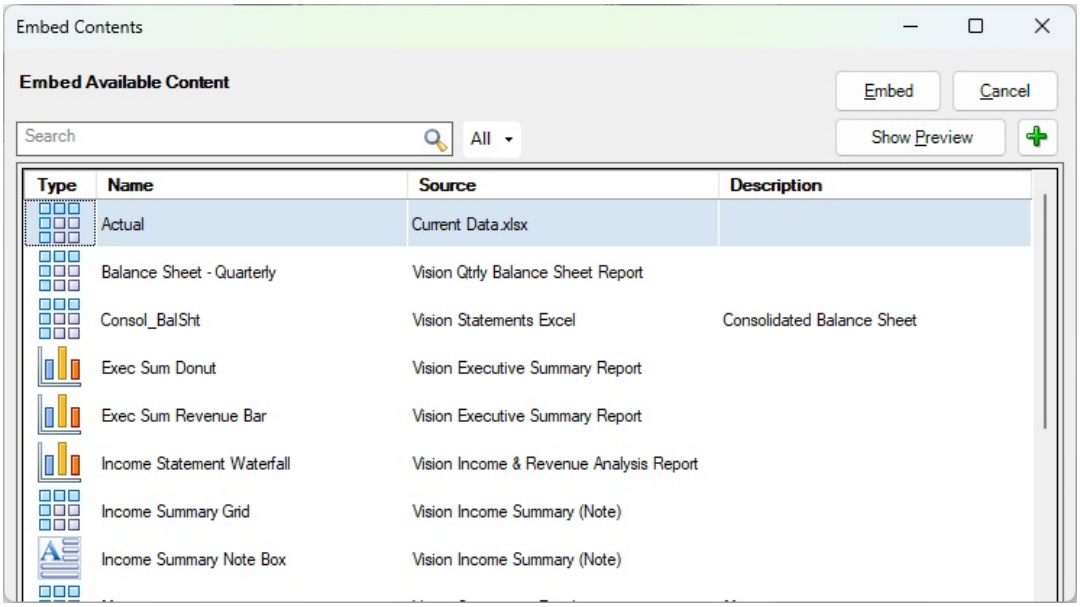
> **Note**
>
> You can also use the filtering options (described in the previous step) on the search results.

6. In **Embed Contents**, select the available content to embed.

   Optionally, click the **Show Preview** button to view a preview of the selected available content, as described in Previewing Available Content Using the Ribbon and Dialog.

   In Figure 1, the available content, "Actual," is selected.

Figure 24-47 Embed Contents Dialog Box, with Available Content from Reference File Selected



7. Click **Embed** to embed the available content into the doclet.

> **Note**
>
> In PowerPoint, you can relocate and resize the embedded content on the slide. Once resized, the revised height of the image on the slide is retained on refresh, and the refreshed image will have the same aspect ratio as the source object.

Figure 2 shows an Excel table embedded into a Word doclet:

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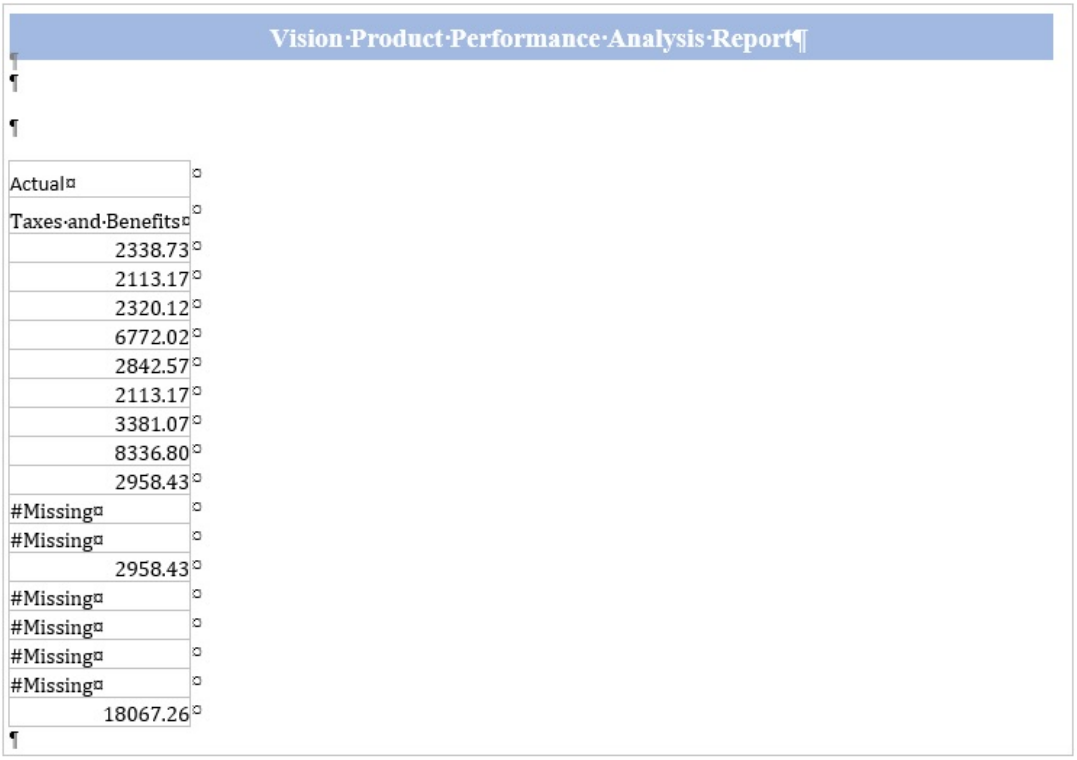
Figure 24-48 Content from Reference File Embedded in a Word Doclet



8. **Optional:** Select the embedded content on the doclet to view its available content name, as described in Viewing Available Content Name in Doclets.
9. **Optional:** Repeat this procedure starting with step 3 to embed any other available content displayed in the **Embed Contents** dialog into the current doclet.
10. When finished, upload the doclet and check it in.

Adding and Embedding Available Content from Reference Files

Once you have defined named ranges in your Excel reference file, you can specify ranges as available content, and then instantly embed that content in your doclet using the procedure in this topic (bypassing the two-part procedure described in Registering Reference Files with a Doclet and Embedding Reference File Content in a Doclet).

In this topic, we are going to add available content from the Excel file we used in Registering Reference Files with a Doclet. In that scenario, we added one named range as available content. However, in that Excel file, there were four other named ranges that could be added as available content. In this procedure, we'll add named ranges from that Excel reference file as available content and then embed them.

The process described in this topic is the same whether you are embedding content into a Word or a PowerPoint doclet.

To add content from a reference file to a doclet and then embed it:

1. Open the report package, and then open and check out the doclet.

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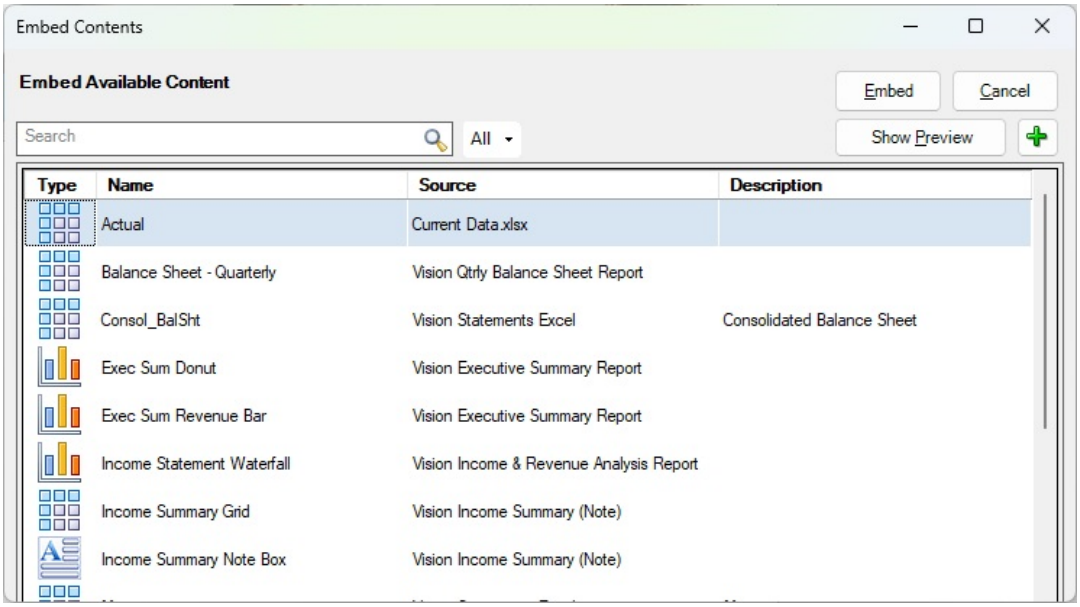
> **Note**
>
> Be sure to position your cursor at the point where you want to insert the embedded content that you will be working with in this procedure.

2. In the Narrative Reporting ribbon, click the **Embed** button to launch the **Embed Contents** dialog box.

   Figure 1 shows one available content, "Actual," sourced from the reference file, Current Data.xlsx.

   Optionally, click the **Show Preview** button to see a preview of the selected available content, as described in Previewing Available Content Using the Ribbon and Dialog.

Figure 24-49 Embed Contents Dialog Box



3. Click to launch the **Embed New Content** dialog.
4. In **Embed New Content**, click the drop-down menu in the **Source** field and select an option, as shown in Figure 2.

   - **Local File**—After selecting **Local File**, click , browse to the location of the Excel file that you plan to use as a reference file, and then select the file.
   - A reference file—If you want to add more available content from a previously registered reference file in the list, select the file from the **Source** drop-down menu.

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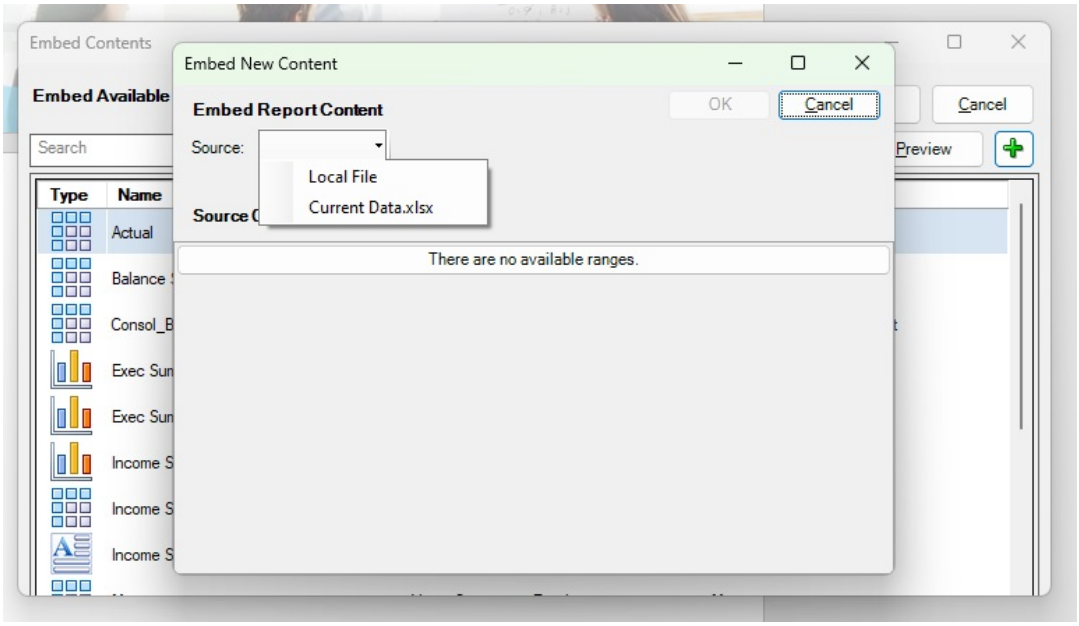
Figure 24-50 Embed New Content Dialog Box



With either selection, the list of ranges that can be selected for available content is displayed under **Source Objects**.

For the example in this topic, we'll select the Current Data.xlsx file that was using previously in Registering Reference Files with a Doclet and Embedding Reference File Content in a Doclet, and now lists four ranges under **Source Objects** that can be added as available content, as shown in Figure 2 in the next step.

5. In the **Embed New Content** dialog, click the source object name (not the check box) that you want to embed in the doclet.

> **Tip**
>
> Select only one object.

In Figure 3, the source object named "All" is clicked and the check box is selected.

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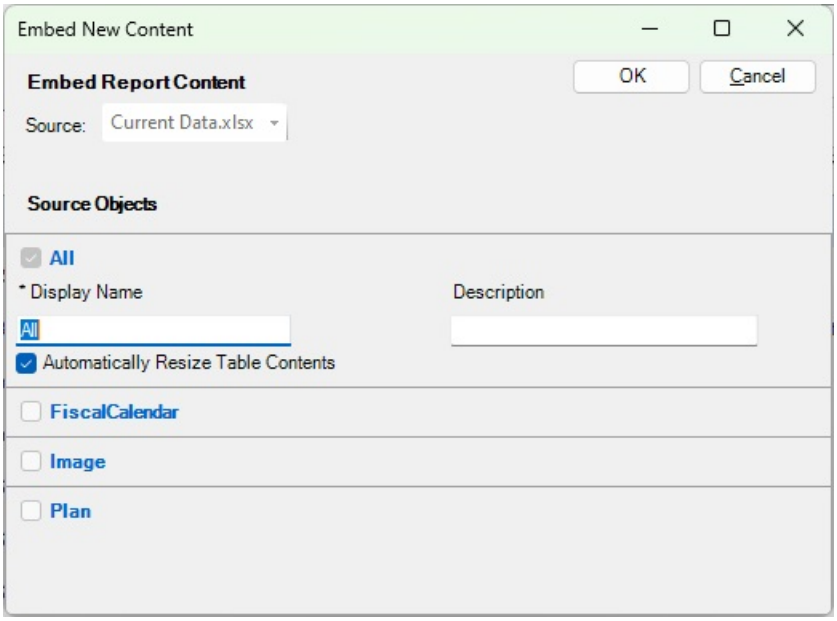
Figure 24-51 Embed New Content Dialog Box with a Named Range Selected



6. Click **OK** to embed the selected content into the doclet.

   The example in Figure 4 shows an Excel table embedded into a Word doclet.

Figure 24-52 Content from Reference File Embedded in Word Doclet

Vision·Product·Performance·Analysis·Report¶

¶

¶

¶

¤	2023¤	Actual¤	North·America·Corporate¤	USD¤	Bookshelf·Audio·System¤
¤	Salaries·and·Wages¤	Taxes·and·Benefits¤	Total·Compensation¤	¤	¤
¤¤¤¤¤¤¤¤January¤	10971.83	2338.73	13310.56¤	¤	¤
¤¤¤¤¤¤¤¤February¤	9913.62	2113.17	12026.79¤	¤	¤
¤¤¤¤¤¤¤¤March¤	10884.52	2320.12	13204.64¤	¤	¤
¤¤¤¤Quarter1¤	31769.97	6772.02	38541.99¤	¤	¤
¤¤¤¤¤¤¤¤April¤	13335.52	2842.57	16178.09¤	¤	¤
¤¤¤¤¤¤¤¤May¤	9913.62	2113.17	12026.79¤	¤	¤
¤¤¤¤¤¤¤¤June¤	15861.80	3381.07	19242.86¤	¤	¤
¤¤¤¤Quarter2¤	39110.93	8336.80	47447.74¤	¤	¤
¤¤¤¤¤¤¤¤July¤	13879.07	2958.43	16837.50¤	¤	¤
¤¤¤¤¤¤¤¤August¤	#Missing¤	#Missing¤	#Missing¤	¤	¤
¤¤¤¤¤¤¤¤September	#Missing¤	#Missing¤	#Missing¤	¤	¤
¤¤¤¤Quarter3¤	13879.07	2958.43	16837.50¤	¤	¤
¤¤¤¤¤¤¤¤October¤	#Missing¤	#Missing¤	#Missing¤	¤	¤
¤¤¤¤¤¤¤¤November	#Missing¤	#Missing¤	#Missing¤	¤	¤
¤¤¤¤¤¤¤¤December	#Missing¤	#Missing¤	#Missing¤	¤	¤
¤¤¤¤Quarter4¤	#Missing¤	#Missing¤	#Missing¤	¤	¤
Fiscal·Calendar¤	84759.97	18067.26	102827.23¤	¤	¤

¶

¶

7. **Optional:** Select an embedded content on the doclet to view its available content name, as described in Viewing Available Content Name in Doclets.

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8. **Optional:** Repeat this procedure, starting at step 2 for each additional available content from a refererence file that you want to embed.
9. When finished, upload the doclet and check it in.

Managing Named Ranges for Reference Files

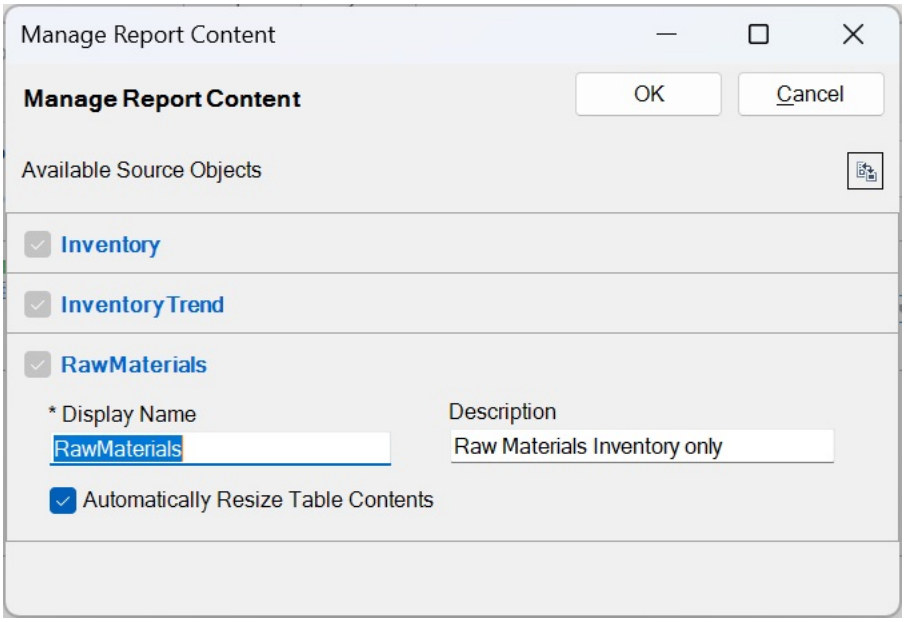
As a doclet author, you can rename a named range in a reference file or delete a reference file. For example, as a doclet author, you can delete a reference file that is no longer in use.

To manage named ranges in a reference file:

1. Open the report package and, if you have already not done so, open and check out the doclet that contains the reference file you would like to modify.
2. Click **Inspect** in the Narrative Reporting ribbon to open the **Properties** dialog box.
3. In **Properties** , click the **Embedded Content** tab, , and then click the **Available Files** link.
4. To change the display name, optional description, and table column resize setting of named ranges in the reference file:
   a. Click ▼ next to the reference file with the named ranges you want to work with, and select **Manage Report Content**.
   b. **Optional:** In the **Manage Report Content** dialog, click on the reference file name link to expand it, and make any necessary changes to the **Display Name** and **Description** fields; and enable or clear the **Automatically Resize Table Contents** check box, as you require, and then click **OK**.

      Disable the resizing option on the **Automatically Resize Table Contents** option to minimize the variations between the embedded Word table and the source reference table or grid.

      In the following example, the content named "Raw Materials" can be renamed, the optional description can be modified, and the **Automatically Resize Table Contents** check box may be cleared.



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5. To delete a reference file:
   a. Click ▼ next to the reference file to delete, and select **Delete**.
   b. At the prompt, click **Yes** to confirm the delete action.

      Deleting the reference file means that any embedded content from that reference file remains in the doclet, but the links between the embedded content and the reference file is now broken. Any further changes you make to the reference file will not be reflected in the embedded content in the doclet. For this reason, use care when deleting reference files.
6. When you are finished with managing named ranges and or deleting reference files from a doclet, close the **Properties** dialog box, **Embedded Content** tab.
7. Upload and check in the doclet.

Updating Available Content in a Reference File

As the reference file author, you may want to update existing content in a reference file.

For example, you may need to refresh a profitability report table with new data. Any updates made in the reference file are automatically refreshed in the doclet that embeds the report content when the reference file is uploaded back to the doclet.

To update content in a reference file:

1. Select and check out the doclet that contains the reference file you would like to modify.
2. Click **Inspect** in the Narrative Reporting ribbon to open the **Properties** dialog box.
3. In **Properties** , click the **Embedded Content** tab, , and then click the **Available Sources** link.
4. Click ▼ next to the reference file with the content you want to work with, and select **Download**.

   The file is downloaded by default to your **Downloads** folder.

   Alternatively, on the **Available Sources** tab, click on the file name link. This downloads the file to the **Downloads** folder and opens the file in Excel.

   You can close the **Properties** dialog in the doclet for now.
5. If not already open, open the file in Excel, make the updates and changes you require, and then save the file.

   Note that after saving the file, you may click the **Upload** button in the Narrative Reporting ribbon. Once the file is uploaded, close Excel and then proceed to step 10.
   Alternatively, to upload files using the **Properties** dialog, proceed to the next step.
6. Return to the report package doclet you opened in the first step and, in the Narrative Reporting ribbon, click **Inspect**.
7. In the **Properties** dialog, **Embedded Contents** tab, select **Available Files**, then click ▼ next to the reference file containing the content you just modified, and select **Upload**.
8. In the **Upload** dialog box, click **Choose File** and navigate to the location of the modified Excel reference file and select it, then click **Open**.
9. Click **OK** to close the **Upload** dialog, then close the **Properties** dialog. You may also close Excel.
10. To refresh the embedded content from the recently uploaded reference file, in the Narrative Reporting ribbon, select **Refresh**, and then **Refresh Embedded Content**.

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11. Upload and check in the doclet.

Remapping Content within Reference Files

As a reference file author, you may find that the available content that you defined needs to be remapped to different report content within the file source. This may occur if the reference file was updated or a named range was renamed or deleted.

You can remap the available content to other available content within the reference file.

> **Note**
>
> Prior to beginning this procedure, ensure that the author phase has been initiated.

To remap available content within a reference file:

1. If you have not already done so, open the report package, and then open and check out the doclet that contains the reference file to update.

   The impacted doclet is the doclet that is associated with a reference file in which you want to remap available content.

   The doclet should open in Word or PowerPoint. If you opened the report package in Excel, Word or PowerPoint is launched when opening the impacted doclet.

2. Click **Inspect** in the Narrative Reporting ribbon to launch the **Properties** dialog box.

   Alternatively, with the doclet selected in the report package list, click the **View Properties** link to access the **Properties** dialog box.

3. Select to display the **Embedded Content** tab of the **Properties** dialog.

4. In the **Embedded Content** tab, click the **Available Sources** link.

   Note that you can view the available content in use by clicking on the arrow next to "Available Source Objects."

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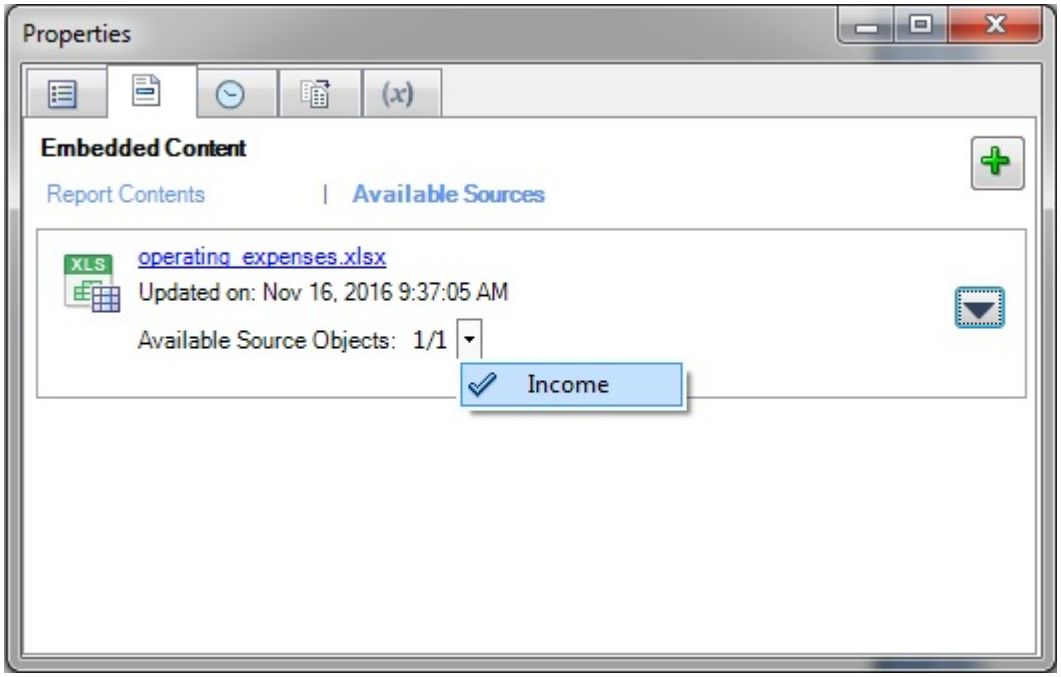
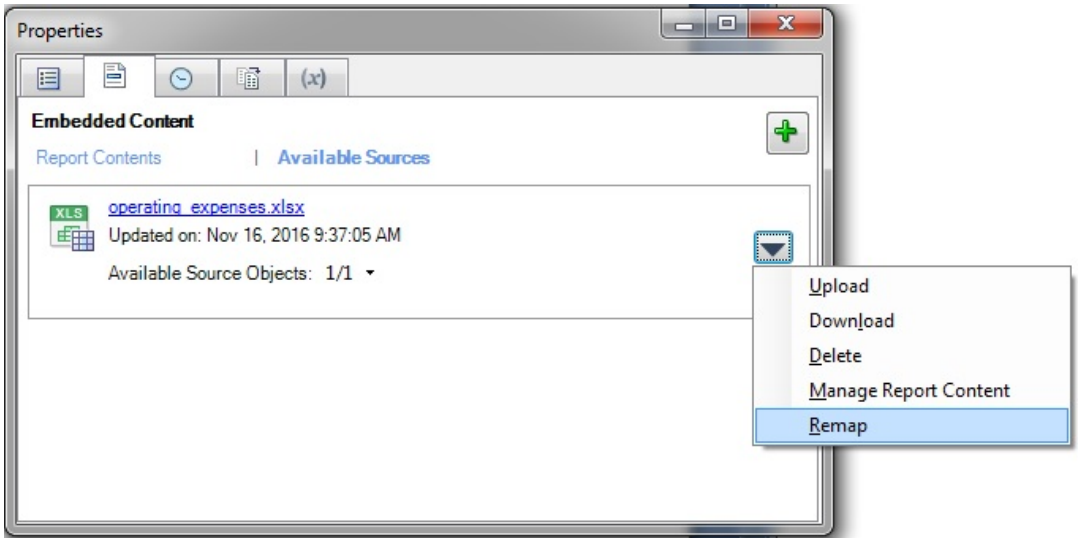


5. Click next to the content to remap and select **Remap** from the drop-down menu.



The **Remap** dialog is displayed.

6. In the **Remap** dialog, click on the associated **Select** link for the reference file with content to remap.

   A list of available content that is not already mapped is displayed. In the following illustration, the list contains one item, OpExp.

   The "Current" item is mapped to the available content called Income. We want to remap to the content called OpExp.

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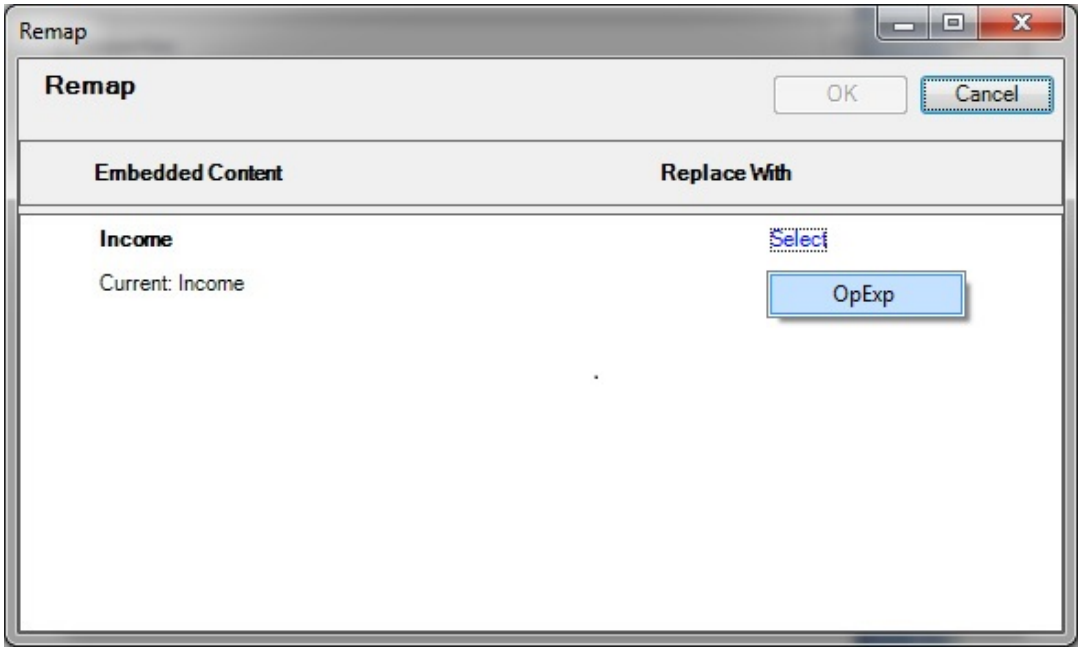
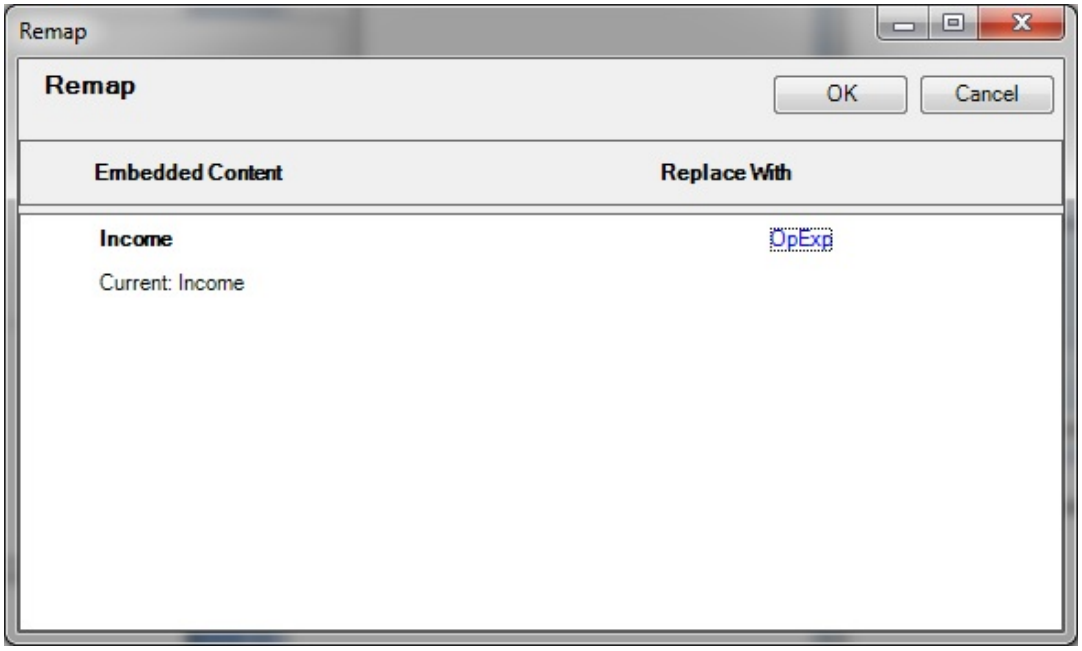


7. From the **Select** drop-down list, select an available content item to remap to.

   After you make a selection, the range you chose is shown in the **Replace with** column.

   In the following example, the OpExp range is now showing in the **Replace with** column.



8. Repeat step 5 through step 8 for each available content item that you want to remap.
9. When you're finished remapping content, click **OK** to close the **Remap** dialog, and then exit the **Properties** dialog.

Working with Variables

In a report package, variables provide centralized maintenance of common text, numbers, and dates that are displayed in doclets throughout a report package. Variables can also be used to

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reference content between doclets, such as inserting Excel data from a reference doclet into a Word paragraph or PowerPoint text box.

Related Topics:

About Variables

Creating Static Variables

Creating Reference Variables

Adding Shared Variables

Inserting Variables in a Doclet

Working with Variables in Smart View for PowerPoint

Searching for Variables

Locating the Source of Reference Variable Values

Editing Variables

Filtering Variables

Highlighting Variables in Doclets

Inspecting Variables

Unlinking Reference Variables

Deleting Variables

Video

Your Goal	Watch This Video
Learn about working with reference variables.	Changing Member Selections in Smart View Queries with Report Package Variables

About Variables

Report package variables may be created using either Narrative Reporting on the web, or the Narrative Reporting extension for Oracle Smart View for Office, with these exceptions:

- You can only define reference variable values in Smart View
- You can only create shared variables and specify their values in Narrative Reporting web

Once created, use Smart View to insert the variables into a doclet (in headers, tables, cells, or paragraphs).

These types of variables are available:

- ***Static*** variables use static input that is defined by the user, such as date labels or a set value, which can be used throughout the report package. These static variables can be easily updated, and all doclet instances of the variable value reflect the change. The static variables help to centrally maintain common dates, numbers and text across the report package document content.

  In the list of variables in the Variables panel, this icon, represents static variables.

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- ***Reference*** variables are created by referencing another doclet or reference file within the report package as the source, and selecting the value for the variable, such as text in a Word paragraph or an Excel cell value. Reference variables cannot be sourced from any PowerPoint content. If the source document is subsequently updated, those changes are automatically updated in the inserted instances of the variable in the report package. Reference variables can be used to insert Excel cell values into a Word or PowerPoint paragraph, to create Excel formulas to implement cross-footing rules for increased data accuracy, or to create directional words for the report narrative, such as "an increase" or "a decrease".

  In the list of variables in the Variables panel, this icon, (#) represents reference variables. **Value** displays the current value of the reference variable. **Source** displays the name of the doclet or reference file from which the reference variable is sourced

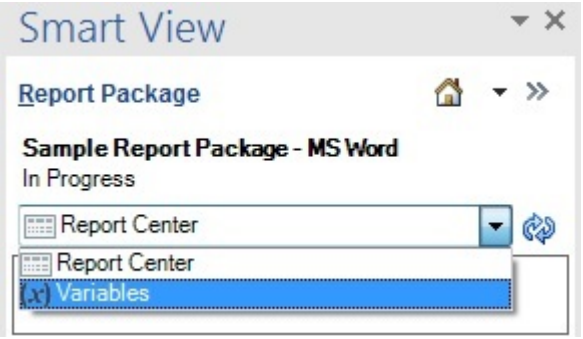
- ***Shared*** variables are created by Power Users in Narrative Reporting web (25.03+). These are static variables consisting of common values that multiple report packages within the same reporting period can incorporate within their report content. Report package owners added these shared variables to their report packages in Narrative Reporting web. Once added, they can be used within their report packages like other variables.

  In the list of variables in the Variables panel, this icon, (x) represents shared variables.

  When shared variables are in use, the icon changes to (x) with a 1. **Value** displays the current value of the shared variable. **Source** displays the name of the variable list to which the shared variable belongs.

Static and reference variables can be created by any report package owner or doclet author. Shared variables are created and defined by the report package owner.

To view a list of all variables defined for a report package, first, open a report package. From the Report Package panel, change the drop-down from **Report Center** to **Variables**:



The list of available variables appears. You can view details such as variable type, the number of times the variable is used in the report package (the blue circle containing a number), and the source for reference variables, as shown in Figure 1.

From the Variables panel, you can:

- Create static and references variables
- Edit static and reference variables
- Select a variable to insert into a doclet
- Filter to view:
  - Only static, reference, or shared variables

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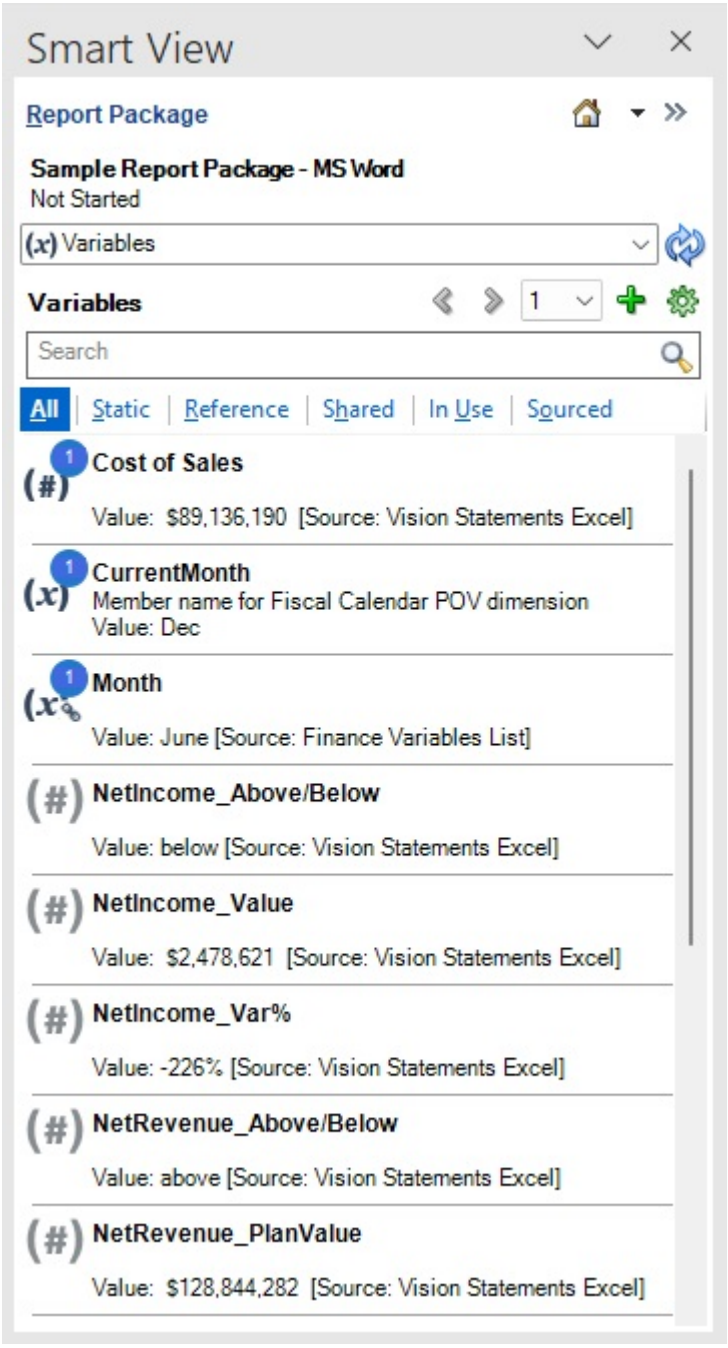
- Only those variables already in use in the report package
- Only those variables sourced from the current doclet

Figure 24-53 List of Variables Defined for a Report Package



To locate variables in report packages containing more than 50 variables, use the controls at the top of the panel (shown in Figure 2):

- Use the left and right arrows to navigate through the pages
- Use the page number drop-down list to jump to a specific page

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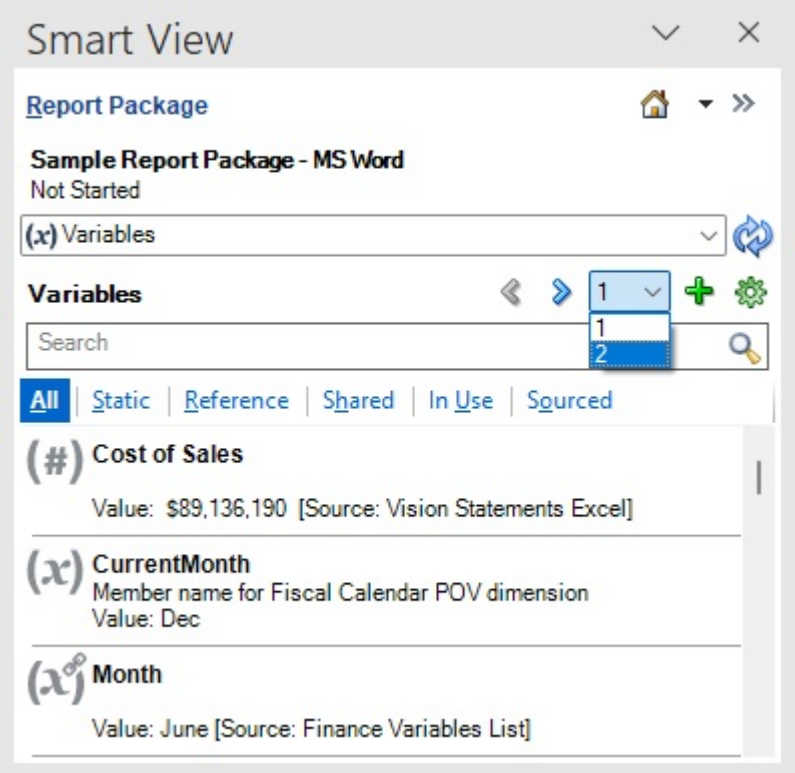
Figure 24-54 Portion of Variables Panel Showing Navigation Arrows and Page Number Drop-down List



After the variable has been created, the variable is managed as follows:

- The report package owner can delete and edit all variables in the report package. However, the report package owner must use Narrative Reporting web to delete and edit shared variables.
- A doclet author can only delete and edit static and reference variables that they created.
- For reference variables, any user with Write access to the source location of the variable value can update that variable value.
- Author users have Read access to variables that they did not create, so they can see a list of all variables and insert them into doclets to which they have Author access.

Creating Static Variables

A static variable is a string of text, such as a label or paragraph, which can be inserted into a report package doclet.

As an example, if you create a static variable for the current month called "CurrentMonth", you might enter the text,"August 2016". When you roll over to the report for the next month, it is a simple matter to update the text in the CurrentMonth variable to "September 2016," and the change is propagated to all instances of that variable throughout the report package.

The static variable can also be created and defined in the Narrative Reporting web interface; however, it must be inserted into the doclet using Oracle Smart View for Office.

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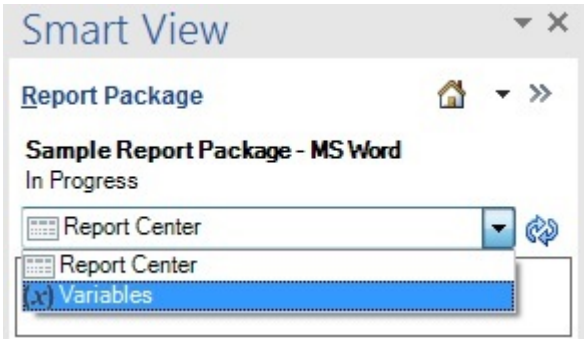
> **Note**
>
> Before you begin, ensure that you have opened a report package, and opened and checked out a doclet.

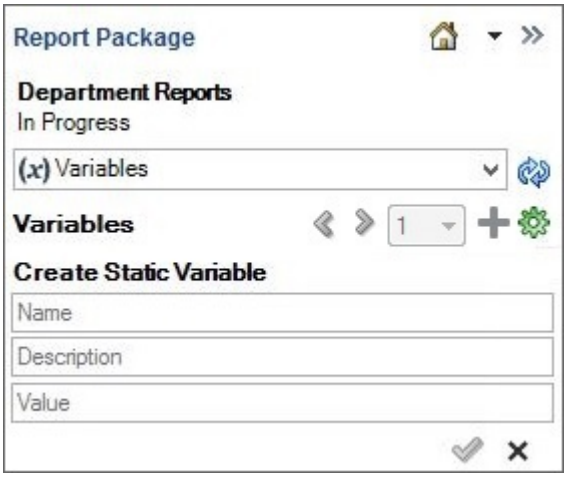
To create a static variable:

1. Open a report package, and in the drop-down list in the Report Package panel, select **Variables**



2. In the Report Package panel, click **Create New Variable**, +, and then select **Static Variable** from the drop-down list.

   The report package panel displays **Create Static Variable**, where you enter the variable name and value, and an optional description:



3. Define the variable as follows:
   a. Enter a **Name** for the variable.

      The name must be unique across variables within the report package, and should be descriptive of the variable to make it easier to find.

   b. **Optional:** Enter a **Description** for the variable.

   c. In the **Value** field, enter the text for the static variable.

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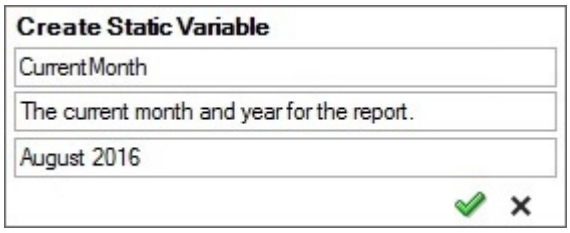
- Static variables can have a maximum size of 255 characters.
- The text string can be a label or paragraph, and the entire string will be displayed as entered in the report package.

In the following example, the user created a static variable with the Name of "CurrentMonth", a Description of "The current month and year for the report", and a Value of "August 2016". This variable can be inserted in multiple locations showing the date of the current month in different usages, as shown below:



This variable can be inserted in multiple locations showing the date of the current month in different usages; for example:

- Insert the static variable into the text displayed in an internal Operating Expenses doclet that reads "For the month of <<CurrentMonth>>".
- Insert the static variable into a paragraph in footnote of any of the doclets that reads: "During <CurrentMonth>>, ..."

The next month, to update all instances of the Current Month date in the report package, modify the variable value to use the new month; for example, September 2016. This option ensures that the change is implemented uniformly, and no incorrect dates for the value remain.

4. Click the **OK** button, .

   To cancel creating the variable, click the Cancel button, .

5. Insert the variable into a doclet, following the procedure in Inserting Variables in a Doclet.

Creating Reference Variables

Reference variables enable you to reference a source in another document (doclet or reference file) within the report package, such as a single Excel cell or selected Word text, and use them as reference variable value sources in your report package doclet. You can then insert the reference variable into one or more doclets. When the reference variable source value is updated, all inserted instances of the variable are automatically updated.

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Note

- Images and shapes are not supported as reference variable values.
- Reference variable values cannot be blank. The Excel cell must contain a value when defining or updating a reference variable.
- Reference variable values cannot be sourced from other reference variables.
- Reference variable values cannot be sourced from embedded content, where a range from an Excel reference doclet is embedded in Word or PowerPoint.
- Reference variables cannot be sourced from any PowerPoint content.
- Reference variable values sourced in Word can have a maximum size of 2,000 characters. Reference variable values sourced in Word cannot be inserted into Excel if the number of characters is greater than 255.
- Reference variable values must be single line only. In an Excel spreadsheet, select only one cell. In Word, select text from only one line or one table cell.
- Reference variable values sourced from Excel can have a maximum size of 255 characters.
- Reference variable values sourced from Excel include all of the number formatted text within the cell (for example, 123,456). If inserted into another Excel worksheet, the variable value will be inserted as text and not a numeric value.

For example, use Excel formulas in Oracle Smart View for Office to generate reference variable values:

- Use an IF function to return a string of "increase" or "decrease," or "above" or "below", if a data value increases or decreases between the current and prior period. Insert the Excel-based directional word variable or results into a Word paragraph.

  =IF(B8<0,"below","above")

- Use an IF function, or simple subtraction, to compare the occurrence of a data value (such as "Revenues" or "Summary Income Statement") that is displayed multiple times throughout a report package.

  ='Summary Income Statement'!B4

- Use Excel formulas to calculate the variance or variance percent of changing data values from period to period, and insert that variance into a Word paragraph.

  ='Summary Income Statement'!B4-'Summary Income Statement'!C4

If the value source is updated, each instance of the variable will reflect the current information when the variable is updated in Smart View.

The name and description of the reference variable can also be created in the Narrative Reporting web interface; however, you must add the variable source and value in Smart View, and the variable must be inserted into the doclet using Smart View.

Note

Before you begin, ensure that you have opened a report package, and opened and checked out a doclet.

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To create a reference variable:

1. Open a report package, and then open and check out a Word doclet, a Word doclet that contains a reference file, or an Excel reference doclet.

   You can just open a report package to create a reference variable, without checking out a doclet, and define the reference variable name and description; but the doclet needs to be checked out to define a source value from the doclet as the reference variable value.

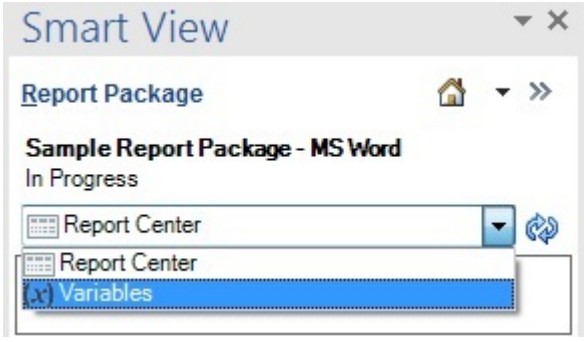
2. In the doclet or reference file, select the Excel cell or Word text or table cell to reference in your new reference variable.

   For example, in the following grid, cell **B13** is selected. The value in cell, including the data source POV, is the value for our new reference variable.

	A	B	C	D	E
1		Fiscal Calendar	Entities	Total Segments	Currencies
2		**Actual**	**Plan**	**Variance**	**Variance %**
3	Total Compensation	$ 64,845,803.24	$ 115,166,742.59	$ 50,320,939.35	43.69
4	Travel	4,836,436.25	8,287,961.06	3,451,524.80	41.65
5	General Supplies	3,674,837.98	6,258,357.17	2,583,519.19	41.28
6	Telecommunications	6,378,561.45	11,057,528.97	4,678,967.53	42.31
7	Equipment Maintenance	14,993,537.06	26,272,058.13	11,278,521.07	42.93
8	Fees Outside Services	100,996,742.28	180,334,457.05	79,337,714.77	43.99
9	Employee HR	6,634,968.62	11,428,589.57	4,793,620.94	41.94
10	Facilities Exp	13,031,228.94	22,994,537.25	9,963,308.31	43.33
11	Utilities	2,159,896.85	3,820,238.43	1,660,341.58	43.46
12	Depreciation and Amort	17,818,170.62	31,705,917.75	13,887,747.13	43.80
13	Operating Expenses	$ 235,370,183.29	$ 417,326,387.97	$ 181,956,204.68	43.60

> **Note**
>
> You can always change the reference variable value later.

3. In the drop-down list in the Report Package panel, select **Variables**.



4. In the Report Package panel, click the **Create New Variable** button, ✚, and then select **Reference Variable** from the drop-down list.

   The report package panel displays **Create Reference Variable**, where you enter the variable name and value, and an optional description. As you can see, the value is already pre-populated with the value we selected in step 2

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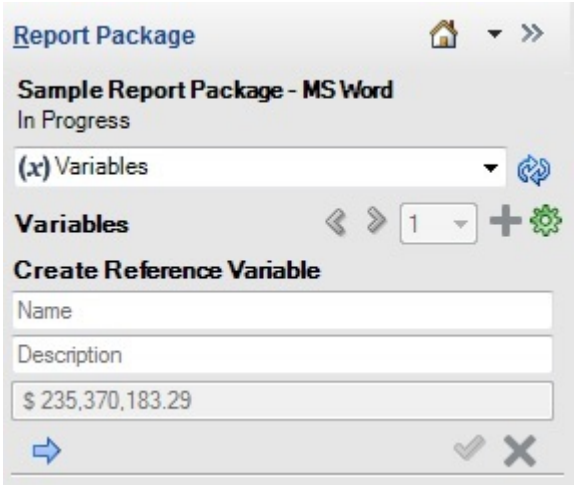

5. Define the reference variable as follows:
   a. Enter a **Name** for the reference variable.

      The name must be unique across all variables within the report package, and should be descriptive of the variable to make it easier to find.

   b. **Optional:** Enter a **Description** for the reference variable.

   c. Click to use the value of the currently selected cell as the reference value.

      Optionally, you can select another cell on the sheet, verify that the value is changed in the Value field, and click
6. Click the **OK** button, , to add the variable to the report package.
7. Upload and check in the doclet or reference file for the variable value to be added to the system.

> **Note**
>
> If the doclet or reference file is not checked in, the value will continue to be displayed in the variables panel as Not Committed for the current doclet and other doclets in Smart View. In the Narrative Reporting web interface, the value is displayed as #Missing.

Adding Shared Variables

Report package owners use Narrative Reporting web to add shared variables to report packages.

In Oracle Smart View for Office, authors add shared variables to doclets just as they do static or reference variables.

For information on creating shared variables in Narrative Reporting web, see these topics in *Creating and Managing Report Packages for Narrative Reporting*:

- Learning About Shared Variables
- Adding Shared Variables to a Report Package

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- Refreshing Shared Variables

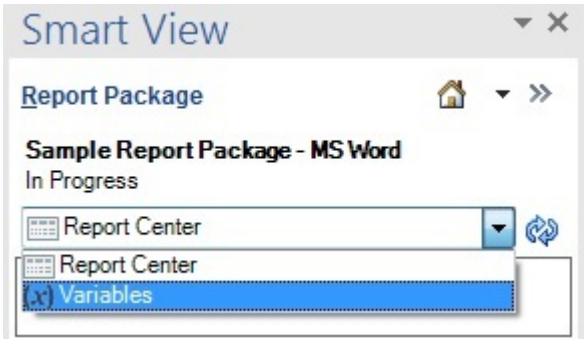
Inserting Variables in a Doclet

After static and reference variables are created and checked in, or shared variables are associated with a report package, they are ready for authors to use in Word or PowerPoint doclets in headers, tables, cells, or paragraphs, or in Excel doclet cells.

> **Note**
>
> - Oracle recommends limiting the number of variables inserted into an individual doclet to 250 or less. If a doclet contains more than 250 variables, then you may encounter extended processing time while checking in a doclet or, in some cases, the doclet check-in may fail.
> - When working with Oracle Smart View for Office and the Narrative Reporting extension on the 32-bit version of Office 365, an intermittent issue may occur when inserting a variable into a PowerPoint doclet from the Variables panel. See Working with Variables in Smart View for PowerPoint to work around this issue.

To insert a variable into a doclet:

1. Open a report package, and then open and check out a doclet.
2. In the drop-down list in the Report Package panel, select **Variables**.



Once you select **Variables**, the list of available variables are displayed in the Smart View Panel.Figure 1 shows a short list of variables. See Figure 1 for another example list of variables in a report package.

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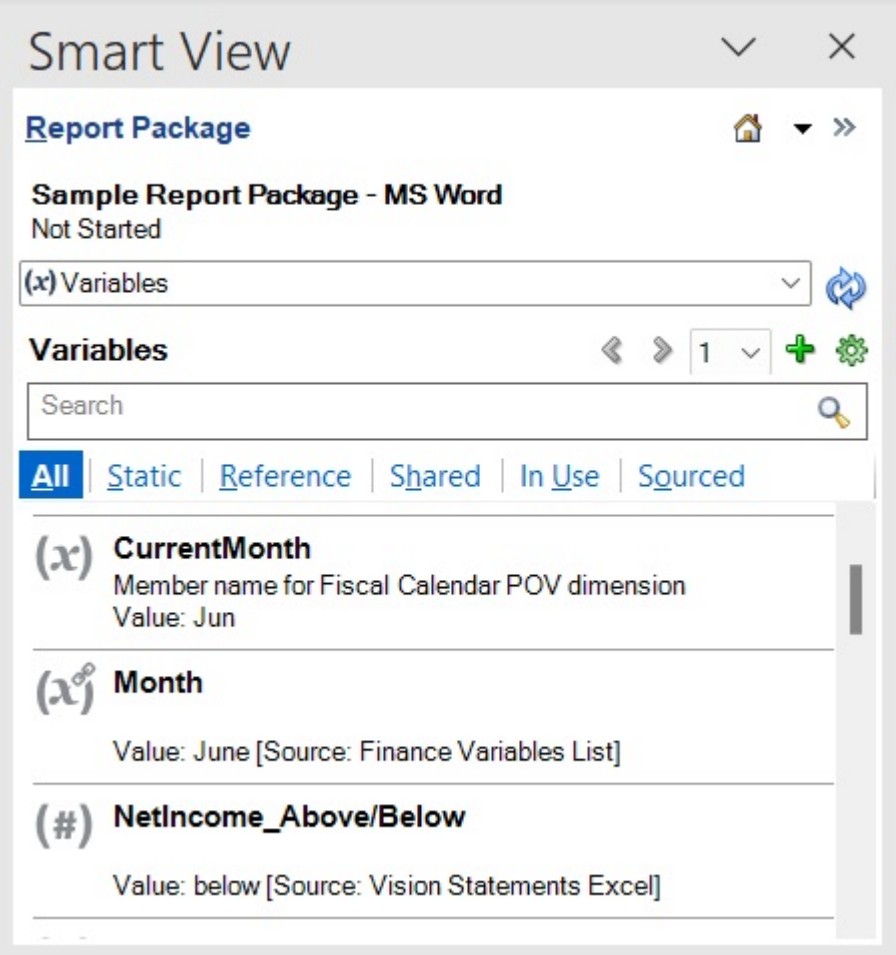
Figure 24-55 Example List of Variables Available for a Report Package



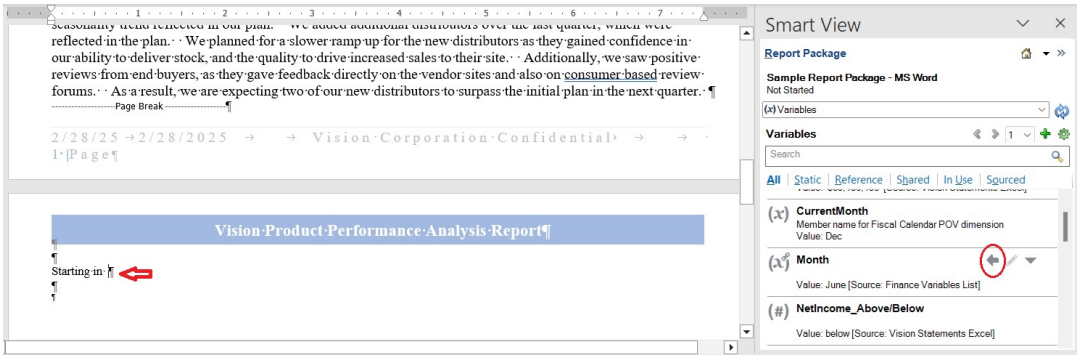
3. In the doclet, select the point where you want to insert the variable.
4. From the list of variables, select the variable to insert.

   When you select a variable in the list, three menu options for the variable are displayed, as shown in Figure 1.

5. Click ← to insert the variable at the selected point in the doclet.

   The example in Figure 2 shows a portion of a Word doclet with an arrow that shows variable insertion point within the doclet. The Insert Variable button, ←, is circled.

Figure 24-56 Word Doclet with Variable Insertion Point Noted



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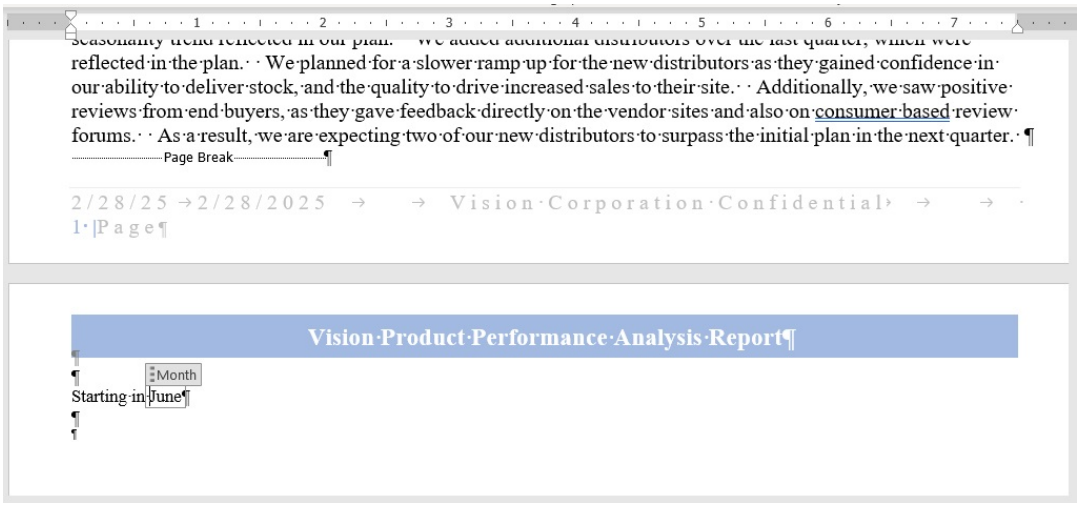
The example in Figure 3 shows the result of inserting a shared variable called Month, defined as June, into a Word doclet.

Figure 24-57 Word Doclet Showing the Result of Inserting a Shard Variable for Month



6. When finished inserting variables into the current doclet, upload and check in the doclet.
7. Repeat the steps in this procedure for each doclet that requires that you insert variables.

Working with Variables in Smart View for PowerPoint

When working with Oracle Smart View for Office and the Narrative Reporting extension on the 32-bit version of Office 365, an intermittent issue occurs when inserting a variable into a PowerPoint doclet from the Variables panel. At times, the variable is not inserted correctly and only a blank space is inserted. Other times, the variable inserts correctly.

Workaround: Variables will insert without issues if you turn off Windows Clipboard history. Follow these steps to turn off the "Clipboard history" setting.

1. From the Windows Start button, select **Settings**.
2. Search for "Clipboard" and select **Clipboard settings**.
3. In the **Clipboard settings** page, set the **Clipboard history** option to **Off**.
4. Start PowerPoint and connect to Narrative Reporting.
5. Open a PowerPoint report package, and then open and check out a PowerPoint doclet.
6. Insert variables in the PowerPoint doclet.

Searching for Variables

Use the search in the Variables panel to locate variables to insert, modify, highlight, or delete

To search for variables:

1. Open the report package.
2. In the drop-down list in the Report Package panel, select **Variables**.

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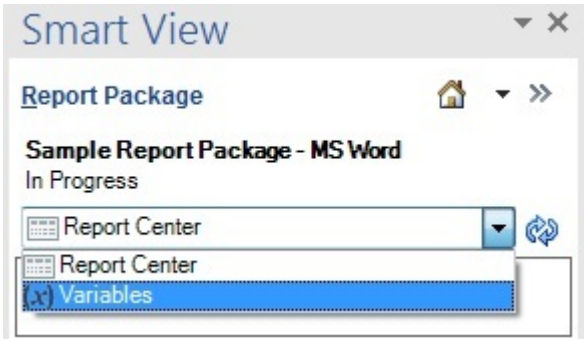

The list of variables available in the report package is displayed in the panel.

The magnifying glass icon, signifies the variable search text box.

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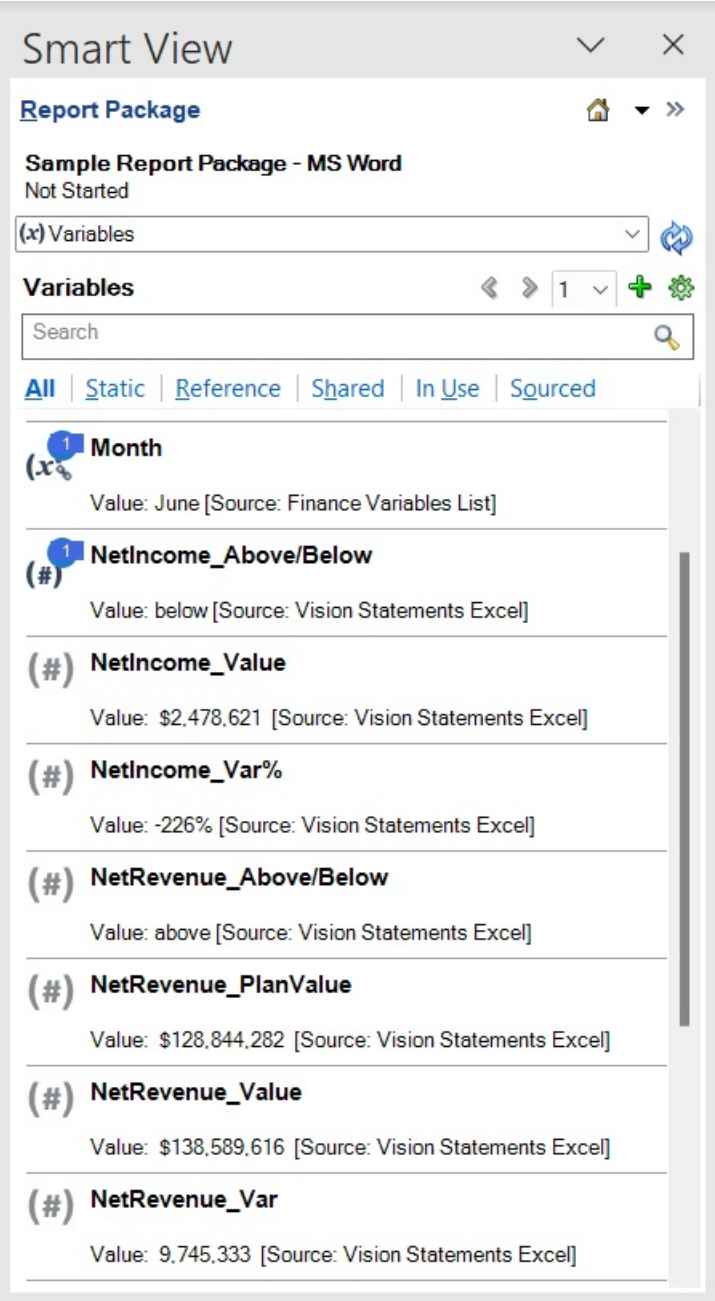

3. **Optional:** To search from a filtered list of variables, click any of the filter links: **Static**, **Reference**, **Shared**, **In Use**, or **Sourced** (see Filtering Variables).

4. Enter search criteria in the variables search text box, and then click .

   The search results are listed.

   In the following example, a search for variables that contain Revenue in their name yielded the following results.

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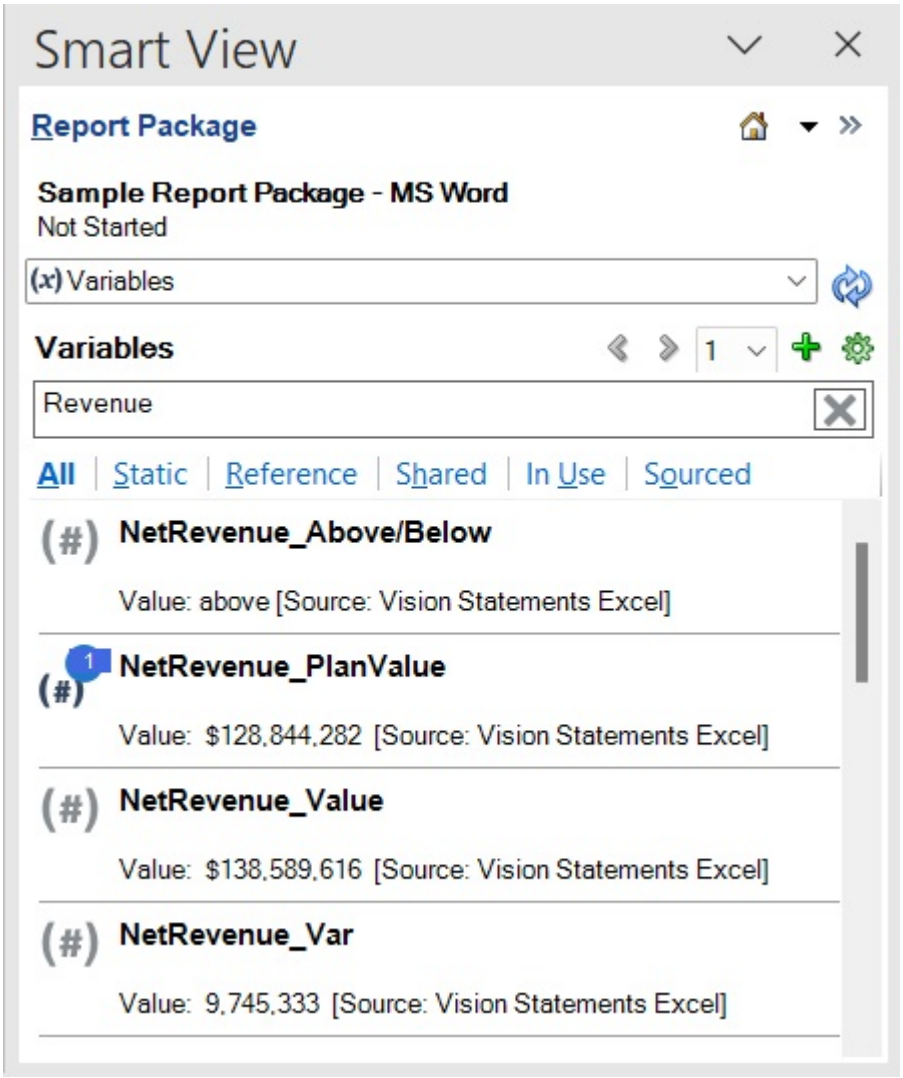

> **Note**
>
> Wildcards symbols, such as asterisks, are not required and should not be used unless they are part of the variable name.

5. To clear the search results list and restore the full list of variables, click ✕ in the variables search text box, or click the **All** filter link.

   Alternatively, click any of the filter links, such as **Static** or **Reference**, to return to a filtered list of variables.

Locating the Source of Reference Variable Values

You can easily locate a reference variable value's source within your doclets using the **View Source** action available from the **Sourced** tab in the Variables panel in Oracle Smart View for Office.

From the **Sourced** tab in the Variables panel, you can view all reference variables sourced from the current doclet.

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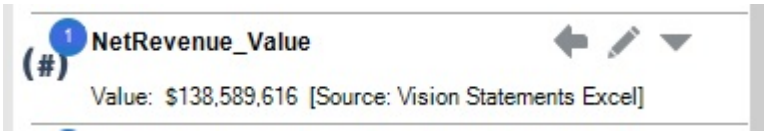
Then, also from the **Sourced** tab, use the **View Source** action on the ▼ drop-down menu for a selected variable to locate a reference variable value's source in a reference doclet or reference file. In Word- or Excel-based doclets, you can also locate a reference variable value's source if the variable is sourced from the doclet.

Before you begin, review the items in Guidelines for Locating Variable Source Values.

> **Note**
>
> For the following procedure, let's assume you're starting at the report package level, before you have opened any doclets. Note, however, that you can also begin this procedure from any opened doclet.

To locate the source of a reference variable value:

1. Open a report package, and in the drop-down list in the Report Package panel, select **Variables**.
2. In the Variables panel, **All** tab, check the list for the variable that you want to source, and note source doclet name.
   For example, using the Vision sample application in Narrative Reporting, for the reference variable, NetRevenue_Value, the source doclet is an Excel file, Vision Statements, which is a reference doclet.



3. Perform an action:
   - For a variable sourced in a reference doclet, open the reference doclet.
   - For a variable sourced from a reference file, open the doclet to which the reference file is registered, and then download the reference file and open it.
   - For a variable sourced from a Word- or Excel-based doclet, open the doclet.
4. If you plan to make any changes, check out the doclet you have just opened.
5. To view all variables sourced from the currently opened reference doclet or reference file, in the Variables panel, select the **Sourced** tab.
   You would also select the **Sourced** tab if the source is a Word- or Excel-based doclet.
6. In the **Sourced** tab, locate the variable for which you want to view the source, click the **More Actions** button, ▼ and, from the drop-down menu, select **View Source**.

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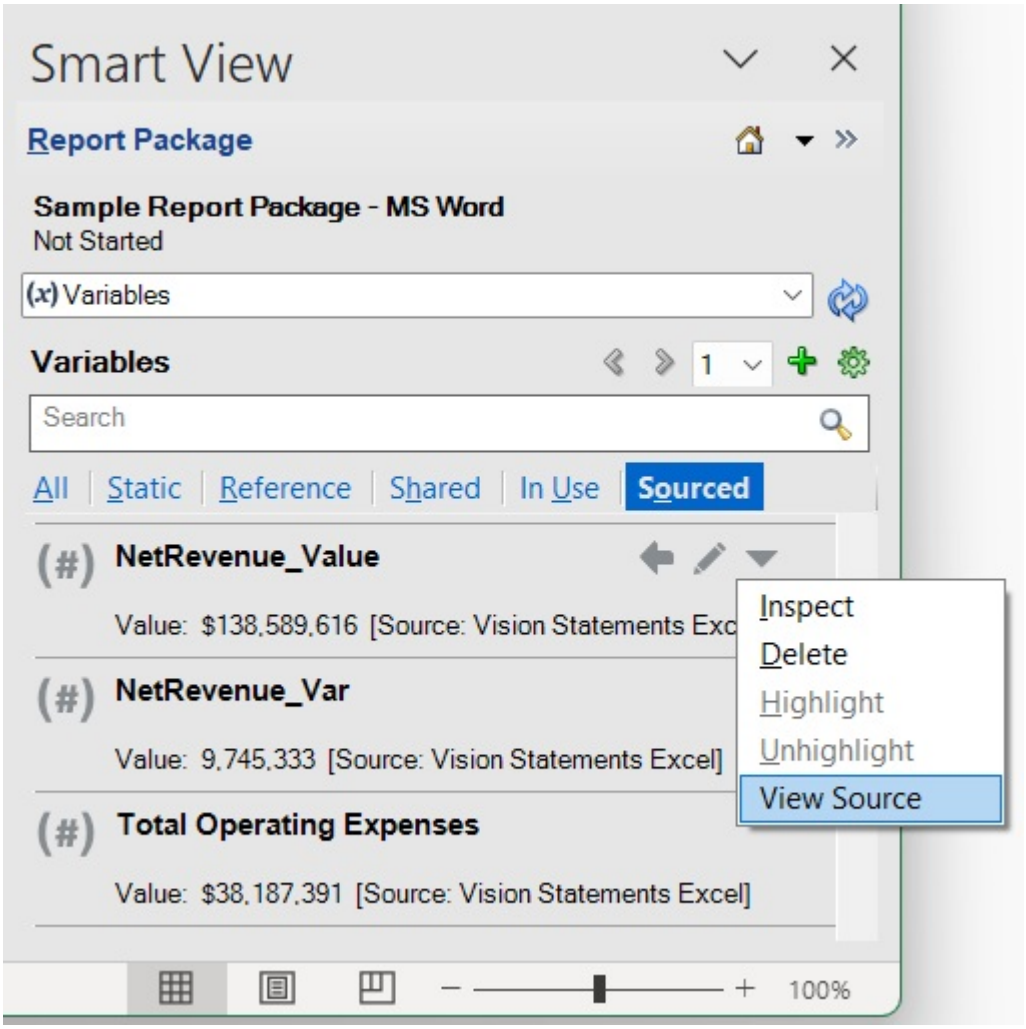

For Excel reference doclets or files, Smart View immediately takes you to the location of the cell that is the source of the variable, regardless of the sheet you're on in the workbook.

In Word- or Excel- based doclets, Smart View takes immediately takes you to the text source of the refrence variable (Word), or the cell that is the source of the variable.

In the following example of the NetRevenue_Value reference variable, Smart View takes us to cell B6 on the Rules tab of the Vision Statements reference doclet. Excel's formula bar shows us that this variable is referencing cell B4 in the Summary Income Statement tab of the Vision Statements workbook.

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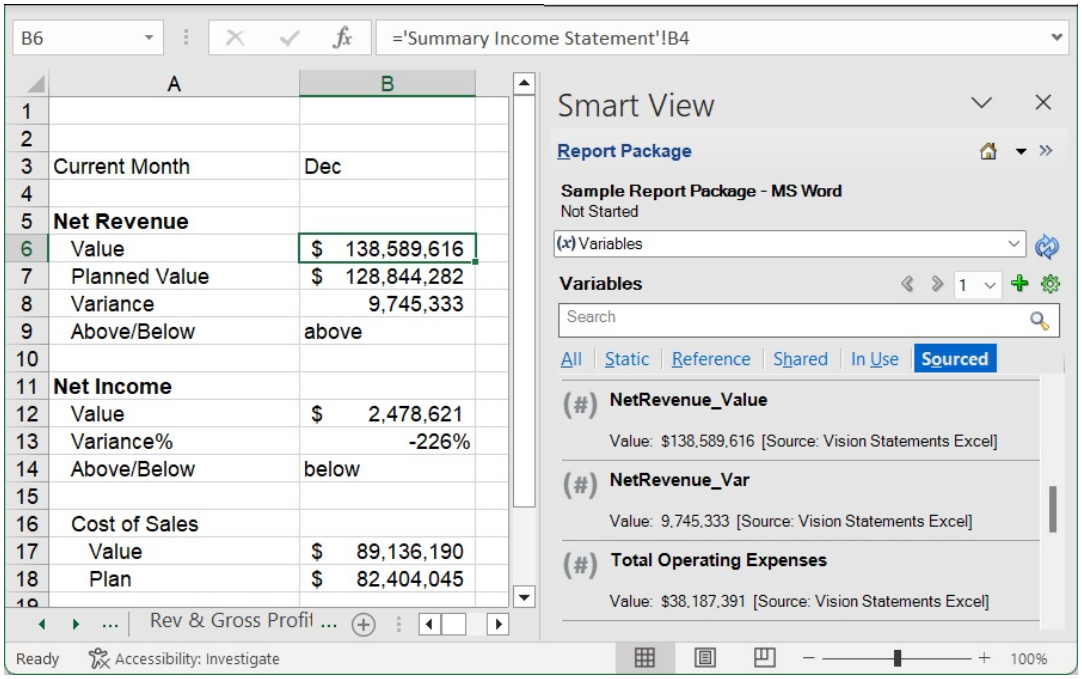

7. Repeat this procedure starting with step 2 for each reference variable for which you want to view its value source.

Guidelines for Locating Variable Source Values

- Variables cannot be sourced from PowerPoint. Therefore, the **View Source** action is not available in PowerPoint-based doclets.
- Use the same procedure outlined above when working with reference files or Word- or Excel-based doclets with these considerations:
  - When working with reference files, first open the Word- or Excel-based doclet to which the reference file is registered, and then download the reference file.
  - If no variables are sourced from the Word- or Excel-based doclet, then the **View Source** action is disabled. Use the variable highlight action to locate variables used (not sourced) in the doclet, if needed.
- This feature requires the 23.12+ update of Narrative Reporting web and the Narrative Reporting extension for Smart View.

Editing Variables

Once created, you can easily edit static and reference variables in Oracle Smart View for Office.

> **Note**
>
> Shared variables are not editable in Smart View.

To edit variables:

1. Open a report package.

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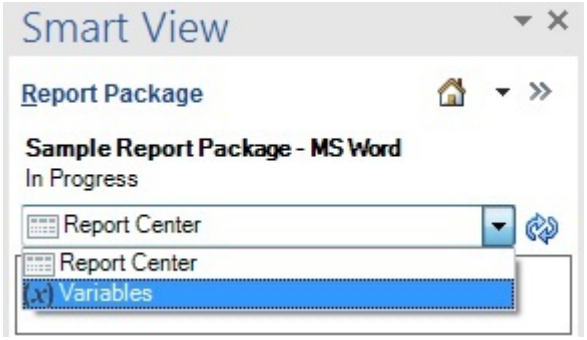
- If you plan to edit a static variable, you do not need to check out any doclets.
- If you plan to edit a reference variable, open and check out the Word or Excel reference doclet or reference file from which the reference variable is sourced.

2. In the drop-down list in the Report Package panel, select **Variables**.



The list of variables available in the report package is displayed in the panel.

3. Select a variable and click the **Edit** button, .

> **Note**
>
> To help to locate the variable to edit, follow the procedure in Searching for Variables

The **Edit** button, , displays whenever you hover over a variable from the list.

In the following illustration, the CurrentMonth variable, a static variable, is selected for editing.

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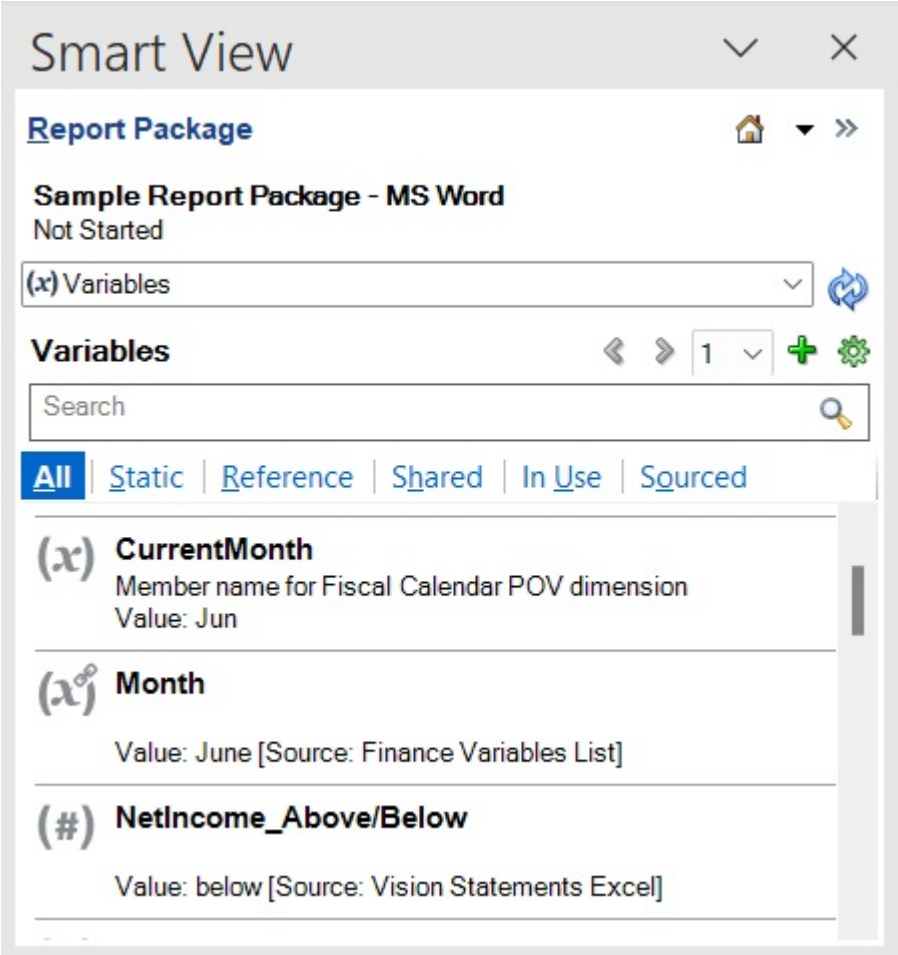
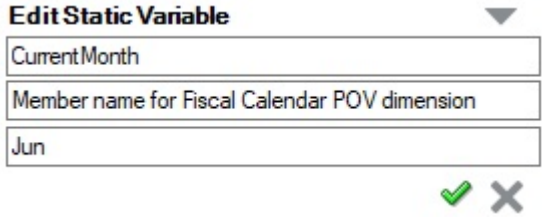


After you click , the **Name**, **Description**, and **Value** fields are displayed. Here is an example of a static variable that is ready to edit:



4. Perform an action:
   - To modify a static variable, type over the existing entries in the **Name**, **Description**, or **Value** fields as required, and then click .

     The static variable is updated as soon as you click .
   - To modify a reference variable:
     a. Ensure that you have opened and checked out the reference doclet or reference file from which the reference variable is sourced.
     b. Type over the existing entries in the **Name** and **Description** fields, as required.

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c. To change the **Value** field, select the text in a Word doclet or the appropriate cell in the Excel reference doclet, and then click .

When editing a reference variable, remember these guidelines:

- Images and shapes are not supported as reference variable values.
- Reference variable values cannot be sourced from other reference variables.
- Reference variable values cannot be sourced from embedded content, where a range from an Excel reference doclet is embedded in Word or PowerPoint.
- Reference variable values can contain only 255 characters.
- Reference variable values must be single line only. In an Excel spreadsheet, select only one cell. In Word, select text from only one line or one table cell.
- Reference variables cannot be sourced from any PowerPoint content.

d. After you have finished editing the reference variables for the checked-out doclet or reference file, upload the source document and check it in.

Once the doclets or reference files are checked in, the variables with their updated values are available to other report package authors.

5. Repeat the preceding steps for all variables that require editing.

Filtering Variables

For easier viewing, you can filter the list of a variables in a report package. The default filter is All, meaning all variables—static, reference, and shared—are displayed in the variables list.

Filtering categories are:

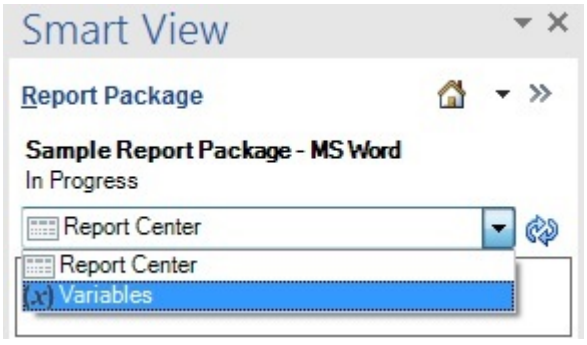
- All
- Static
- Reference
- Shared
- In Use
- Sourced

To filter variables:

1. Open a report package, and then open a doclet.

   You do not need to check out a doclet in order to filter variables.

2. In the drop-down list in the Report Package panel, select **Variables**.



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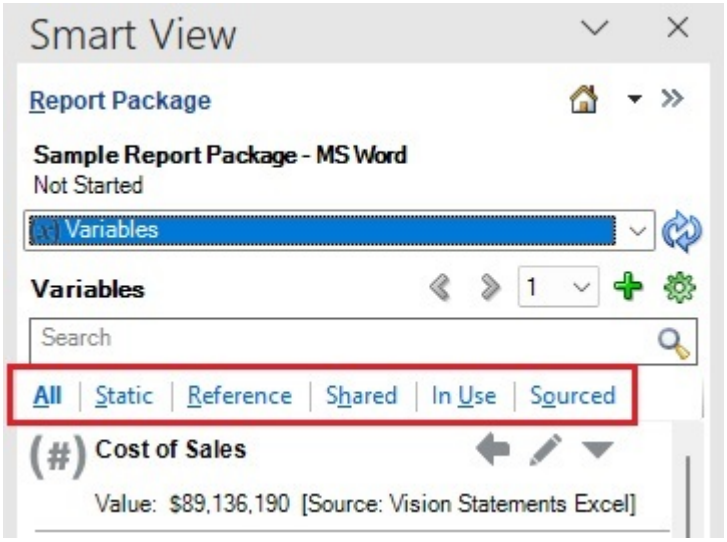
The list of variables available in the report package is displayed in the panel.

3. Choose a filtering option by clicking the links at the top of the variable list:



- **All**—Displays all variable types.
- **Static**—Displays only static variables.
- **Reference**—Displays only reference variables.
- **Shared**—Displays only shared variables.
- **In Use**—Displays only those variables that are in use in the currently-opened doclet.
- **Sourced**—Displays only those variables that are in sourced from the currently-opened doclet.

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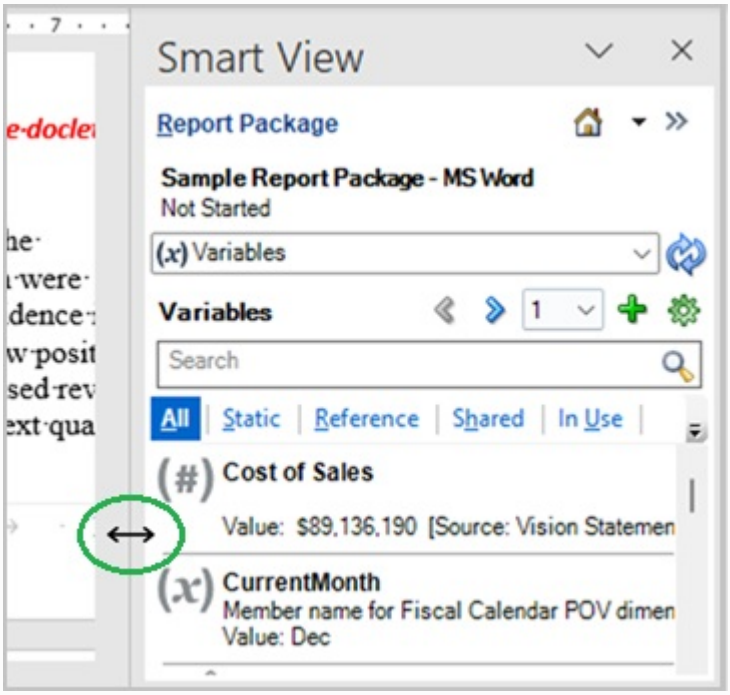
Note

If you do not see all the available filtering options in the Variables panel, try either of these methods in order to view all filtering options:

- Widen the Variables panel using the Microsoft Office two-headed arrow, as shown below circled in green. Point your mouse at the vertical line between the doclet pane and the Variables panel until you see the two-headed arrow, click it, and then drag to the size you require.



- Use the drop-down arrow at the right of the Variables panel, as shown below circled in green, to view, and select from, the remaining available filters.

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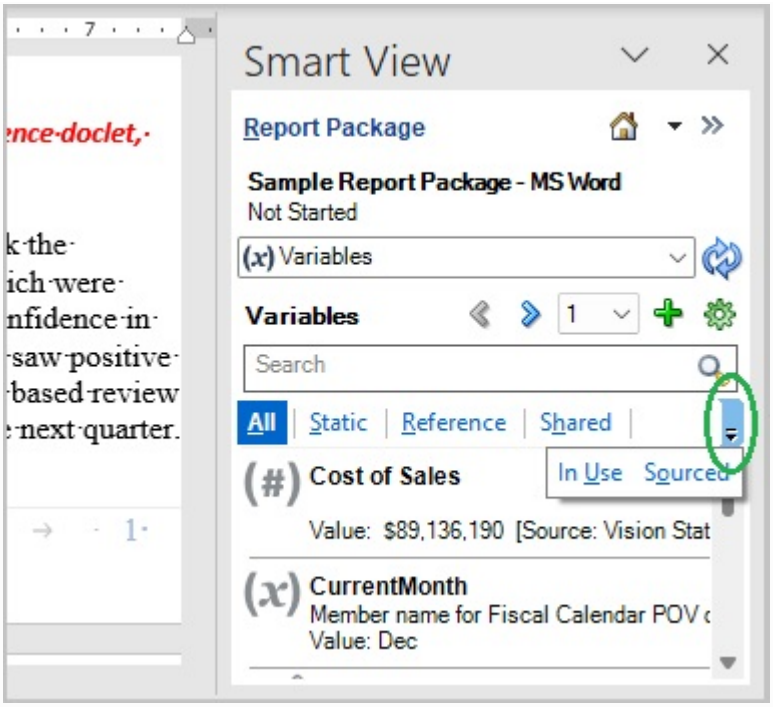


Tip

To help to locate the variables in use in the current doclet, you may choose the highlight option on individual variables, as described in Highlighting Variables in Doclets

Highlighting Variables in Doclets

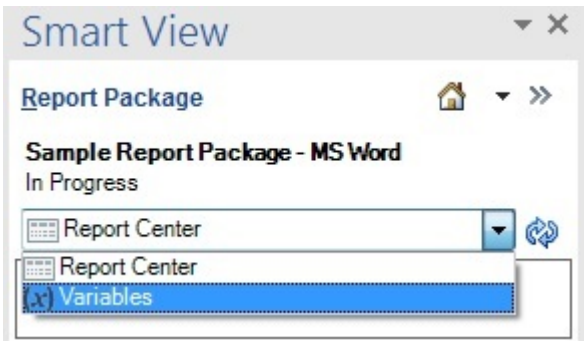
You can quickly view the instances of a variable in a doclet using the Highlight command for the selected variable.

To highlight a variable in a doclet:

1. Open a report package, and then open a doclet.

   You do not need to check out a doclet in order to highlight variables.

2. In the drop-down list in the Report Package panel, select **Variables**.



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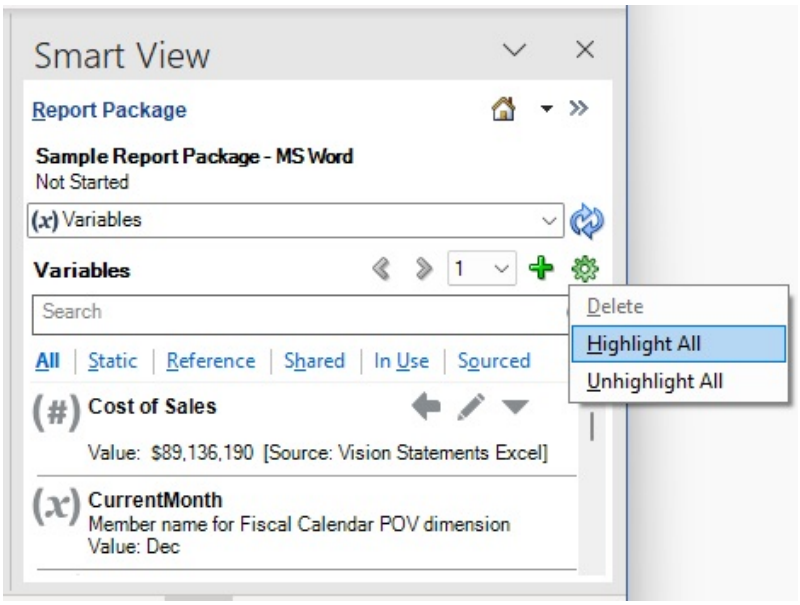
The list of variables available in the report package is displayed in the panel.

3. To highlight all variables in a doclet:

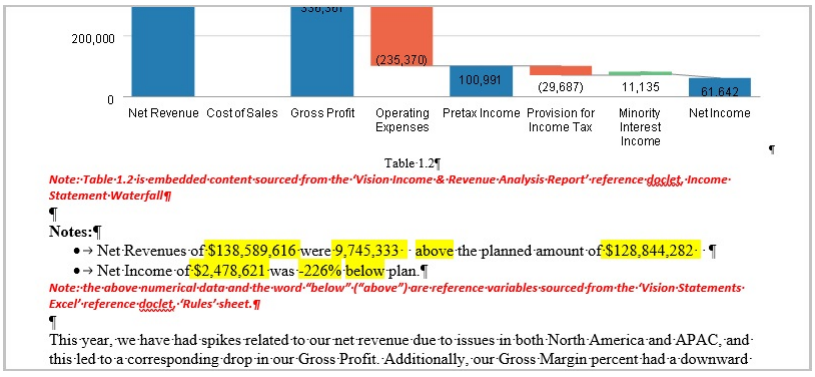
   a. Click the **Options** button, to view the drop-down menu:



   b. Select **Highlight All** from the drop-down list.

   Figure 1, shows a portion of doclet with several variables highlighted. Additionally, the NetRevenue_Above/Below variable is selected and the variable name is displayed above it.

Figure 24-58 Doclet After Selecting Highlight All



   c. To unhighlight all variables, click the **Options** button, , and, from the drop-down menu, select **Unhighlight All**.

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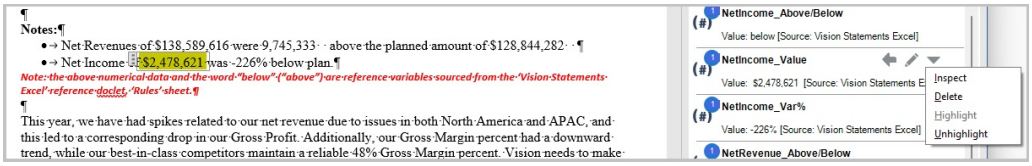
> **Note**
>
> To remove the highlighting from an individual variable when all variables are highlighted, you may select a variable from the list in the Variables panel and, from the **More Actions** menu for the individual variable, select **Unhighlight**.

4. To highlight all instances of an individual variable in a doclet:
   a. Select a variable from the list in the Variables panel.
   b. Click the **More Actions** button for the variable, ▼ and, from the drop-down menu, select **Highlight**.

      In Figure 2, the CurrentMonth variable, a static variable, is selected in the Variables panel. After selecting **Highlight** from the drop-down menu, the NetIncome_Value variable is highlighted in the doclet at the left.

Figure 24-59 Doclet with Highlighting Enabled for a Selected Variable



   c. To unhighlight the selected variable, click the **More Actions** button, ▼ and, from the drop-down menu, select **Unhighlight**.

> **Note**
>
> - Variables within content controls or text boxes will not be highlighted whether using **Highlight All** or the **Highlight** action on the individual variable.
> - Highlighting is not supported on variables placed within headers and footers in Word doclets.
> - All highlighting is cleared upon performing an **Upload** or **Upload and Check In**.
> - **Highlight All** and **Unhighlight All** requires Narrative Reporting extension 24.10 or later.

Inspecting Variables

You can inspect for variables at the doclet level, or you can inspect individual variables selected from the list of variables in the Variables panel.

To inspect for variables:

1. To inspect for variables in a doclet:
   a. Open a report package, select a doclet, and, optionally, open it.

      You can inspect for variables without opening the doclet.
   b. In the report package panel, click **View Properties** to open the **Properties** dialog box.

      If you opened a doclet, you can also click **Inspect** in Narrative Reporting ribbon to open the **Properties** dialog box.

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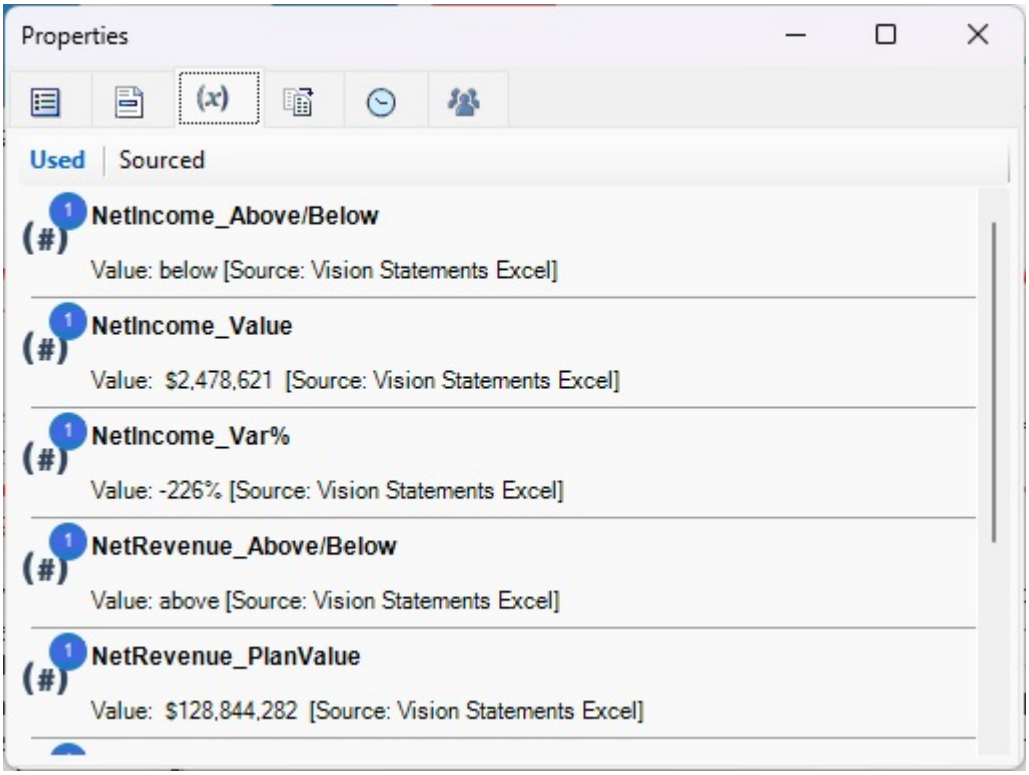
c. In the **Properties** dialog box, select the **Variables** tab, (x)

The **Variables** tab, (x), shows you the variables available in a doclet. The blue circle next to a variable contains the number of times that variable is in use in the doclet. For example, here is the variables tab from a doclet in a report package:



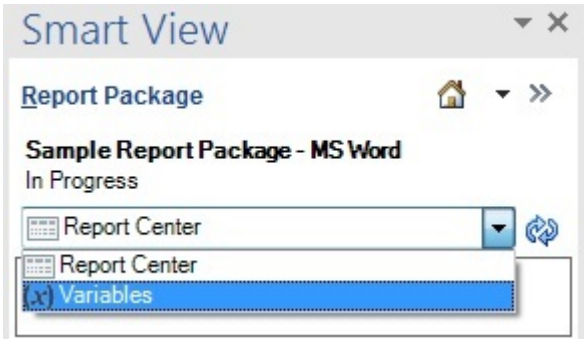
d. Click the **X** in the top right corner to close the **Properties** dialog box.

2. To view the properties of an individual variable:

a. Open a report package, and then open a doclet.

You do not need to check out a doclet in order to highlight variables.

b. In the drop-down list in the Report Package panel, select **Variables**.



The list of variables available in the report package is displayed in the panel.

c. Select a variable from the list in the Variables panel.

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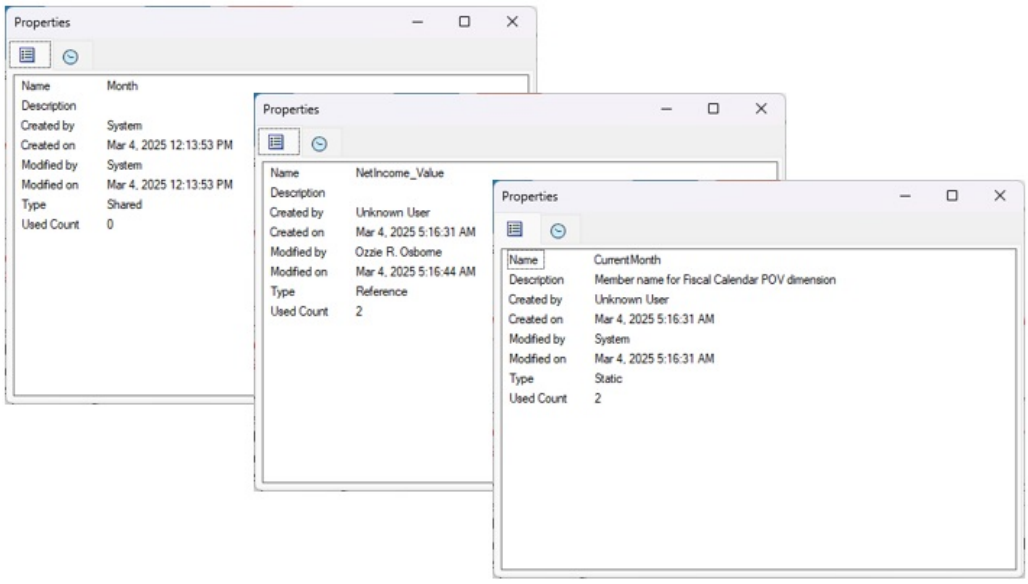
d. Click the **Options** button, ▼ and, from the drop-down menu, select **Inspect**.

   The **Properties** dialog box for the selected variable is displayed.

   The Properties tab shows you basic information about the variable, including whether it is a static, reference, or shared variable. It also shows you the number of times the variable is used in the report package. Following are the example properties of a static, reference, and shared variable.



e. **Optional:** Select the **History** tab, to view who made changes to the variable, and what changes were made.

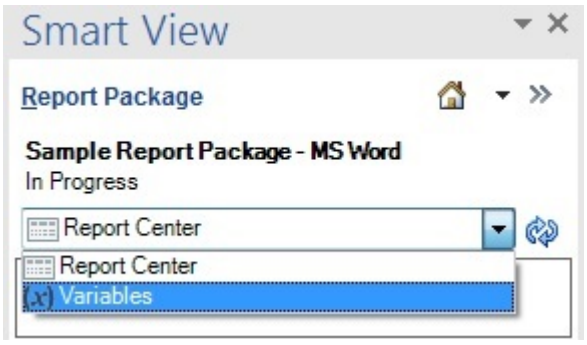
f. Click the **X** in the top right corner to close the **Properties** dialog box.

Unlinking Reference Variables

Unlinking applies to reference variables only. When you unlink a reference variable, Narrative Reporting removes the association between the reference variable value and the source value in the doclet, and sets the value to #Missing.

To unlink a variable:

1. Open a report package, and then open and check out a doclet.
2. In the drop-down list in the Report Package panel, select **Variables**.



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The list of variables available in the report package is displayed in the panel.

3. In the Smart View Panel, select the reference variable to unlink from the list and click the **Edit Variable** button, .

   The **Edit Variable** button, , displays whenever you select a variable from the list.

4. In the variable editing area, click the **Unlink** button, .

   A warning message is displayed to advise that the selected variable will be permanently removed from the doclet.

   Though the variable values in the selected doclet are no longer managed by Narrative Reporting, the #Missing text remains in the doclet. If required, manually remove the #Missing text from the doclet.

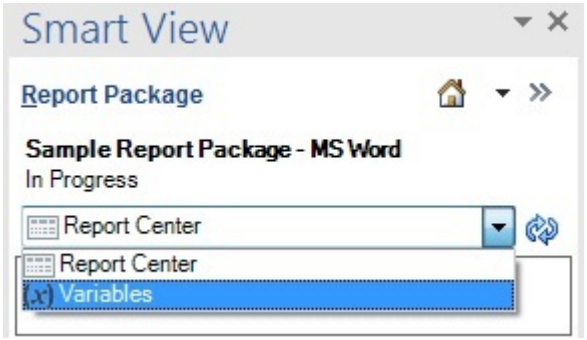
5. Repeat the preceding steps for any other variables that you want to unlink.
6. When finished, upload check in the doclet.

Deleting Variables

You can delete variables from the report package.

To delete a variable from a report package:

1. Open the report package from which you want to delete a variable.
2. In the drop-down list in the Report Package panel, select **Variables**.



   The list of variables available in the report package is displayed in the panel.

3. Ensure that the variable is no longer used in the report package:

   To check whether a variable is in use in a doclet:

   a. Select the icon next to a doclet in the Report Package panel.

   b. In the Action Panel, select **Properties**, and then select the **Variables** tab, .

      The variables that are used in the selected doclet, and the number of instances of each variable in the doclet, are listed.

   c. If an instance of the variable that you plan to delete appears in the doclet, open and check out the doclet, and then manually delete the instances of that variable.

   d. Make any other necessary edits in the doclet, then perform an upload and check in the doclet.

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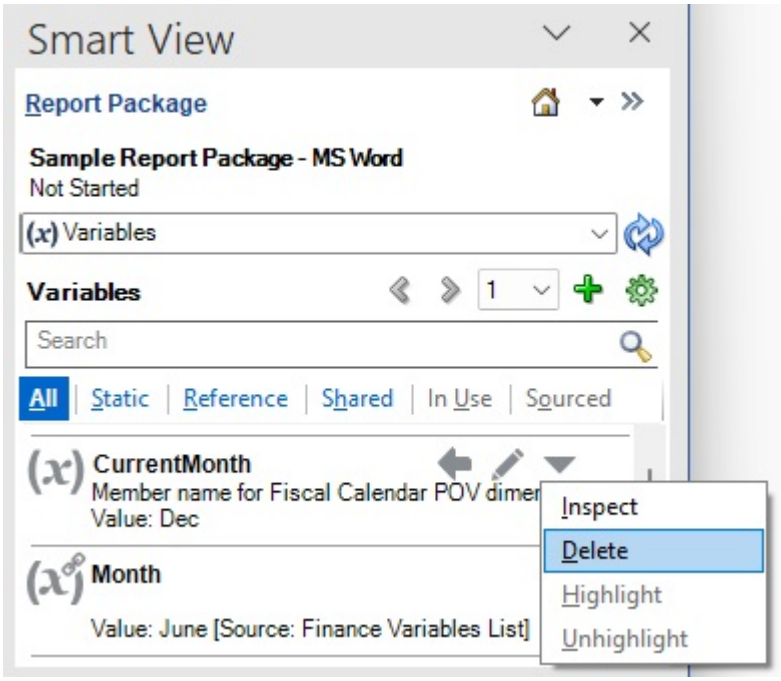
e. Repeat these steps for each doclet in the report package.

> **Note**
>
> You must search each doclet for all instances of the variables.

4. Once you have cleared all instances of a variable in the report package, close any open doclets.
5. In the Variables panel, click the **Options** button, ▼, for the variable to delete, and then select **Delete**.



A warning message is displayed, asking you to confirm the delete action.

6. Click **Yes** in the warning message to permanently delete the variable.

   If you did not remove the variable from the doclet text, as described in step 3, the variable is removed from the listing on the variables list, but the variable text is not automatically removed from the doclets. You must search for each instance of the variable text in the doclets and manually delete it, and make any necessary edits in the doclet.

> **Note**
>
> To reinstate a variable, you must re-create it, and then add the variable as required to the appropriate doclets.

Working with Excel Doclets in PDF-based Report Packages

In PDF-based report packages, you can specify Excel workbooks as regular doclets. Authors and administrators can edit the content in Excel doclets and select sheets that will become part of the final report package.

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To work with Excel doclets in PDF-based report packages:

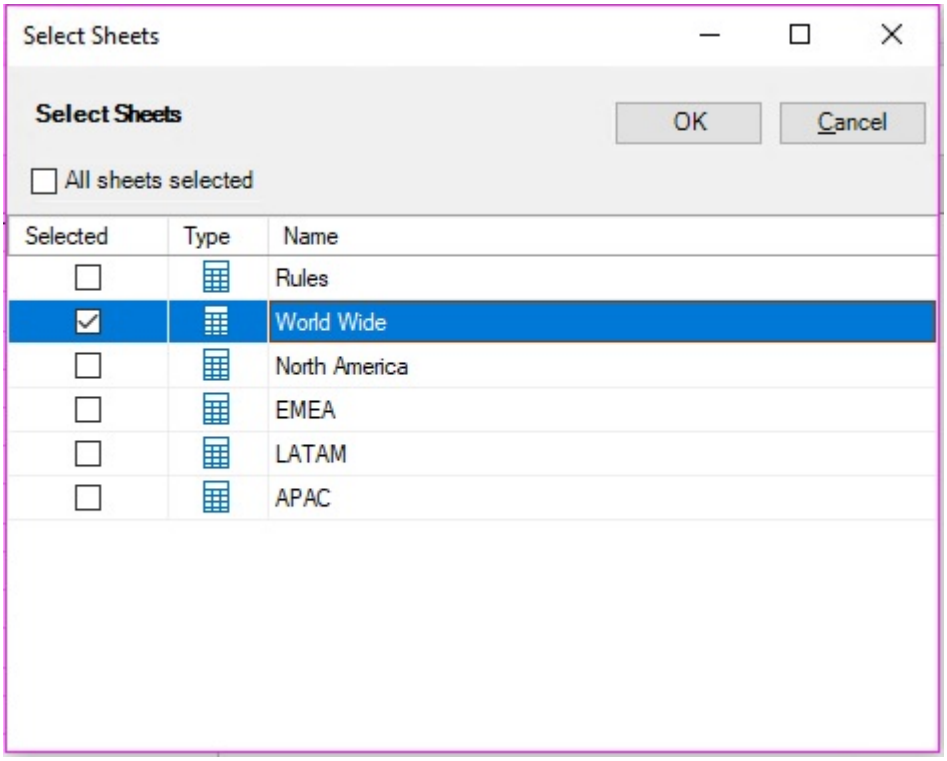
1. In the PDF-based report package, open and check out the Excel doclet to work with.
2. In the Narrative Reporting ribbon, click **Select Sheets:**

3. In the **Select Sheets** dialog, use the check boxes to select the sheets to include in the final report package.

   Alternatively, you can select the **All sheets selected** check box.

   In Figure 1, the **Select Sheets** dialog shows six worksheets available in the Excel doclet; however, only one, "World Wide," is selected for inclusion in the report package.

Figure 24-60 Select Sheets Dialog Showing One Sheet Selected for Inclusion in the Report Package



4. Edit the sheets in the doclet as you require.

   For example, you can perform ad hoc analysis or apply formatting.

5. When finished editing the Excel doclet, upload and check it in.

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Working with Server-Initiated Refresh

Related Topics

- About Server-Initiated Refresh
- Creating and Editing Data Source Connections
- Selecting Sheets for Server-Initiated Refresh
- Initiating Refresh from Narrative Reporting Web
- Guidelines for Working with Server-Initiated Refresh

About Server-Initiated Refresh

With server-initiated refresh, you can easily refresh the Oracle Smart View for Office data queries in all of the Excel-based doclets and reference doclets within a report package using the Refresh options in the Narrative Reporting web application.

In Smart View, you specify which Excel doclets and reference doclets to refresh. You can choose all sheets within a workbook or select only the sheets you require. From the Narrative Reporting web application, you select to refresh data from all defined data sources or selected data sources.

Only one Narrative Reporting data source is allowed per report package. You can also source refreshable data queries from these Oracle Fusion Cloud Enterprise Performance Management data sources:

- Planning
- Planning Modules
- Financial Consolidation and Close
- Tax Reporting

Service Administrators set up data sources in the **Data Sources** folder in Narrative Reporting.

For more guidelines and requirements, see the topics in Guidelines for Working with Server-Initiated Refresh:

- Enabling Server-Initiated Refresh
- Requirements
- Data Sources
- Workbook Size Limit
- Workbook Layout
- Grid Design Considerations and Guidelines
- Supported and Unsupported Grid Types
- Workbook Use Case Scenarios

For information on using server-initiated refresh, see:

- Selecting Sheets for Server-Initiated Refresh
- Initiating Refresh from Narrative Reporting Web

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Videos

Your Goal	Watch This Video
Learn the basics of server-initiated refresh.	Server-Initiated Refresh Using Smart View and Narrative Reporting

Creating and Editing Data Source Connections

In Narrative Reporting web, administrators define data sources for all data queries in all of the Excel-based doclets and reference doclets that will be used with server-initiated refresh.

Oracle Smart View for Office locates the URLs used for each data query on each sheet that users have selected for server refresh, and maps the URLs to the corresponding data sources defined in the **Data Sources** folder in Narrative Reporting. If the data source is not defined in Narrative Reporting web, then the content in Smart View will be ignored (not refreshed)

To create a data source connection in Narrative Reporting:

1. From the **Data Sources** folder in the Library, click , and select **Data Source**.
2. In **Data Source Name**, enter a descriptive identifier for the data source, such as a combination of the source product, server, and application or database.
3. In **Type**, select the type of data source.

   Currently, only the "Oracle Enterprise Performance Management Cloud" source is supported, which includes these business processes:

   - Planning
   - Financial Consolidation and Close
   - Tax Reporting
4. In **Server Name**, enter the only data source server name, including the HTTPS protocol.

   For example, for Planning, if the data source URL is:

   https://<servername>/HyperionPlanning

   Then the server name is:

   <servername>
5. In **Identity Domain**, enter the identity domain of the data source environment.
6. Enter the administrator user ID and password.

> **Note**
>
> You must log in to Narrative Reporting with the administrator credentials for the data source that you want to create a connection to. For example, if your Planning Modules administrator is **PlanAdmin**, you must log in to Narrative Reporting with the **PlanAdmin** credentials to create a data source connection to the Planning Modules data source. Enter User ID and Password credentials used for native authentication at the source. Single Sign-on with Identity Assertion technologies is not supported.

7. Click **Test Connection**.

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8. After a successful connection, you can browse and select the application and cube by selecting ▼ for application name and cube name.

   After selecting a cube, click on to preview the dimension list.

9. **Optional:** To edit a data source connection, select the connection and then select **Edit** from the **Actions** menu. When you edit a connection, you can change the connection name, server, application and cube name.

> **Note**
>
> - You do not need to specify the data source server protocol (for example, https://) in the **Server Name** field.
> - Changing the connection name does not affect any report objects that use the connection.
> - Changing the server, application, or application or cube names causes any report objects that use the connection to point to the new destination.
> - For security purposes, you must re-enter the administrator credentials when editing a data source.

Selecting Sheets for Server-Initiated Refresh

In Oracle Smart View for Office, you select sheets to be recalculated and refreshed during server-initiated refresh. You can include sheets from Excel doclets and Excel reference doclets.

To select sheets to include in server-initiated refresh:

1. If you haven't already done so, open your report package.
2. Open and check out the Excel doclet or Excel reference doclet that contains sheets that you want to include in server-initiated refresh.

> **Tip**
>
> You must check out the doclet before you can select sheets.

3. Click **Inspect** in the Narrative Reporting ribbon to launch the **Properties** dialog box.

4. In the **Properties** dialog, select the **Opt In** tab.

   By default, no sheets in the workbook are selected.

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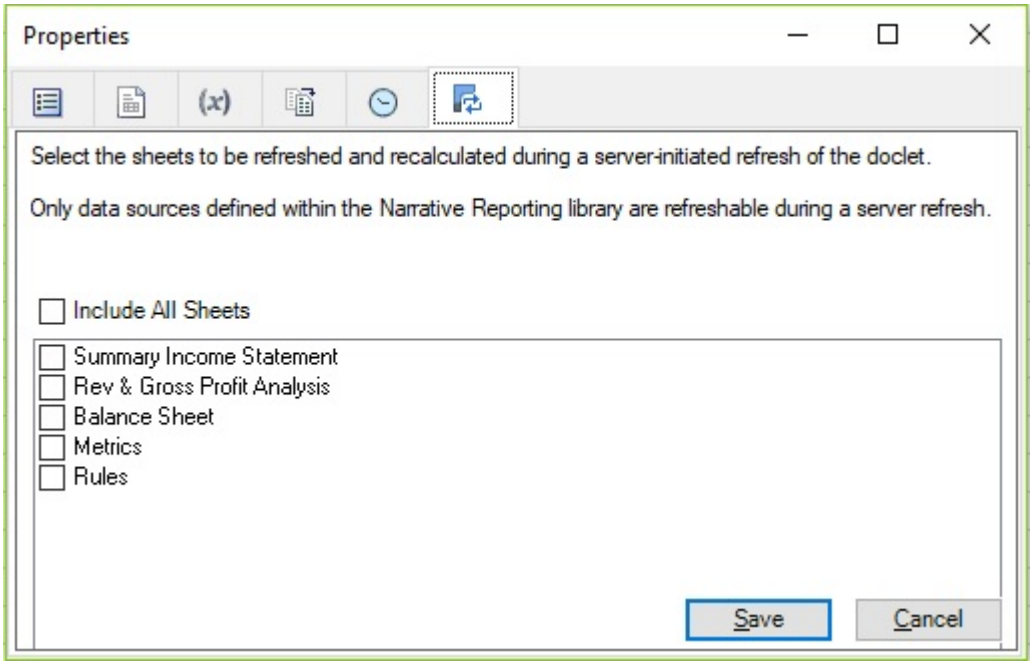
Figure 24-61 Initial Launch of Properties Dialog - Opt In Tab; No Sheets Selected



> **Note**
>
> The **Opt In** tab is visible only if your administrator has enabled server-initiated refresh in your service.

5. Perform an action to select sheets in the workbook for inclusion in server-initiated refresh of the doclet:
   - Select **Include All Sheets**
   - Select only the specific sheets you require

> **Note**
>
> The Excel doclet or reference doclet workbook must not exceed 3 megabytes in size. If the workbook exceeds 3 megabytes in size, all check boxes in the **Opt In** tab are disabled.

In the example below, two sheets that contain unsupported grid layouts are not selected for refresh:

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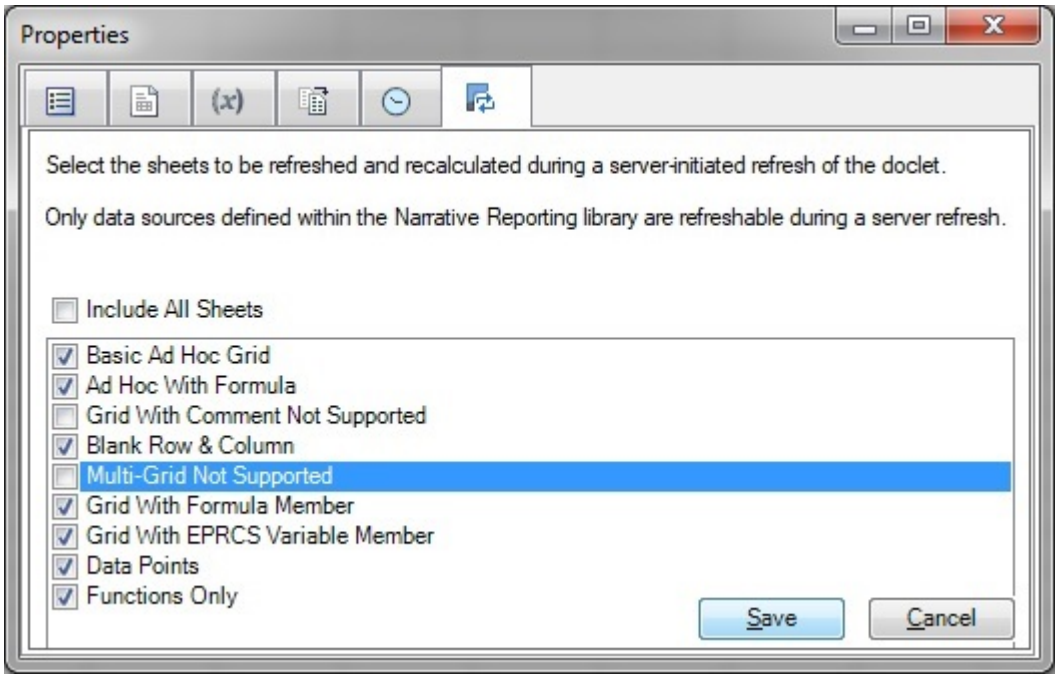
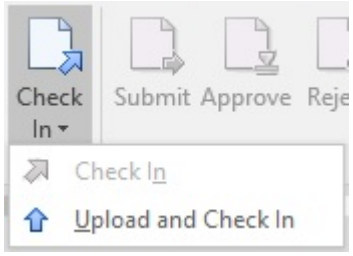
Figure 24-62 Example Opt In Tab with Specific Sheets Selected for Server-Initiated Refresh



6. In the **Properties** dialog, click **Save**.
7. Upload and check in the doclet by selecting **Check In**, and then **Upload and Check In**.



The sheets you selected are now available for refresh the next time you access the report package in the Narrative Reporting web interface.

8. Repeat this procedure for any other applicable Excel doclets or Excel reference doclets in your report package.
9. To perform the server-initiated refresh on the selected doclets and sheets, go to the Narrative Reporting web interface.

   Use the **Refresh** options on the **Actions** menu to choose whether to refresh all selected doclets, or choose to refresh doclets from a selected data source. See Initiating Refresh from Narrative Reporting Web for more information.

Initiating Refresh from Narrative Reporting Web

To refresh Excel-based doclets and reference doclets from the Narrative Reporting web interface:

1. Open the report package in the Narrative Reporting web interface.

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> **Note**
>
> For instructions on accessing report packages in the Library, see Using the Library.

2. From the top right

menu, select **Refresh**, and then select **All** or select a data source from the drop-down list.

   You can also refresh individual Excel-based doclets and reference doclet in Narrative Reporting.

   Select an Excel-based doclet or reference doclet, click the arrow for the doclet, then select **Refresh**, and then select **All** or select a data source from the drop-down list.

Guidelines for Working with Server-Initiated Refresh

Related Topics

- Enabling Server-Initiated Refresh
- Requirements
- Data Sources
- Workbook Size Limit
- Workbook Layout
- Grid Design Considerations and Guidelines
- Supported and Unsupported Grid Types
- Workbook Use Case Scenarios

Enabling Server-Initiated Refresh

Server-initiated refresh is enabled in the Narrative Reporting web application by default.

Requirements

To use the server-initiated refresh feature, currently supported versions of the following components are required:

- Oracle Smart View for Office
- Narrative Reporting extension for Smart View
- Oracle Fusion Cloud Enterprise Performance Management

Once enabled, the server-initiated refresh options appear in the Narrative Reporting web interface. In Smart View, once connected to the enabled service, the **Opt In** tab is available in the **Properties** dialog, where you specify sheets to refresh.

Data Sources

Administrators set up data sources in the **Data Sources** folder in Narrative Reporting. See Creating and Editing Data Source Connections.

Workbook Size Limit

The Excel doclet or reference doclet workbook must not exceed 3 megabytes in size. If the workbook exceeds 3 megabytes in size, all check boxes in the **Opt In** tab of **Properties** dialog are disabled.

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Workbook Layout

When a workbook is refreshed, the service will process the worksheets in a sequential order. The initial pass will perform a data refresh on all selected worksheets within the workbook—Sheet1, Sheet2, Sheet3 (working left to right). A secondary pass will perform a recalculation on the selected sheets.

Grid Design Considerations and Guidelines

In order for server side refresh to work properly, certain considerations need to be designed in to your workbook. You may need to redesign or rebuild to fit these considerations.

Keep in mind the following considerations and guidelines when designing your grids:

- Lay out worksheet elements as follows:
  - Data query (ad hoc grid or form) is at the top of the sheet.
  - Formulas, functions, and comment cells are placed below the data query area, unless member or data cells that are part of the query reference a formula or function.
- The server-initiated refresh only recalculates and refreshes sheets containing Smart View content from the supported Cloud EPM sources.

  From the Narrative Reporting web, you will not be able to select on-premises data sources for refresh, even if you selected an on-premises sheet in Smart View. On-premises data source content and non-Smart View content will be skipped.
- Report package variables may be inserted into the query POV directly or through a formula that references a cell location in the same sheet or in a different sheet within the workbook.
- HsGetValue functions, function grids, and dynamic data points must be created using Smart View 11.1.2.5.900 or later and refreshed once to save the connection information. Otherwise, the server-initiated refresh will not be able to evaluate the functions, function grids, or data points and a #No Connection message will be returned.

  If you're not using Smart View version 11.1.2.5.900 or later, then HsGetValue functions, function grids, and dynamic data points should not be included on selected sheet.
- If you plan to use HsGetValue functions with cell references that point to a connection name with server-initiated refresh, see Example with Cell Reference to Data Source Connection in HsGetValue.

Grid Design Limitations

Keep in mind the following limitations when designing your grids:

- Do not include external formula references on sheets selected for refresh.

  For example, do not include references to formulas in other network or local locations.
- VBA functions are not executed.
- User-defined macros are not executed.
- When a refresh is initiated, cell styles defined in the workbook are preserved.

  During server-initiated refresh, only the latest data values are refreshed. Existing Smart View cell styles are preserved, and no cell styles modifications are made during the server-initiated refresh.

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Supported and Unsupported Grid Types

This section contains descriptions and illustrations of supported and unsupported grid types. Consider the supported grid types when designing grids in your reference doclets.

Basic Ad Hoc Grid

In the example below, the sheet contains only a basic ad hoc grid. There are no formulas, functions, pasted data points, referenced cells, or other Smart View or Excel elements on the sheet.

Supported by: Cloud EPM, Narrative Reporting

	A	B	C	D	E	F
1		Years	Scenarios	Entities	Total Segments	Currencies
2		Income Statement	Balance Sheet	Statistics	Accounts	
3	Quarter1	33834533.78	-0.06	#Missing	33834533.78	
4	Quarter2	24743297.74	-0.03	#Missing	24743297.74	
5	Quarter3	3063752.89	#Missing	#Missing	3063752.89	
6	Quarter4	#Missing	#Missing	#Missing	#Missing	
7	Fiscal Calendar	61641584.41	#Missing	#Missing	61641584.41	

Ad Hoc Grid with Formula

You can place formula cell outside of the grid. In the example below, cell B9 contains a formula.

Supported by: Cloud EPM, Narrative Reporting

B9 =SUM(B3:B7)

	A	B	C	D	E	F
1		Years	Scenarios	Entities	Total Segments	Currencies
2		Income Statement	Balance Sheet	Statistics	Accounts	
3	Quarter1	33834533.78	-0.06	#Missing	33834533.78	
4	Quarter2	24743297.74	-0.03	#Missing	24743297.74	
5	Quarter3	3063752.89	#Missing	#Missing	3063752.89	
6	Quarter4	#Missing	#Missing	#Missing	#Missing	
7	Fiscal Calendar	61641584.41	#Missing	#Missing	61641584.41	
8						
9		123283168.83				

Ad Hoc Grid with Comment

You can place text comments in cells outside of the grid. In the example below, cell A9 contains a formula.

Supported by: Cloud EPM

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	A	B	C	D	E	F
1		Years	Scenarios	Entities	Total Segments	Currencies
2		Income Statement	Balance Sheet	Statistics	Accounts	
3	Quarter1	33834533.78	-0.06	#Missing	33834533.78	
4	Quarter2	24743297.74	-0.03	#Missing	24743297.74	
5	Quarter3	3063752.89	#Missing	#Missing	3063752.89	
6	Quarter4	#Missing	#Missing	#Missing	#Missing	
7	Fiscal Calendar	61641584.41	#Missing	#Missing	61641584.41	
8						
9	Comment					

Ad Hoc Grid with Blank Rows and Columns

You may use blank rows and columns with a grid.

Supported by: Cloud EPM, Narrative Reporting

	A	B	C	D	E	F	G	H	I
1					Years	Scenarios			
2					Income Statement	Balance Sheet		Statistics	Accounts
3	Currencies	Total Segments	Entities	Quarter1					
4	Currencies	Total Segments	Entities	Quarter2					
5									
6	Currencies	Total Segments	Entities	Quarter3					
7	Currencies	Total Segments	Entities	Quarter4					
8	Currencies	Total Segments	Entities	Fiscal Calendar					

Multiple Ad Hoc-Grids on a Single Sheet

The multiple ad hoc grids on a single sheet scenario is not supported.

	A	B	C	D	E	F	G
1			Year				
2			Period				
3	Account	Entity	#Missing				
4							
5							
6							
7							FY15
8							Period
9					Account	Entity	

Grid with Referenced Member

This grid contains a member (cell A4) referenced as a formula from another sheet.

Supported by: Cloud EPM, Narrative Reporting

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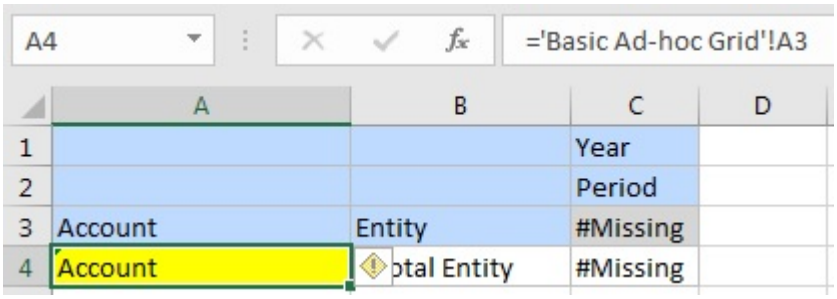
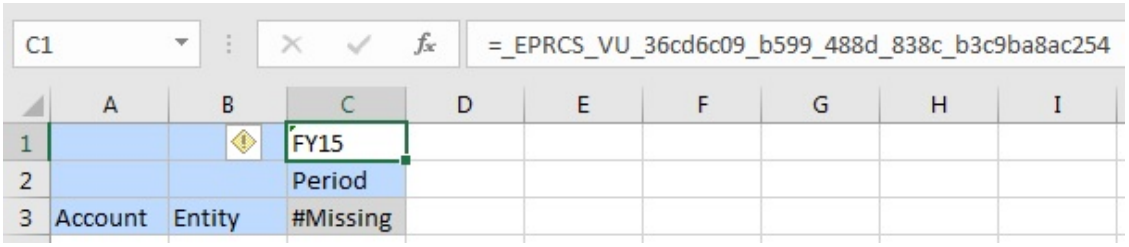


Grid with Members Referenced as Narrative Reporting Variable

This grid, based on a Cloud EPM data source, contains a member (cell C1) referenced as a Narrative Reporting variable.

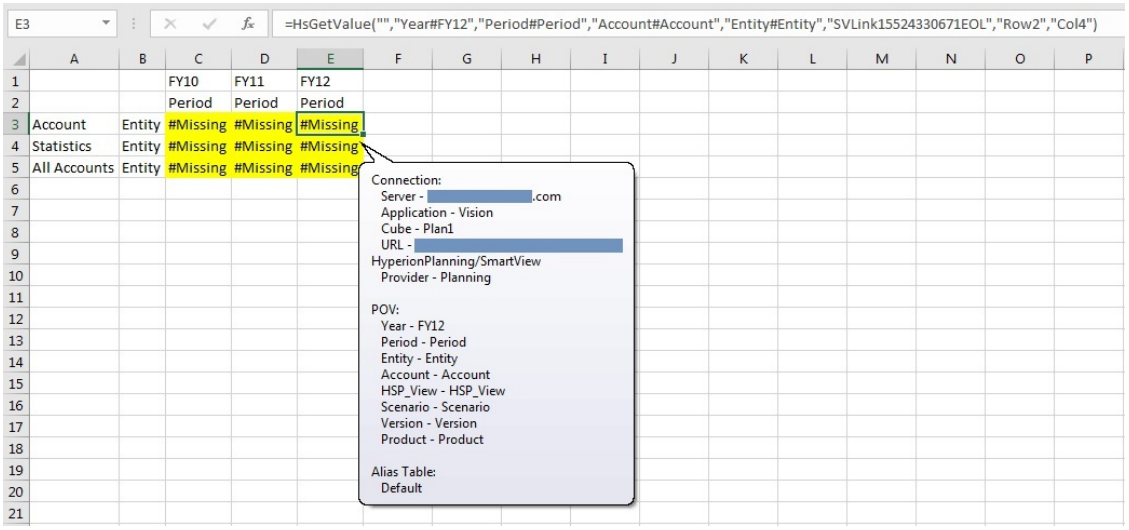
Supported by: Cloud EPM, Narrative Reporting



Grid Containing Pasted Data Points

This grid, based on a Cloud EPM data source, contains a cell range (cells C3 to E5) consisting of pasted data points. The data points can be copied from another sheet within the same workbook or from a different workbook. The data source for the data points could be based on the same data source as the original sheet, or a different data source.

Supported by: Cloud EPM, Narrative Reporting



Function-Only Grid

This grid contains two functions, both based on a Cloud EPM data source. Sheets may contain functions based on different support data sources.

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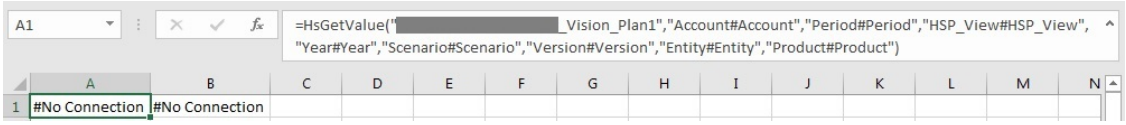
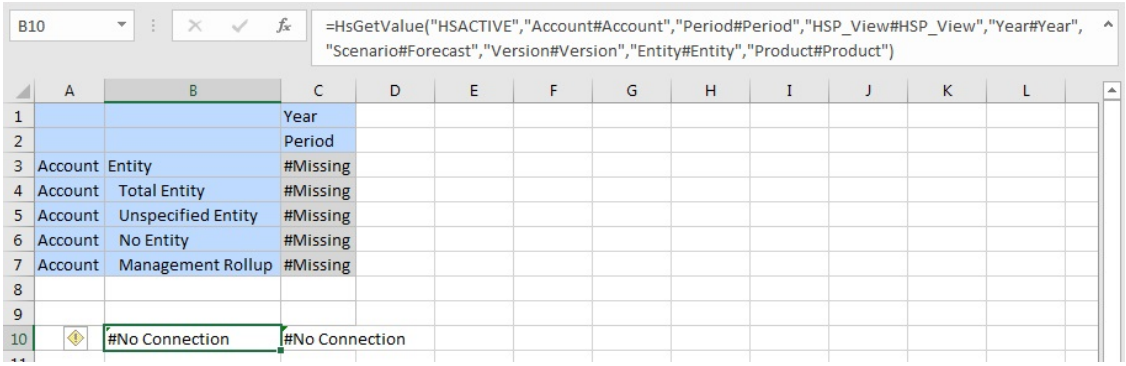
Supported by: Cloud EPM, Narrative Reporting



Ad Hoc Grid with Functions

This grid, based on a Cloud EPM data source, contains two functions, also based on the current Cloud EPM data source. Notice that the two functions are placed below the grid.

Supported by: Cloud EPM, Narrative Reporting



Form-only Sheet

Supported by: Cloud EPM

	A	B	C	D	E
1		Q1	Q2	Q3	Q4
11	+Current Assets	535037857	557236631	588280659	625485092
30	+Fixed Assets	53928601	49644739	45371662	41234259
34	+Other Assets Total	223088151	223088151	223088151	223088151
35	Total Assets	812054610	829969521	856740473	889807502
41	+Current Liabilities	335095303	336221789	337455964	345206032
43	+Long Term Liabiities	43770	43770	43770	43770
44	Total Owners Equity	476915537	493703962	519240738	544557701
45	Total Liabilities and Owners Equity	812054610	829969521	856740473	889807502

Form with Comment and Formula Cells

This grid, based on a Cloud EPM data source, contains both comment cells and formula cells in row 5. Notice that the comment cell and formula cells are placed below the form. Sheets containing a form may contain either comment cells, formula cells, or both.

Supported by: Cloud EPM

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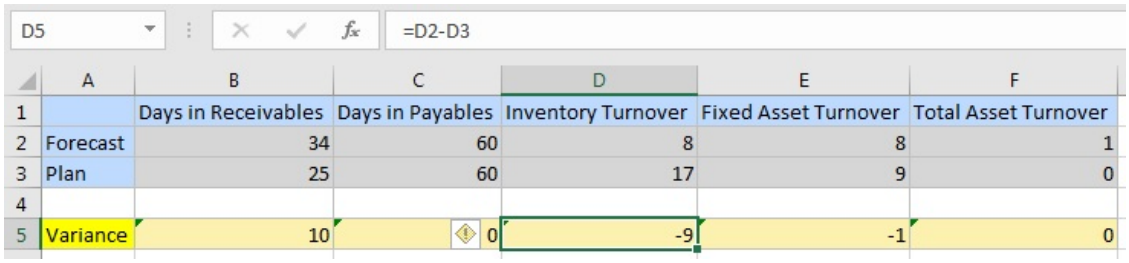
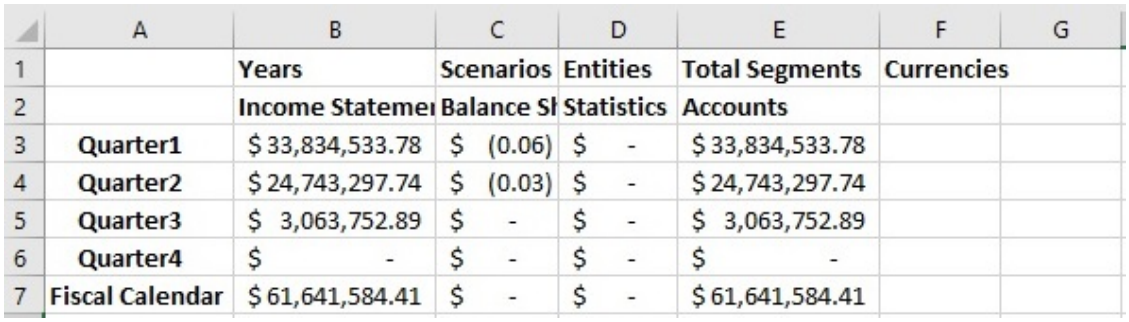


D5 =D2-D3

	A	B	C	D	E	F
1		Days in Receivables	Days in Payables	Inventory Turnover	Fixed Asset Turnover	Total Asset Turnover
2	Forecast	34	60	8	8	1
3	Plan	25	60	17	9	0
4						
5	Variance	10	0	-9	-1	0

Formatted Ad Hoc Grid

Supported by: Cloud EPM, Narrative Reporting



	A	B	C	D	E	F	G
1		Years	Scenarios	Entities	Total Segments	Currencies	
2		Income Statemer	Balance Sl	Statistics	Accounts		
3	Quarter1	$ 33,834,533.78	$ (0.06)	$ -	$ 33,834,533.78		
4	Quarter2	$ 24,743,297.74	$ (0.03)	$ -	$ 24,743,297.74		
5	Quarter3	$ 3,063,752.89	$ -	$ -	$ 3,063,752.89		
6	Quarter4	$ -	$ -	$ -	$ -		
7	Fiscal Calendar	$ 61,641,584.41	$ -	$ -	$ 61,641,584.41		

Workbook Use Case Scenarios

In this section, we'll show you example use case scenarios based on a reference doclet workbook. The workbook contains five sheets, with each sheet containing a data query from a different data source. Data sources are both cloud and on-premises. The scenarios show you the outcome of different combinations of sheet selection when performing a refresh from the Narrative Reporting web application.

The example workbook in the following use case scenarios contains the following sheets:

- Sheet 1: Planning data query
- Sheet 2: Narrative Reporting data query
- Sheet 3: Oracle Hyperion Financial Management data query (on-premises data source)
- Sheet 4: No data query
- Sheet 5: Planning data query

Scenario 1—No sheets are selected for server-initiated refresh and recalculation

Upon inspection of the workbook, there should not be any data sources shown as refreshable as nothing has been selected.

From the server side, this is a non-refreshable doclet.

Scenario 2—Only Sheet 1 is selected

Upon inspection of the workbook, the only refreshable data source is Planning.

From the server side, only Planning is shown as a refreshable data source.

Upon refresh, only Sheet 1 will be refreshed and recalculated. Sheet 5, which is also a Planning sheet, would not be refreshed or recalculated.

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Scenario 3—Sheets 1 and 2 are selected

Upon inspection of the workbook, the refreshable data sources are Planning and Narrative Reporting.

From the server side, both Planning and Narrative Reporting are shown as refreshable data sources.

Upon refresh, only Sheets 1 and 2 are refreshed and recalculated. Sheet 5 which is also a Planning sheet, is not refreshed or recalculated.

Scenario 4—Sheets 1, 2, and 3 are selected

Upon inspection of the workbook, the refreshable data sources are Planning and Narrative Reporting.

From the server side, both Planning and Narrative Reporting are as refreshable data sources.

Upon refresh, Sheets 1 and 2 are refreshed and recalculated. Sheet 3 is recalculated but the Financial Management query is not impacted. Sheet 5, which is also a Planning sheet, was not selected so it is not refreshed or recalculated.

Scenario 5—Sheet 1, 2, 3, and 4 are selected

Upon inspection of the workbook, the refreshable data sources are Planning and Narrative Reporting.

From the server side, both Planning and Narrative Reporting are shown as a refreshable data sources.

Upon refresh, Sheets 1 and 2 are refreshed and recalculated. Sheet 3 will be recalculated but the Financial Management query is not impacted. Sheet 4 is recalculated. Sheet 5, which is also a Planning sheet, is not refreshed or recalculated.

Scenario 6—All sheets selected

Upon inspection of the workbook, the refreshable data sources are Planning and Narrative Reporting.

From the server side, both Planning and Narrative Reporting are shown as refreshable data sources.

Upon refresh, Sheets 1, 2, and 5 are refreshed and recalculated. Sheet 3 is recalculated but the Financial Management query is not impacted. Sheet 4 is recalculated.

Scenario 7 – Sheets 3 and/or 4 are selected

Upon inspection of the workbook, there should not be any refreshable data sources returned to the server as the selected sheets do not contain any refreshable data sources.

From the server side, this is a non-refreshable doclet.

Inserting Links and Cross-References to Pages in Doclets

Use Microsoft Word bookmarks to link to and cross-reference page numbers in your doclet. You can cross-reference bookmarks as page numbers in a table of contents doclet, whether you inserted the cross-references manually or inserted a manual table of contents and edited the cross-references. If the page number containing the bookmark changes, then the page number cross-references also change.

This topic describes inserting the bookmarks and then the cross-references. The procedures can also be used to edit a manual table contents.

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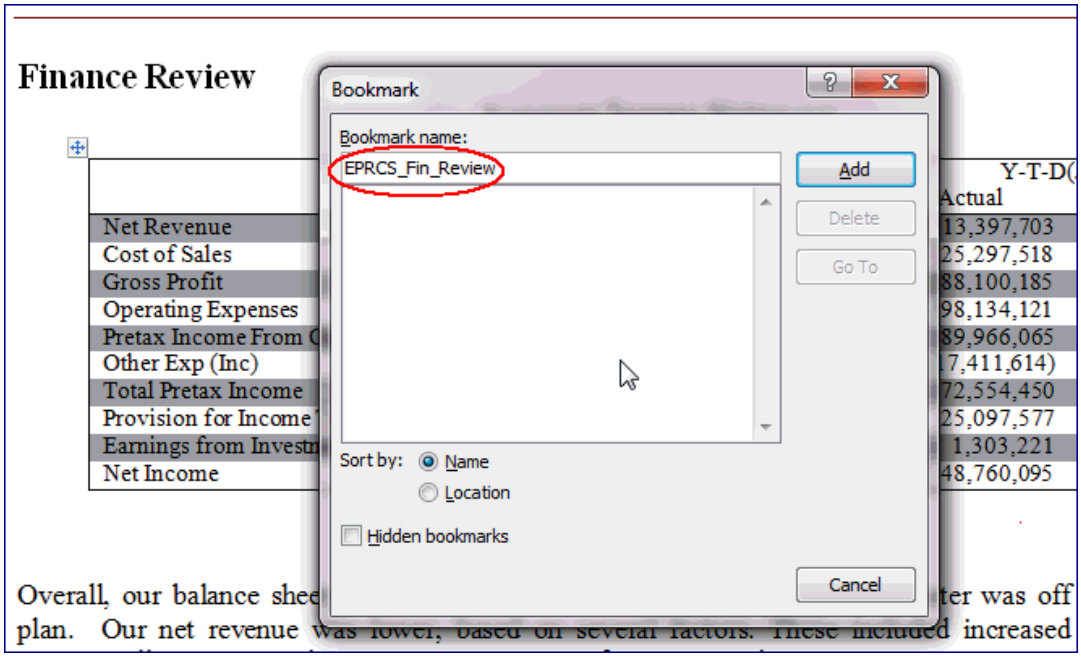
Inserting Bookmarks

Before you add a cross-reference or a link, you must insert a bookmark at the location that you want to link to.

To insert a bookmark:

1. In a Word document, place your cursor at the location of the bookmark.
2. In the **Insert** ribbon, select

.
3. In **Bookmark Name**, enter EPRCS_ and a bookmark identifier. For example, EPRCS_Fin_Review.



4. Click **Add**.

   The bookmark is created.

Inserting Page Number Cross-References or Links in Doclets

After you create the target bookmark, you can insert a page number cross-reference or a link to that bookmark in the document that you want to link from.

To insert page number cross-references:

1. In the document to link from, place the cursor where you want the cross-reference. In this example, we will add a page number cross-reference in the table of contents.

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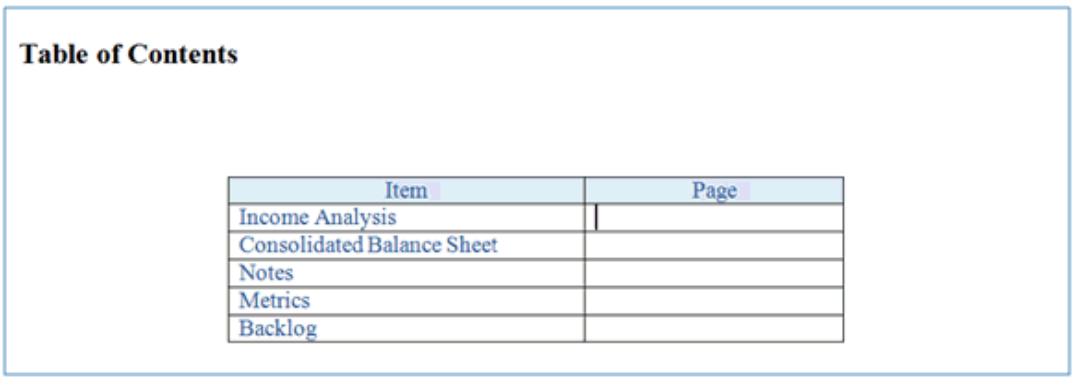
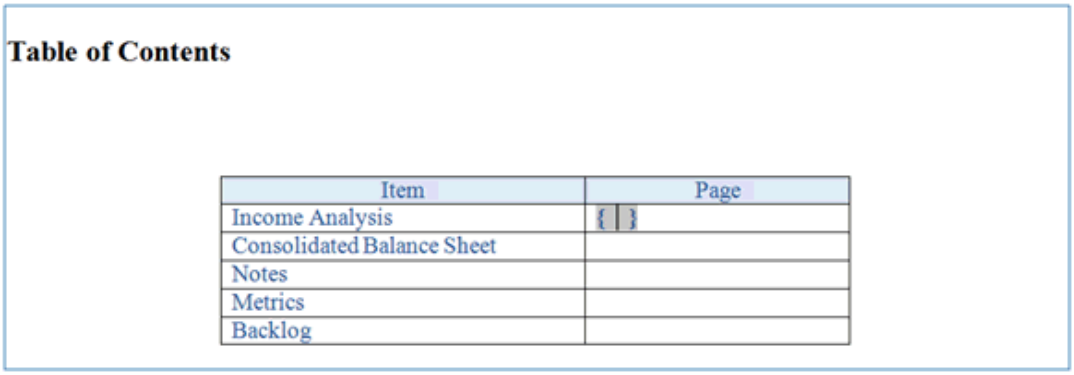
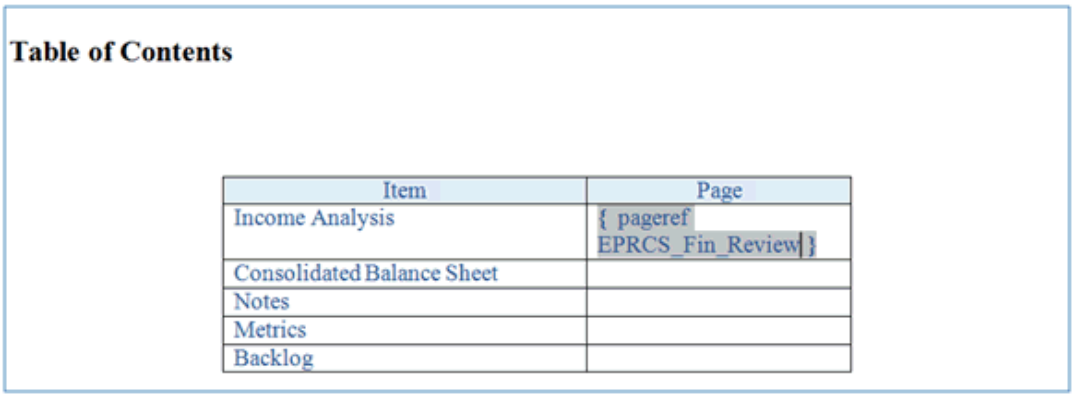


2. Press **Ctrl+F9** to insert field brackets. Ensure that the insertion point stays between the brackets.



3. Enter pageref, followed by a space and then the bookmark name. For example, pageref EPRCS_Fin_Review.



4. Upload and check the source and target doclets back into the report package.
5. On the **Preview** tab, select **Actions**, and then **Download Preview** to see the page cross-reference.
6. In the downloaded report package preview in Word, you must refresh the page reference field to reflect the page number.

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> **Note**
>
> Word may display 'Error! Bookmark not defined'.

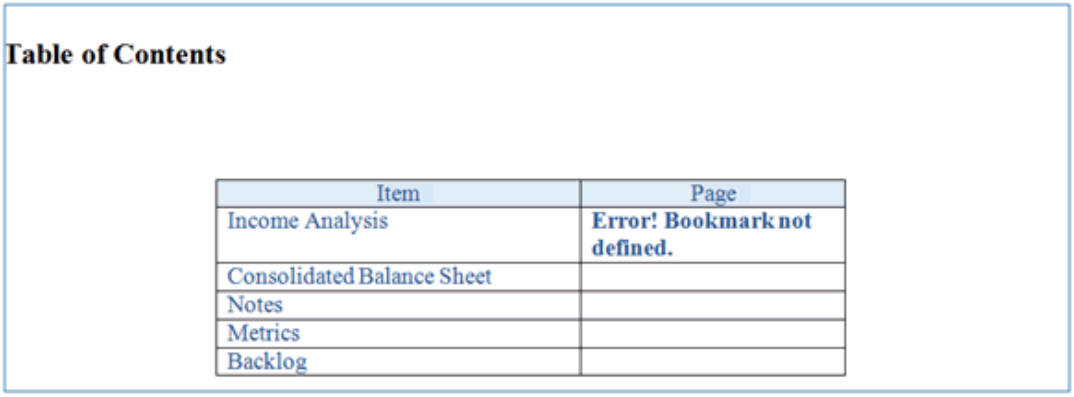

Table of Contents

Item	Page
Income Analysis	**Error! Bookmark not defined.**
Consolidated Balance Sheet	
Notes	
Metrics	
Backlog	

7. Press **F9** to refresh the field information.

> **Note**
>
> The field is updated to reflect the page number in the report package where you inserted the bookmark in the doclet.

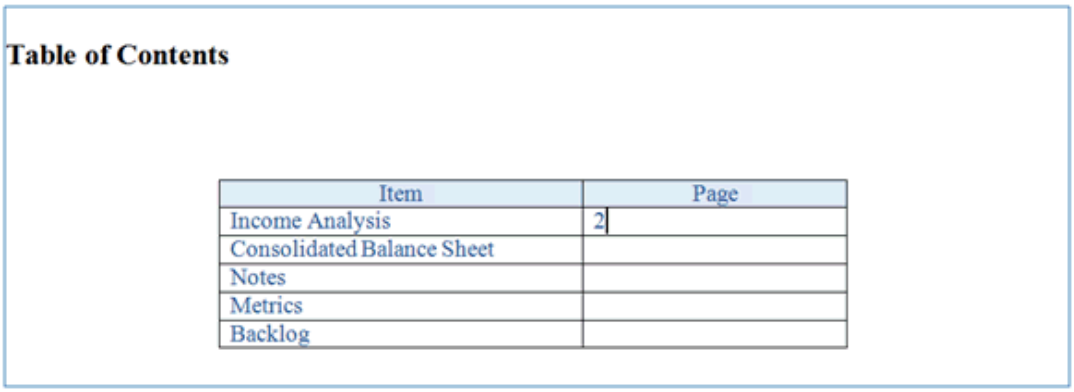

Table of Contents

Item	Page
Income Analysis	2
Consolidated Balance Sheet	
Notes	
Metrics	
Backlog	

To insert links:

1. Highlight the text to add the link to, and then right-click and select **Hyperlink**.

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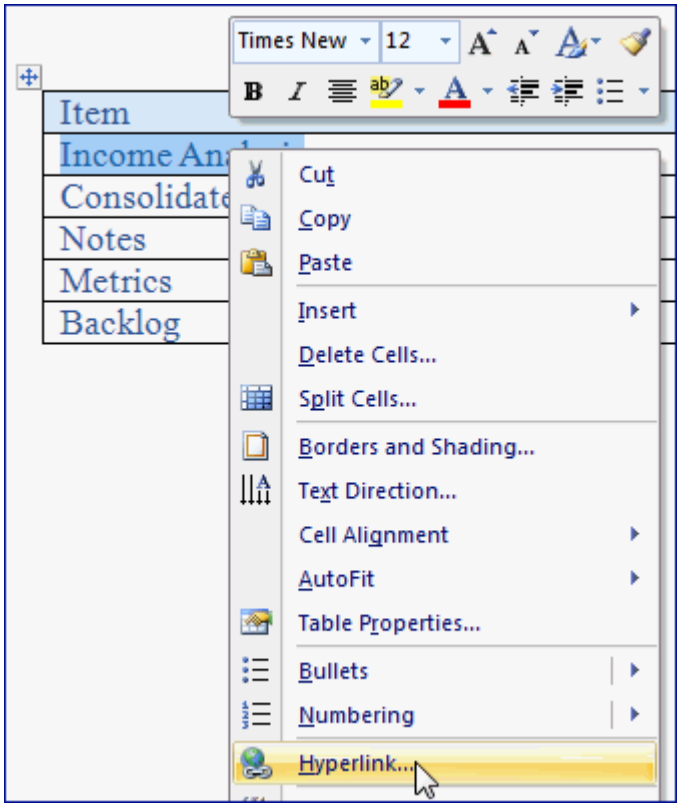
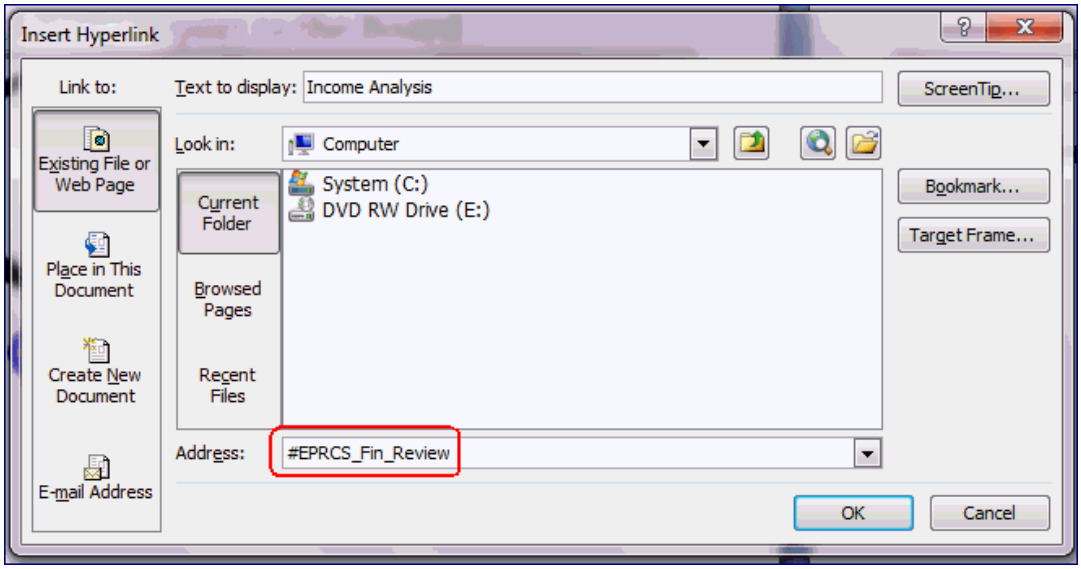


2. In the **Insert Hyperlink** dialog box, for **Address**, enter #, followed by the bookmark name. For example, #EPRCS_Fin_Review.



3. The link is added to the text that you selected. In this example, the link was added to the **Income Analysis** text.

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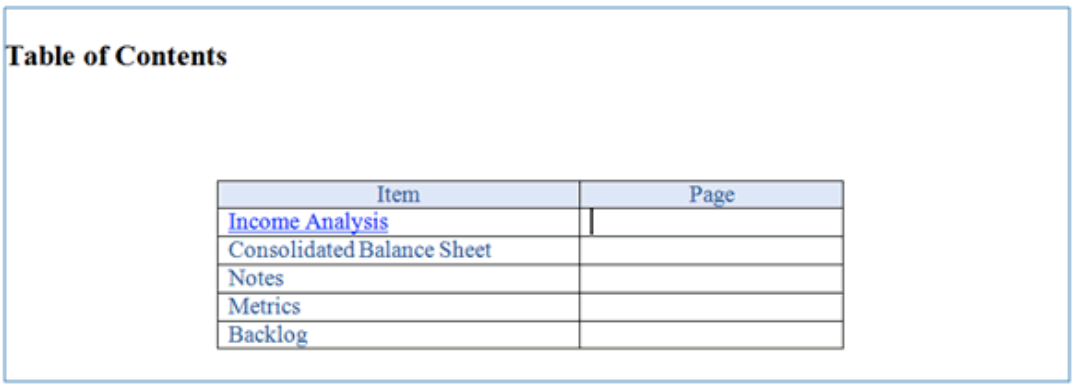
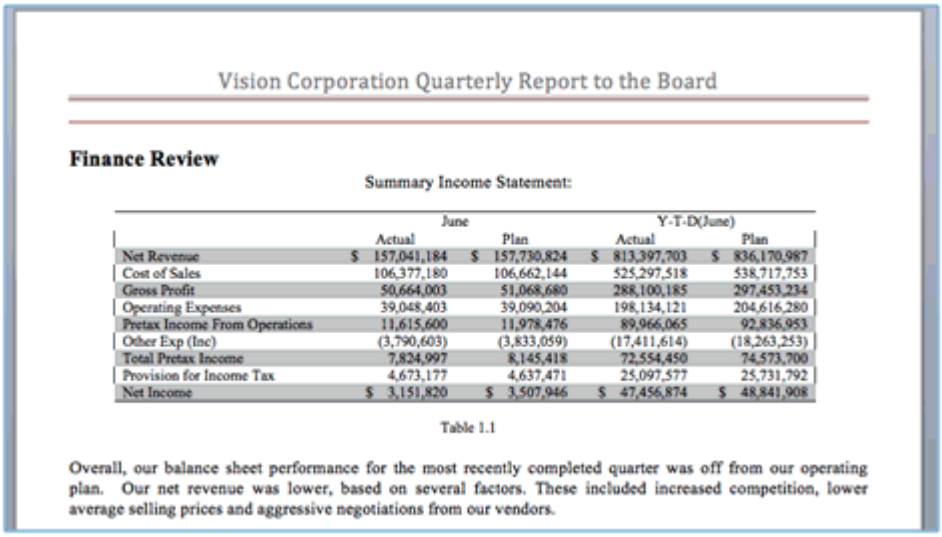


Table of Contents

Item	Page
Income Analysis	
Consolidated Balance Sheet	
Notes	
Metrics	
Backlog	

4. Upload and check the doclet back into the report package.
5. On the **Preview** tab, select **Actions**, and then **Download Preview** to see the link.
6. Click the link to navigate to the bookmark location.



Vision Corporation Quarterly Report to the Board

Finance Review

Summary Income Statement:

	June		Y-T-D(June)	
	Actual	Plan	Actual	Plan
Net Revenue	$ 157,041,184	$ 157,730,824	$ 813,397,703	$ 836,170,987
Cost of Sales	106,377,180	106,662,144	525,297,518	538,717,753
Gross Profit	50,664,003	51,068,680	288,100,185	297,453,234
Operating Expenses	39,048,403	39,090,204	198,134,121	204,616,280
Pretax Income From Operations	11,615,600	11,978,476	89,966,065	92,836,953
Other Exp (Inc)	(3,790,603)	(3,833,059)	(17,411,614)	(18,263,253)
Total Pretax Income	7,824,997	8,145,418	72,554,450	74,573,700
Provision for Income Tax	4,673,177	4,637,471	25,097,577	25,731,792
Net Income	$ 3,151,820	$ 3,507,946	$ 47,456,874	$ 48,841,908

Table 1.1

Overall, our balance sheet performance for the most recently completed quarter was off from our operating plan. Our net revenue was lower, based on several factors. These included increased competition, lower average selling prices and aggressive negotiations from our vendors.

Working with an Automatic Table of Contents

When you insert a Microsoft Word table of contents into a doclet, you can choose either a manual, automatic, or custom type. For manual types, you can create page number links by using links and cross-references or by inserting a manual table of contents (see Inserting Links and Cross-References to Pages in Doclets). For automatic or custom types, the table of contents is updated whenever the doclet is merged into the report package. For example, preview the report package or the section that contains the table of contents to view the dynamically updated table of contents.

> **Note**
>
> If you preview only the doclet that contains the table of contents, no entries are displayed in the table. You must preview the report package or the section that contains the doclet to see the updated table of contents.

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> **Note**
>
> Automatic and custom tables of contents are available for Microsoft Word report packages only.

Approving or Rejecting Doclets

This topic applies to Office-based doclets of all types—regular, reference, and supplemental. Unless otherwise noted, the term *doclets* refers to all Office-based doclet types.

As approver, you review and approve doclets after the author submits them. You also have access to the same functionality as the author, including:

- Check Out
- Upload
- Check In
- Inspect

See:

- Approving Doclets
- Rejecting Doclets

Videos

Your Goal	Watch This Video
Learn about approving and rejecting doclets in Word-based report packages.	Authoring and Approving Microsoft Word-Based Doclets in Smart View
Learn about approving and rejecting doclets in PowerPoint-based report packages.	Authoring and Approving Microsoft PowerPoint-Based Doclets in Smart View

Approving Doclets

This topic applies to Office-based doclets of all types—regular, reference, and supplemental. Unless otherwise noted, the term *doclets* refers to all Office-based doclet types.

As approver, if you are satisfied that the doclet is correct, you approve it to complete it. If multiple approvals are required, you, as approver, submit the doclet for further approvals. After approval, authors can no longer check out the doclet, although they can still download and inspect it.

To approve a doclet, reference doclet, or Office-based supplemental doclet:

1. If not already open, in the Smart View Panel, navigate to the doclet and double-click it to open it.

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> **Note**
>
> In the Report Center, a green arrow, , signifies doclets that require your attention as approver.

2. In the Narrative Reporting ribbon, click **Approve**.

In the Smart View Panel, the approved doclet appears in the doclet responsibilities list with a green check mark:

If a doclet requires multiple levels of approval, the approved artifact appears in the doclet responsibilities list with the rubber stamp icon:

When a doclet is approved by all approvers, its status is updated to **Approved** in the Narrative Reporting web interface; the green check mark is displayed with the doclet in Oracle Smart View for Office.

Rejecting Doclets

This topic applies to Office-based doclets of all types, including reference and supplemental. Unless otherwise noted, the term *doclets* refers to all Office-based doclet types.

If a doclet is not ready for approval, you can either edit it yourself (check out the doclet, modify it, and check in the corrected version), or you can reject it to send it back to the author to edit.

To reject a doclet, reference doclet, or supplemental doclet:

1. If not already open, in the Smart View Panel, navigate to the doclet and double-click it to open it.
2. In the Narrative Reporting ribbon, click **Reject**.

When a doclet is rejected, its status is updated to **Rejected**, and the responsibility reverts to the author, and notification is sent to the author. If there are multiple approver levels, notification is sent to all approvers within the approval path.

The author must update the content and resubmit it for approval.

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In the Smart View Panel, the rejected doclet appears in the doclet responsibilities list with a red X:

Recalling Doclets

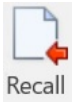
If enabled in the report package, Authors and Approvers may use the **Recall Doclet** button in the Narrative Reporting ribbon to restart the Doclet workflow, allowing them to make modifications to the Doclet content as needed. This action will be available to the Authors and Approvers when the doclet has been marked complete or when the doclet is at a higher level within the approval path; for example, after the doclet has been submitted.

If the **Recall Doclet** setting is not enabled in the report package, the Recall Doclet button does not appear on the Narrative Reporting ribbon. Once an author submitted or an approver approved a doclet, they can no longer update the doclet's contents if additional modifications are needed. The Report Package Owner is required to either reject or restart the Doclet workflow.

Recalling a doclet restarts the authoring process for only the selected doclet. Authors may continue their modifications, and can submit the updated doclet for approval if an approval phase is required.

To recall a doclet:

1. Open the doclet to recall.
2. In the Narrative Reporting ribbon, click the **Recall Doclet** button.

   After you click **Recall Doclet**, the **Submit** button is again enabled.
3. Continue with authoring process for the doclet; for example, check out the doclet, make modifications, upload, check in, and submit for approval, if required.

Inspecting Doclets

This topic applies to Office-based and non-Office-based doclets of all types, including reference and supplemental, and of all supported file formats.

For detailed information on regular doclets, reference doclets, and supplemental doclets, click **Inspect** in the Narrative Reporting ribbon.

The Inspect button launches the **Properties** dialog box.

From the **Properties** dialog box, you can also download previous versions of a doclet, reference doclet-, or Office-based supplemental doclet.

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> **Note**
>
> All steps in the following procedure are optional.

To view information about a regular doclet, linked regular doclet reference doclet, or supplemental doclet:

1. If the report package is not already open, in the Smart View Panel, navigate to the report package and open it.
2. Select a regular doclet, linked regular doclet, reference doclet, or supplemental doclet in the list and click the **Inspect** button in the Narrative Reporting ribbon.
3. In the **Properties** dialog box, view the information the **Properties** tab (the default tab).

   The **Properties** tab displays basic information about the doclet, such as the file name, doclet type, link status, suppression status, and the user who created the doclet.

Figure 24-63 Properties for a Regular Doclet

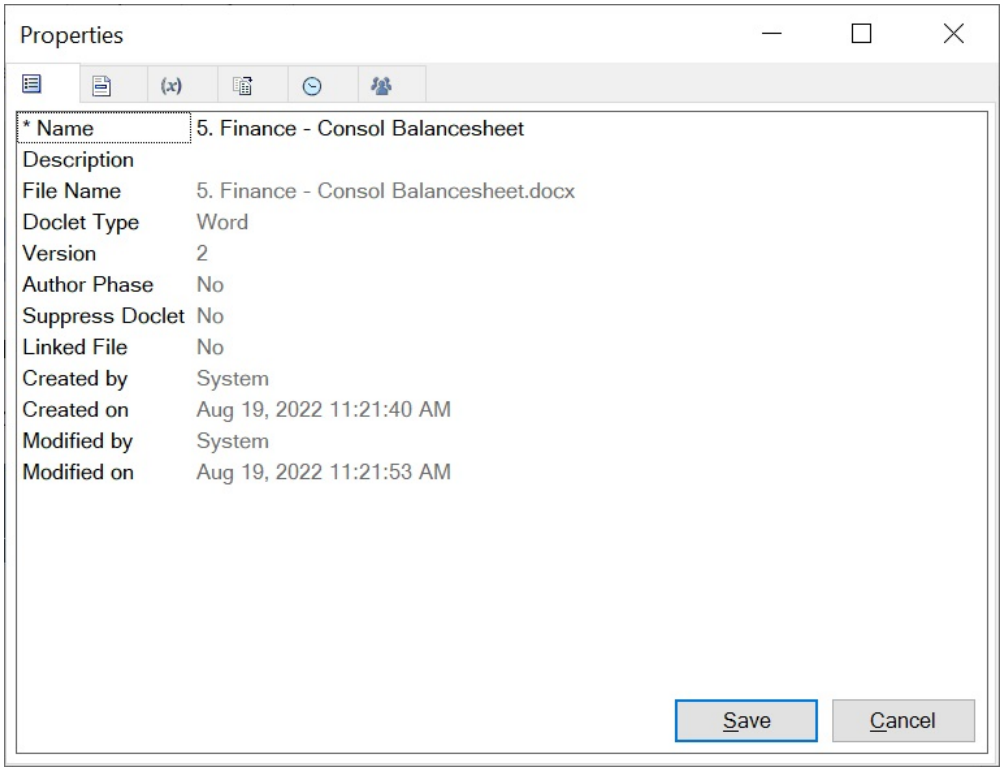

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Figure 24-64 Properties for a Linked Regular Doclet

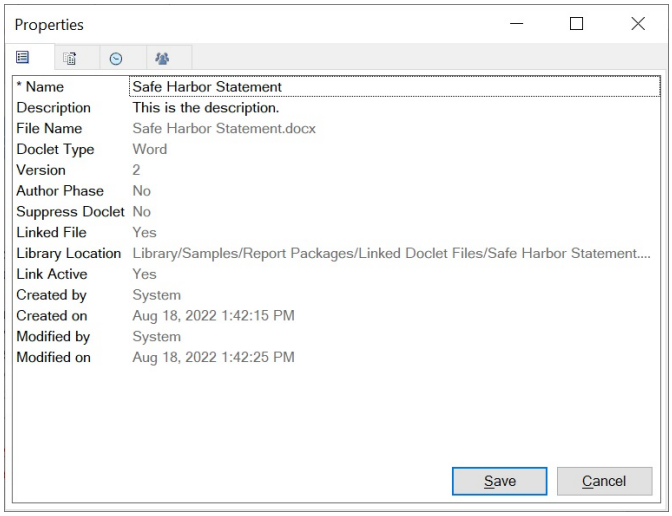

Figure 24-65 Properties for a Reference Doclet

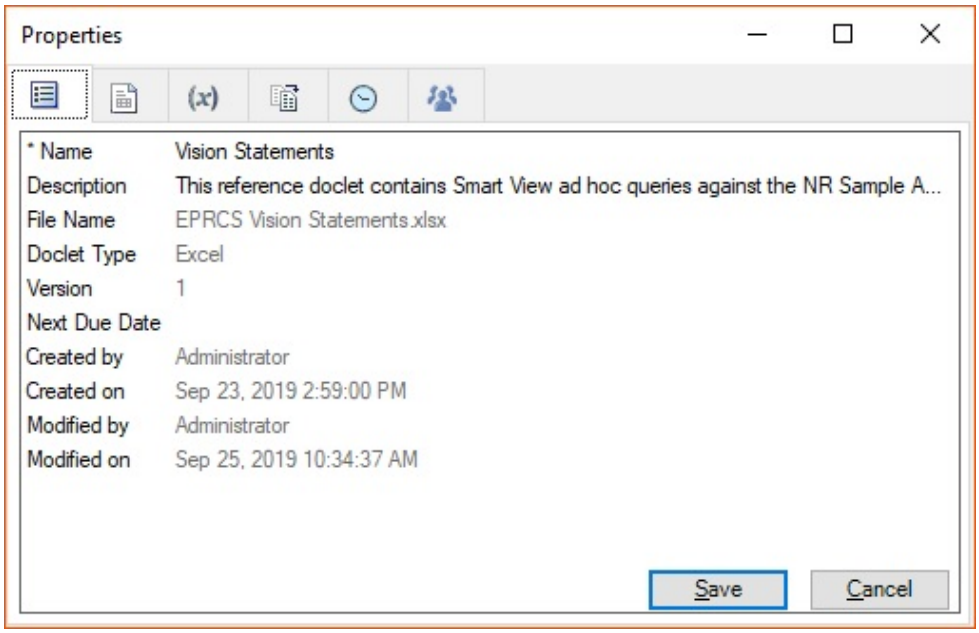

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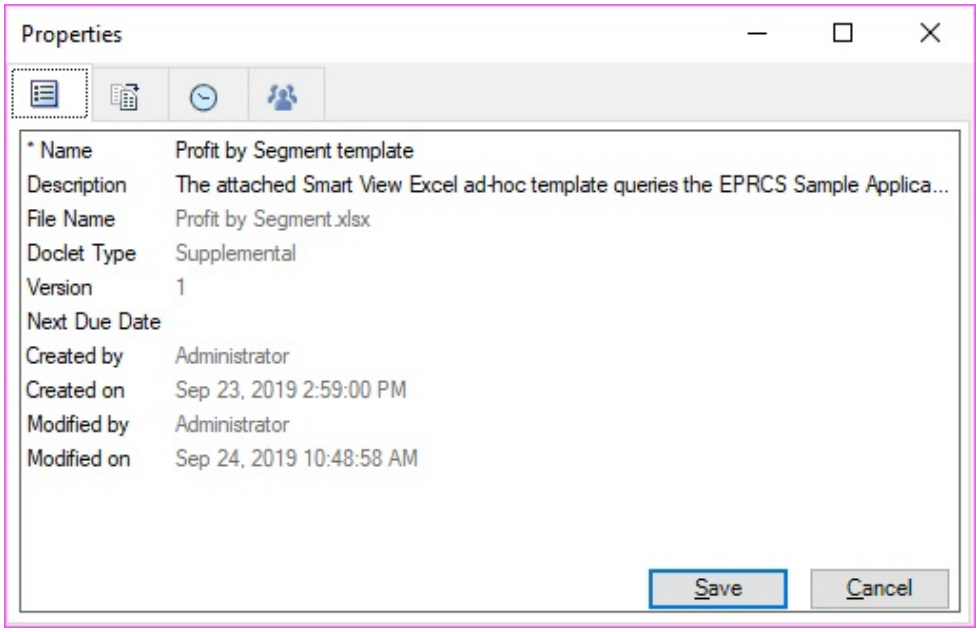
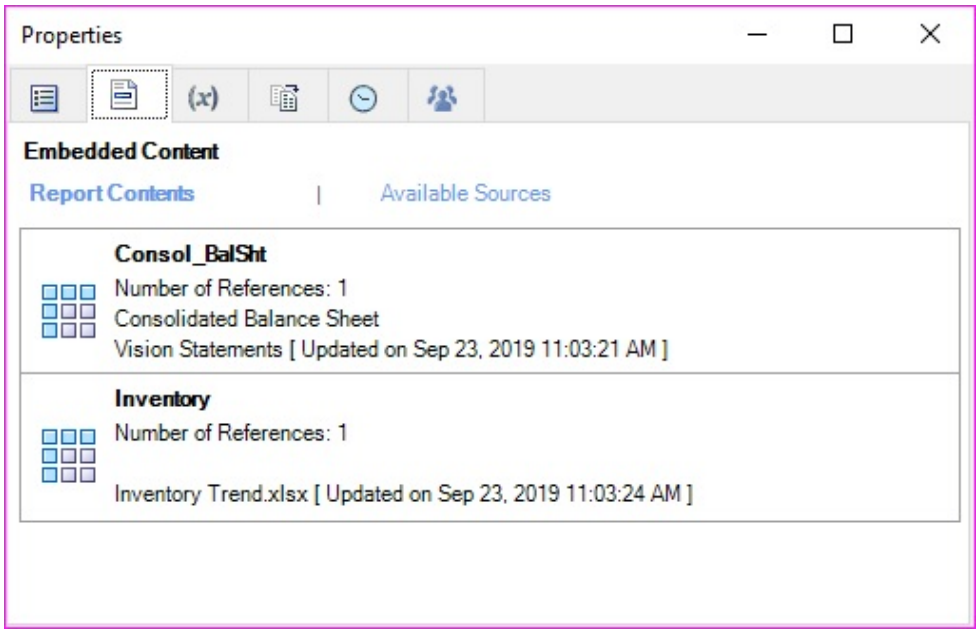
Figure 24-66 Properties for a Supplemental Doclet



4. Click the **Embedded Content** tab, , to view a list of the embedded content that is being used in the doclet.



5. Click the **Version** tab, , to download previous versions of Office-based doclets.

   As new versions of doclets are checked in, the previous versions are stored so that you can download and view them to see what changed.

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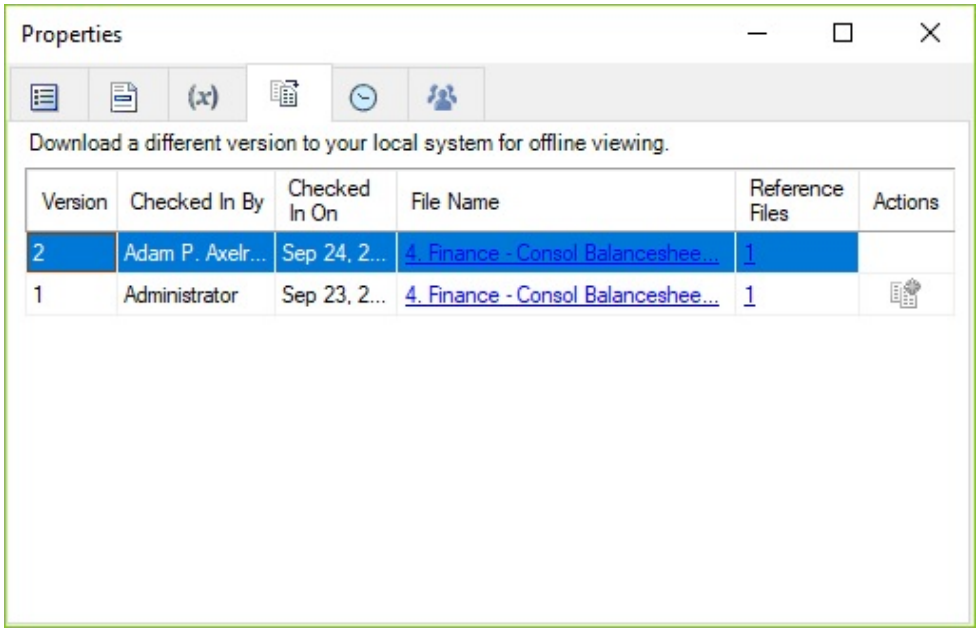
> **Note**
>
> Doclet versioning is optimized to minimize the impact of multiple automated check-ins. When multiple automated check-ins are performed on the doclet due to variable or embedded content changes, the system will update the doclet contents but will not generate a new version.

To download a previous version of a doclet, click the link next to the version that you want to view.



A message notifies you of the location of the downloaded doclet .

You may download any type of doclet; however, only Office-based doclets may have previous versions.

6. Click the **History** tab, , to view audit information about the doclet , such as the user who last updated it (if applicable).

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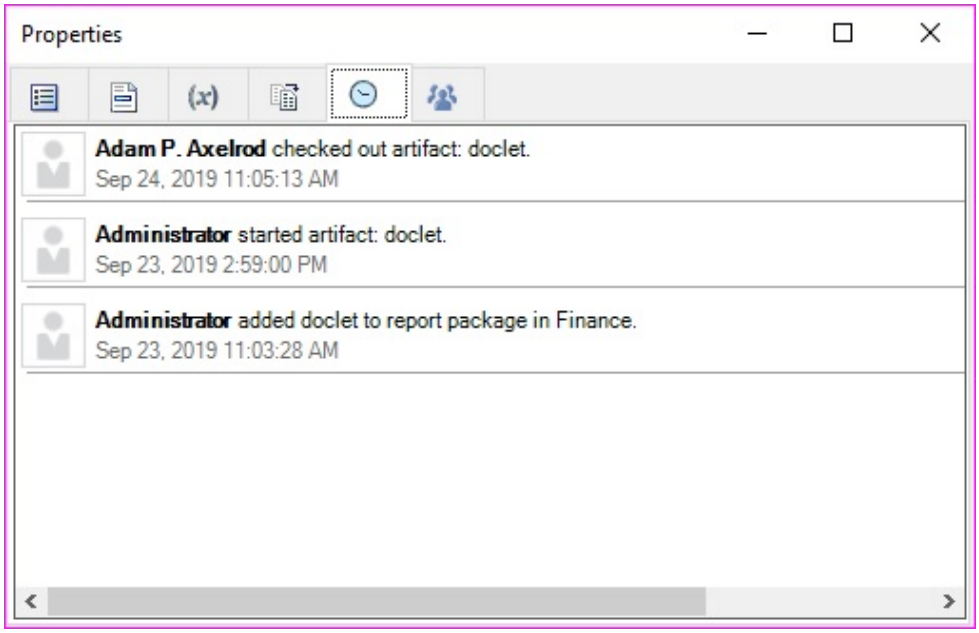
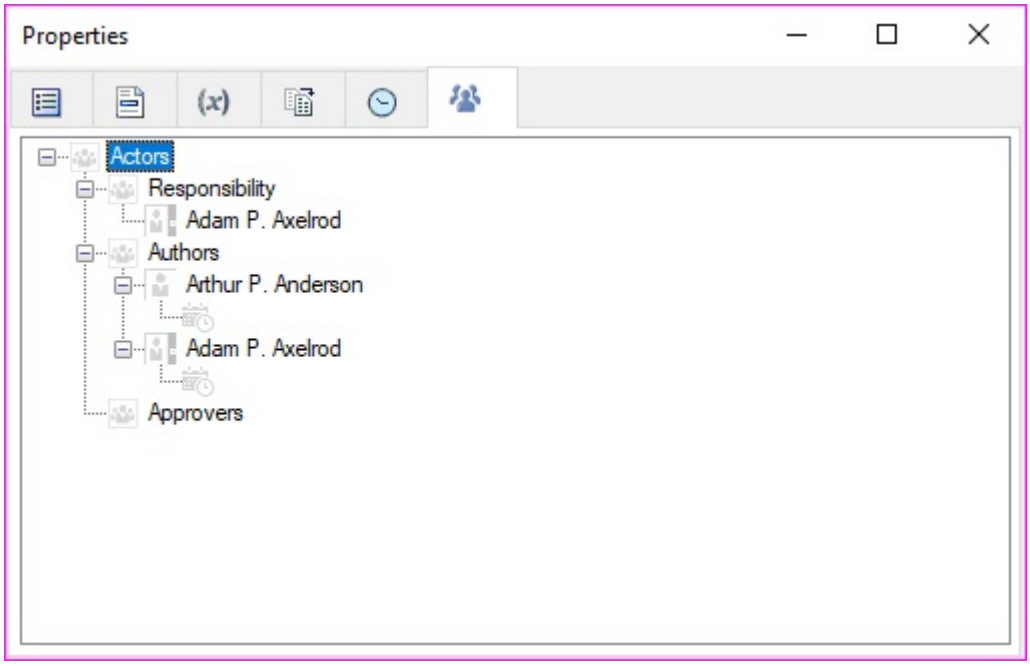


7. Click the **Actors** tab, , to view the actors associated with the doclet.

   The **Responsibility** node shows the user who has currently checked out the doclet. The **Authors** node shows the authors assigned to the doclet. The **Approvers** node shows the assigned approvers.

   In the following illustration, the doclet is currently checked out by Adam P. Axelrod. There are two assigned authors, and there are no assigned approvers.



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Reverting to a Prior Version of a Doclet

When authoring a doclet in a report package and your updates or the outcome is incorrect after previewing the doclet, you can revert back to a prior doclet version.

You can revert doclets, reference doclets, and supplemental doclets to previous versions.

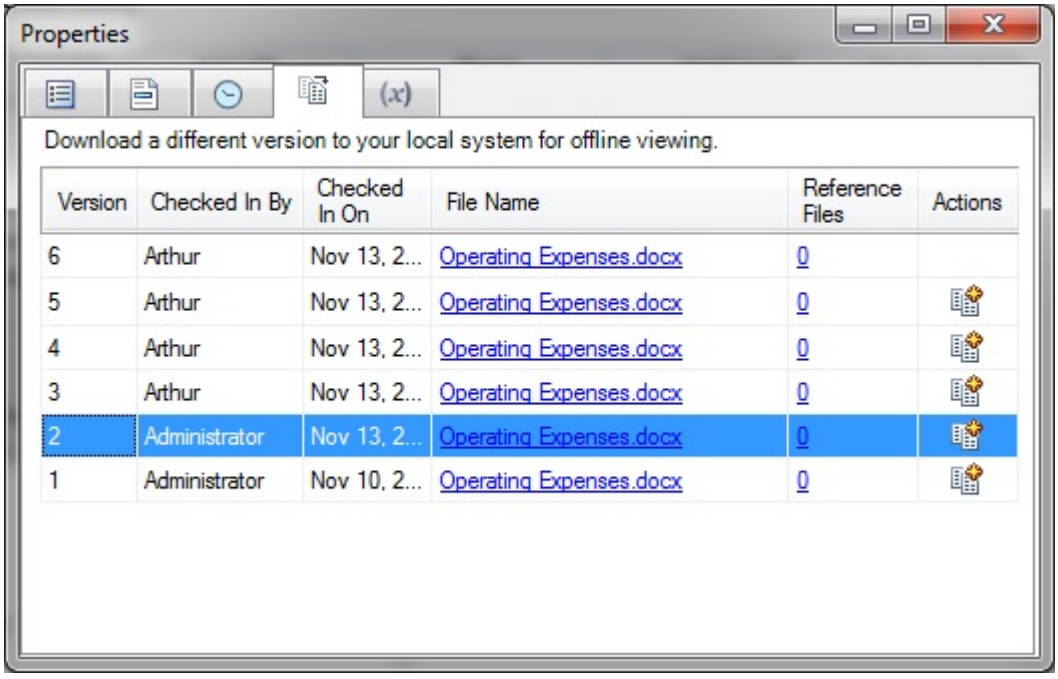
To revert a doclet to a prior version:

1. Open the report package.
2. Open, and then check out the doclet.

   The doclet is opened in the appropriate Office application.
3. Click **Inspect** in the Narrative Reporting ribbon to launch the **Properties** dialog box.

   Alternatively, with the doclet selected in the report package list, select the **View Properties** link in the Action Panel.
4. In the **Properties** dialog, click the **Version** tab, .
5. In the **Version** tab, click for the version of the doclet you want to make current.

   In the following example, we want to make version 2 the current version, so we'll click on the line for version 2.

   A new work-in-progress version of the doclet is created based on the selected doclet file.
6. In the warning prompt, click **Yes** to confirm.

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The report content in the new version is based on the prior version. However, any embedded content or variables contained in the prior version are refreshed to their current values.

> **Note**
>
> If you accessed the **Properties** dialog by selecting the **View Properties** link in the Action Panel, then you must close and reopen the doclet in order to see the reverted version.

7. Review the doclet to verify it is the correct content.
8. Upload and check the doclet back in to the report package to commit the changes to the report.

Performing Reviews

Perform reviews by entering comments and providing your feedback in a review instance in Oracle Smart View for Office.

Related Topics

- About the Review Phase Process
- Working with Review Instances in Smart View

About the Review Phase Process

The review phase enables report stakeholders to review and provide feedback on the content in the report package. Reviewers provide commentary on their assigned areas of the report package. This could be the entire report package or a subset consisting of sections or specific doclets. Reviewers can provide their feedback by using Oracle Smart View for Office to enter, review, and respond to comments.

> **Note**
>
> In Smart View, you can only perform reviews on Microsoft Word- and PowerPoint-based report packages. To perform a review on a PDF-based report package, use Narrative Reporting web.

The review phase process:

1. The report package owner creates the review instance, and then starts the review cycle in the Narrative Reporting web interface.
2. Notification messages are sent to reviewers to begin their work. If the review is iterative, reviewers are notified to begin their work at the start of each iteration.
3. Reviewers view a document called a review instance in Smart View. A review instance includes only the reviewer's assigned content.

   Review instances do not include supplemental doclets of any file type.

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> **Note**
>
> Though reviewers see only their assigned content, all comments are made and retained against the single review instance.

4. Reviewers highlight content and post comments in plain text or in rich text format, which can include links and attachments.
5. Reviewers collaborate by adding to other comments in comment threads.
6. Reviewers mark their reviews complete, indicating to the report package owner that they are finished with their review. If the reviewer wants to add additional comments after marking the review complete, the reviewer can "Reopen for comments," indicating to the report package owner that they are not done with their review.

   A report package may have multiple review cycles defined for it. All review cycles follow the same process.

Collaborative Review Process

As reviewers, you collaborate by viewing and adding to other reviewers' comments, creating comment threads. For example, a previous reviewer may have asked a question that you know the answer to. You can add to their comment to provide the answer.

Iterative Review Process

Reviews can be iterative, which means that a report package owner can schedule multiple review cycles depending on the type of review required.

For example, for a multiple draft review process, the review process may include:

- Multiple review cycles; with three drafts.
- Review assignments that vary by draft; for example:
  - First draft for manager level
  - Second draft for executive level
  - Third draft for CEOs, CFOs, and so on
- Review assignments that vary by area where you can assign users to review:
  - Entire report
  - Sections
  - Doclets

Key points to remember about the iterative review process:

- A new review instance incorporates content modifications.
- Comments persist across review cycles, so reviewers can see previous comments and how they were addressed.
- The review phase is complete when all review cycles are closed.

Working with Review Instances in Smart View

You perform reviews by entering comments and providing your feedback in a review instance in Oracle Smart View for Office. The review instance shows you a draft version of the areas of

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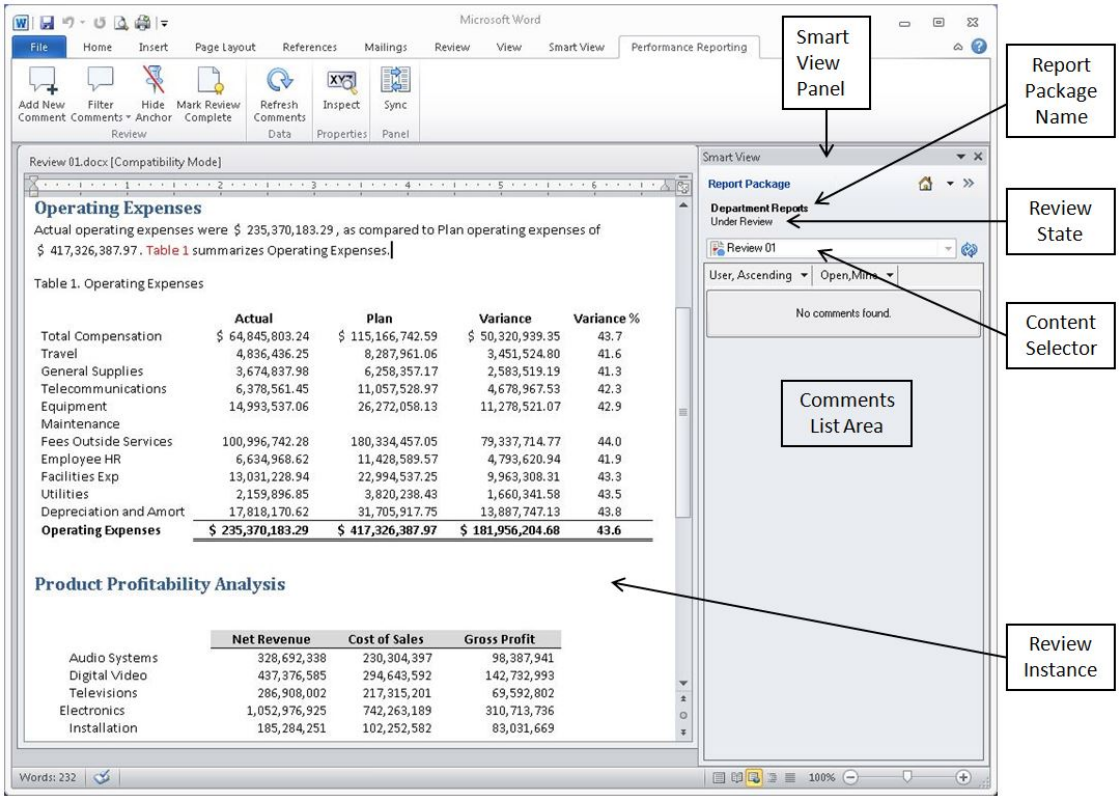
the report package that you have been assigned to review (see Figure 1). The review instance may consist of the entire report or a subset of the report content. Review instances do not include reference doclets or supplemental doclets of any file type.

Before you begin the review procedures, you should have launched Microsoft Word or PowerPoint, connected to Narrative Reporting, and opened a report package, as described in Connecting to Narrative Reporting in Smart View.

Figure 24-67 A Portion of an Example Review Instance in Smart View with Word



Videos

Your Goal	Watch This Video
Learn about working with review instances in Word-based report packages.	Reviewing Microsoft Word-Based Report Package Content in Smart View
Learn about working with review instances in PowerPoint-based report packages.	Reviewing Microsoft PowerPoint-Based Report Package Content in Smart View

Selecting a Review Instance

When a report package is ready for review, a Narrative Reporting web interface message notifies reviewers that they can begin their work.

For example:

RReview is required for Sample Report Package - MS Word - Review Cycle 2

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In this example, "Review Cycle 2" signifies that you will select "Review 02" in the Content Selector in Oracle Smart View for Office.

To select a review instance in Smart View:

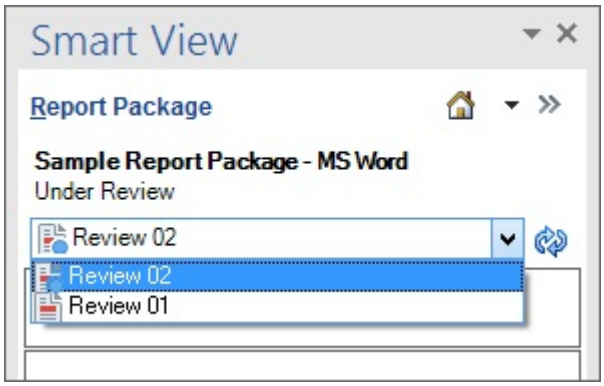
1. In the Smart View Panel, verify that the required review instance is selected in the **Content Selector**.

   When you first open a report package, the active review instance is shown in the **Content Selector** by default. However, even if you intend to open the active review instance that is showing in the **Content Selector**, you must still manually select it.

   > **Note**
   >
   > If only one review cycle is defined for the report package, you must manually select the review instance in the **Content Selector**.

   In Figure 1, "Review 01" and "Review 02" are the available options. The dot next to "Review 02" signifies that this review instance is active and ready for your review comments. Notice that there is no dot next to "Review 01." This signifies that the review instance is closed to new review comments; however, you may open "Review 01" to view it.

Figure 24-68 Example of Review Instances in the Content Selector



2. If not already selected, select the required review instance.

   When you select a review instance, your screen should resemble Figure 1.

   You can now begin working with review comments in the review instance.

Posting Comments

See these topics:

- Posting a New Comment
- Posting a Reply to a Comment

Posting a New Comment

To post a new comment:

1. Perform an action:

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- **Comments on Text in Word:** To post comments on text in a Word-based report package, in the review instance, select the text to comment on, and in the Narrative Reporting ribbon, click **Add New Comment**.

- **Comments on Text in PowerPoint:** To post comments on text in a PowerPoint-based report package, place your cursor in the slide you want to comment on, and in the Narrative Reporting ribbon, click **Add New Comment**.

  A pin is placed in the top left corner of the slide. Click the pin and drag it to position it on or near the text to comment on. Then, double-click the pin to open the **EPRCS Comments** text box.

  > **Note**
  >
  > If text was selected before clicking **Add New Comment**, the pin will be placed at the top left corner of the selection.

- **Comments on Graphics in Word:** To post comments on graphics in a Word-based report package, in the review instance, select the graphic to comment on, and in the Narrative Reporting ribbon, click **Add New Comment**.

  A pin is placed in the top left corner of the page that contains the graphic. Click the pin, and drag and drop it on the desired location within the graphic. Then double-click the pin to open the **EPRCS Comments** text box.

  Select only the graphic. Do not select any paragraph markers, text, or empty spaces around the graphic.

- **Comments on Graphics in PowerPoint:** To post comments on graphics in a PowerPoint-based report package, in the review instance, select the graphic to comment on, and in the Narrative Reporting ribbon, click **Add New Comment**.

  A pin is placed in the top left corner of the graphic. Click the pin, and drag and drop it on the desired location within the graphic. Then double-click the pin to open the **EPRCS Comments** text box.

  Select only the graphic. Do not select any paragraph markers, text, or empty spaces around the graphic.

- **Comments on Embedded Content in Word:** To post comments on embedded content in Word, select a data or text cell *within* a single instance of embedded content, and in the Narrative Reporting ribbon, click **Add New Comment**.

  For example, select data or text within an individual cell in an embedded content object. You may select a range of cells, but the pin is placed only on the first cell in the range (the upper left cell of the range).

  To select an entire embedded content object for commenting, select some text from the row above the embedded content, along with the entire embedded content object.

  You may add comments to only one embedded content object at a time. If you must add the same comment to other embedded content objects, you must add the comment separately to each embedded content object.

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- **Comments in Automatic TOCs (Word only):** With the Narrative Reporting extension version 17.07+, commenting on automatic TOCs is not allowed. To add comments related to an automatic TOC, place the comment as close to the TOC as you can, and then refer to it in your comment.

  With pre-17.07 versions of the Narrative Reporting extension, commenting on automatic TOCs is allowed in the heading or title only. You cannot comment in the body of the automatic TOC.

- **Comments in Manual TOCs (Word only):** Commenting is allowed on both the heading and the body of manual TOCs.

> **Tip**
>
> The selection area for comments cannot be empty. Select a graphic or at least one word or number when adding comments.
>
> You cannot select an entire embedded content object *only* and then add a comment; that selection is considered an empty selection. You must select text above the embedded content, along with the embedded content, to be considered a valid selection area for comments.

2. In **EPRCS Comments**, enter a comment.

   Figure 1 shows an example of an **EPRCS Comments** text box with text selected for commenting.

Figure 24-69 EPRCS Comment Text Box in Word with Text Selected

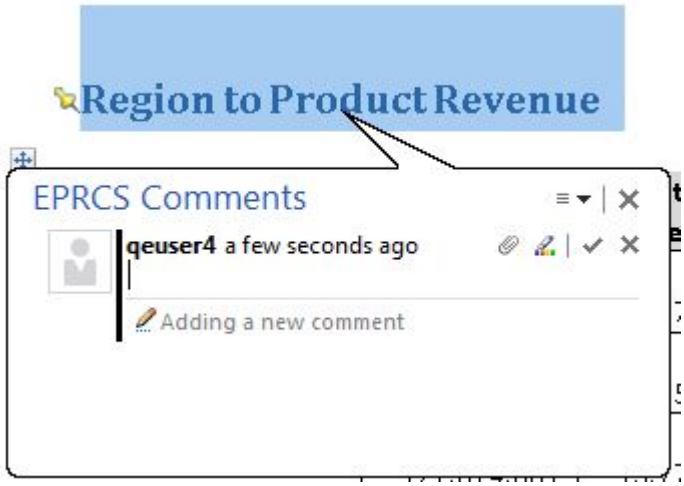

Figure 2 shows an example of an **EPRCS Comments** text box with a graphic selected for commenting in PowerPoint. Notice that the pin was placed in the upper left corner of the graphic.

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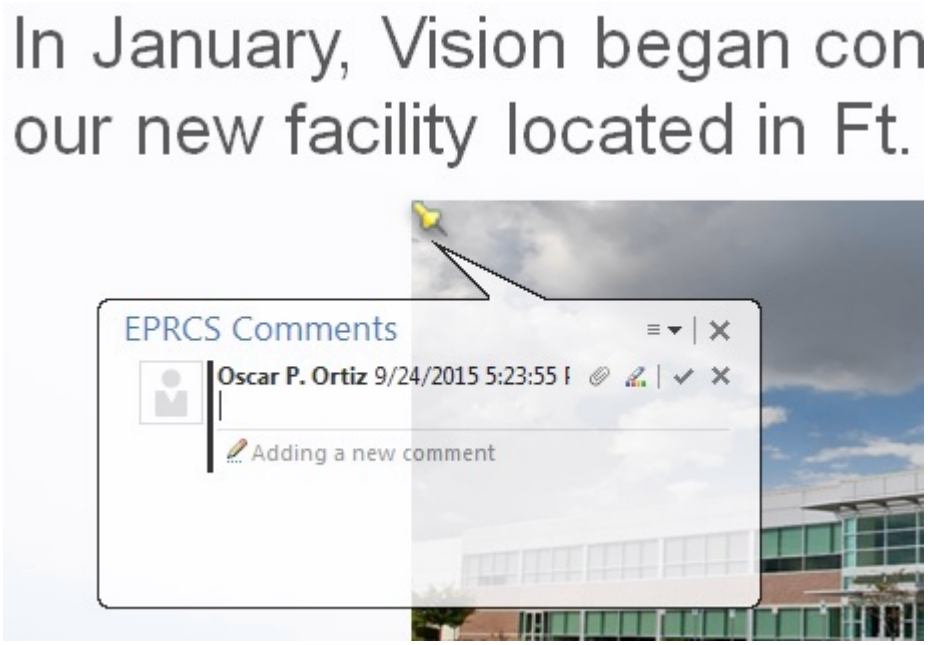
Figure 24-70 EPRCS Comment Text Box in PowerPoint with Graphic Selected



> **Note**
>
> You can add URLs, text formatting, and attachments to comments. See Editing and Deleting Comments and Attaching Supporting Files and Customizing Comment Text.

3. Click **Enter**, ✓, to post your comment.

> **Note**
>
> A comment must contain text, an attachment, or both.

Your comment is added to the list of comments in the comments pane in the Smart View Panel, and an anchor icon, , is added to the review instance to indicate that there is a comment.

4. In the top right corner of the **EPRCS Comments** text box, click **Close**, ✕, to exit.

Posting a Reply to a Comment

To post a reply to a comment:

1. In the Smart View Panel, double-click a comment in the list to launch the **EPRCS Comments** text box.
2. In the **EPRCS Comments** text box, click the **Reply** button, ↵, and enter your reply.

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> **Note**
>
> You can add text formatting and attachments to comment replies. See Attaching Supporting Files and Customizing Comment Text for more information.

3. Click the **Enter** button, ✔, to post your reply.
4. Click **Close**, ✖, to exit the **EPRCS Comments** text box.

Filtering and Sorting Comments

You can filter comments in the comment management panel. For example, you can show or hide comments, display open or closed comments, or display or hide a user's comments.

To filter and sort comments:

1. In the Narrative Reporting ribbon, click the **Refresh Comments** button to see new comments and replies.

2. **Optional:** Click the **Hide Anchor** or **Show Anchor** button to hide or display the comment anchors in the review instance.

   Hide Anchor displays by default the first time you open a review instance, meaning that anchors are currently showing.

   After clicking **Hide Anchor**, the button toggles to **Show Anchor**.

   Anchors display throughout the review instance and mark the location where comments are entered. Anchors are signified by a pushpin icon. In Figure 1, an anchor is circled in a portion of the review instance.

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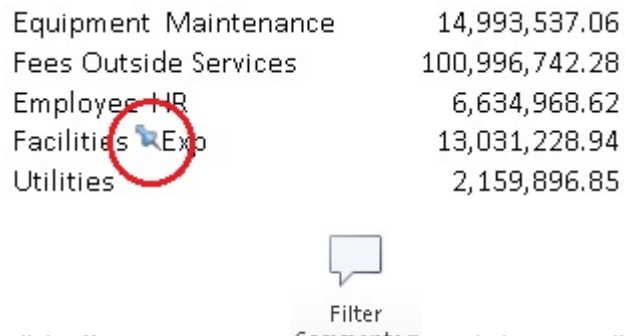
Figure 24-71 Anchor Example in Review Instance

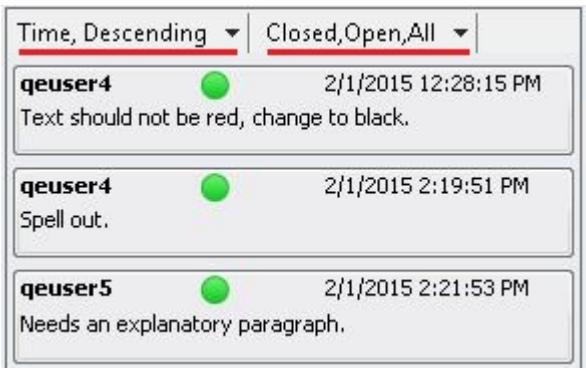


3. Click **Filter Comments**, , and choose a display option:
   - **Open Comments**
   - **Closed Comments**
   - **All Comments**
   - **My Comments**

   You can choose to display **Open Comments** and **Closed Comments** at the same time.
4. View the results of your selections in the comments list in the Smart View Panel.

   Alternatively, you can choose filter and sort options by using the drop-down lists in the comments pane. The heading at the left is for sorting comments; the heading at the right is for filtering.

   The following example shows comments sorted by time in descending order and, because the Open, Closed and All filters are selected, all comments are displayed:



5. **Optional:** Open a comment by clicking it in the list of comments in the Smart View Panel.

Editing and Deleting Comments

You can edit a thread entry when it is the last entry in the thread that you posted.

You can delete a comment that you posted. You can also delete a comment thread entry that you posted when it is the last entry in the thread.

To edit or delete a comment:

1. From the comment list in the Smart View Panel, click a comment that you started.
2. To edit a comment:

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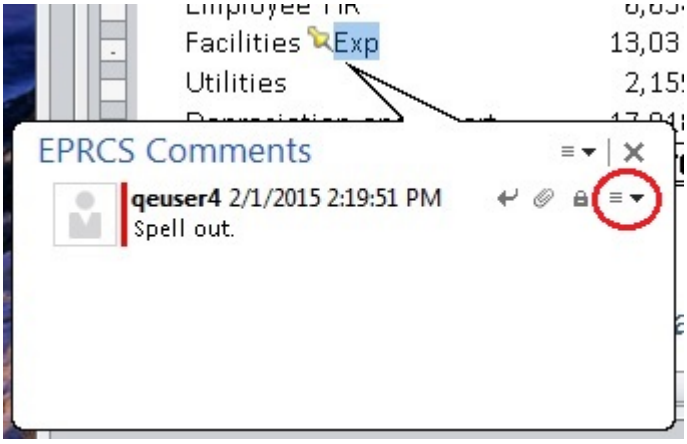
a. Click the drop-down list arrow as shown in Figure 1, and then select **Modify**.

Figure 24-72 Comment Text Box with Drop-Down List Circled



b. Edit the comment text.

> **Note**
>
> You can add URLs, text formatting, and attachments to comments. See Attaching Supporting Files and Customizing Comment Text.

c. Click **Enter**, ✓, to update the comment.

d. Click **Close**, ✕, to exit the **EPRCS Comments** text box.

3. To delete a comment, select either the comment or the last entry in a comment thread, then click the drop-down list arrow shown in Figure 1 for the comment or the thread entry, and then select **Delete**.

> **Note**
>
> You can only delete the last entry in a thread. Deleting the last entry does not delete the entire comment thread.

4. To cancel modifications, click the **Cancel** or **Close** button, ✕ in the **EPRCS Comments** text box.

Attaching Supporting Files and Customizing Comment Text

You can select a local file from your computer to attach to your comment. For example, you might want to associate a supporting document with one of your comments. Or, you may want to customize the text of a comment using the rich text editor. For example, you may want to make text bold or apply a different font color. You can also add a URL to a comment.

To attach files to a comment, customize comment text, or add a link to a web page:

1. In the Smart View Panel, in the comment list, double-click a comment that you started to launch the **EPRCS Comments** text box.

   The comment you select must be the only or last comment in a thread.

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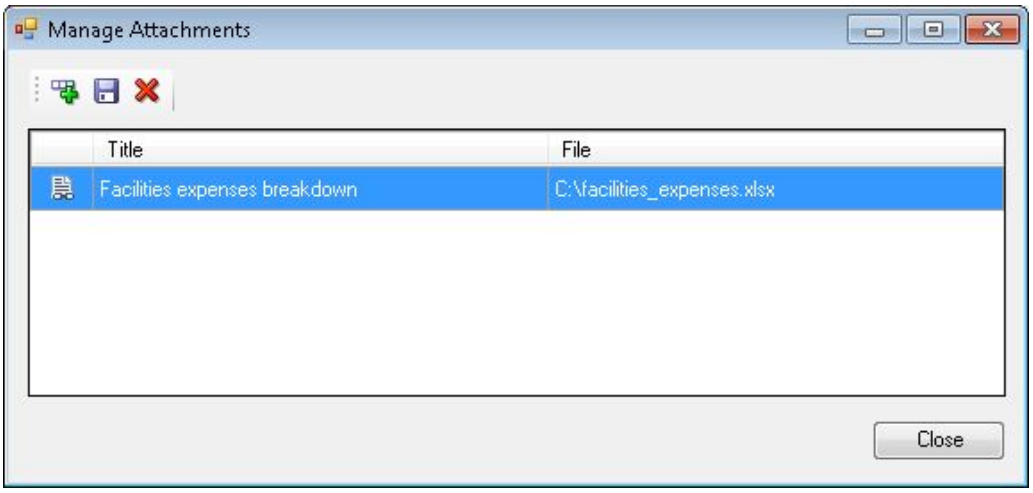
2. To attach a file to your comment:
   a. Click the **Manage Attachments** button, .
   b. In **Manage Attachments**, click , then navigate to the file to attach and select it, and then click **Open**.
   c. In the **Title** column, add a descriptive title for the file, and then press **Enter**; for example:



   d. Click **Save**, , to save the attachment and title text.

      The statement "Comment has attachments" is added to the **EPRCS Comments** text box.

> **Note**
>
> The **Manage Attachments** button, is enabled in all comments in a thread so that all users included in the review instance may view attachments associated with all comments.

   e. Repeat step 1 through step 2.d for all the files that you want to attach to the comment.
3. To apply custom formatting to comment text:
   a. In the **EPRCS Comments** text box, select the last comment in the thread, then click the drop-down list arrow shown in Figure 1, and then select **Modify**.
   b. Select the comment text to format.
   c. Click the **Show Formatting Bar** button, , to add text formatting to the comment.

      Formatting options:

      - Font style, size, and color
      - Bold, italics, and underlining
      - Align text to the left or right, or center it

   d. Click **Enter**, , to retain your changes.
4. To add a URL in a comment:

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a. In the **EPRCS Comments** text box, , enter the URL; for example, enter:

   http://www.oracle.com

   For URLs to be recognized, you must precede them with a valid URL protocol identifier, such as:

   - http://
   - https://

   For example:

   http://www.oracle.com

   Oracle recommends testing URLs in a browser to ensure that they work before adding them to comments.

b. Click **Enter**, ✔.

5. Click **Close**, ✕, to exit the **EPRCS Comments** text box.

Addressing and Closing Review Comments

When a comment is added to a review instance, the comment status is "Open." When the questions or concerns raised in a comment have been addressed, users can change the comment status to "Closed."

Addressing Comments

Some comments may be addressed with a simple reply to the comment. Other comments may require revisions to the original doclet. Any user, except for a viewer, can respond to or address comments. After you mark your review complete, it prevents you from adding new comments. However, you can still reply to existing comments. Following are examples of the actions that users can take in response to comments:

- Answer a question and then close the comment.

  For example, if a review asked if a figure in a doclet represented an up-to-date number, a user with that knowledge can reply to the comment and mark it closed.

- Edit the doclet content and then close the comment.

  For example, if a reviewer suggests an edit, another user can check out and edit the doclet, and then reply to the comment that the edit was made, and then close the comment.

- Send the doclet back to the doclet author for additional revisions.

  For example, if a reviewer suggests that a doclet is using old data and needs to be updated with the latest figures, the report package owner can send the doclet back to the author. When a doclet is restarted, a notification is sent to the doclet author indicating that the doclet has been reopened, and the doclet status is changed to "Started." Note that the doclet due dates for authors and approvers may be changed by the report package owner. At this point, the doclet follows the same workflow as in the author phase (see Authoring Doclets in Smart View); it is edited and approved by the authors and approvers that were assigned in the author phase.

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Closing Comments

To close a comment:

1. Double-click the comment in the comment list in the Review Center.
2. In the **EPRCS Comments** dialog box, click **Reply**, , and enter the reply text.
3. Click the **Mark Closed** button, to close the comment.

   A reply is added, noting that the comment is closed.

   To reopen the comment to add additional comments, click **Reopen Comment**, .

Comparing Review Instances

In Oracle Smart View for Office, you can compare two review instances to see what changes occurred between review cycles, depending on the review cycles to which you have access. For example, you can compare between a selected version and the prior version, or you can compare between a selected version and any other earlier version.

This allows you, as a reviewer, to be more efficient by focusing your review only on the content that has been updated, rather than reviewing all your assigned content with each review cycle.

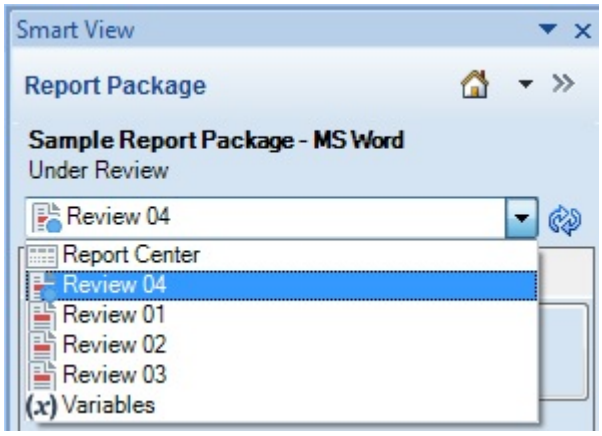
To compare review instances:

1. Open a report package.

   You should have access to two or more review cycle instances in order to use the review instance compare feature.
2. In the **Content Selector**, select a review instance on which to base the compare.

   The review instances listed depend on the review instances to which you have been assigned.

   In the following example, there are four review instances listed. We'll select Review 04. Once you make a selection, the review instance opens in Word.



3. In the Narrative Reporting ribbon, click the arrow on the **Compare** button to view **Compare changes since**, then select a review instance from the drop-down list.

   Depending on the review instance selection you make in the Content Selector, you will see a corresponding list of earlier review instance versions on the **Compare** drop-down list. If only one review instance exists, then there will be no earlier versions to compare to.

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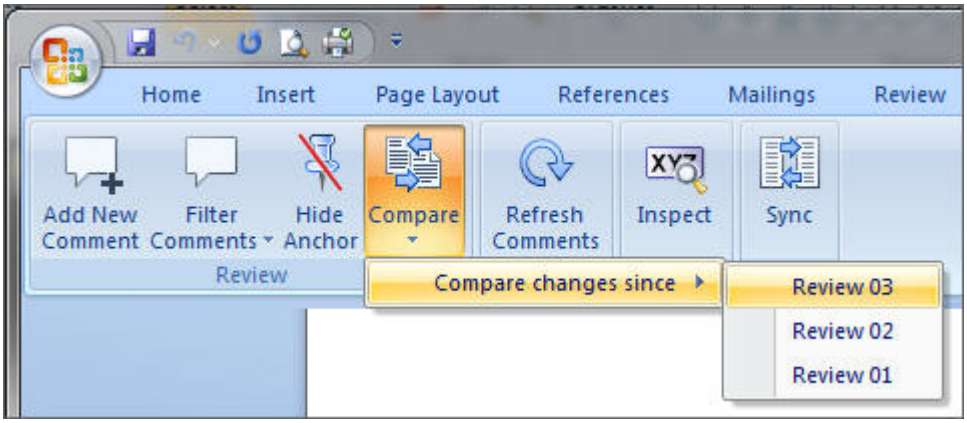
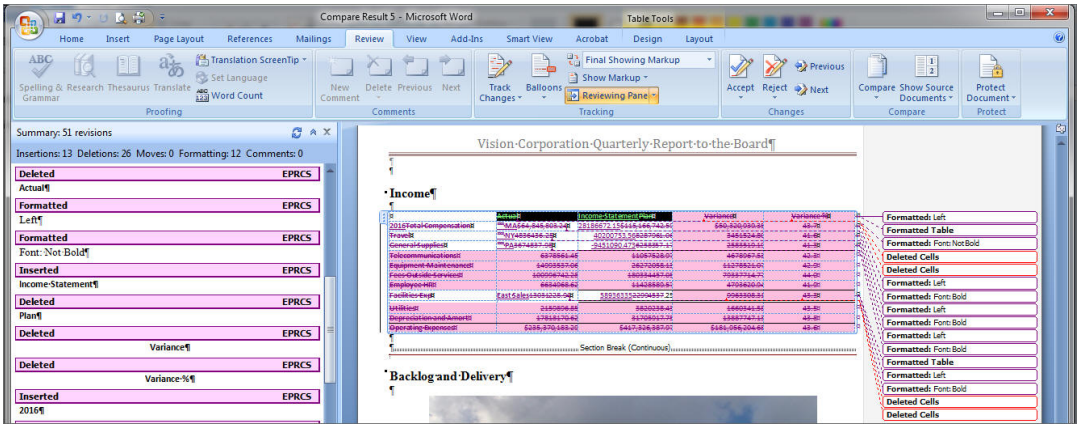
In the following example, we'll select Review 03. This means that we're going to look at the changes that occurred in Review 04 since Review 03.



Smart View downloads the two review instances and generates a detailed comparison document using Microsoft Word's comparison feature. You can use the Previous and Next button in Word's Review ribbon to navigate through the compare document.



The compare document is for viewing only. You do not need to use the Accept Changes functionality in order to keep any changes.

You can go back to the current review instance to add any necessary comments, and open and check out any doclets that you want to change.

4. When finished reviewing the changes, close the compare document.

Marking Reviews Complete

If you are satisfied with your review and you would like to notify the report package owner, mark your review complete.

After you mark your review complete, it prevents you from adding additional comments.

To mark your review complete:

1. Click **Mark Review Complete** in the Narrative Reporting ribbon.

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> **Note**
>
> The button toggles to **Reopen for Comments**.

2. **Optional:** To add more review comments to the report package, click the **Reopen for Comments** button.

Working with Distributions

Distributions enable report package owners to send report content to stakeholders at any point in the report package development.

Related Topics

- About Distributions
- Viewing Distributions

About Distributions

Distributions enable a report package owner to send report content to stakeholders at any point in the report package development. As a recipient, depending on the options that the report package owner selects, you can view, download in native format, or download as PDF all of the report content that the report package owner assigns to you.

When a report package owner executes a distribution, notifications are sent to the recipients' email and the Messages tab on the Narrative Reporting web interface. The notifications contain links to access the distributed content from Narrative Reporting. You can click the links in the email to view or download the distribution from the web interface.

Or, you can launch Oracle Smart View for Office, open the report package, navigate to the Distributions panel, and view or download the distribution in PDF format from Office.

Report package owners can refer to *Reviewing, Signing, and Receiving Report Packages in Narrative Reporting* for information on setting up distributions.

Viewing Distributions

When a report package owner executes a distribution, notifications are sent to the recipients' email and the Messages tab on the web. The notifications contain links to access the distributed content. You can also log in to Oracle Smart View for Office and, depending on the

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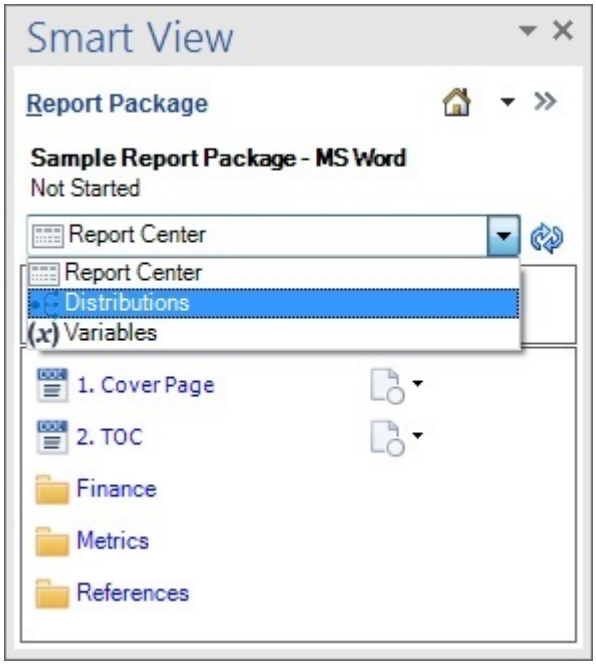
options selected by the report package owner, download or open the PDF version of the distribution for viewing.

To view distributions:

1. Connect to Narrative Reporting and open a report package, as described in Connecting to Narrative Reporting in Smart View.
2. In the Report Package panel, select **Distributions** from the drop-down list.



3. From the list of distributions in the Report Package panel, select a distribution.

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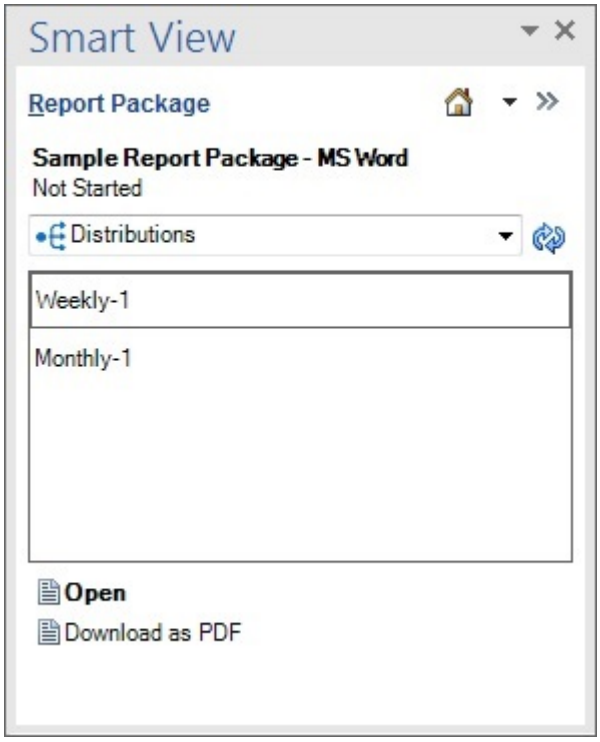

4. Perform an action:
   - Click **Open** to view the distribution immediately.
   - Click **Download as PDF** to download the distribution and view anytime.

Performing Sign Offs

Signers review the finalized content of a report. They can either sign off on or reject the report.

Related Topics

- About the Sign Off Phase
- Signing Off On or Rejecting a Report Package

About the Sign Off Phase

The goal of the sign off phase is to gather final approvals from your key stakeholders. Stakeholders review finalized content and either sign off on or reject the report package. All prior authoring and review phases must be complete, and all doclets must be checked in and completed as well. The sign off phase enables you to lock your report package and ensures that approved content is not modified. This is beneficial for reports that rely on content to be locked down and to prevent changes.

The sign off phase follows this process:

1. The report package owner creates the sign off instance, and then starts the sign off phase.
2. Notifications are sent to signers to begin their work.
3. Signers review finalized content in the form of a sign off instance, and can either sign off on or reject the report package.

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> **Note**
>
> After all the signers provide their approvals, the report package is marked final.

Signing Off On or Rejecting a Report Package

The signers review the final report and can either sign off on or reject the report package. Additionally, signers can attach a note with details on their action.

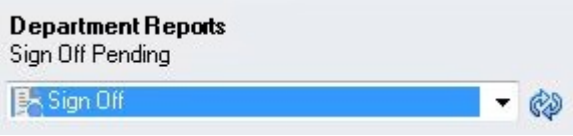
Before you begin the procedures in this topic, you should have launched Microsoft Word or PowerPoint, connected to Narrative Reporting, and opened a report package, as described in Connecting to Narrative Reporting in Smart View.

Videos

Your Goal	Watch This Video
Learn about signing off on a Word-based report package.	Signing Off on Microsoft Word-Based Report Packages in Smart View
Learn about signing off on a PowerPoint-based report package.	Signing Off on Microsoft PowerPoint-Based Report Packages in Smart View

To sign off on or reject a report package:

1. In the Smart View Panel, **Content Selector** drop-down list, ensure that **Sign Off** is selected.



   Selecting **Sign Off** launches the sign off instance document, which you review to sign off on the report package.

2. Do one of the following:

   - If you are satisfied with your review of the sign off instance document, click **Sign Off** in the Narrative Reporting ribbon.

     When you sign off on the sign off instance document, the report package process is complete, and the report is ready for publication.

   - If you are not satisfied with the sign off instance document, click **Reject Sign Off** in the Narrative Reporting ribbon.

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The report package owner can take corrective actions to address issues.

3. **Optional:** Whether you are signing off or rejecting the report package in the sign off instance document, add a comment in **Add Note**, and then click **Sign Off** or **Reject Sign Off**.

After all signers approve the report, the report package status becomes "Final."

Refreshing Report Packages

You can refresh the contents of a report package by using the Refresh Report Package command in the Library pane of the Smart View Panel.

When you select **Refresh Report Package**, Oracle Smart View for Office takes the following actions for each doclet (regular and reference doclets) in the report package:

- Download
- Checkout
- Refresh of all data points, embedded content, and variables; this includes all data points or data sheets within Excel reference and supplemental doclets for all defined Smart View Panel sources
- Upload
- Checkin

> **Note**
>
> When you perform a **Refresh Report Package**, you must have access to all the doclets, including those that contain Smart View queries. Furthermore, in order to refresh those queries, you may be prompted for login credentials to all the data sources that those queries are accessing.

To refresh a report package:

1. Ensure that you are in the Library pane of the Smart View Panel.

   From Narrative Reporting Home, click Library, then expand the **EPRCS** node, then the **Library** node, then expand the **Report Packages** folder, and then select a report package.

   In the following example, you could select the report package named "Sample Report Package - MS Word".

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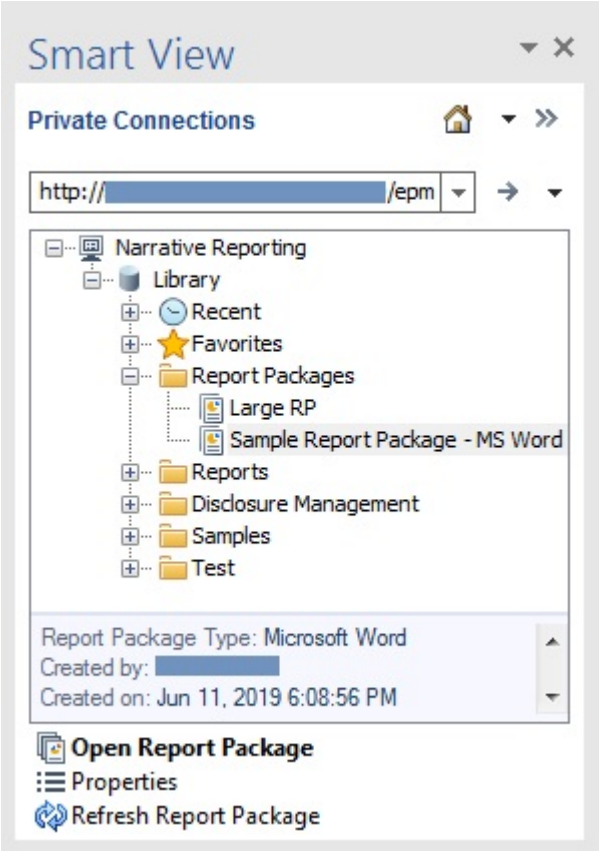
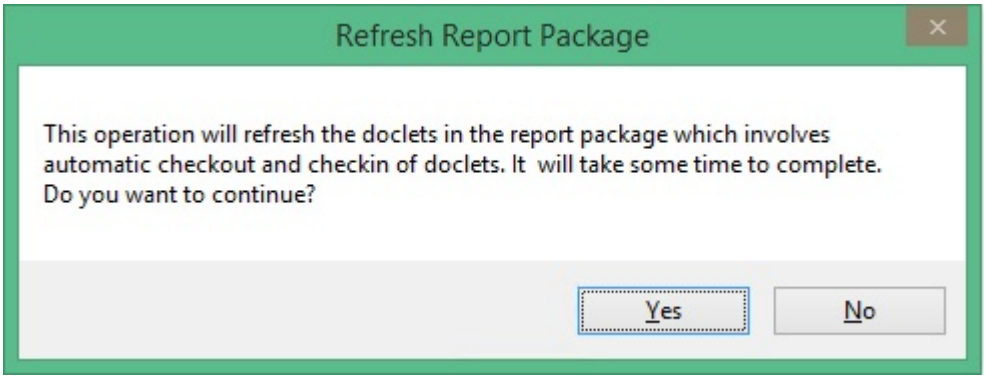


2. With the report package selected, from the Action Panel, click **Refresh Report Package**.

   The **Refresh Report Package** prompt is displayed letting you know that the process can be time consuming.



3. Click **Yes** at the prompt.

   Smart View begins the process of opening and checking out doclets; refreshing data points, data sheets in Excel reference doclets, embedded content, and variables; and then closing the doclets.

   Focus will move between Office applications.

   If the refresh is successful for all doclets, Smart View returns you to the Office application from which you began the process.

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Publishing Report Packages, Sections, and Doclets

You can publish report packages, specific sections, and individual doclets directly from Smart View, in addition to publishing them from the Narrative Reporting web application.

You can publish the reports either in the PDF format or in the report's native format (for example, Word or PowerPoint). The published report can be saved in your local area or in the Narrative Reporting Library. You can also overwrite an already published report while publishing and saving its new version.

When you publish a report package, section, or doclet, a single merged file is created for all the report contents selected. However, any supporting documents such as reference doclets and supplemental doclets present in the report package or section are not published.

To publish report package, section, or doclet:

1. Ensure that you are in the Library pane of the Smart View Panel.

   From Narrative Reporting Home, click Library, then expand the **Narrative Reporting** node, then the **Library** node, then expand the **Report Packages** folder, and then select a report package.

2. To publish the selected report package, click **Publish Report** from the Action Panel.

   Alternatively, to publish a specific section or doclet from the selected report package, click **Open Report Package**, select the required section or doclet, and click **Publish**.

   > **Note**
   >
   > The **Publish** action appears in the Action Panel only if the section or doclet has publishable content.

3. In the **Publish** dialog, select either **Native** or **PDF** option in **File Type** field.

   > **Note**
   >
   > If you are publishing a PDF report package, then the **PDF** option is selected by default.

4. In **Save To** field, select either **Local** or **Library** option, and click **Browse** to select the location where the report should be saved.

5. **Optional:** If an older version of the report exists in the location, and if you want to overwrite it with the current version being published, then select the **Overwrite Existing File** check box.

6. Click **OK** to publish the report package, section, or doclet.

   If published in the Native format to the Library, the published report appears in the selected folder under Library/Documents in the Smart View Panel.

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Saving Office Documents to Cloud EPM in Narrative Reporting in Smart View

In Oracle Smart View for Office, you can save Microsoft Office documents to the Oracle Fusion Cloud Enterprise Performance Management Library. Documents you save in the Cloud EPM Library can be made accessible to other users. You can also download saved files from the library.

See Saving Office Documents to Cloud EPM for information on saving Office documents in Narrative Reporting, as well as other supported data sources.

Working with Reports in Smart View

Reports is a cloud-based reporting solution for creating Oracle Fusion Cloud Enterprise Performance Management financial and managerial reports. It enables users to insert charts and grids utilizing Cloud EPM sources such as Planning, and other sources such as Oracle Essbase as well as ERP Cloud Financials, into a report.

See Reports for information on working with reports in Narrative Reporting, as well as other supported data sources.

Working with Narrative Reporting Data in Smart View

You can use Oracle Smart View for Office to copy data from supported on-premises and cloud data sources.

This includes Narrative Reporting data sources, and paste the data into doclets in a report package.

For example, you can incorporate data from Oracle Essbase and Narrative Reporting in the same doclet or different doclets within a report package. A doclet in a report package in Word or PowerPoint may contain a profit and loss statement report that was created from an Essbase source along with an income statement report created from a Narrative Reporting source. The data points for the areas that you copy are retained in Word or PowerPoint, so you can refresh the doclet to keep the data up to date.

The scenario in Example: Working with Narrative Reporting Data in Smart View demonstrates using ad hoc analysis in Excel to create a report, and then copying the data points from that report and pasting them into a doclet in Word.

Example: Working with Narrative Reporting Data in Smart View

The topics in this section provide a brief look at the following features of Narrative Reporting:

- Performing ad hoc queries and retrieving data from Narrative Reporting data sources.
- Copying and pasting Narrative Reporting data into doclets. You can copy and paste data in the form of grids or data points.

Performing Ad Hoc Analysis with Narrative Reporting Data

Narrative Reporting comes with a sample application that consists of a model containing seven dimensions. You create the sample application with a click of a button in the Narrative Reporting web interface.

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When connected to the sample model in Oracle Smart View for Office, you can perform ad hoc queries that allow you to create data reports containing the information that you want to see. You can copy and paste data from the reports into doclets in Narrative Reporting report packages. You can copy and paste grids or individual data points into doclets.

The scenario in this topic shows you how to create an ad hoc grid and paste individual data points and an entire grid into a doclet, in preparation for the doclet being included in a report package in Narrative Reporting.

Video

Your Goal	Watch This Video
Learn about analyzing data using ad hoc analysis.	Creating Advanced Ad Hoc Reports in Smart View

To create an ad hoc grid from a Narrative Reporting data source:

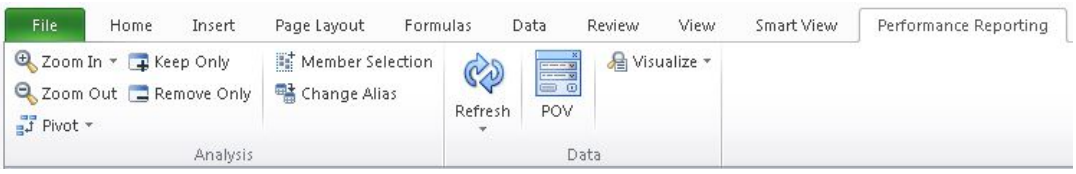
1. If you have not already done so, launch Excel, and set up a data source connection as described in Creating Connections to Narrative Reporting.
2. In Excel, connect to the Narrative Reporting data source.

   See Connecting to Narrative Reporting in Smart View.
3. In the Smart View Panel, expand **Reporting Applications**, then **Sample Application**, and then right-click **Sample Model** and select **Ad hoc analysis**.

   The initial dimensions and data are placed on the sheet. The Accounts dimension and Fiscal Calendar dimension are the active dimensions.

> **Note**
>
> The dimensions , Entities, Total Segments, Currencies, Years, and Scenarios are in the POV and are not in the body of the grid. They can be used to change the data perspective of the grid; however, we are not showing that functionality in this scenario.

And the Narrative Reporting ribbon for ad hoc functionality is displayed:



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4. Before proceeding, in the Smart View ribbon, click **Options**, select the **Formatting** tab, and ensure that these options are selected:
   - **Use Excel Formatting**
   - **Adjust Column Width and Row Height**

   Click **OK**.
5. Click the **Refresh** button in either the Smart View ribbon or the Narrative Reporting ribbon to see the effect of the formatting changes on the current grid:

	A	B	C	D	E	F
1		Entities	Total Segments	Currencies	Years	Scenarios
2		Accounts				
3	Fiscal Calendar	50506747.63				

   The goal for our layout is to show the Accounts members in rows, and Scenarios members in columns, to create a simple operating expenses report.
6. To move the Scenarios dimension to the column, right-click and drag the Scenarios dimension cell, and then drop it on the Accounts dimension cell.

	A	B	C	D	E
1		Entities	Total Segments	Currencies	Years
2		Scenarios			
3		Accounts			
4	Fiscal Calendar	50506747.63			

7. To move the Accounts dimension to the row, right-click and drag the Accounts dimension cell, and then drop it on the Fiscal Calendar dimension cell.

	A	B	C	D	E	F
1			Entities	Total Segments	Currencies	Years
2			Scenarios			
3	Accounts	Fiscal Calendar	50506747.63			
4						

8. Right-click and then drag the Fiscal Calendar dimension to the POV row, and then drop it on the Entities dimension.

	A	B	C	D	E	F
1		Fiscal Calendar	Entities	tal Segments	Currencies	Years
2		Scenarios				
3	Accounts	50506747.63				

   In the previous grid, the Scenarios and Accounts dimensions are the active dimensions. The dimensions Fiscal Calendar, Entities , Total Segments, Currencies, and Years are in the POV. This is the desired dimension layout.

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Now let's zoom into row and column members and use the Keep Only and Remove Only buttons on the Narrative Reporting ribbon to create the row and column layout that we want to see.

9. Select the Scenarios dimension, and then either double-click or click **Zoom In** on the Narrative Reporting ribbon.

	A	B	C	D	E	F	G
1		Fiscal Calendar	Entities	Total Segments	Currencies	Years	
2		Actual	Plan	Forecast	Variance	Variance %	Scenarios
3	Accounts	50506747.63	95734223.23	#Missing	-45227475.6	-47.24274567	50506747.63

10. Press the **Ctrl** key, select the Forecast and Scenarios members, and then click the **Remove Only** button in the Narrative Reporting ribbon.

    The grid should look like this:

	A	B	C	D	E	F	G
1		Fiscal Calendar	Entities	Total Segments	Currencies	Years	
2		Actual	Plan	Variance	Variance %		
3	Accounts	50506747.63	95734223.23	-45227475.6	-47.24274567		

Now let's zoom in to the Operating Expenses member.

11. Select Accounts, and then either double-click or click **Zoom In** from the Narrative Reporting ribbon.

    The result of the first zoom in:

	A	B	C	D	E	F
1		Fiscal Calendar	Entities	Total Segments	Currencies	Years
2		Actual	Plan	Variance	Variance %	
3	Income Statement	50506747.63	95734223.23	-45227475.6	-47.24274567	
4	Balance Sheet	#Missing	#Missing	#Missing	#Missing	
5	Statistics	#Missing	#Missing	#Missing	#Missing	
6	Accounts	50506747.63	95734223.23	-45227475.6	-47.24274567	

12. Continue to zoom in:
    a. Click **Zoom In** on the Income Statement member.
    b. Click **Zoom In** on the Net Income member.
    c. Click **Zoom In** on the Total Pretax Income member.
    d. Click **Zoom In** on the Pretax Income From Operations member.

    The grid should look like this:

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	A	B	C	D	E	F
1		Fiscal Calendar	Entities	Total Segments	Currencies	Years
2		Actual	Plan	Variance	Variance %	
3	Gross Profit	336361285.4	602930074.5	-266568789.1	-44.212223	
4	Operating Expenses	235370183.29	417326388	181956204.7	43.60045517	
5	Pretax Income From Operations	100991102.1	185603686.5	-84612584.38	-45.58777144	
6	Other Exp (Inc)	-20797054.5	-37816841.08	-17019786.58	-45.00583893	
7	Total Pretax Income	80194047.61	147786845.4	-67592797.8	-45.73668083	
8	Provision for Income Tax	29687299.97	52052622.17	22365322.19	42.96675415	
9	Minority Interest Income	#Missing	#Missing	#Missing	#Missing	
10	Net Income	50506747.63	95734223.23	-45227475.6	-47.24274567	
11	Income Statement	50506747.63	95734223.23	-45227475.6	-47.24274567	
12	Balance Sheet	#Missing	#Missing	#Missing	#Missing	
13	Statistics	#Missing	#Missing	#Missing	#Missing	
14	Accounts	50506747.63	95734223.23	-45227475.6	-47.24274567	

13. To keep only the Operating Expenses member, we'll select the Operating Expenses cell and click **Keep Only** from the Narrative Reporting ribbon.

    The grid should look like this:

	A	B	C	D	E	F
1		Fiscal Calendar	Entities	Total Segments	Currencies	Years
2		Actual	Plan	Variance	Variance %	
3	Operating Expenses	235370183.3	417326388	181956204.7	43.60045517	
4						

14. Double-click or zoom in on the Operating Expenses member cell.
15. In the expanded grid, select members with #Missing in their rows, Operating Expense Synergies and Allocations, and click **Remove Only** from the Narrative Reporting ribbon.

    The grid should look like this:

	A	B	C	D	E	F
1		Fiscal Calendar	Entities	Total Segments	Currencies	Years
2		Actual	Plan	Variance	Variance %	
3	Total Compensation	64845803.24	115166742.6	50320939.35	43.6939851	
4	Travel	4836436.25	8287961.057	3451524.802	41.64504126	
5	General Supplies	3674837.978	6258357.165	2583519.187	41.28110811	
6	Telecommunications	6378561.445	11057528.97	4678967.528	42.31476616	
7	Equipment Maintenance	14993537.06	26272058.13	11278521.07	42.92972028	
8	Fees Outside Services	100996742.3	180334457.1	79337714.77	43.99476177	
9	Employee HR	6634968.623	11428589.57	4793620.944	41.94411669	
10	Facilities Exp	13031228.94	22994537.25	9963308.314	43.3290229	
11	Utilities	2159896.852	3820238.434	1660341.582	43.46172656	
12	Depreciation and Amort	17818170.62	31705917.75	13887747.13	43.80175097	
13	Operating Expenses	235370183.3	417326388	181956204.7	43.60045517	
14						

Now let's format the left column.

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16. For a left-aligned list, in the Smart View ribbon, click **Options**, and then click the **Member Options** tab.
17. In **Indentation**, select **None**, and then click **OK**.
18. In the Smart View ribbon or Narrative Reporting ribbon, click **Refresh**.

    The grid should look like this:

	A	B	C	D	E	F
1		Fiscal Calendar	Entities	Total Segments	Currencies	Years
2		Actual	Plan	Variance	Variance %	
3	Total Compensation	64845803.24	115166742.6	50320939.35	43.6939851	
4	Travel	4836436.25	8287961.057	3451524.802	41.64504126	
5	General Supplies	3674837.978	6258357.165	2583519.187	41.28110811	
6	Telecommunications	6378561.445	11057528.97	4678967.528	42.31476616	
7	Equipment Maintenance	14993537.06	26272058.13	11278521.07	42.92972028	
8	Fees Outside Services	100996742.3	180334457.1	79337714.77	43.99476177	
9	Employee HR	6634968.623	11428589.57	4793620.944	41.94411669	
10	Facilities Exp	13031228.94	22994537.25	9963308.314	43.3290229	
11	Utilities	2159896.852	3820238.434	1660341.582	43.46172656	
12	Depreciation and Amort	17818170.62	31705917.75	13887747.13	43.80175097	
13	Operating Expenses	235370183.3	417326388	181956204.7	43.60045517	

Next, we want to remove the POV members from the first row of the report.

19. In the Narrative Reporting ribbon, click the **POV** button.

Clicking the POV button causes the POV members move to the POV toolbar, which **floats** on the grid, as shown in Figure 1.

Figure 24-73 POV Toolbar

	A	B	C	D	E	F	G
2		Actual	Plan	Variance	Variance %		
3	Total Compensation	64845803.24	115166742.6	50320939.35	43.6939851		
4	Travel	4836436.25	8287961.057	3451524.802	41.64504126		
5	General Supplies	3674837.978	6258357.165	2583519.187	41.28110811		
6	Telecommunications	6378561.445	11057528.97	4678967.528	42.31476616		
7	Equipment Maintenance	14993537.06	26272058.13	11278521.07	42.92972028		
8	Fees Outside Services	100996742.3	180334457.1	79337714.77	43.99476177		
9	Employee HR	6634968.623	11428589.57	4793620.944	41.94411669		
10	Facilities Exp	13031228.94	22994537.25	9963308.314	43.3290229		
11	Utilities	2159896.852	3820238.434	1660341.582	43.46172656		
12	Depreciation and Amort	17818170.62	31705917.75	13887747.13	43.80175097		
13	Operating Expenses	235370183.3	417326388	181956204.7	43.60045517		

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> **Note**
>
> The POV toolbar can be moved around on the grid or docked by dragging the POV toolbar to the top, bottom, left, or right of the Excel window. You can prevent the POV toolbar from docking by holding the **Ctrl** key as you drag the toolbar.

Now let's apply formatting to the numbers in the grid. Number formatting will carry over when we copy the grid and paste it into Word.

20. Press and hold down the **Ctrl** key, and then select the dollar amounts in the first and last rows of the report, cells B3, C3, D3, B13, C13, and D13.

	A	B	C	D	E
2		Actual	Plan	Variance	Variance %
3	Total Compensation	64845803.24	115166742.6	50320939.35	43.6939851
4	Travel	4836436.25	8287961.057	3451524.802	41.64504126
5	General Supplies	3674837.978	6258357.165	2583519.187	41.28110811
6	Telecommunications	6378561.445	11057528.97	4678967.528	42.31476616
7	Equipment Maintenance	14993537.06	26272058.13	11278521.07	42.92972028
8	Fees Outside Services	100996742.3	180334457.1	79337714.77	43.99476177
9	Employee HR	6634968.623	11428589.57	4793620.944	41.94411669
10	Facilities Exp	13031228.94	22994537.25	9963308.314	43.3290229
11	Utilities	2159896.852	3820238.434	1660341.582	43.46172656
12	Depreciation and Amort	17818170.62	31705917.75	13887747.13	43.80175097
13	Operating Expenses	235370183.3	417326388	181956204.7	43.60045517

21. With cells B3, C3, D3, B13, C13, and D13 selected, in the Excel Home ribbon, in the **Number** group, click the **Accounting Number Format** button, $.

    If you are working in a non-American English environment, choose the default currency symbol for your locale.

22. In the Excel Home ribbon, make the following changes to the currency and variance percentage figures:

    a. Select only the figures in columns B, C, and D, and then, in the **Number** group, click the **Comma Style** button, ,.

    b. Select only the figures in column E, Variance %, and then, in the **Number** group, click the **Decrease Decimal** button, .00→.0, until only one decimal place remains.

    You should now have a report similar to the one shown in Figure 2.

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Figure 24-74 Ad Hoc Report from Narrative Reporting Data Source

	A	B	C	D	E
2		Actual	Plan	Variance	Variance %
3	Total Compensation	$ 64,845,803.24	$ 115,166,742.59	$ 50,320,939.35	43.7
4	Travel	4,836,436.25	8,287,961.06	3,451,524.80	41.6
5	General Supplies	3,674,837.98	6,258,357.17	2,583,519.19	41.3
6	Telecommunications	6,378,561.45	11,057,528.97	4,678,967.53	42.3
7	Equipment Maintenance	14,993,537.06	26,272,058.13	11,278,521.07	42.9
8	Fees Outside Services	100,996,742.28	180,334,457.05	79,337,714.77	44.0
9	Employee HR	6,634,968.62	11,428,589.57	4,793,620.94	41.9
10	Facilities Exp	13,031,228.94	22,994,537.25	9,963,308.31	43.3
11	Utilities	2,159,896.85	3,820,238.43	1,660,341.58	43.5
12	Depreciation and Amort	17,818,170.62	31,705,917.75	13,887,747.13	43.8
13	Operating Expenses	$ 235,370,183.29	$ 417,326,387.97	$ 181,956,204.68	43.6

This formatting will carry over to the report package doclet in Word. You'll add more formatting when you're authoring the doclet in Word (as described in Copying and Pasting Narrative Reporting Data into Doclets).

23. Save the report and continue with Copying and Pasting Narrative Reporting Data into Doclets.

    We'll show you how to copy and paste the dynamic data points from this report in to a doclet in a Narrative Reporting report package. This is a typical task that a doclet author performs during the authoring phase of the report package lifecycle.

Copying and Pasting Narrative Reporting Data into Doclets

For this demonstration, we'll work with an example Word-based report package called Department Reports. We'll use the data that we created in Performing Ad Hoc Analysis with Narrative Reporting Data to create refreshable data points in a doclet called "Operating Expenses." The doclet will contain text interspersed with data points, and the full grid.

> **Note**
>
> The procedure in this topic could also be performed in a PowerPoint-based report package.

To copy and paste Narrative Reporting data into doclets:

1. In Word, connect to the Narrative Reporting data source, and then open a report package, as described in Connecting to Narrative Reporting in Smart View.
2. In the Smart View Panel, select the doclet to check out.

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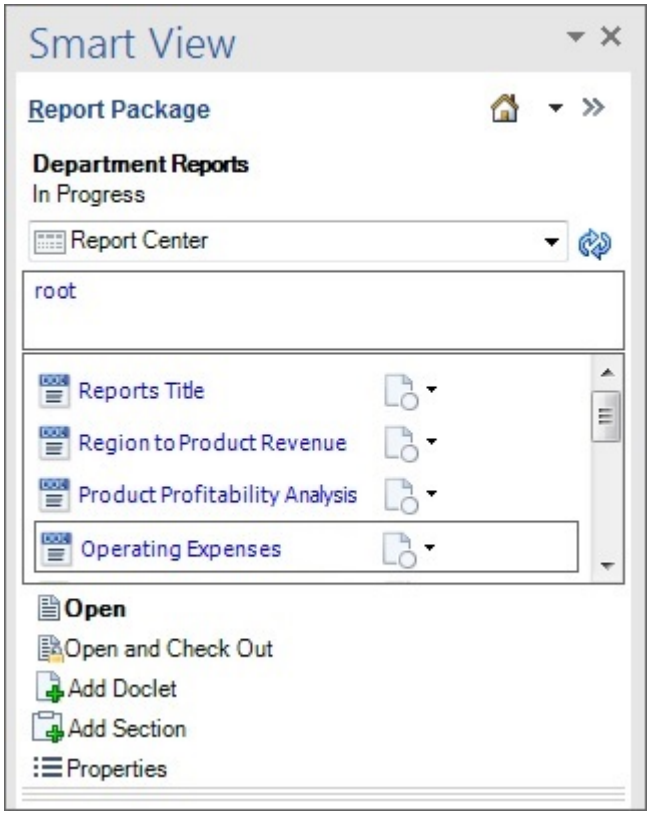
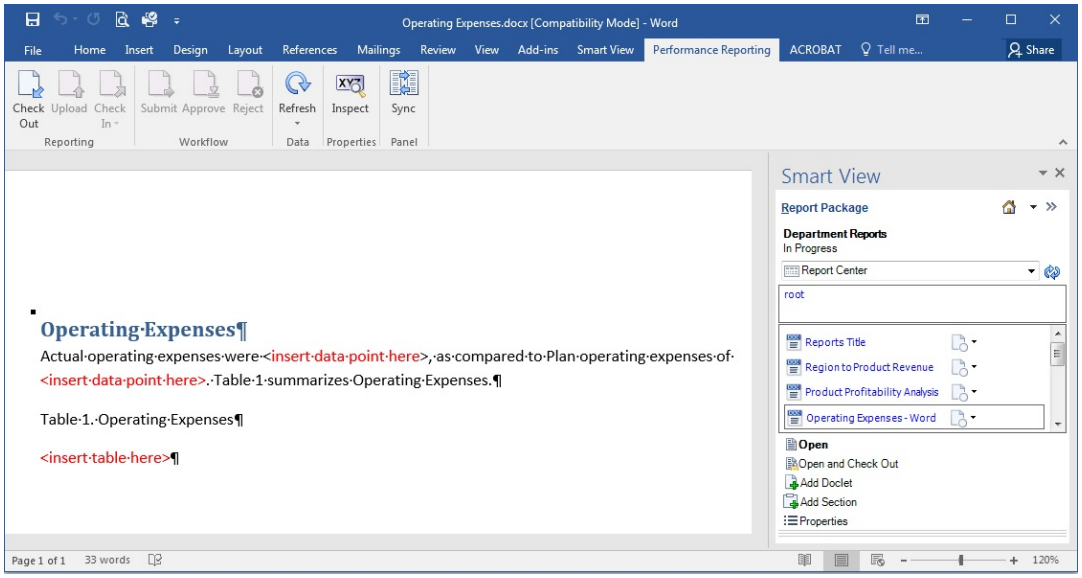
Figure 24-75 Smart View Panel Showing the Operating Expenses Doclets Selected



3. Double-click the doclet name to open it.

Figure 24-76 Doclet Opened from Smart View Panel, Ready to be Checked Out



4. In the Narrative Reporting ribbon, click **Check Out**.

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You can now author in the doclet. The example doclet in Figure 2 has placeholders within the paragraph for pasting data points. You can paste the entire grid below the table caption.

5. To copy and paste a data point:

   a. Open and connect to the ad hoc grid that you created in Performing Ad Hoc Analysis with Narrative Reporting Data.

   b. Select the Actual total operating expenses figure in cell B13, and then click

from the Smart View ribbon.

	A	B
2		Actual
3	Total Compensation	$ 64,845,803.24
4	Travel	4,836,436.25
5	General Supplies	3,674,837.98
6	Telecommunications	6,378,561.45
7	Equipment Maintenance	14,993,537.06
8	Fees Outside Services	100,996,742.28
9	Employee HR	6,634,968.62
10	Facilities Exp	13,031,228.94
11	Utilities	2,159,896.85
12	Depreciation and Amort	17,818,170.62
13	Operating Expenses	$ 235,370,183.29

> **Tip**
>
> You must be connected to the ad hoc grid, and you must use the **Copy** and **Paste** buttons on the Smart View ribbon so that the data you copy and paste remains dynamic between Office applications.

   c. In Word, position the cursor in the paragraph at the required location, and then, in the Smart View ribbon, click **Paste**.

   The paste operation results in a placeholder, "#NEED_REFRESH".

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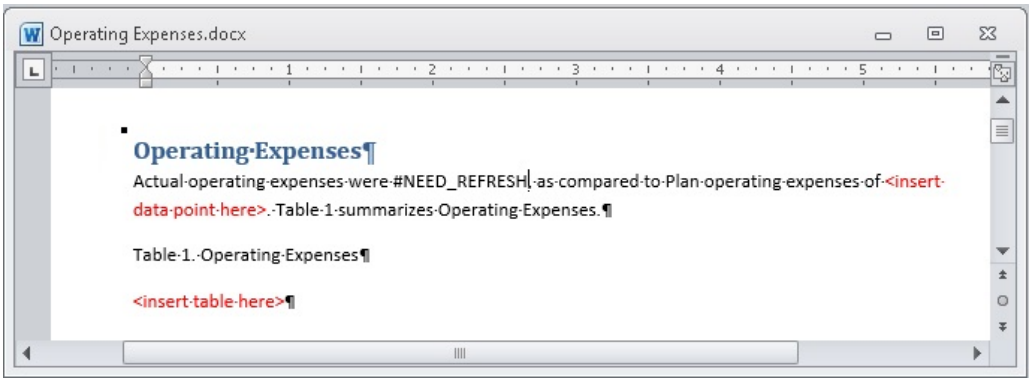

In this scenario, a second data point for plan operating expenses is pasted into the paragraph.

6. To copy and paste a range:

   a. Go to the ad hoc grid that you created in Performing Ad Hoc Analysis with Narrative Reporting Data.

   b. Select the entire grid, including all members, and then click Copy; in the example in Figure 3, you would select cells A2 through E13.

      Remember that in Performing Ad Hoc Analysis with Narrative Reporting Data, we moved the POV dimensions from row 1 to the POV toolbar. That's why the grid that we're copying from begins on row 2.

Figure 24-77 Entire Ad Hoc Report Selected for Copying

	A	B	C	D	E
2		Actual	Plan	Variance	Variance %
3	Total Compensation	$ 64,845,803.24	$ 115,166,742.59	$ 50,320,939.35	43.7
4	Travel	4,836,436.25	8,287,961.06	3,451,524.80	41.6
5	General Supplies	3,674,837.98	6,258,357.17	2,583,519.19	41.3
6	Telecommunications	6,378,561.45	11,057,528.97	4,678,967.53	42.3
7	Equipment Maintenance	14,993,537.06	26,272,058.13	11,278,521.07	42.9
8	Fees Outside Services	100,996,742.28	180,334,457.05	79,337,714.77	44.0
9	Employee HR	6,634,968.62	11,428,589.57	4,793,620.94	41.9
10	Facilities Exp	13,031,228.94	22,994,537.25	9,963,308.31	43.3
11	Utilities	2,159,896.85	3,820,238.43	1,660,341.58	43.5
12	Depreciation and Amort	17,818,170.62	31,705,917.75	13,887,747.13	43.8
13	Operating Expenses	$ 235,370,183.29	$ 417,326,387.97	$ 181,956,204.68	43.6

   c. In Word, position the cursor at the location that you require, and in the Smart View ribbon, click **Paste**.

      The paste operation results in a table in which every cell is populated with the placeholder, "#NEED_REFRESH", as shown in Figure 4.

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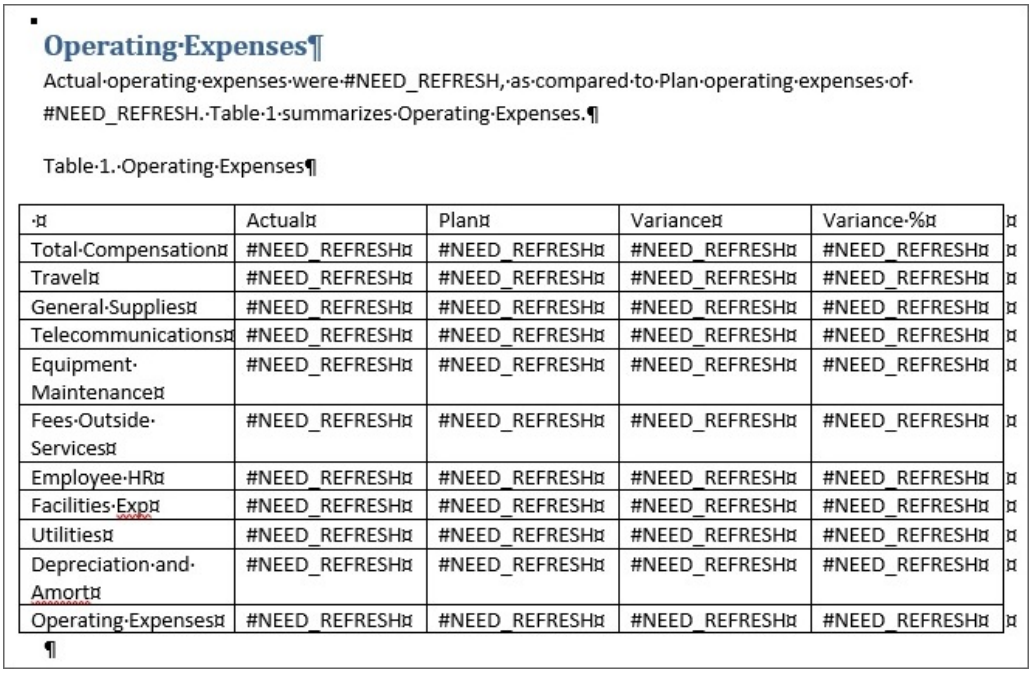
Figure 24-78 Ad Hoc Grid Range Pasted Below Table Caption



Operating·Expenses¶

Actual·operating·expenses·were·#NEED_REFRESH,·as·compared·to·Plan·operating·expenses·of·#NEED_REFRESH.·Table·1·summarizes·Operating·Expenses.¶

Table·1.·Operating·Expenses¶

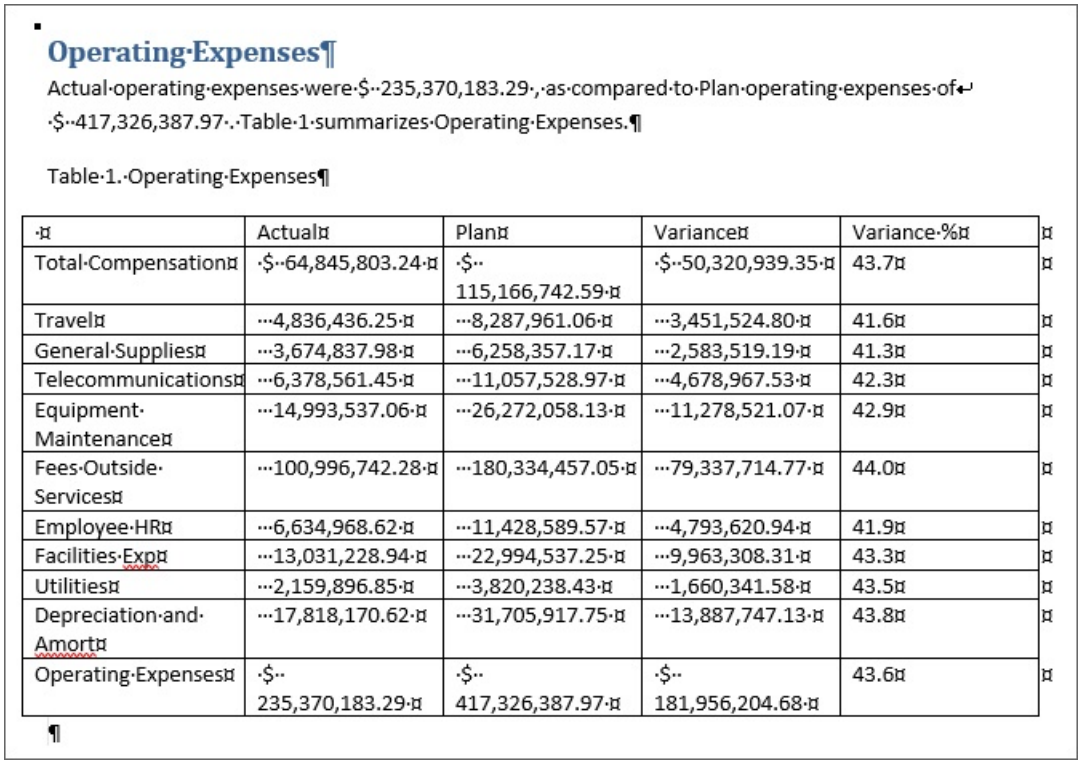
·¤	Actual¤	Plan¤	Variance¤	Variance·%¤
Total·Compensation¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Travel¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
General·Supplies¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Telecommunications¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Equipment·Maintenance¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Fees·Outside·Services¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Employee·HR¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Facilities·Exp¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Utilities¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Depreciation·and·Amort¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤
Operating·Expenses¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤	#NEED_REFRESH¤

¶

The data points and range are ready to be refreshed.

7. Click **Refresh**, either in the Smart View ribbon or the Narrative Reporting ribbon.

   The resulting doclet page should look like this:



Operating·Expenses¶

Actual·operating·expenses·were·$··235,370,183.29·,·as·compared·to·Plan·operating·expenses·of·$··417,326,387.97·.·Table·1·summarizes·Operating·Expenses.¶

Table·1.·Operating·Expenses¶

·¤	Actual¤	Plan¤	Variance¤	Variance·%¤
Total·Compensation¤	·$··64,845,803.24·¤	·$·· 115,166,742.59·¤	·$··50,320,939.35·¤	43.7¤
Travel¤	···4,836,436.25·¤	···8,287,961.06·¤	···3,451,524.80·¤	41.6¤
General·Supplies¤	···3,674,837.98·¤	···6,258,357.17·¤	···2,583,519.19·¤	41.3¤
Telecommunications¤	···6,378,561.45·¤	···11,057,528.97·¤	···4,678,967.53·¤	42.3¤
Equipment·Maintenance¤	···14,993,537.06·¤	···26,272,058.13·¤	···11,278,521.07·¤	42.9¤
Fees·Outside·Services¤	···100,996,742.28·¤	···180,334,457.05·¤	···79,337,714.77·¤	44.0¤
Employee·HR¤	···6,634,968.62·¤	···11,428,589.57·¤	···4,793,620.94·¤	41.9¤
Facilities·Exp¤	···13,031,228.94·¤	···22,994,537.25·¤	···9,963,308.31·¤	43.3¤
Utilities¤	···2,159,896.85·¤	···3,820,238.43·¤	···1,660,341.58·¤	43.5¤
Depreciation·and·Amort¤	···17,818,170.62·¤	···31,705,917.75·¤	···13,887,747.13·¤	43.8¤
Operating·Expenses¤	·$·· 235,370,183.29·¤	·$·· 417,326,387.97·¤	·$·· 181,956,204.68·¤	43.6¤

¶

8. Use the tools in Word to format the table in the doclet.

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a. Select the entire table and from the **Layout** ribbon in Word, select **AutoFit**, and then **AutoFit Contents**.

b. Center and bold the headings.

c. Right-align all the data values in the Actual, Plan, and Variance columns.

d. Center the percentages in the Variance % column.

e. Bold the totals in the Operating Expenses row.

f. Clear the borders from the entire table.

g. Add a single underline under the column headings and under the Actual, Plan, Variance, and Variance % columns in the "Depreciation and Amort" row.

h. Add double underlines under the Actual, Plan, Variance, and Variance % columns in the "Operating Expenses" row.

After you've applied the Word formatting, the table should resemble the table in Figure 5.

Figure 24-79 Doclet Example Containing Formatted Word Table

Operating Expenses

Actual operating expenses were $ 235,370,183.29 , as compared to Plan operating expenses of $ 417,326,387.97 . Table 1 summarizes Operating Expenses.

Table 1. Operating Expenses

	Actual	Plan	Variance	Variance %
Total Compensation	$ 64,845,803.24	$ 115,166,742.59	$ 50,320,939.35	43.7
Travel	4,836,436.25	8,287,961.06	3,451,524.80	41.6
General Supplies	3,674,837.98	6,258,357.17	2,583,519.19	41.3
Telecommunications	6,378,561.45	11,057,528.97	4,678,967.53	42.3
Equipment Maintenance	14,993,537.06	26,272,058.13	11,278,521.07	42.9
Fees Outside Services	100,996,742.28	180,334,457.05	79,337,714.77	44.0
Employee HR	6,634,968.62	11,428,589.57	4,793,620.94	41.9
Facilities Exp	13,031,228.94	22,994,537.25	9,963,308.31	43.3
Utilities	2,159,896.85	3,820,238.43	1,660,341.58	43.5
Depreciation and Amort	17,818,170.62	31,705,917.75	13,887,747.13	43.8
Operating Expenses	**$ 235,370,183.29**	**$ 417,326,387.97**	**$ 181,956,204.68**	**43.6**

Now that you've completed your authoring tasks in the doclet, you can upload it and check it in to make it available to other doclet authors.

9. Save the doclet in Word.

10. In the Narrative Reporting ribbon, click **Upload**.

11. In the **Upload File** dialog box, select the check box next to any style attributes that you want to override, and then click **OK**.

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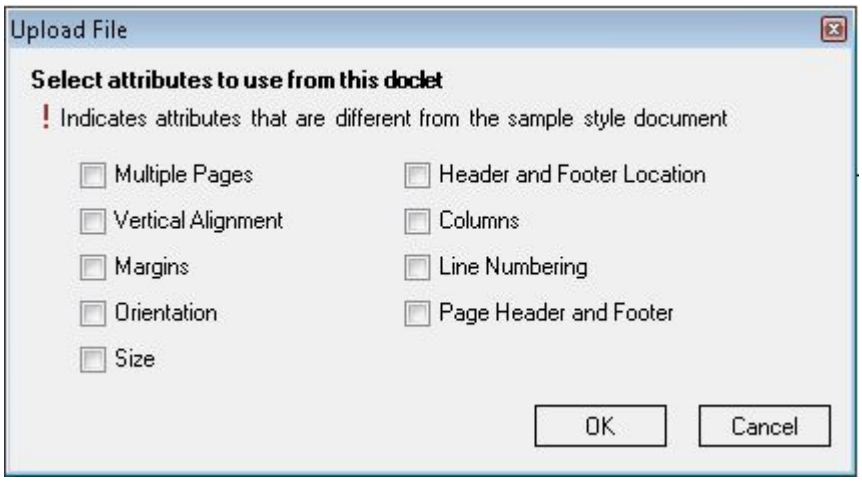
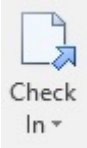
Style attributes in the doclet that differ from the style sample for the report package are noted with an exclamation point. In this case, there are no style attributes to override.



12. From the Narrative Reporting ribbon, click **Check In**.



The lock icon is removed from the doclet in the doclet responsibilities list, indicating that the doclet is no longer checked out.

This completes the example scenario. In summary, we showed you how to accomplish these tasks:

- Create an ad hoc report while connected to an Narrative Reporting data source.
- Format the figure and percentage data in Excel.
- Open a report package and check out a doclet for authoring.
- Copy and paste data points and ranges from the ad hoc grid in Excel to the doclet, creating a Word table.
- Format the table using Word formatting.
- Upload the doclet and check it in.

In a production environment, the next steps that you take depend on the requirements of the report package. You may need to submit the doclet for approval. You might need to author other doclets. Later, you may be asked to review portions or all of the report package. You can do all of these tasks in Oracle Smart View for Office.

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25

Smart View and Account Reconciliation

Related Topics

- About Using Smart View With Account Reconciliation
  This topic introduces and links to the procedures needed in order to install Oracle Smart View for Office, set up the connection, and then download the Smart View extension for Reconciliation Compliance, as well as the actual import transactions procedure.
- Setting Up Account Reconciliation in Smart View
  You can set up Account Reconciliation in Oracle Smart View for Office.
- Connecting to Account Reconciliation in Smart View
  You can connect to Account Reconciliation anytime you start Microsoft Excel.
- Importing Transactions Directly From Excel Using the Smart View Extension for Reconciliation Compliance
  This topic describes how to initialize and import transactions into Reconciliation Compliance using the Smart View Account Reconciliation extension.

About Using Smart View With Account Reconciliation

This topic introduces and links to the procedures needed in order to install Oracle Smart View for Office, set up the connection, and then download the Smart View extension for Reconciliation Compliance, as well as the actual import transactions procedure.

You can use Excel to load transactions into Reconciliation Compliance by using the Smart View Account Reconciliation extension. The direct integration requires the base installation of Smart View plus the Smart View extension for Reconciliation Compliance.

For instructions on how to install Smart View and connect to Account Reconciliation, and then install the Smart View extension for Reconciliation Compliance, see the topics in Setting Up Account Reconciliation in Smart View.

For procedures to load transactions into Reconciliation Compliance, see Importing Transactions Directly From Excel Using the Smart View Extension for Reconciliation Compliance.

For more information on Account Reconciliation, see the documentation on the Oracle Help Center.

Setting Up Account Reconciliation in Smart View

You can set up Account Reconciliation in Oracle Smart View for Office.

The topics in this section discuss setting up Account Reconciliation in Smart View. This is the workflow:

- Download and run the Smart View installer
- Set up a connection to Account Reconciliation
- Install the Account Reconciliation extension

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Downloading and Running the Smart View Installer

To download and run the Oracle Smart View for Office installer:

1. Start Account Reconciliation in a web browser, and log in with your Cloud EPM user name and password.
2. In the upper-right corner of the Account Reconciliation web interface, select the arrow next to your user name to display the user menu, and then select **Downloads**.
3. On the **Downloads** page, under Smart View, click **Download From Oracle Technology Network**.

   If a popup blocker message prevents you from continuing, follow the steps required for your browser to allow popups to display for the current web address.
4. On the **Oracle Smart View for Office** information page on Oracle Technology Network, click **Download Now**.

   This action take you to the **Oracle Software Delivery Cloud** page.

   If prompted, provide your Oracle login credentials.
5. On the **Oracle Software Delivery Cloud** page:
   a. Review the Oracle Gadgets License Agreement, and then select the **I reviewed and accept the following license agreements** check box.
   b. Select the **Oracle Smart View for Office <version>** check box.
   c. Under **Platforms**, you are required to select an option. However, there is only one Smart View executable file for all platforms, so Oracle recommends selecting the **All** option.
6. Click **Download**, and follow the steps for your browser to download and save the file to a folder on your computer; for example, save the file to the **Downloads** folder.

   An Oracle Software Download Manager EXE file is downloaded to your computer.
7. Double-click the EXE file to launch the **Oracle Download Manager**, then perform these steps:
   a. Under **Destination** click **Browse** and navigate to a folder for the Smart View download ZIP file, and then click **Next**.
   b. In the **Status** window, allow the ZIP file to download, and then click **Open Destination** to open the ZIP download location in File Explorer.
8. In File Explorer, unzip the contents of the ZIP file, and then double-click SmartView.exe or right-click SmartView.exe and select **Run as administrator** to start the installation wizard.

   > **Note**
   >
   > Whenever possible, Oracle recommends using the **Run as administrator** command when installing Smart View.

9. Select a destination folder for Smart View, and then click **OK**; for new installations, Smart View is installed by default in:

   C:/Oracle/SmartView

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> **Note**
>
> If you are upgrading an installation of Smart View, then the installer defaults to the folder where you previously installed Smart View.

10. When installation is complete, click **OK**.

The tab for the Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

Continue the setup process with Creating Connections to Account Reconciliation.

Creating Connections to Account Reconciliation

After you install Oracle Smart View for Office, as described in Downloading and Running the Smart View Installer, you can create connections to Account Reconciliation.

Connections require information about your service URL. Your Smart View administrator should provide you with the information that you need to create the connection.

For the connection to Account Reconciliation, use the quick connection method in Smart View.

> **Note**
>
> Use the procedure in this topic to create connections. Once connections are created, use the procedure Connecting to Account Reconciliation in Smart View for connecting on a routine basis.

To create a private connection to Account Reconciliation using the quick connection method:

1. Open Microsoft Excel, Word, or PowerPoint, and select the Smart View ribbon.
2. From the Smart View ribbon, click **Panel**.
3. From the Smart View Panel, select **Private Connections**.

   Alternatively, from the Smart View Panel, click the arrow next to the **Switch to** button, , and then select **Private Connections** from the drop-down list.
4. Still in the Smart View Panel, in the text box shown in Figure 1, enter the service URL for the Account Reconciliation.

Figure 25-1 Quick Connection - Enter a URL

The URL syntax:

https://*serviceURL*/arm/arcs/svp

Your Smart View administrator should provide you with the URL for Account Reconciliation

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5. Press **Enter**.

   Alternatively, click the **Go** button, next to the text box where you entered the service URL.

6. In the Smart View Panel, expand the **ARCS** node, then **Reconciliation Compliance**, then **SmartView**, and then click **Connect** in the Action Panel.
7. In the login window, enter your Oracle Cloud Identity Service Domain credentials, and click **Sign In**.
8. Perform an action:
   - If the **Extension Alerts** dialog is displayed, then click the **Go to Extension Dialog** button. The **Extension Alerts** dialog informs you of the latest Account Reconciliation extension available for installation. To complete the extension update procedure, see Installing the Account Reconciliation Extension.
   - If the **Extension Alerts** dialog is *not* displayed, continue with Installing the Account Reconciliation Extension.

Installing the Account Reconciliation Extension

This topic covers installing the Account Reconciliation extension from within Oracle Smart View for Office.

Before you begin this procedure, complete the steps in Creating Connections to Account Reconciliation.

> **Note**
>
> You can also install the extension from the Account Reconciliation web interface. To install the extension from the web, see:
>
> - Downloading and Installing Clients in *Getting Started Guide for Administrators*
> - Downloading and Installing Clients in *Getting Started Guide for Users*

To install the Account Reconciliation extension from Smart View:

1. From the Smart View ribbon, select **Options**, and then **Extensions**.

   > **Note**
   >
   > If the **Extension Alerts** dialog was displayed when you completed the steps in Creating Connections to Account Reconciliation, then you should already be in the **Extensions** tab of the **Options** dialog.

2. Click the **Check for Updates, New Installs, and Uninstalls** link.
3. In **Select Location for Extension Updates**, select the check box that corresponds to your Account Reconciliation connection, and then click **Get Updates**.

   The dialog box expands to display a message window providing you with the progress and status of the extension query.

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4. Click **Close** in the **Select Location for Extension Updates** dialog to return to the **Extensions** tab of the **Options** dialog.
5. In the list of extensions in the **Extensions** tab, locate **Reconciliation Compliance** and click the **Install** link, , to launch the installer.

> **Note**
>
> In release 25.100+, a message alerts you if a minimum version of Smart View is required and the current Smart View installation is not at the minimum version.
>
> You may continue with the installation; however, some features may not be available in the extension being installed.

6. In the popup dialog asking "Apply this extension update?", click **Yes**, and then click **OK** to close the **Options** dialog, **Extensions** tab.

   A dialog display the progress of the extension installation.
7. In the message dialog informing you that the installation is successful and instructing you to restart Office, click **OK**, and then close and restart Office.

For more information on extension installation in Smart View, see the following topics:

- Initially Checking for Available Extensions
- Installing Extensions

After completing the procedure in this topic, you are ready to begin using the Reconciliation Compliance extension with Smart View.

Connecting to Account Reconciliation in Smart View

You can connect to Account Reconciliation anytime you start Microsoft Excel.

> **Note**
>
> Before you connect to Account Reconciliation, make sure you have completed the procedures in Downloading and Running the Smart View Installer, Creating Connections to Account Reconciliation, and Installing the Account Reconciliation Extension.

To connect to Account Reconciliation:

1. Launch Excel, select the Smart View ribbon, and then click **Panel**.
2. In the Smart View Panel, select **Private Connections**.

   Alternatively, from the Smart View Panel, click the arrow next to the **Switch to** button, , and then select **Private Connections** from the drop-down list.
3. In the text box shown in Figure 1, click the arrow to display the drop-down menu and select your connection.

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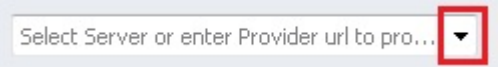
Figure 25-2 Quick Connection Arrow for Drop-down List



If you created your data source connection using the procedure in Creating Connections to Account Reconciliation, then it should be listed under **Quick Connect URLs** in the drop-down list.

4. In the Smart View Panel, expand the **ARCS** node, then Reconciliation **Compliance**, then **SmartView**, and then click **Connect** in the Action Panel.
5. In the **Login** window, enter your **User Name** and **Password**, and then click **Sign In**.

Importing Transactions Directly From Excel Using the Smart View Extension for Reconciliation Compliance

This topic describes how to initialize and import transactions into Reconciliation Compliance using the Smart View Account Reconciliation extension.

You can use Excel to load transactions into Reconciliation Compliance by using the Oracle Smart View for Office Account Reconciliation extension. The direct integration requires the base installation of Smart View plus the Smart View extension for Reconciliation Compliance.

You can either **Add** to your existing transactions, or use **Replace All** to replace your existing transactions with this new import file.

For instructions on how to install Smart View and how to download the Smart View extension for Reconciliation Compliance, see Setting Up Account Reconciliation in Smart View.

To load transactions, you use the **Initialize** and then **Import** options on the Smart View Reconciliation Compliance ribbon to import the data. **Initialize** prepares the header row (always Row 1) in the spreadsheet for the import based on Transaction Type and selection of formats. **Import** performs the actual import of the transactions.

You can load any of the following Transaction Types across one or many reconciliations in one import: Balance Explanations, Adjustment to Source System, Adjustment to Subsystem, and Variance Explanations.

For the procedure to initialize, see Initializing the Import

For the procedure to import the transactions, see Importing the Transactions

> **Note**
>
> Transactions loaded through Smart View will exhibit exactly the same behavior as **Import Pre-mapped Transactions**. See Import Pre-Mapped Transactions.

Initializing the Import

The **Initialize** option prepares the header row for the import based on specification of **Transaction Type** and selecting one or more formats. You can also include **Amortization** headers as well as **Action Plan** headers.

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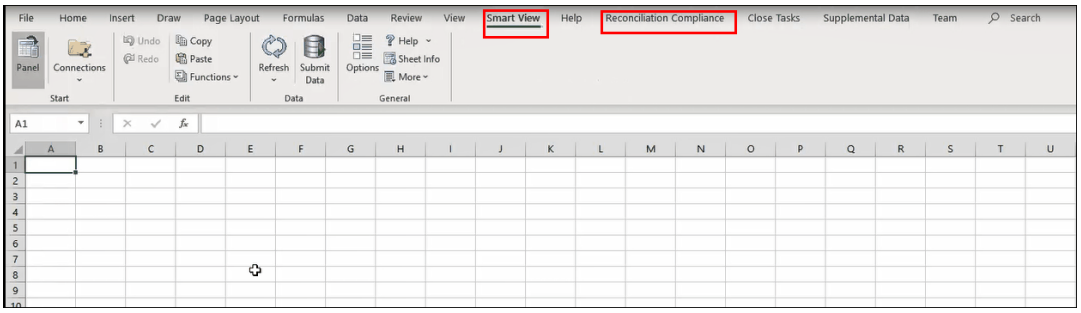
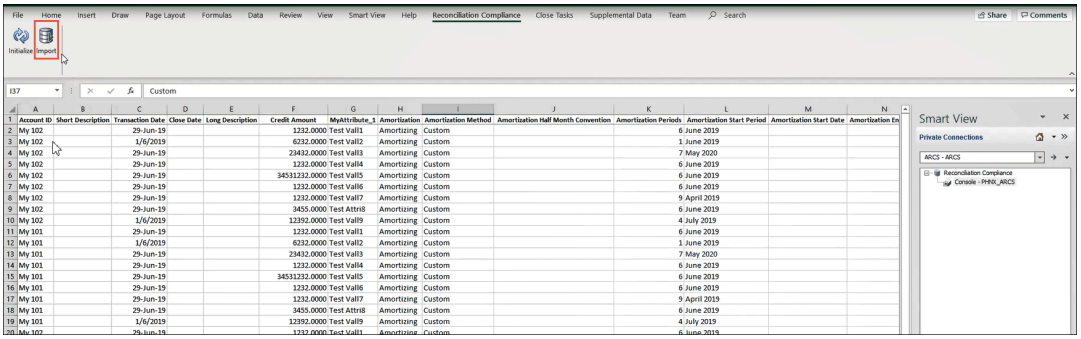
> **Note**
>
> If you are loading transactions using the same header row from a previous load, you do not have to use the Initialize option again. You can go directly to the **Import** option.

1. Once the Smart View installation steps are complete, open **Excel**, and establish the private connection.

   Note that you see the **Smart View** ribbon menu option as well as **Reconciliation Compliance** in Excel.



   Once you connect. you see the **Initialize** and **Import** options in the Reconciliation Compliance ribbon are active and ready to use.



2. Click **Initialize**.

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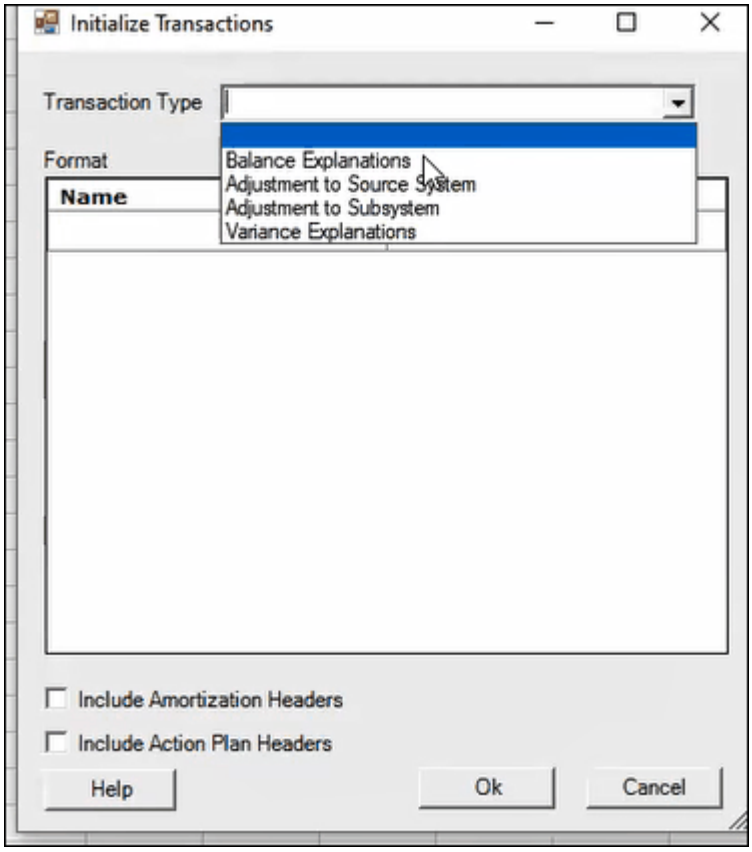

3. Select a **Transaction Type** from the drop down and the list of formats display for that transaction type.

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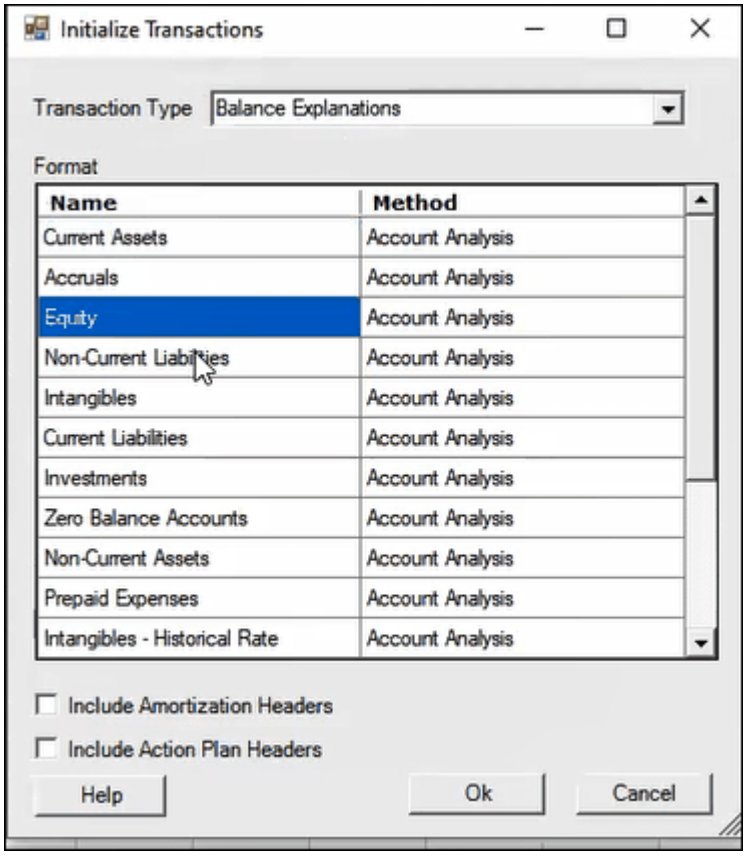
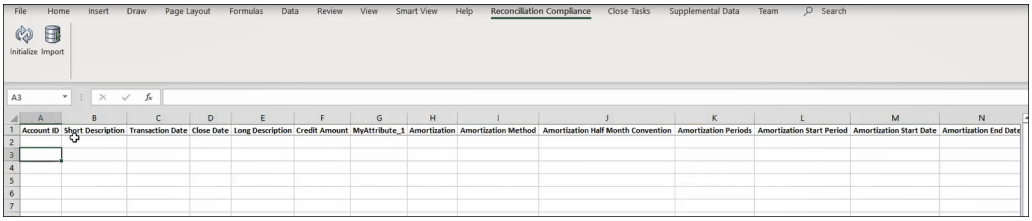


4. Select one or more **Formats**. The Formats selected will determine which Attributes are created in the header row after the Initialize step is complete.
5. You can select the check box to **Include Amortization Headers** and/or **Include Action Plan Headers**. Then click **OK**. If you leave these blank, they will not be included in the Header Row.

    - **Amortization Headers**—Here's an example of the header row showing the Amortization columns:



    - **Action Plan Headers**—Any custom attributes (not system attributes) that are part of an action plan and whose names contain the term "Action Plan" are displayed in Smart View with the term enclosed in square brackets. For example, a custom attribute named Action Plan Owner is shown as [Action Plan] Action Plan Owner in Smart View. This syntax occurs only in the name displayed in Smart View. The actual name of the custom attribute is not impacted or changed.

      Here's an example of the header row showing custom attributes in Action Plan columns.

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- **Rows and Columns**—You can add your own rows and columns to the spreadsheet to include pre-import notes, calculations or anything else that may help your work process. Rows without an Account ID and columns without a predefined header will be ignored by the **Import**.

  Here is a summary of the difference between column headers in Excel and the premapped Reconciliation Compliance Transaction Import file layout in **Account Reconciliation**:

Smart View Excel Transaction Import	Premapped Reconciliation Compliance Transaction Import File	Notes
Account ID	Reconciliation Account ID	These are the same. Example: 101-22270
<Sub Segment Name>	SubSegmentx	Used if one or more of the selected formats is a group reconciliation. Example: Store
Short Description	Short Description	These are the same. Example: Contract - AirNow
Long Description	Long Description	These are the same.
Transaction Date	Transaction Date	These are the same.
Close Date	Close Date	These are the same.
<Entered> Amount	Amountx	For the Smart View import, use the same currency bucket names as specified in the Currency Buckets configuration in Account Reconciliation. Bucket names are configurable. Default names are Entered, Functional, or Reporting.
<Entered> Currency	Amount Currencyx	For the Smart View import, use the same currency bucket names as specified in the Currency Buckets configuration in Account Reconciliation. Example: USD Bucket names are configurable. Default names are Entered, Functional, or Reporting.
<Attribute>	Attributex Attribute Valuex	For the Smart View import, use the same Attribute Name as specified in the Attributes configuration in Account Reconciliation.
Amortization	Amortization	Example: Amortizing
Amortization Method	Amortization Method	Example: Straight Line

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Smart View Excel Transaction Import	Premapped Reconciliation Compliance Transaction Import File	Notes
Amortization Half Month Convention	Amortization Half Month Convention	Example: No
Amortization Periods	Amortization Periods	Example: 7
Amortization Start Period	Amortization Start Period	Example: Jan-19
Amortization Start Date Amortization End Date	Amortization Start Date Amortization End Date	
Amortization Original <Entered>	Amortization Original Amount1	For the Smart View import, use the same bucket name as specified in the configuration in Account Reconciliation. Bucket names are configurable. Default names are Entered, Functional, or Reporting.
Action Plan Closed	Action Plan Closed	Example: Y
Action Plan Closed Date	Action Plan Closed Date	Example: 1/20/2020
Action Plan <Attribute>	Action Plan AttributeX Action Plan Attribute Valuex	For the Smart View import, use the same Action Plan Attribute Name as specified in the Attributes configuration in Account Reconciliation.

Note

- The Smart View import requires the Amount or Date fields to be formatted in Excel as Amount or Date format. They cannot be Text or other format.
- Excel commonly converts Amortization Period names to dates, which will cause errors on import. To prevent this, format the column as Text (Initialize does this automatically) or prefix the Period name with a single quote (ex: 'January 2021).

Importing the Transactions

Once your header row layout is ready, you can load your transactions into Reconciliation Compliance via Smart View.

1. Make sure your Excel header row is ready and you are connected to the Account Reconciliation instance.
2. Create transactions for import in the sheet that has your header row configured.

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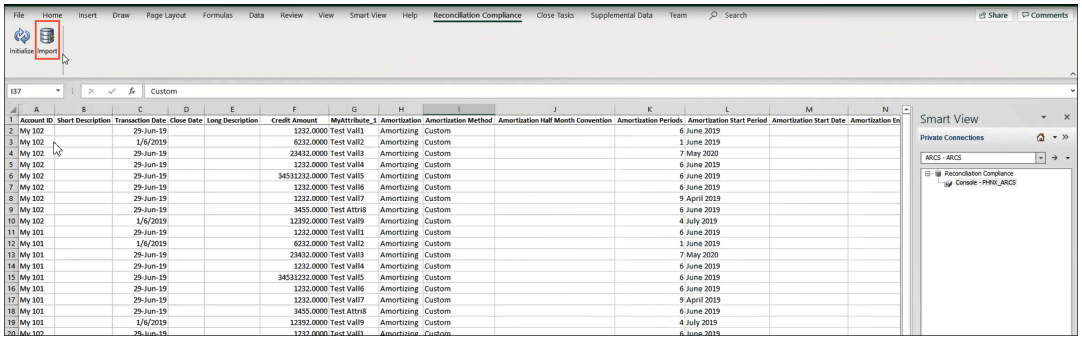
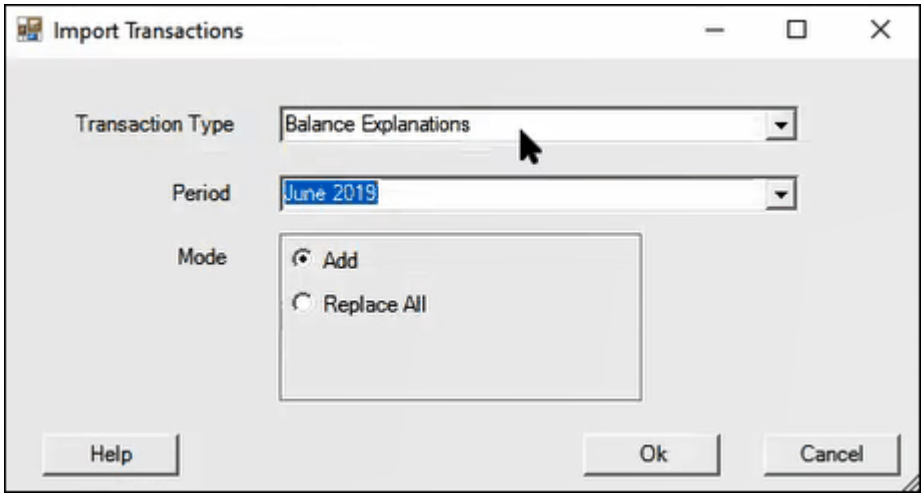


3. In Reconciliation Compliance ribbon in Smart View, click **Import**.
4. The **Import Transactions** dialog displays. You can change the **Transaction Type** if you wish.
5. Select the period from the drop down of **Open** and **Closed** periods.

> **Note**
>
> You can load transactions for a period whether or not reconciliations are created for that period. Once the reconciliations are created, the transactions are displayed on the Reconciliation. If the reconciliation is deleted, the transactions that were loaded using **Smart View** still remain in the database.



6. Select the import mode of either **Add** or **Replace All**. Then click **OK**. **Add** adds the transactions to your existing transactions. **Replace All** replaces your existing transactions with this new transaction import file.
When processing is complete, you see a **Results** dialog. Note that it warns you that any attributes with Read Only access are ignored. You can also download the file, if you wish.

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> **Note**
>
> Once you set up the header row, if you want to perform another import of transactions, you can go directly to **Import** without initializing again.

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Smart View and Profitability and Cost Management

Related Topics

- About Smart View and Profitability and Cost Management
  To maximize profitability, a business must be able to accurately measure, allocate, and manage costs and revenue.
- Downloading and Running the Smart View Installer
- Creating Data Source Connections to Profitability and Cost Management
  After you install Oracle Smart View for Office, you can create connections to Profitability and Cost Management.

About Smart View and Profitability and Cost Management

To maximize profitability, a business must be able to accurately measure, allocate, and manage costs and revenue.

Profitability and Cost Management is an analytic software tool that manages the cost and revenue allocations that are necessary to compute profitability for a business segment, such as a product, customer, region, or branch. Profitability and Cost Management enables you to use cost decomposition, consumption-based costing and scenario-playing to measure profitability for effective planning and decision support.

> **Note**
>
> For information on Enterprise Profitability and Cost Management, see Smart View and Cloud EPM.

Use the topics in this chapter to install and connect to Profitability and Cost Management:

- Downloading and Running the Smart View Installer
- Creating Data Source Connections to Profitability and Cost Management

Then you are ready to begin working with data in Profitability and Cost Management. Information on using Oracle Smart View for Office with Profitability and Cost Management is contained throughout this guide:

- Dimensions and Members
- Data and Data Cells
- Ad Hoc Analysis
- General Operations
- Smart Query
- Smart Slices
- Query Designer and MDX Queries

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- Smart View Options
- Functions
- Free-Form Mode
- Smart View Diagnostics and Health Check

Downloading and Running the Smart View Installer

Before running the Oracle Smart View for Office installer, review the Smart View prerequisites mentioned in Smart View Prerequisites in the *Getting Started Guide for Users*.
To download and run the Smart View installer:

1. Start Profitability and Cost Management in a web browser, and log in with your user name and password.
2. In the upper-right corner of the Profitability and Cost Management web interface, select the arrow next to your user name to display the user menu, and then select **Downloads**.
3. On the **Downloads** page, under Smart View, click **Download From Oracle Technology Network**.

   If a popup blocker message prevents you from continuing, follow the steps required for your browser to allow popups to display for the current web address.
4. On the **Oracle Smart View for Office** information page on Oracle Technology Network, click **Download Smart View for Office**, and then click **Download Now**.

   This action take you to the **Oracle Software Delivery Cloud** page.

   If prompted, provide your Oracle login credentials.
5. On the **Oracle Software Delivery Cloud** page:
   a. Review the Oracle Gadgets License Agreement, and then select the **I reviewed and accept the following license agreements** check box.
   b. Select the **Oracle Smart View for Office <version>** check box.
   c. Under **Platforms**, you are required to select an option. However, there is only one Smart View executable file for all platforms, so Oracle recommends selecting the **All** option.
6. Click **Download**, and follow the steps for your browser to download and save the file to a folder on your computer; for example, save the file to the **Downloads** folder.

   An Oracle Software Download Manager EXE file is downloaded to your computer.
7. Double-click the EXE file to launch the **Oracle Download Manager**, then perform these steps:
   a. Under **Destination** click **Browse** and navigate to a folder for the Smart View download ZIP file, and then click **Next**.
   b. In the **Status** window, allow the ZIP file to download, and then click **Open Destination** to open the ZIP download location in File Explorer.
8. In File Explorer, unzip the contents of the ZIP file, and then double-click SmartView.exe or right-click SmartView.exe and select **Run as administrator** to start the installation wizard.

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> **Note**
>
> Whenever possible, Oracle recommends using the **Run as administrator** command when installing Smart View.

9. Select a destination folder for Smart View, and then click **OK**; for new installations, Smart View is installed by default in:

   C:/Oracle/SmartView

> **Note**
>
> If you are upgrading an installation of Smart View, then the installer defaults to the folder where you previously installed Smart View.

10. When installation is complete, click **OK**.

    The tab for the Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

    Continue the setup process with Creating Data Source Connections to Profitability and Cost Management.

Creating Data Source Connections to Profitability and Cost Management

After you install Oracle Smart View for Office, you can create connections to Profitability and Cost Management.

Connections require information about the server and port. Your cloud service administrator should provide you with the information you need to create the connection. Use the quick connection method to create a private connection to the cloud service.

To create a private connection using the quick connection method:

1. In Excel, select the Smart View ribbon, and then click Panel.
2. On the Smart View Panel, **Private Connections**.
3. Still in the Smart View Panel, in the text box, enter the URL for the data source to which you want to connect.

   The URL syntax:

   https://*serviceURL*/aps/smartview

4. Click Go, or press **Enter**.
5. On the login window, enter your login credentials, and then select a data source from the drop-down menu.

You can now begin working with data in Profitability and Cost Management. See the functional areas listed in About Smart View and Profitability and Cost Management for more information.

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Smart View and Financial Reporting

Related Topics

- About Importing Financial Reporting Documents
  Using Oracle Smart View for Office, you can import Financial Reporting reports into Microsoft Excel, Word, and PowerPoint.
- Editing and Refreshing Documents
  The Smart View ribbon provides several edit and refresh options.
- Refreshing Financial Reporting Documents
  Refreshing updates the report with the latest data.
- Financial Reporting Import Formats
  You can import Financial Reporting documents as *fully-formatted* HTML, which you can display in Excel, or in *query-ready* HTML, which enables you to connect to run queries.
- Importing Financial Reporting Documents
  You can import Financial Reporting documents into Excel, Word, and PowerPoint.
- Exporting Financial Reporting Reports
  You can export Financial Reporting reports.

About Importing Financial Reporting Documents

Using Oracle Smart View for Office, you can import Financial Reporting reports into Microsoft Excel, Word, and PowerPoint.

> **Note**
>
> In this chapter:
>
> - References to Financial Reporting apply to the Oracle Fusion Cloud Enterprise Performance Management version of Financial Reporting.
> - References to Cloud EPM apply to these business processes: Planning, FreeForm, Planning Modules, Financial Consolidation and Close, and Tax Reporting.

Editing and Refreshing Documents

The Smart View ribbon provides several edit and refresh options.

In Office, you can edit and refresh documents that were previously imported from Oracle Fusion Cloud Enterprise Performance Management business processes .

- Edit—change filters, POVs, or parameters of embedded Cloud EPM documents.
- Refresh—refresh the selected job with the latest Cloud EPM data. Only the job selected in Office is updated; not the entire Office document.

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- Refresh All— update all jobs in the Office document.

General Edit and Refresh Behavior

- When you refresh an imported document in which pages have been deleted, only the remaining pages are refreshed. The deleted pages are not reinstated.
- If editing or refreshing results in fewer pages in an imported document, the removed pages display as blanks pages in Office.
- If editing or refreshing results in more pages in an imported document, those pages are appended to the document in Office.
- Formatting headings and comments are retained when you refresh in Word and PowerPoint but not when you refresh in Excel.

Maintaining Cell References During Document Refresh

In Excel, a customized worksheet that references imported document cells or ranges is updated when you execute a Refresh All on the imported documents. For example, imported worksheet A and B are referenced in customized worksheet C. When you execute Refresh All on worksheet A and B, worksheet C is refreshed with updated data from worksheets A and B.

Refreshing Financial Reporting Documents

Refreshing updates the report with the latest data.

Refresh Behaviors in Financial Reporting

- You must select a page in the report to refresh. In Word and PowerPoint, if you do not select any pages when refreshing, a message is displaying stating that no pages are updated.
- If you select **Refresh**, all pages of the report are refreshed. If you select Refresh All, then all reports in the document are refreshed.
- An "Invalid Pointer" error results during login when the data source connection has timed out and you attempt to refresh a previously-saved report that contains a function grid. To work around this, close the workbook and Excel. Then, restart Excel, open the workbook, and perform the refresh.

Refreshing Financial Reporting Documents Against Cloud EPM Connections

To refresh Oracle Fusion Cloud Enterprise Performance Management documents in Excel, Word, or PowerPoint, perform an action:

- To update the selected Financial Reporting document, including all pages associated with that document, select **Refresh** on the Smart View ribbon.
- To update all Financial Reporting documents, select **Refresh All** on the Smart View ribbon.

Financial Reporting Import Formats

You can import Financial Reporting documents as *fully-formatted* HTML, which you can display in Excel, or in *query-ready* HTML, which enables you to connect to run queries.

Perform a **Refresh** on an imported report before you begin working on it in query-ready mode to ensure that the report and the POV are in sync.

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When you import Financial Reporting documents as query-ready HTML, the selected pages of the current data object are converted to HTML, and Oracle Smart View for Office-specific formatting is removed. Thus, Smart View can re-query the data source independent of the Web application.

When you import Financial Reporting documents as fully formatted HTML, the selected pages of the current data object are converted to HTML, and Smart View formatting definitions and calculated members are retained. Thus, Smart View cannot directly query the data source, but Smart View content can be leveraged by Microsoft Office applications.

> **Tip**
>
> After importing an image in Word or PowerPoint, use the Office Format Picture option to format it; for example, to crop and resize. The Format Picture settings are preserved, even after you refresh the image.

Importing Financial Reporting Documents

You can import Financial Reporting documents into Excel, Word, and PowerPoint.

Related Topics

- Importing Financial Reporting Documents
- Importing Financial Reporting Documents into Excel
- Importing Financial Reporting Documents into Word and PowerPoint
- Sliders
- Editing Financial Reporting Documents
- Creating Templates in PowerPoint Documents
- Refreshing PowerPoint Templates

Importing Financial Reporting Documents

Table 27-1 Financial Reporting Import Document Types

Document Type	Excel	Word, PowerPoint
Report	Fully Formatted, Query-Ready, Function Grid	Image, Function Grid
Snapshot report	Fully Formatted	Image
Book	N/A	N/A
Snapshot Book	N/A	N/A
Batch	N/A	N/A
Grid Object	N/A	N/A
Image Object	N/A	N/A
Chart Object	N/A	N/A
Text Object	N/A	N/A
Row and Column template	N/A	N/A

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Importing Financial Reporting Documents into Excel

To import Financial Reporting documents into Excel:

1. From the Smart View ribbon, select **Panel**.
2. In the Smart View Panel, connect to an Oracle Fusion Cloud Enterprise Performance Management business process .
3. Navigate to the Financial Reporting document that you want to import.
4. From the Action Panel, click **Open.**

   The **Import Workspace Document** wizard is displayed.

   > **Note**
   >
   > Some wizard screens do not apply to some documents.

5. In **Select a Document**, expand the repository, select a Financial Reporting document, and click **OK**.

   The document is previewed in the **Import Workspace Document** window.

   > **Note**
   >
   > Some options may not be available for some documents.

6. If **Preview User Point of View** is displayed, preview the current POV or change the members of the POV.

   > **Note**
   >
   > To display this screen, select Preview for User Point of View in the preferences for your Cloud EPM service.

7. Click **Next**.
8. **Optional:** If you want to change the default value, in **Respond to Prompts**, make a selection for prompts, and click **Next**.

   > **Note**
   >
   > This screen is displayed only if the document contains prompts.

9. **Optional:** In **Preview** from **Grid POV**, change the POV by selecting a POV.
10. Change the page dimension by selecting **Page**.
11. To import all pages of the document, select **All Pages**.
12. **Optional:** To refresh the Financial Reporting document using the Cloud EPM service Point of View, select **Refresh Using Workspace Point of View**.

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13. In **Import Document As**, select an option:
    - **Fully-Formatted**—displays reports in a fully-formatted HTML.
    - **Query-Ready**—enables you to run ad hoc analysis on reports when connected to Oracle Hyperion Financial Management and Oracle Essbase data sources.

      > **Note**
      >
      > Perform a **Refresh** on an imported report before you begin working on it in query-ready mode to ensure that the report and the POV are in sync.

    - **Function Grid**—a dynamic grid format, allows you to further select a report option, as described in step 18.
14. To display each page on a separate Excel worksheet, select **Split Pages across worksheets**.

    > **Note**
    >
    > This option available only if you selected **Fully-Formatted** in step 13.

15. Click **Finish**.

    Your next steps depend on the option you selected in step 13:

    If you selected:
    - **Fully-Formatted**—the document is imported into the Office application, and you can only view the Reporting and Analysis document.
    - **Query-Ready**—the document is imported into the Office application, and you can now connect to a Financial Management or Essbase data source, where you can perform ad hoc analysis, such as retrieving, zooming, or pivoting data.
    - **Function Grid**—continue with step 16.
16. Click to refresh the **Document Contents** pane.
17. Select the function grid object in **Document Contents**, right-click and select **Insert New Reporting Object/Control**.
18. From the **Insert New Reporting Object/Control** dialog box, select one of these report types to place on the grid:
    - **Function Grid** — a dynamic grid format

      When you refresh a function grid, data cells are refreshed; members are not. To refresh both data and members, you must reinsert the function grid into the sheet. For this reason, function grids are most useful for reports in which members remain reasonably static. For reports whose members may change more often, tables and charts are better report types. Although you can have multiple reports on a worksheet, you can have only one function grid.

      You can use Excel formulas, for example SUM, with function grids. To retain such formulas as part of the function grid, you must leave one empty row between the grid and the cell containing the formula and include the empty row in the range of cells selected for the formula definition. This permits retention of the formula when refreshing the data results in a different number of rows in the grid.

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To format a function grid, use Excel formatting capabilities.

- **Table**

  Table reports display results in a grid format that floats on the document and can be moved and re-sized. When you refresh a table, both members and data are refreshed. Tables are useful for displaying large grids in a smaller space; their scroll bars enable you to quickly access rows and columns.

  You can zoom in and out in a table report, but you cannot perform other ad hoc operations or use free form.

- **Chart**

  Chart reports display results in a chart format that floats on the document and can be moved and re-sized. When you refresh a chart, both members and data are refreshed.

19. **Optional:** To move or resize a table or chart, in **Document Contents**, click the down arrow next to , and from the menu, select **Toggle Design Mode**.

    You can now move objects within the sheet, slide, or page.

    When you are ready to exit design mode, select **Toggle Design Mode** again.

20. Refresh.

21. **Optional:** To create a separate report for any or all of the members of one dimension in the report and cascade these reports separately across the worksheets of the workbook, see Cascading Reports and Ad Hoc Grids.

> **Note**
>
> - In reports that contain a chart and a table, cascading may cause the chart and table to overlap the next time you open the workbook.
> - In Office 2016, when connected to Financial Reporting, Microsoft Word suspends or terminates unexpectedly after inserting several reporting objects in succession

Importing Financial Reporting Documents into Word and PowerPoint

> **Note**
>
> In this topic, references to Financial Reporting apply to the Oracle Fusion Cloud Enterprise Performance Management versions of Financial Reporting.

To import Financial Reporting documents into Word and PowerPoint:

1. From the Smart View ribbon, select **Panel**.
2. In the Smart View Panel, connect to a supported Cloud EPM data source.
3. Navigate to the Financial Reporting document that you want to import.
4. From the Action Panel, click **Open.**

   The **Import Workspace Document** wizard is displayed.

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5. In **Select a Document**, expand the repository, select a Financial Reporting document, then click **OK**.

   The document is previewed in the **Import Workspace Document** window.

   > **Note**
   >
   > Some screens do not apply to some documents.

6. If the **Preview User Point of View** screen is displayed, preview the current POV or change the members of the POV by selecting a member.

   > **Note**
   >
   > To display this screen, select Preview for User Point of View in the preferences for your Cloud EPM service.

7. **Optional:** If you want to change the default value, in **Respond to Prompts**, make a selection for prompts, and click **Next**.

   > **Note**
   >
   > This screen is displayed only if the document contains prompts.

8. In **Preview** from **Grid POV**, change the POV by selecting a POV.

   > **Note**
   >
   > Some wizard screens do not apply to some documents.

9. Change the page dimension by selecting **Page**.
10. Select **All Pages** to import all pages of the document.
11. **Optional:** To refresh the Financial Reporting document using Point of View of the connected Cloud EPM service , select **Refresh Using Workspace Point of View**.
12. In **Import Document As**, select an option:
    - **Image**—To import the document as an image.
    - **Function Grid**—To import a dynamic grid format, which allows you to further select a report option, as described in step 16 (available in Word only).
13. Click **Finish**.

    Your next steps depend on the option you selected in step 12:

    If you selected:

    - **Image**—The report is imported into the document as an image and you can only view the Reporting and Analysis image in the Word.
    - **Function Grid**—Continue with step 14 (Word only).

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14. Click to refresh the **Document Contents** pane.
15. Select the report object in **Document Contents**, right-click and select **Insert New Reporting Object/Control**.
16. From the **Insert New Reporting Object/Control** dialog box, select one of these report types to place on the page:
    - **Function Grid** —a dynamic grid format

      When you refresh a function grid, data cells are refreshed; members are not. To refresh both data and members, you must reinsert the function grid into the sheet. For this reason, function grids are most useful for reports in which members remain reasonably static. For reports whose members may change more often, tables and charts are better report types. Although you can have multiple reports on a worksheet, you can have only one function grid.

      You can use Excel formulas, for example SUM, with function grids. To retain such formulas as part of the function grid, you must leave one empty row between the grid and the cell containing the formula and include the empty row in the range of cells selected for the formula definition. This permits retention of the formula when refreshing the data results in a different number of rows in the grid.

      To format a function grid, use Excel formatting capabilities.

    - **Office Table**

      Office tables can be used with Word only. Office tables display results in native Microsoft Office table format. When you refresh an Office table, both members and data are refreshed.

      Office tables look and feel like part of the Word document, but the members and data in the table cells are connected to the Smart View provider. With Office tables, you can work with the Word table formatting and styles that you are accustomed to. Insert a POV object into the report and you can change the POV of the Office table. Refresh the Office table after changing formatting or POV and the new POV is reflected in the results and custom formatting is retained.

      You cannot zoom in or out in an Office table object, and you cannot perform other ad hoc operations or use free form.

    - **Table**

      Table reports display results in a grid format that floats on the document and can be moved and re-sized. When you refresh a table, both members and data are refreshed. Tables are useful for displaying large grids in a smaller space; their scroll bars enable you to quickly access rows and columns.

      You can zoom in and out in a table report, but you cannot perform other ad hoc operations or use free form.

    - **Chart**

      Chart reports display results in a chart format that floats on the document and can be moved and re-sized. When you refresh a chart, both members and data are refreshed.
17. **Optional:** To move or re-size a table or chart, in **Document Contents**, click the down arrow next to , and from the menu, select **Toggle Design Mode**.

    You can now move objects within the sheet, slide, or page.

    When you are ready to exit design mode, select **Toggle Design Mode** again.
18. Refresh.

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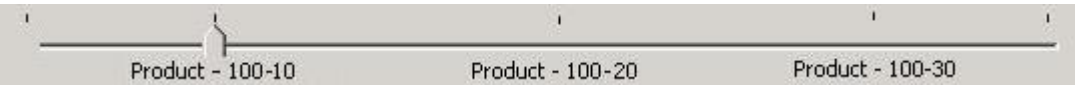
> **Note**
>
> In Office 2016, when connected to Financial Reporting, Microsoft Word suspends or terminates unexpectedly after inserting several reporting objects in succession

Sliders

Figure 1 shows a slider. The slider displays a selected set of dimension members from a query; when you drag the slider marker to a member, its data is displayed in all reports associated with the query on the sheet. Sliders can contain dimensions from more than one query in the Report Designer if the dimensions have the same boundaries.

Figure 27-1 Slider



- Creating a Slider from One Query
- Creating a Slider from Joined Queries

Creating a Slider from One Query

To create a slider:

1. Ensure that one or more report type is inserted in the worksheet for the query for which you want to create the slider.
2. From the report designer, click **Query View** and select **Query View**.
3. In the Report Designer, select the query on which to base the slider.
4. Click

and select **Slider** to open **Member Selection**.
5. Select a dimension, members, and filters for the slider and click **OK**.

   The slider is displayed on the sheet.
6. **Optional:** To move or re-size the slider, click and then move or re-size.

Creating a Slider from Joined Queries

You can create a slider that contains dimensions from multiple queries if, and only if, the dimensions from the different queries have the exact same boundaries.

To create a slider using a dimension from multiple queries:

1. Ensure that one or more report type is inserted in the worksheet for the query for which you want to create the slider.
2. Click **Query View** and select **Dimension View**. Notice that the Report Designer tree view is grouped by dimensions rather than by queries. Under each dimension are the queries that contain that dimension. If the dimensions do not contain the same boundaries, multiple sliders will be created to accommodate each of them. For example, if the Market

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dimension in one query contains a children filter and the Market dimension from another query contains a descendents filter, two Market sliders would be created.

3. In the Report Designer, select the dimension on which to base the query.
4. Click

and select **Slider** to open **Member Selection**.
5. Select dimension members, and filters for the slider and click **OK**.

   The slider is displayed on the sheet.
6. **Optional:** To move or re-size the slider, click and then move or re-size.

Editing Financial Reporting Documents

> **Note**
>
> In this topic, references to Financial Reporting apply to the Oracle Fusion Cloud Enterprise Performance Management versions of Financial Reporting.

To edit Financial Reporting documents in Excel, Word, and PowerPoint:

1. Open the Financial Reporting document to edit.
2. From the Smart View ribbon, click the arrow in

, then select **Reporting and Analysis Document**, and then **Edit**.

   The **Import Workspace Document** wizard is displayed.

   > **Note**
   >
   > Some wizard screens do not apply to some documents.
3. If the **Preview User Point of View** screen is displayed, preview the current POV or change the members of the POV.

   > **Note**
   >
   > To display this screen, select Preview for User Point of View in the preferences for your Cloud EPM service.
4. **Optional:** In documents that contain prompts, to change the default value, in **Respond to Prompts**, make a selection for prompts, and click **Next**.

   > **Note**
   >
   > **Respond to Prompts** is displayed only if the document contains prompts.

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5. To change the POV, in **Preview** from **Grid POV** select a POV.
6. Click **Finish**.

Creating Templates in PowerPoint Documents

You can create PowerPoint template documents that can be saved by importing one or more Financial Reporting reports to the presentation. Every Create Template action creates a new PowerPoint slide with a report name to show where it will be placed when Refresh Template is used.

To create a template:

1. Open PowerPoint.
2. Connect to a Reporting and Analysis provider.
3. From the Smart View ribbon, select **Panel**, then **Reporting and Analysis Document**, and then **Create Template**.
4. In **Import Workspace Document**, select a Financial Reporting document.
   - **Optional:** To import all pages of the document, select **All Pages**. A separate slide is created for each page.
   - To import the current screen presentation, clear **All Pages**.
5. **Optional:** To use the the point of view for your Oracle Fusion Cloud Enterprise Performance Management service, select **Refresh Using Workspace Point of View.**
6. Click **OK**. The document name is imported into the PowerPoint presentation.

Refreshing PowerPoint Templates

To refresh a template:

1. Open the PowerPoint presentation containing the template.
2. Connect to a Reporting and Analysis provider.
3. From the Smart View ribbon, select **Panel**, then **Reporting and Analysis Document**, and then **Refresh Template**.
4. Edit and save the PowerPoint presentation as needed.

Exporting Financial Reporting Reports

You can export Financial Reporting reports.

When exporting a Financial Reporting report from Oracle Fusion Cloud Enterprise Performance Management to Oracle Smart View for Office, the user POV for the report is not retained. The user POV defaults to the user POV used most recently in Smart View.

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Smart View and Oracle Analytics Cloud

Related Topics

- About Oracle Analytics Cloud and Smart View
  With Oracle Smart View for Office, users can connect to Oracle Analytics Cloud and utilize the content created in Oracle Analytics Cloud dashboards and analyses.
- Features and Components of Oracle Analytics Cloud in Smart View
  When connected to an Oracle Analytics Cloud data source in Oracle Smart View for Office, you can perform several actions.
- Installing the Oracle Analytics Cloud Extension
  How the Oracle Analytics Cloud extension is installed depends on whether you are an end user or an administrator.
- Working with Windows System Locales in Oracle Analytics Cloud
  On each Oracle Smart View for Office client machine, Windows system locales must match that of Smart View in order for any data (numbers, dates, currencies, percentages) to be interpreted correctly.
- Connecting to Multiple Oracle Analytics Cloud Data Sources
  You connect to Oracle Analytics Cloud data sources using private connections.
- Oracle BI Presentation Catalog
  The Oracle BI Presentation Catalog, also referred to as the catalog or catalog tree, is displayed in the Smart View Panel.
- Working with Oracle Analytics Cloud Analyses, Views, and Dashboards
  In Oracle Analytics Cloud, analyses are made up of individual views; dashboards are made up of analyses and individual views.
- Working with Views Using the View Designer
  Using the View Designer in Oracle Smart View for Office, you can create ad hoc views based on an Oracle Analytics Cloud subject area.

About Oracle Analytics Cloud and Smart View

With Oracle Smart View for Office, users can connect to Oracle Analytics Cloud and utilize the content created in Oracle Analytics Cloud dashboards and analyses.

In addition to working with this content, Smart View users can create content in the form of simple views with the View Designer, using Oracle Analytics Cloud as the data source. The views created can then be published to the Oracle BI Presentation Catalog, where they can be edited further.

Smart View offers Oracle Analytics Cloud users a cohesive and consistent experience across all Oracle Analytics Cloud content providers.

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> **Note**
>
> To use the Oracle Analytics Cloud-related features in Smart View, you must have Oracle Analytics Cloud 17.3.2 or later.

Features and Components of Oracle Analytics Cloud in Smart View

When connected to an Oracle Analytics Cloud data source in Oracle Smart View for Office, you can perform several actions.

- Connect to Oracle Analytics Cloud.
- Navigate through the Oracle BI Presentation Catalog.
- Connect to multiple instances of Oracle Analytics Cloud and switch between connections.
- Import pre-created views from the Oracle BI Presentation Catalog into Microsoft Excel, PowerPoint, and Word. For example, you can:
  - Insert views—Oracle Analytics Cloud tables, pivot tables, and graphs—into Excel as refreshable, editable objects.
  - Insert views from different connections into the same Office document.
  - Apply Excel formatting to Oracle Analytics Cloud data; formats are retained when you refresh.
- Copy Oracle Analytics Cloud Dashboard content and paste it into Smart View client documents. The data, metadata, and view layout are copied.
- Create simple views in Excel using Oracle Analytics Cloud as the source for metadata and data.
- Interact with content imported into Smart View documents, such as drill and prompt selections.
- Manage the imported content in Smart View, including content from multiple connections; for example, refresh, mask, copy and paste, and document contents.
- Mask data from Oracle Analytics Cloud objects in Excel so that users must log in to view the data. Masked objects can be viewed upon refresh.
- Program using Visual Basic. See *Developing Applications for Smart View for Office* for more information.

Key components are:

- Ribbon—The Oracle Analytics Cloud ribbon contains Oracle Analytics Cloud commands for designing and publishing views in Smart View, inserting, and copying and pasting views from Oracle Analytics Cloud, editing prompts, masking data, editing, and setting preferences.
- Catalog—The catalog is an expandable tree list of the Oracle Analytics Cloud dashboards, analyses, and views that are available to you for insertion into Excel. Each analysis expands to display all views available from that analysis. Only views that are supported and defined in Oracle Analytics Cloud, and for which you have permission, are displayed. You can refresh the catalog to display the latest list of available analyses and views.

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Installing the Oracle Analytics Cloud Extension

How the Oracle Analytics Cloud extension is installed depends on whether you are an end user or an administrator.

Related Topics

- For Smart View End Users
- For Smart View Administrators

For Smart View End Users

To install the extension for Oracle Analytics Cloud:

1. Install Oracle Smart View for Office as instructed by your Smart View administrator.

   > **Note**
   >
   > In some cases, your administrator may install Smart View automatically for you.

2. After Smart View is installed, and *before* you start Microsoft Excel, Word, or PowerPoint, ensure that you are logged in to your computer with your own user name.

   > **Note**
   >
   > You must be logged in with your own user name, not an administrator's or anyone else's user name, in order to be able to correctly install and use the extension for Oracle Analytics Cloud.

3. Start Microsoft Excel, Word, or PowerPoint.

   > **Note**
   >
   > To install the Oracle BI EE extension, you can start Excel, Word, or PowerPoint; the Oracle BI EE extension installation is not launched from Outlook.
   >
   > See Installing Extensions for details.

4. To verify that the extension for Oracle Analytics Cloud is installed, from Excel, Word, or PowerPoint, select the Smart View ribbon, then **Options**, and then **Extensions**, and confirm that the extension named "Oracle BI EE" is listed.

   If the extension is not listed, contact your Smart View administrator.

For Smart View Administrators

After Oracle Smart View for Office installation, the Oracle Analytics Cloud extension is installed automatically the first time an Office application is launched. You must ensure that the intended end user is logged in to Windows before Office is launched.

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Or, you can control how your Smart View end users install the Oracle Analytics Cloud extension via the **Extensions** page of the Smart View **Options** dialog box. See "Administering Extension Installations and Updates" in the *Oracle Smart View for Office Installation and Configuration Guide* for more information on setting up automatic or manual installations.

If you choose to set up automatic or manual installations, you should install Smart View in a test environment first, then refer to the UpdateList.xml file, found in the extensions folder of your Smart View installation. Use the entry in this file as a guideline for the Oracle Analytics Cloud entry you will add to the UpdateList.xml file, as described in "Configuring Manual Extension Updates" in the *Oracle Smart View for Office Installation and Configuration Guide*.

Working with Windows System Locales in Oracle Analytics Cloud

On each Oracle Smart View for Office client machine, Windows system locales must match that of Smart View in order for any data (numbers, dates, currencies, percentages) to be interpreted correctly.

The following are the applicable Windows system locales:

- Smart View language option
- Microsoft Office language
- Windows Regional Settings
- Windows operating system

When working with Oracle Analytics Cloud data sources, in cases of mismatched Windows system locales, data may display incorrectly, or formatting may be ignored and plain data rendered instead.

An example of a Windows system locale mismatch is the Windows operating system, Regional Settings, and Office language in English, and Smart View in Russian.

When locale mismatches occur, the Smart View log indicates a warning such as the following: "Encountered mismatched locale. Chart will use unformatted data values."

Connecting to Multiple Oracle Analytics Cloud Data Sources

You connect to Oracle Analytics Cloud data sources using private connections.

See Creating Private Connections.

To connect using shared connections, the shared connection information must be stored in a file, as described in Accessing Shared Connections from an XML File in the *Oracle Smart View for Office Installation and Configuration Guide*.

Additionally, Oracle Smart View for Office supports multiple Oracle Analytics Cloud private connections on one Office worksheet, slide, or document.

For example, in one worksheet, you may insert two graphs from two different Oracle BI Presentation Catalogs and refresh the sheet. Each graph will be updated with the latest data from the two different servers.

When connected to multiple Oracle Analytics Cloud servers:

- Users can switch between those connections in the Smart View Panel and browse the respective catalogs.
- Users can insert views from the different connections into the same Office document.

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- If View Designer is launched from the Smart View ribbon and no Oracle Analytics Cloud view is selected, then View Designer will be connected to the Oracle Analytics Cloud server that was last used.
- If Paste is invoked from the Smart View ribbon to paste content from Oracle Analytics Cloud, the paste action will use the Oracle Analytics Cloud connection that was last used.
- When refreshing a document containing views from different connections, the views will be refreshed against the servers from which they were inserted.
- There can be only one Excel pivot table view per Excel worksheet. Additionally, Excel pivot table views are always inserted onto a new worksheet. This is the expected behavior, whether you are working with a single data source connection or with multiple connections.

To connect to multiple Oracle Analytics Cloud private connections:

1. From **Smart View Home** or from the menu displayed when you click the arrow next to , click **Private Connections**
2. In the **Private Connections** panel, select a connection from the drop-down menu and, in **Connect to Data Source**, enter your user name and password for the data source.

   Assume you have inserted a view from the Oracle Analytics Cloud catalog. Continue with step 3.
3. Move the cursor to a different part of the worksheet, slide, or document.
4. In the **Private Connections** panel, select a different connection from the drop-down menu.
5. In **Connect to Data Source**, enter your user name and password for the second data source.

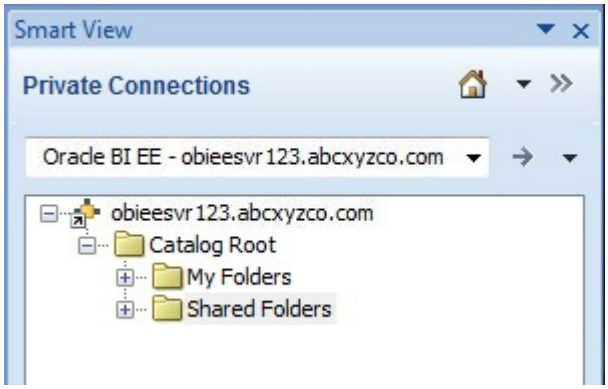
   You can now insert a view from the newly-connected data source into the Office document
6. Repeat step 3 through step 5 for any other data sources to which you want to connect.

Oracle BI Presentation Catalog

The Oracle BI Presentation Catalog, also referred to as the catalog or catalog tree, is displayed in the Smart View Panel.

The catalog tree displays a root node called "Catalog Root" and, by default, two folders called "My Folders" and "Shared Folders".

Figure 28-1 Oracle BI Presentation Catalog, or Catalog Tree



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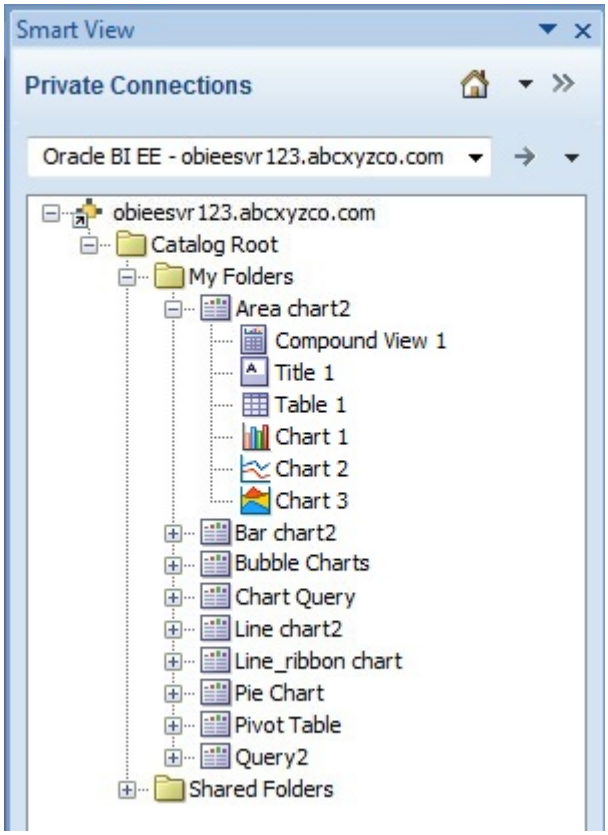
Items that you save to My Folders appear only to you when you expand the folder. Items that other users save to My Folders appear only to them.

Items that you save to Shared Folders can be viewed by all users who have logged on with BI Consumer privileges. If you have BI Consumer privileges, you can also view the items that other users have saved in Shared Folders.

To view the properties of any folder to which you have access, including the name of the folder creator and the creation date, right-click the folder in the catalog tree and select **View Folder Properties**.

The folders in the catalog tree contain a list of analyses, both from Oracle Analytics Cloud and Oracle Smart View for Office, as well as any subfolders created. Expand an analysis node (for example, "Area chart2" under **My Folders**) and the list of views that are stored there is displayed (for example, "Compound View 1" and "Table 1").

Figure 28-2 Catalog Tree Showing Views Under an Analysis Node



To view the properties of an analysis, including the name of the analysis creator, the creation date, and modification date, right-click the analysis in the catalog tree and select **View Analysis Properties**.

You can choose to edit any analysis in Oracle Analytics Cloud. If a view in the analysis was created in Smart View, you can also choose to edit the view in Smart View.

To edit an analysis in Oracle Analytics Cloud, right-click the analysis in the catalog tree and select **Edit Analysis in Answers**.

Selecting this option launches the default browser and opens the analysis editing wizard in Oracle Analytics Cloud. If you are not already logged onto Oracle Analytics Cloud, a login

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dialog box is displayed where you can enter your credentials. You must have BI Consumer privileges to edit an analysis in Oracle Analytics Cloud.

To edit a view in Smart View, right-click the view in the catalog tree and select **Load view in View Designer**.

In this case, the view must have been created in Smart View. See Launching the View Designer for other methods for accessing views for editing.

From the catalog tree, you can also insert table views, pivot table views, graph views, titles, and compound views into Smart View. See Working with Oracle Analytics Cloud Analyses, Views, and Dashboards.

Working with Oracle Analytics Cloud Analyses, Views, and Dashboards

In Oracle Analytics Cloud, analyses are made up of individual views; dashboards are made up of analyses and individual views.

Related Topics

- Supported Oracle Analytics Cloud View and Object Types
- Inserting Tables and Pivot Tables
- Inserting Graphs
- Inserting Compound Views
- Inserting Dashboards
- Working with Prompts
- Working with Page Prompts
- Specifying Preferences for Refreshing Views
- Refreshing Views
- Masking Data in Views
- Viewing Properties of an Oracle Analytics Cloud Object
- Copying and Pasting Oracle Analytics Cloud Objects Between Office Applications
- Editing an Analysis in Oracle Analytics Cloud
- Copying and Pasting Views From Oracle Analytics Cloud to Office
- Editing Views Created in Oracle Analytics Cloud

Supported Oracle Analytics Cloud View and Object Types

You can insert the following views into Oracle Smart View for Office clients (Excel, PowerPoint, and Word) from the catalog or by copying and pasting.

> **Note**
>
> Drill operations are not supported on Oracle Analytics Cloud views inserted in Smart View. (Drill operations are referred to as Zoom In and Zoom Out in Smart View.)

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- **Table Views**

  Table views display data in table format, either in a format similar to the display in Oracle Analytics Cloud (also referred to as native format), or as an Excel table.

  Using the **Insert** option, you can insert table views into all Smart View clients in native format. This format offers no sorting or filtering. Cells with the same data are merged into a single cell.

  In Excel, using the **Insert as Excel Table** command, you can insert a table view as an Excel table. With this format, you can perform further analysis operations, such as sorting and filtering.

  Notes:

  – In Excel, you can insert multiple tables on a worksheet, but you cannot insert a table on top of an existing table. You can, however, do the following:

    * To replace a table, select any cell within the table and click the Delete button on the Oracle BI EE ribbon. Then insert the table into the worksheet.

    * To insert additional tables onto the worksheet, select a cell outside any table views or other view objects, and then insert the table.

  – Excel may not recognize some custom formats in table views and Excel table views may not be recognized by Excel, resulting in an error when the view is inserted into Excel.

- **Pivot Table Views**

  Pivot table views display data in the grouped format defined in Oracle Analytics Cloud, which is also referred to as native format. Features such as page item lists and group sectioning are maintained. Data can also be displayed in Excel pivot table format.

  Using the **Insert** option, you can insert pivot table views into all Smart View clients in native format. As with inserting a table view, this format offers no sorting or filtering; cells with the same data are merged into a single cell.

  In Excel, using the **Insert as Excel Pivot** option, you can also insert a pivot table view as an Excel pivot table. With this format, you may perform further analysis operations, such as pivoting, aggregating, drilling, sorting, and filtering.

  Notes:

  – When working with Excel pivot table views, only views with measure columns of numerical data type are supported.

  – There can be only one Excel pivot table view per Excel worksheet. Additionally, Excel pivot table views are always inserted onto a new worksheet. This is the expected behavior, whether you are working with a single data source connection or with multiple connections.

  – Excel may not recognize some custom formats in Pivot table views, resulting in an error when the view is inserted into Excel.

  – Smart View does not have the "Graph Pivoted Results" functionality of Oracle Analytics Cloud. In order to view a graph of the same row, column and page dimensions of a particular pivot table, you must create a separate chart view in Oracle Analytics Cloud, and then insert that chart view in Smart View.

- **Graph Views**

  Graph views display data by mapping the graph defined in Oracle Analytics Cloud to a graph type supported by Microsoft Office charts.

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Using the **Insert as Image** option, you can insert graphs directly into Smart View clients as a static image. The image cannot be edited or refreshed.

Using the **Insert** option in all Smart View clients, you can edit and refresh graphs. Smart View attempts to match the graph style from Oracle Analytics Cloud as closely as possible, including graph properties such as visual effect (2D, 3D), canvas size, chart title, subtitle, axis titles, legend and legend position, axis scale, data format (numeric, date, currency format), and title and label formatting.

If a matching Office chart type is not available, you can insert the graph view as an image. See Supported Oracle Analytics Cloud Chart and Object Types and Unsupported Oracle Analytics Cloud Chart and Object Types.

- **Gauge Views** and **Funnel Graph Views**

  In Oracle Analytics Cloud, gauge views and funnel graph views are separate object types from graph views.

  Using the **Insert as Image** option, you can insert gauge and funnel views directly into Smart View clients as a static image. You cannot edit or refresh the image.

- **Title Views**

  Title views display the title of a report, along with other information that is part of the Oracle Analytics Cloud title view.

  Title views typically include title text, subtitle text, the analysis name, the date and time inserted, an optional logo, and an optional URL (for example, a help link). Title views are inserted into Smart View clients as a collection of text boxes and images grouped together as a single Office object.

- **Compound Views**

  Compound views display data as an assembly of different views.

  You can insert compound views into all Smart View clients. Smart View inserts all supported views that make up the compound view. Each type of view—table, pivot table, graph, gauge, funnel, filter, and title—is inserted into Smart View clients in its own default format.

  In Word, all views are inserted next to and below each other filling pages in the active Word document.

  In Excel or PowerPoint, users are prompted to choose between inserting all the views on one sheet or slide, or inserting each view on a separate sheet or slide.

Inserting Tables and Pivot Tables

The maximum number of rows and columns that you can insert depends on the version of Excel you are using. See Microsoft Excel documentation for worksheet size limits.

To insert a table or pivot table:

1. Place the cursor at the point in the Excel worksheet, PowerPoint slide, or Word page where you want the table or pivot table to begin.
2. In the catalog tree in the Smart View Panel, right-click a table or pivot table.
3. Select one of the following:

   - **Insert**—The selected table view or pivot table view is inserted in the format defined in Oracle Analytics Cloud. See Figure 1 and Figure 2

     If prompts are defined for the table or pivot table in Oracle Analytics Cloud, the **Prompt Selector** dialog box is displayed where you make selections on the data to

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display (otherwise, the table or pivot table is inserted directly). After the initial insert, you may edit the prompts by clicking the **Edit Prompts** icon in the Oracle Analytics Cloud ribbon. See Working with Prompts for more information.

If page prompts are defined for the table or pivot table (view prompts in Oracle Analytics Cloud), you may edit them by clicking the **Edit Page Prompts** icon in the Oracle Analytics Cloud ribbon. See .Working with Page Prompts.

Figure 28-3 Table View Inserted as Table with Formatting from Oracle Analytics Cloud

	A	B	C
1	D1 Office	Guadalupe Office	
2			
3	1- Revenue	2- Billed Quantity	T05 Per Name Year
4	1218703.43	126416	2008
5	1218703.43 Total	126416	2008 Total
6	1140273.25	124481	2009
7	1140273.25 Total	124481	2009 Total
8	1412013.01	153615	2010
9	1412013.01 Total	153615	2010 Total
10			
11			
12	D1 Office	Figueroa Office	
13			
14	1- Revenue	2- Billed Quantity	T05 Per Name Year
15	1335360.24	144293	2008
16	1335360.24 Total	144293	2008 Total
17	1142302.6	118765	2009
18	1142302.60 Total	118765	2009 Total
19	1613498.14	173192	2010
20	1613498.14 Total	173192	2010 Total

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Figure 28-4 Pivot Table Inserted as a Pivot Table with Formatting from Oracle Analytics Cloud

	A	B	C	D	E	F
1			2008		2009	
2			1- Revenue	2- Billed Quantity	1- Revenue	2- Billed Quantity
3	D1 Office	D2 Department				
4	Montgomery Office Total		409261.44	44404	474402.83	49612
5	Montgomery Office	Entertainment Dept.	409261.44	44404	474402.83	49612
6	Blue Bell Office Total		762007.79	76964	626768.91	69812
7	Blue Bell Office	Entertainment Dept.	762007.79	76964	626768.91	69812
8	Foster Office Total		665353.16	73453	499749.5	53700
9	Foster Office	Technology Dept.	665353.16	73453	499749.5	53700
10	Glenn Office Total		380957.44	41450	335018.03	35817
11	Glenn Office	Technology Dept.	380957.44	41450	335018.03	35817
12	Tellaro Office Total		572256.65	62393	470830.43	51801
13	Tellaro Office	Technology Dept.	572256.65	62393	470830.43	51801
14	Madison Office Total		472503.56	51717	410123.97	47135
15	Madison Office	Translated Products	472503.56	51717	410123.97	47135
16	Eden Office Total		531569.71	62894	502306.03	54444
17	Eden Office	Translated Products	531569.71	62894	502306.03	54444
18	Sherman Office Total		780186.36	84984	680636.06	75006
19	Sherman Office	Translated Products	780186.36	84984	680636.06	75006

In Oracle Smart View for Office clients, the table is displayed in the form a grid.

- **Insert as Excel Table** (table views only)—The selected table view is inserted as an Excel table. Columns in the page prompt edge and section edge, if present, are moved to the top of the table as drop-down headings. Select this option when you want to use Excel operations to filter, define formulas, sort, and perform other Excel tasks.

  When a table view is inserted as an Excel table, prompts that are defined in Oracle Analytics Cloud are not available.

  The selected table is inserted on the worksheet.

Figure 28-5 Portion of a Table View Inserted as an Excel Table

	A	B	C	D	E
1	T05 Per Name Yea	D1 Office	D2 Department	2- Billed Quantity	1- Revenue
2	2008	Montgomery Office	Entertainment Dept.	44404	409261.44
3	2008	Blue Bell Office	Entertainment Dept.	76964	762007.79
4	2008	Foster Office	Technology Dept.	73453	665353.16
5	2008	Glenn Office	Technology Dept.	41450	380957.44
6	2008	Tellaro Office	Technology Dept.	62393	572256.65
7	2008	Madison Office	Translated Products	51717	472503.56
8	2008	Eden Office	Translated Products	62894	531569.71
9	2008	Sherman Office	Translated Products	84984	780186.36
10	2008	Casino Office	Test Programs Dept.	77474	739129.6
11	2008	Merrimon Office	Test Programs Dept.	55194	526620.06
12	2008	Perry Office	Equipment Dept.	109600	1095278.63
13	2008	Eiffel Office	Equipment Dept.	131681	1172037.85
14	2008	Spring Office	Operations Dept.	119880	1136782.66
15	2008	Mills Office	Operations Dept.	73890	713164.64
16	2008	College Office	Surplus Dept.	117934	1072744.45

- **Insert as Excel Pivot** (pivot table views only)—The selected pivot table view is inserted as an Excel pivot table. Columns in the page edge and section edge, if present, are mapped to the report filters area, and columns in the measures edge are

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moved to the values area. Select this option when you want to perform further analysis, such as aggregating, pivoting, drilling, sorting, and filtering.

The selected table or pivot table is inserted on the worksheet. See Figure 4.

Notes:

- When a pivot table view is inserted as an Excel Pivot table, prompts that are defined in Oracle Analytics Cloud are not available.
- When working with Excel pivot table views, only views with measure columns of numerical data type are supported.
- There can be only one Excel pivot table view per Excel worksheet. Additionally, Excel pivot table views are always inserted onto a new worksheet. This is the expected behavior, whether you are working with a single data source connection or with multiple connections.

Figure 28-6 Pivot Table Inserted as an Excel Pivot Table

	A	B	C	D	E	F	G
1				T05 Per Name Year			
2	D1 Office	D2 Department	Data	2008	2009	2010	Grand Total
3	Blue Bell Office	Entertainment Dept.	Sum of 2- Billed Quantity	76964	69812	85062	231838
4			Sum of 1- Revenue	762007.79	626768.91	801073.08	2189849.78
5	Blue Bell Office Sum of 2- Billed Quantity			76964	69812	85062	231838
6	Blue Bell Office Sum of 1- Revenue			762007.79	626768.91	801073.08	2189849.78
7	Casino Office	Test Programs Dept.	Sum of 2- Billed Quantity	77474	66313	88807	232594
8			Sum of 1- Revenue	739129.6	594498.95	846609.99	2180238.54
9	Casino Office Sum of 2- Billed Quantity			77474	66313	88807	232594
10	Casino Office Sum of 1- Revenue			739129.6	594498.95	846609.99	2180238.54
11	College Office	Surplus Dept.	Sum of 2- Billed Quantity	117934	104384	115288	337606
12			Sum of 1- Revenue	1072744.45	974454.3	1150437.44	3197636.19
13	College Office Sum of 2- Billed Quantity			117934	104384	115288	337606
14	College Office Sum of 1- Revenue			1072744.45	974454.3	1150437.44	3197636.19
15	Copper Office	Local Plants Dept.	Sum of 2- Billed Quantity	112428	98158	124486	335072
16			Sum of 1- Revenue	994751.43	924933.74	1159553.05	3079238.22
17	Copper Office Sum of 2- Billed Quantity			112428	98158	124486	335072
18	Copper Office Sum of 1- Revenue			994751.43	924933.74	1159553.05	3079238.22
19	Eden Office	Translated Products	Sum of 2- Billed Quantity	62894	54444	65983	183321

You can edit tables and pivot tables as described in Editing an Analysis in Oracle Analytics Cloud.

Inserting Graphs

When inserting graphs, Oracle Smart View for Office attempts to map the Oracle Analytics Cloud graph into a chart type supported by Microsoft Office 2007 and later. Further, Smart View attempts to match visual effects, such as 2D or 3D, and other graph properties such as canvas size, axis scale, data format, and formatting in terms of font styles and colors.

When a matching chart type is not available, the graph view can only be inserted as image.

See Supported Oracle Analytics Cloud Chart and Object Types and Unsupported Oracle Analytics Cloud Chart and Object Types.

To insert a graph:

1. From the catalog, right-click a graph view.
2. Select an option:
   - **Insert**—The selected graph is inserted as an Excel chart, which can be edited, masked, and refreshed.

     If prompts are defined for the graph in Oracle Analytics Cloud, the **Prompt Selector** dialog box is displayed where you make selections on the data to display (otherwise, the graph is inserted directly). After the initial insert, you may edit the prompts by

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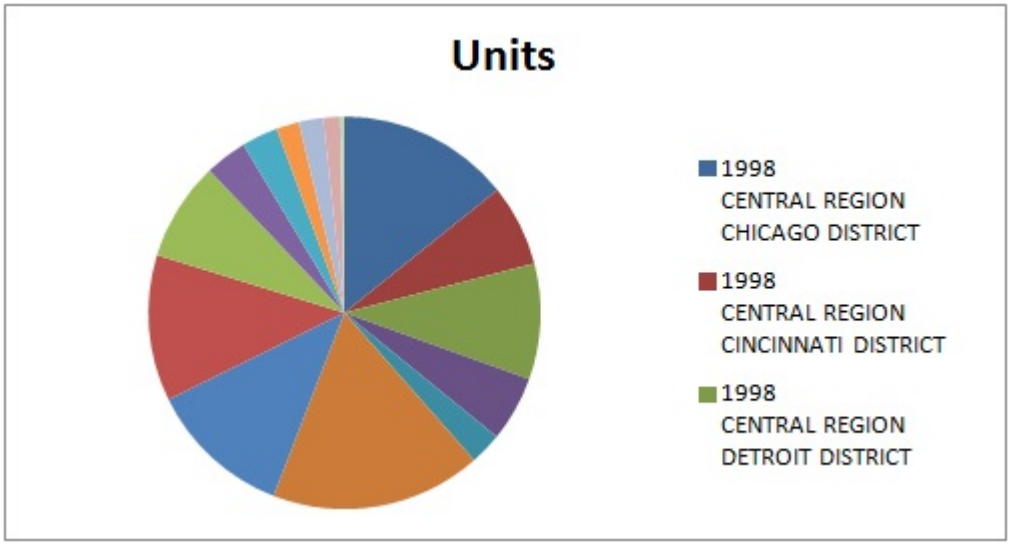
clicking the **Edit Prompts** icon in the Oracle Analytics Cloud ribbon. See Working with Prompts.

If page prompts are defined for the graph (view prompts in Oracle Analytics Cloud), you may edit them by clicking the **Edit Page Prompts** icon in the Oracle Analytics Cloud ribbon. See Working with Prompts for more information.

If no prompts are defined for this analysis, then the graph is inserted directly. See Figure 1.

Figure 28-7 A Pie Chart View Inserted as an Excel Chart



You can edit graphs inserted this way as described in Editing Views Created in Oracle Analytics Cloud.

- **Insert as Image**—The selected graph is inserted as an image of the graph, which cannot be edited or customized.

  When a graph is inserted directly as an image, prompts, page prompts, and sections that are defined in Oracle Analytics Cloud are not available.

  Note that gauge and funnel objects can only be inserted using the **Insert as Image** command.

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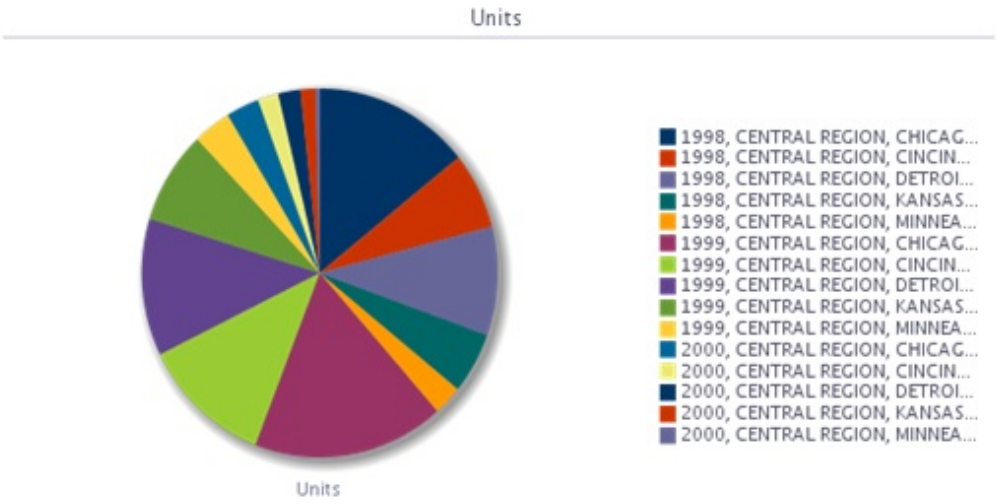
Figure 28-8 A Pie Chart View Inserted as an Image



Once inserted, whether as an Excel chart or as an image, both types of graphs shown can be resized by stretching them.

Supported Oracle Analytics Cloud Chart and Object Types

The following chart subtypes are supported:

- Line
- Bar: Vertical, Horizontal, Stacked Vertical, Stacked Horizontal, 100% Stacked Vertical, 100% Stacked Horizontal
- Area: Stacked, 100% Stacked
- Pie graph
- Bubble
- Scatter
- Line-bar Combination: Standard, Stacked
- Radar

The following graphs can only be inserted as an image:

- Time Series Line
- Pareto
- Waterfall

The following objects can only be inserted as an image:

- Gauge
- Funnel

Unsupported Oracle Analytics Cloud Chart and Object Types

The following view types are not supported:

- Performance Tiles

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- Trellis views
- Map views
- Filters views—You can only view properties for filter views, using the **View Analysis Properties** command in the catalog tree.
- Selection Steps
- Column Selector
- View Selector
- Legend
- Narrative
- Ticker
- Static Text
- Logical SQL
- Create Segment
- Create Target List

Inserting Compound Views

To insert a compound view:

1. From the catalog, select the compound view to insert.
2. Right-click and select **Insert All Views**.
3. When prompted, choose an option:
   - **One object per sheet/slide** to insert each object in the compound view on a separate sheet in Excel, or a separate slide in PowerPoint.
   - **All objects on one sheet/slide** to display all objects on one Excel sheet or PowerPoint slide.

   In Excel, objects are inserted on a new sheet or sheets, even if there are unused sheets in the workbook.

   In Word, objects are placed adjacent to and below other objects on a sheet until the sheet is filled, and then continues filling as many sheets as required to hold all the objects.

   The default display is selected for the table, pivot table, and graph view types; that is, the **Insert** action will be used automatically.

   A message notifies you of unsupported view types in the compound view. Unsupported view types are not inserted.

> **Note**
>
> You may perform Refresh and edit prompt and page prompts for selected views. Unselected views from the compound view remain unchanged. See Refreshing Views, Working with Prompts, and Working with Page Prompts.

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Inserting Dashboards

Dashboards are displayed in the catalog tree as folders. A dashboard folder can be expanded to show dashboard pages; a dashboard page can be expanded to show the list of analyses included in that page. You can insert dashboard pages into Excel, PowerPoint, and Word.

To insert dashboard pages into Office applications:

1. From the catalog, right-click a dashboard page and select **Insert All Views**.
2. When prompted, choose an option:
   - **One object per sheet/slide** to insert each object in the dashboard on a separate sheet in Excel, or a separate slide in PowerPoint.
   - **All objects on one sheet/slide** to display all objects on one Excel sheet or PowerPoint slide.

   In Word, objects are placed adjacent to and below other objects on a sheet until the sheet is filled, and then continues filling as many sheets as required to hold all the objects.

   Default display is selected for the table, pivot table, and graph view types; that is, the **Insert** action is used automatically.

   A message notifies of unsupported view types in the dashboard. Unsupported view types are not inserted.

> **Note**
>
> You may perform Refresh and edit prompt and page prompts for selected views. Unselected views from the dashboard remain unchanged. See Refreshing Views, Working with Prompts, and Working with Page Prompts.

Working with Prompts

Prompts enable users to specify criteria that determines the content of the view that they are inserting. Oracle Smart View for Office supports both prompts and page prompts. See Working with Page Prompts for information on page prompts.

Prompts in Smart View are the equivalent of prompts in Oracle Analytics Cloud. Smart View only supports column prompts.

Prompts are defined at the analysis level in Oracle Analytics Cloud. Users are prompted to enter values for these prompts each time a view is inserted in Smart View.

If prompts are defined on an analysis in Oracle Analytics Cloud, then when you insert a table, pivot table, or graph view from the analysis into Smart View, you are prompted to select the data to be displayed for that view. When inserting a compound view from an analysis that has prompts defined, you are prompted to enter values only one time for all the views in that compound view.

For example, a prompt on Year is designated for an analysis, and the years 2010, 2011, and 2012 are available to choose from. When you insert a table, pivot table, or graph, you are prompted to select which year's data to display: 2010, 2011, or 2012. Or, you can choose to insert the compound view, and the prompt selection you make is applied to all the views inserted. After insertion, you can edit the prompts on each individual view to select another year's data to display.

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Views can only be edited individually. The edit operation will prompt you for the values to be selected for each view that is being edited.

You may edit prompts in views that were inserted, or copied and pasted.

> **Note**
>
> Prompts defined on hierarchical columns in Oracle Analytics Cloud are not supported in Smart View.

To edit prompts:

1. From the worksheet, select a view:
   - Graph views—Select the graph.
   - Table and pivot table views—Select a cell in the table.
2. From the Oracle Analytics Cloud ribbon, select the **Edit Prompts** button to display your original selections.

Figure 28-9 Edit Prompts Button

If the report definition has changed on the server, your selections are reset, and you must select all prompts and columns again.

3. In the **Prompt Selector**, modify the prompt selections.

   Depending on how the prompt was set up in Oracle Analytics Cloud, you may be selecting data directly from a drop-down list on the **Prompt Selector**. You may also be picking values from the **Value Selector** dialog box.

   Figure 2 is an example of a **Value Selector**, where the years 2008, 2009, and 2010 were selected for display.

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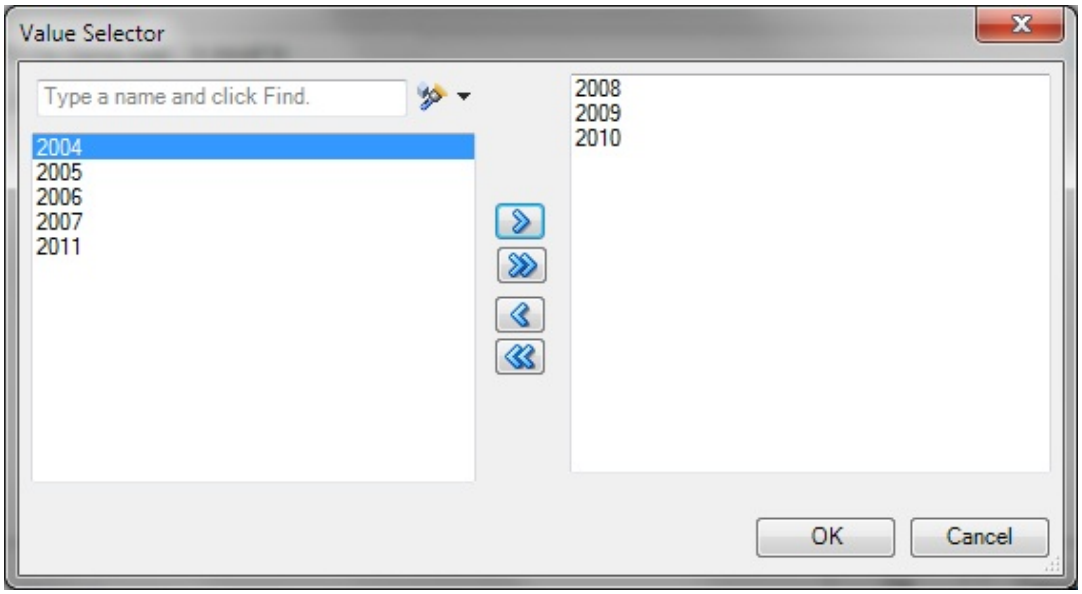
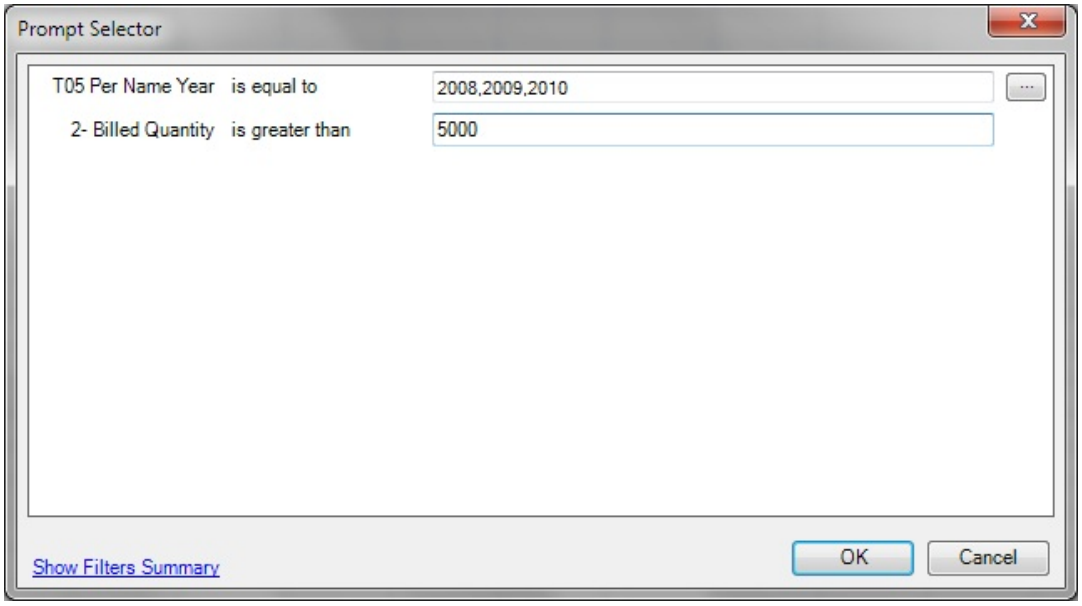
Figure 28-10 Value Selector Dialog Box Showing the Years 2008, 2009, and 2010 Selected



After you click **OK** in the **Value Selector**, the selections populate the first prompt in the example **Prompt Selector** . A second prompt in the example **Prompt Selector** requires that you directly enter an amount; in this example, the amount to display is Billed Quantity greater than $5,000.

The completed **Prompt Selector** dialog then looks like Figure 3.

Figure 28-11 Filled-In Prompt Selector



In some cases, the data to choose from can be exceedingly long. To accommodate loading large amounts of data in the **Value Selector**, Smart View presents values in groups. Scroll and make selections from the first group shown, then click **More** to view and make

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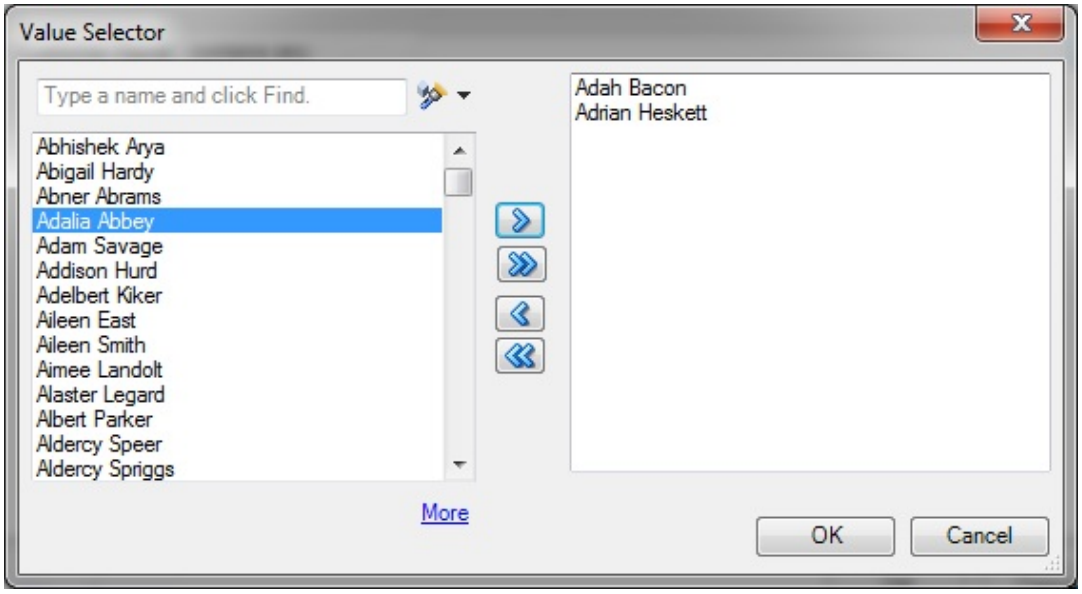
selections from the next group. Continue clicking **More** until you have viewed and made selections from the entire data list. Figure 4 shows an example.

Figure 28-12 Value Selector Showing More for Large Amounts of Data



4. Click **OK** to close the **Prompt Selector**.

   After you make selections and click **OK**, the view is immediately refreshed and reflects your selections.

5. Repeat this procedure to edit the prompts to change the output displayed.

Working with Page Prompts

Page prompts enable users to specify criteria that determines the content of the view that has been inserted. Oracle Smart View for Office supports both page prompts and prompts. See also Working with Prompts.

Page Prompts in Smart View are the equivalent of view prompts in Oracle Analytics Cloud. View prompts are specified on individual views within an analysis. Smart View supports table prompts, graph prompts, and gauge prompts in Oracle Analytics Cloud; these types of prompts are called page prompts in Smart View.

Page prompts may vary on individual views within an analysis. An individual table view within an analysis may have a page prompt set on Year, and a pivot table view within the same analysis may have a page prompt set on Line of Business.

When you first insert a view that contains page prompts, a view state is selected by default. For example, if a prompt on Year is specified on a particular view within an analysis, and the years 2010, 2011, and 2012 are available to choose from, you are not prompted for these at the time of insertion. Instead, a default state of the view is inserted. For example, 2010 data may automatically be inserted, as the first year in the list of years available. You can then edit the page prompts to select another year's data to display for this view.

You may edit page prompts in views that have been inserted, or copied and pasted.

To edit page prompts:

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1. From the worksheet, select a view:
   - Graph views—Select the graph.
   - Table and pivot table views—Select any cell in the table.
2. From the Oracle Analytics Cloud ribbon, select the **Edit Page Prompts** button to display the default page prompt selections for a particular view.

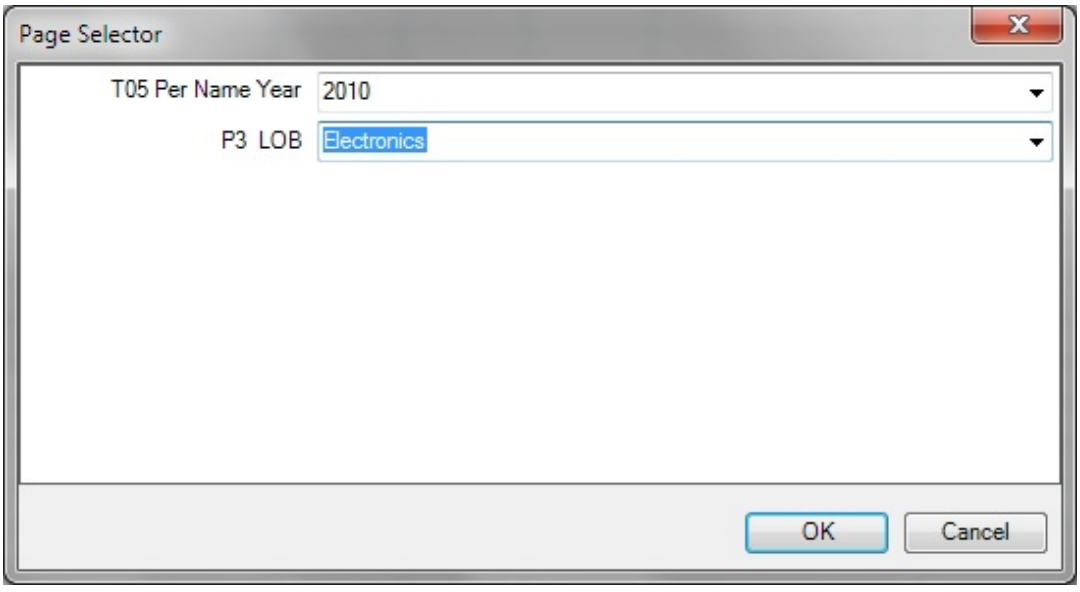
Figure 28-13 Edit Page Prompts Button

If the report definition has changed on the server, your selections are reset, and you must select all page prompts again.

3. In the **Page Selector**, modify the page prompt selections by selecting from the drop-down lists.

   Working with Page Prompts shows a **Page Selector** dialog box, where users select a Year and a Line of Business. In the example, selections were made to display 2010 for the year, and Electronics for the Line of Business.

Figure 28-14 Filled-in Page Selector



4. Click **OK** to close the **Page Selector**.

   After you make selections and click **OK**, the view is immediately refreshed and reflects your selections.
5. Repeat this procedure to edit the page prompts to change the output displayed.

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Specifying Preferences for Refreshing Views

You can specify preferences for refreshing each view. The refresh preferences that you set for each view within a worksheet, slide, or page are saved along with the Office document (Excel workbook, PowerPoint slide presentation, or Word document).

To specify preferences for refreshing a view:

1. Ensure that one or more Oracle Analytics Cloud views are inserted into Oracle Smart View for Office.
2. In **Document Contents**, click to refresh the content of the pane.

   All views that were inserted into the active Office application are displayed in **Document Contents** in a tree format.
3. Select a view in **Document Contents**, and then select **Properties**.
4. In **Properties**, select an option from **Refresh Preferences**:
   - **Refresh Data**—Refreshes only the data points in the selected view or analysis.

     Any changes made to formatting in the sheet, slide, or page are retained.
   - **Replace View**—Replaces the entire view, including any formatting changes set in Oracle Analytics Cloud.

     If you select this option, your prompt and graph selections and custom formatting are lost upon refresh if the view definition has changed.

     > **Note**
     >
     > Oracle Business Intelligence Enterprise Edition title views are not included in refresh actions, so all customizations to a title view are retained when you refresh the worksheet or workbook.

   - **Do not refresh**—Refreshing is not allowed.
5. Click **OK** to save the **Refresh Preference** selection.

   Continue with Refreshing Views.

Refreshing Views

You can refresh the data from Oracle Analytics Cloud in your inserted views. You have the option of refreshing selected views or refreshing all views, depending on the Office document type, as follows.

Excel

- Individual views
- Individual worksheets
- Entire workbook

PowerPoint

- Individual views

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- Individual slides
- Entire presentation

Word

- Individual views
- Entire document

You can refresh views from the Document Contents pane, the Oracle BI EE ribbon, or the Smart View ribbon.

The refresh action is limited according to the Refresh Preference set for a selected view. See Specifying Preferences for Refreshing Views for information.

Note that when you refresh, title views are not included in refresh actions, so all customizations to a title view are retained when you refresh the Office document.

When there are multiple objects on an Office document, if you attempt to refresh the document without having already connected, then you will be prompted for your login credentials once for all objects. If you choose to cancel instead, the **Connect to Data Source** dialog box will appear for each object on the sheet, and you must click **Cancel** for each object. For example, if there are six objects on the sheet, the dialog box will appear six times, once for each object.

To refresh Oracle Analytics Cloud views from the **Document Contents** pane:

1. In **Document Contents** , ensure that **Oracle Analytics Cloud - Document Hierarchy** is displayed in the drop-down list box.
2. In **Document Contents**, click to refresh the contents of the tree.

   From **Document Contents**, you can refresh individual views in all Office applications, individual worksheets, and individual slides.
3. Perform an action:
   - To refresh a selected view in an Excel sheet, PowerPoint slide, or Word document, select the view object from the tree in **Document Contents**, and then select the **Refresh View** action from the right-click menu or click the **Refresh View** link at the bottom of the pane.

     Repeat for each view that you want to refresh.
   - To refresh all Oracle Analytics Cloud views on a selected Excel worksheet or PowerPoint slide, select the sheet or slide from the tree in **Document Contents**, and then select the **Refresh** action from the right-click menu or click the **Refresh** link at the bottom of the pane.

     Repeat for each sheet or slide that you want to refresh.

To refresh all Oracle Analytics Cloud views on a worksheet or slide, or an entire Word document, using the ribbons:

1. Perform an action:
   - Select the worksheet or slide to make it active.
   - Place your cursor in the Word document to select it.
2. Click **Refresh** in the Oracle BI EE ribbon or the Smart View ribbon.

To refresh all Oracle Analytics Cloud views in an Excel workbook, PowerPoint presentation, or Word document:

1. Place your cursor anywhere in the workbook, presentation or document to select it.

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2. Perform an action:

   - To refresh all Oracle Analytics Cloud views in an Excel workbook, click the down arrow in **Refresh** in the Smart View ribbon and select **Refresh all Worksheets**. Figure 1 shows the Refresh icon with the arrow:

     Figure 28-15 Refresh Icon with Down Arrow in Excel and PowerPoint

     Alternatively, click the down arrow in **Refresh** in the Oracle BI EE ribbon and select **Refresh Workbook Data**.

   - To refresh all Oracle Analytics Cloud views in a PowerPoint presentation, click the down arrow in **Refresh** in the Smart View ribbon and select **Refresh All Slides**.

     Alternatively, click the down arrow in Refresh in the Oracle BI EE ribbon and select **Refresh Presentation Data**.

   - To refresh all views in a Word document, click **Refresh** in the Oracle BI EE ribbon or the Smart View ribbon. The Refresh icon in Word does not contain a down arrow, as shown in Figure 2.

     Figure 28-16 Refresh Icon in Word

> **Note**
>
> If requested, provide your credentials for Oracle Analytics Cloud.

Masking Data in Views

You can mask data in the Oracle Analytics Cloud views that you insert in Office documents and in views you create using the View Designer. You have the option of masking data in:

- Selected views
- All views on sheet or a slide
- All views in an Office document

Using the Mask Data functionality in Oracle Smart View for Office, you can perform these actions:

- Select a single Smart View object in an Excel sheet or PowerPoint slide and mask data only in that object
- Mask data in the active Excel worksheet or PowerPoint slide

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- Mask data in the active workbook, presentation, or Word document

You can invoke Mask Data from these locations:

- Document Contents in the Smart View Panel
- Oracle Analytics Cloud ribbon

Masking Data for an Individual View

To mask data in an individual view in an Excel worksheet or PowerPoint slide:

1. In Excel or PowerPoint, click in **Document Contents** to refresh the contents of the tree.

> **Note**
>
> Data in Word documents can only be masked in their entirety; you cannot mask data in individual views in Word.

2. Locate the view with data that you want to mask in **Document Contents**, and then select it.
3. Click the **Mask Data** link in **Document Contents**.

   In a table object, cells are replaced with the text, "Need refresh"; in a graph, the area becomes blank and a small lock image is displayed.
4. Save the current workbook or presentation.

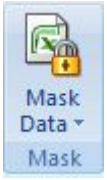
   The masked state of the view remains intact after saving.
5. To display the data in the masked view, click in **Document Contents**, select the view in the tree, and then click the **Refresh View** link.

Masking Data on a Sheet or Slide

To mask data on an Excel worksheet or PowerPoint slide:

1. Choose a method to select a sheet or slide:
   - Place the cursor directly in a sheet or slide
   - In **Document Contents**, click , locate the sheet or slide in the tree, and then select it.
2. Choose a method to mask data for all objects on the selected sheet or slide:
   - In the Oracle Analytics Cloud ribbon, click the **Mask Data** button.

Figure 28-17 Mask Data Button



   - In **Document Contents**, click the **Mask Data** link.

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Data on the sheet or slide is masked.

> **Note**
>
> Data in Word documents can only be masked in their entirety; you cannot mask data on individual pages in Word.

3. Save the current workbook or presentation.

   The masked state of the sheet or slide remains intact after saving.

4. To display the data in the masked sheet or slide, click in **Document Contents**, select the sheet or slide in the tree, and then click the **Refresh** link.

   Alternatively, place the cursor in the sheet or slide to refresh, and then click

.

Masking Data in an Entire Office Document

To mask data in an entire Office document:

1. From the Oracle Analytics Cloud ribbon in the opened Office document, perform an action:

   - **Excel:** Click the down arrow in

and select **Mask Workbook Data**.
   - **PowerPoint:** Click the down arrow in

and select **Mask Presentation Data**.
   - **Word:** Click

.

   > **Note**
   >
   > Word documents can only be masked in their entirety; you cannot mask individual pages in Word.

2. Save the current Office document.

   The masked state of the workbook, presentation, or document remains intact after saving.

3. To display the masked data, click in **Document Contents**, select the sheet, slide, or document in the tree, and then click the **Refresh** link.

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Alternatively, place the cursor in the sheet, slide, or document to be refreshed, and then click

.

Viewing Properties of an Oracle Analytics Cloud Object

You can view various properties of a selected object.

To view the properties of an Oracle Analytics Cloud object:

1. Select an Oracle Analytics Cloud view.

   Select an actual view object and not a sheet or slide.
2. Click the **Properties** link at the bottom of the **Document Contents** pane.

Copying and Pasting Oracle Analytics Cloud Objects Between Office Applications

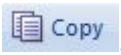
You can copy Oracle Analytics Cloud objects within and between Office applications as follows:

- Graphs can be copied within and between any Office application.
- Tables and pivot tables can be copied within and between Word and PowerPoint.
- Tables and pivot tables cannot be copied within Excel, from Excel to another Office application, or from another Office application to Excel.
- Tables and pivot tables can only be copied and pasted by sections.

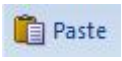
Copying and Pasting a Graph View

To copy and paste a graph view:

1. In Excel, Word, or PowerPoint, select the graph view to copy.

   You can use Document Contents to locate the view, but then select the graph directly in the sheet, slide, or page.
2. From the **Oracle Analytics Cloud** ribbon, click 

.
3. Access the Office application and position the cursor where you want to paste the graph view.

   For example, if you are pasting within an Office application (or if you are copying from Excel and want to paste into PowerPoint, open PowerPoint), position the cursor at the point within the Office document where you want to paste the object.
4. Click 

.
5. Repeat for all graphs that you want to copy and paste.

Copying and Pasting a Table or Pivot Table View

To copy and paste a table view or pivot table view:

1. In Word or PowerPoint, select the table view or pivot table view to copy.

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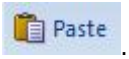
You can use Document Contents to locate the view, but then select the table or pivot table directly in the slide or page.

2. From the **Oracle Analytics Cloud** ribbon, click

.
3. Access the Office application and position the cursor where you want to paste the table or pivot table view.

   For example, if you are pasting within an Office application (or if you are copying from Word and want to paste into PowerPoint, open PowerPoint), position the cursor at the point within the Office document where you want to paste the object.
4. Click 

.
5. Repeat for all tables or pivot tables that you want to copy and paste.

Editing an Analysis in Oracle Analytics Cloud

If the available view does not display the data required, or the data is not displayed as desired, you can edit the view in Oracle Analytics Cloud.

> **Note**
>
> To edit a view in Oracle Analytics Cloud, you must have the required permissions.

To edit a view in Oracle Analytics Cloud:

1. From the Catalog, right-click the view, and then select **Edit Analysis in Answers**.
2. In the login screen, enter your credentials for Oracle Analytics Cloud.

   The selected view is displayed in Oracle Analytics Cloud.
3. In Oracle Analytics Cloud, edit and save the view.
4. Return to the Office application.
5. From the **Oracle Analytics Cloud** ribbon, click **Refresh**, and verify that your changes are reflected in the view.

Copying and Pasting Views From Oracle Analytics Cloud to Office

You can copy and paste views from Oracle Analytics Cloud to Oracle Smart View for Office.

When you refresh pasted views, the data is refreshed, but the view definition is not, even if its definition has been modified in Oracle Analytics Cloud.

> **Note**
>
> When copying and pasting views from Oracle Analytics Cloud to Smart View, some formatting may not be imported to Office.

To copy and paste a view:

1. Ensure that you are logged into Oracle Analytics Cloud.

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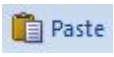
2. From Oracle Analytics Cloud or Interactive Dashboards, launch the analysis that you want to copy.
3. Click the **Copy** link at the bottom of the analysis (displayed only if the analysis is enabled for copying).
4. Open an Office application, such as Excel, and connect to the appropriate Oracle Analytics Cloud data source.
5. From the **Oracle Analytics Cloud** ribbon, click 

.

Editing Views Created in Oracle Analytics Cloud

Related Topics

- What Can and Cannot Be Edited
- Editing Pivot Tables Inserted into PowerPoint
- Other Guidelines

What Can and Cannot Be Edited

Note the following when editing views that were created in Oracle Analytics Cloud:

- Table views and graph views that are inserted or pasted as Microsoft objects using the **Insert** command can be edited in Excel, PowerPoint, or Word.
- Table views that are inserted or pasted as lists, and graphs views that are inserted as images cannot be edited in Excel.
- Views that are inserted or pasted as images cannot be edited in PowerPoint.

Editing Pivot Tables Inserted into PowerPoint

Consider the following items when editing pivot table views that were created in Oracle Analytics Cloud.

Small Pivot Tables

For small pivot tables in PowerPoint, to change column width and row height, use the mouse to drag column and row borders to the desired height and width.

Large Pivot Tables

To adjust column width and row height in large pivot tables, especially where rows and columns are outside of the slide area, use PowerPoint's table editing tools in as follows:

1. Select the pivot table.
2. Select the **Layout** ribbon in PowerPoint.
3. Select a row or column in the pivot table.
4. Adjust height and width by changing the height and width values in the **Cell Size** group.

Other Guidelines

Note the following guidelines when editing views that were created in Oracle Analytics Cloud:

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- Oracle Smart View for Office does not support duplication of charts or tables through the PowerPoint "Duplicate Slide" command.

  In PowerPoint, after duplicating a slide containing a chart, any attempt to update the prompts of either chart result in the prompts for only the original chart being updated. The chart on the duplicate slide is never updated.

  For a pivot table inserted into a PowerPoint slide then duplicated, if you change the prompt for either pivot table, only the pivot table original slide is updated, whether you changed the prompt in the original slide or the duplicate.

- Some modifications made to graphs using Microsoft Office formatting tools—such as changes to colors—may not persist when prompts are changed and the graph is refreshed. Smart View does not keep track of such formatting changes; this is done by Microsoft Office. When a graph series is removed, the format of the series is removed by Office as well. Changing prompts can cause the series count and order to change, which means the formatting will also change. This is expected behavior.

Working with Views Using the View Designer

Using the View Designer in Oracle Smart View for Office, you can create ad hoc views based on an Oracle Analytics Cloud subject area.

Views created in Smart View can be saved to the Oracle BI Presentation CatalogOracle Business Intelligence and edited in either Smart View or Oracle Analytics Cloud.

View Designer is available in Microsoft Excel, Word, and PowerPoint.

Launching the View Designer

Depending on whether you are creating a view or editing a view, you can launch the View Designer using the methods described in this topic.

To launch the View Designer:

1. Perform an action:
   - To create a new view:
     - Right-click the **Catalog Root** node in the catalog tree, and then select **Create New View**.
     - Select the **Catalog Root** node in the catalog tree, and then select **Create New View** at the bottom of the Smart View Panel.
     - From the Oracle BI EE ribbon ribbon, click the View Designer icon.

Figure 28-18 View Designer Icon

You must already be connected to a view in the catalog tree to enable the **Oracle Analytics Cloud** ribbon.

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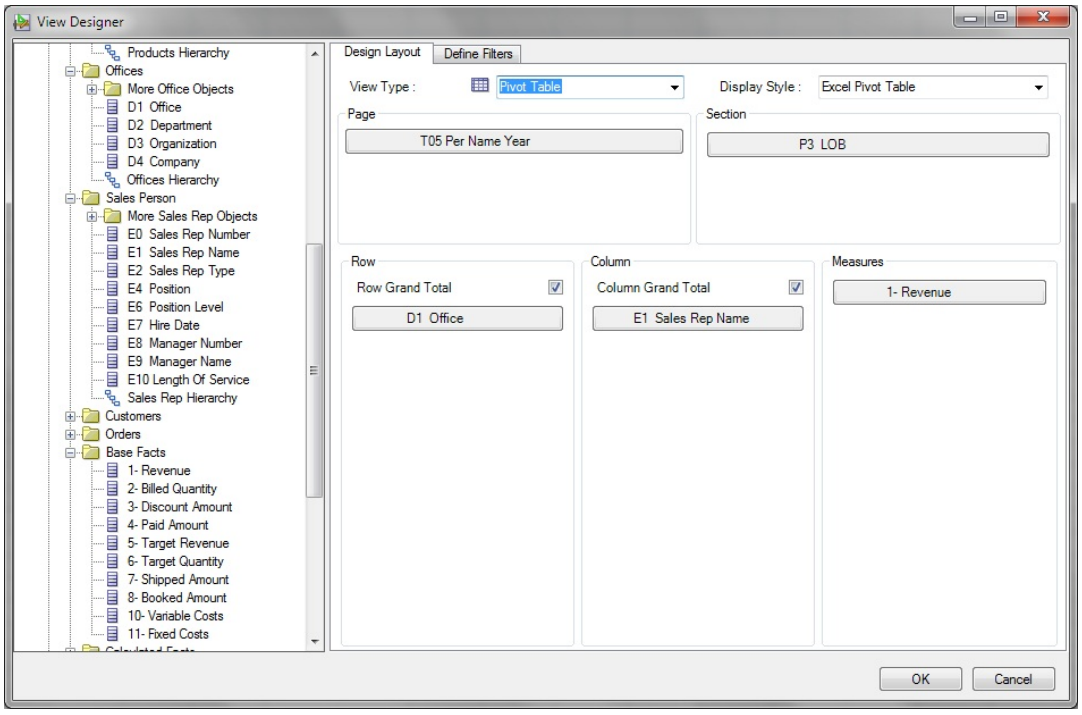
- To edit a view (the view must have been created and inserted from View Designer):
  - From the catalog tree, select a view to edit that was created in View Designer and saved to the Oracle BI Presentation Catalog from Oracle Smart View for Office, and then select the **Load view in View Designer** link at the bottom of the Smart View Panel.
  - Select an existing view on a worksheet in the current or in a saved Office document and click the View Designer icon (see Figure 1).
  - To edit an Excel Pivot Table, click anywhere in the current or in a saved worksheet, even outside the boundaries of the Excel Pivot Table, and click the View Designer icon (see Figure 1).

> **Note**
>
> You can only edit views that were created and inserted from the View Designer in Smart View. To edit views created in Oracle Analytics Cloud, you must use Oracle Analytics Cloud.

The **Design Layout** tab of the View Designer is displayed. Figure 2 shows the Design Layout tab of the View Designer with selections made in the Page, Section, Row, Column, and Measures edges.

Figure 28-19 View Designer, Design Layout Tab for Pivot Table Layout



2. Continue the view design process by following the procedure in Defining the View Type and Display Style.

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Defining the View Type and Display Style

When you are creating a view, you define the view type and display style. This is done only once, during the view creation process. Once the view is created, you cannot edit these two settings.

To define the view type and display style:

1. If you have not already done so, invoke the View Designer (see Launching the View Designer).
2. In **View Type**, select the type of view that you are creating:
   - Table
   - Pivot Table (the default)
   - Line Graph
   - Bar Graph
   - Column Graph
   - Area Graph
   - Pie Chart
   - Scatter Chart
   - Stacked Column Graph

   The selection that you make affects the options available in **Display Style** along with the fields in the layout area.

   > **Note**
   >
   > You cannot change this selection when editing the view either in Oracle Smart View for Office or Oracle Analytics Cloud.

3. In **Display Style**, select a **View Type** and **Display Style** option from Table 1.

   Display style determines how the view is inserted into Excel.

   > **Note**
   >
   > You cannot change this selection when editing the view either in Smart View or Oracle Analytics Cloud.

Table 28-1 View Type Selected and the Display Style Available

View Type Selected	Display Style Available
Table	Excel Table Table
Pivot Table (default)	Excel Pivot Table (default) Pivot Table

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Table 28-1 (Cont.) View Type Selected and the Display Style Available

View Type Selected	Display Style Available
Line Chart	Excel Chart
Bar Chart	Chart Image
Column Chart	
Area Chart	
Pie Chart	
Scatter Chart	
Stacked Column Chart	

4. Continue the view design process by following the procedure in Defining the View Layout .

Defining the View Layout

Define the view layout during the view creation process. You can also edit the view layout of views created in View Designer.

To define or edit the view layout:

1. If you have not already done so, invoke the View Designer (see Launching the View Designer).
2. If you are creating a new view, complete the steps in Defining the View Type and Display Style.

   If you are editing a view, continue with step 3.
3. In the left pane of the View Designer, expand a subject area and the folders to view the columns that you want to work with.
4. Drag columns from the expanded subject area tree and drop them in the layout area.

   The edges in the layout area vary depending on the selections that you made in the **View Type**, as described in Table 1.

Table 28-2 View Type Selected and the Edges Available in the Layout Area of the View Designer

View Type Selection	Edges In Layout Area
Table	**Page**, **Section**, **Row**, **Column**, **Measures** **Optional:** In the **Row** edge, select the **Row Grand Total** check box.
Pivot Table (default)	**Page**, **Section**, **Row**, **Column**, **Measures** **Optional:** In the **Row** edge, select the **Row Grand Total** check box. **Optional:** In the **Column** edge, select the **Column Grand Total** check box.
Line Chart	**Page**, **Section**, **Group By (X)**, **Lines (X)**, **Data: Lines (Y)**
Bar Chart	**Page**, **Section**, **Group By (X)**, **Bars (X)**, **Data: Bars (Y)**
Column Chart	**Page**, **Section**, **Group By (X)**, **Columns (X)**, **Data: Columns (Y)**
Area Chart	**Page**, **Section**, **Group By (X)**, **Area (X)**, **Data: Areas (Y)**
Pie Chart	**Page**, **Section**, **Pies**, **Slices**, **Slice Size**
Scatter Chart	**Page**, **Section**, **Group By (X)**, **Vary by Color**, **Data**

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Table 28-2 (Cont.) View Type Selected and the Edges Available in the Layout Area of the View Designer

View Type Selection	Edges In Layout Area
Stacked Column Chart	**Page**, **Section**, **Group By (X)**, **Bars (X)**, **Data: Bars (Y)**

5. **Optional:** Perform any of these tasks, as applicable, on the columns you have dragged to edges in the View Designer:
   - To move a column between edges, drag the column from one edge and drop it on another; for example, drag a column from the **Row** edge and drop it on the **Column** edge.
   - To reposition the column within the edge, click on a column name and select the **Up** or **Down** arrow.
   - To add a subtotal to a column or row in an edge, right-click a column and select **Subtotal**.

     > **Note**
     >
     > The **Subtotal** option is ignored when applied to the bottom column in an edge, even though the option is selectable in the drop-down menu.

   - To add columns to filter criteria for this view, click on a column and select **Add to Filter**.

     The columns that you select are added to the **Filter Expression** area of the **Define Filters** tab, where you can further define them. See Defining the Filter Expression for Views in View Designer for more information.
   - To remove a column from an edge, click on the column and select **Remove**.
6. **Optional:** If you are working with a table or pivot table view, regardless of the display style:
   - **Pivot Table view:** In the **Row** and **Column** edges, select or clear the **Row Grand Total** and **Column Grand Total** check boxes as you require.
   - **Table view:** In the **Row** edge, select or clear the **Row Grand Total** check box.
7. **Optional:** If you are working with a pivot table view that has the pivot table display style, you can perform these actions with the **Measure Label** element:
   - Reorder the **Measure Label** element within the **Column** edge.
   - Move the **Measure Label** to any other edge *except* the **Measure** edge.

   Notes about the **Measure Label** element:
   - The Measure Label element represents the labels for all the Measures columns in the Measures edge. In the View Designer, the Measure Label element appears by default in the **Column** edge.
   - Measure Label is only available when both the **View Type** and **Display Type** is **Pivot Table**.
   - Experiment with moving the Measure Label element to another edge or reordering it within the Column edge. The result may be a more readable pivot table layout.
   - Measure Label cannot be removed from the View Designer.

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- Measure Label cannot be placed in the Measures edge.

8. To define filters, click the **Filters** tab and continue with Defining the Filter Expression for Views in View Designer.

   If you do not plan to define filters, click **OK**:

   - If you are creating a new view, the view is inserted into Excel.
   - If you are editing a view, the old view is removed and the updated view is inserted.

Defining the Filter Expression for Views in View Designer

Columns that you added for filtering in Defining the View Layout are automatically added to the Filter Expression area of the Define Filters tab in View Designer.

Whether you are creating a new view or editing an existing view, you can add more filter columns, and further define and refine filters on all columns.

To define or edit the filter expression for a view created in View Designer:

1. Complete the steps in Defining the View Layout, selecting the **Define Filters** tab.

   The columns that you added for filtering should be displayed on the **Define Filters** tab.

2. **Optional:** Add more columns to the **Filter Expression** area of the **Define Filters** tab.
3. Select a column in **Filter Expression**.
4. Select a corresponding filter operator from the drop-down list next to the column name.

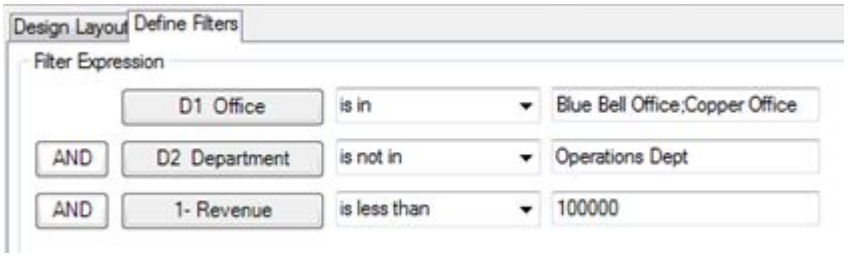
   The operator list from which you can choose is populated based on the type of column that you selected.

   Guidelines for choosing an operator are described in Filter Operators.

5. Specify a filter value in the last column by clicking

and making a selection in the Value Selector.

   For example, here is a set of filters based on the Sample Sales database:



   The filters that you define are summarized in the **Filter Summary** pane. For example, for the filters defined in this step, the summary looks like this:

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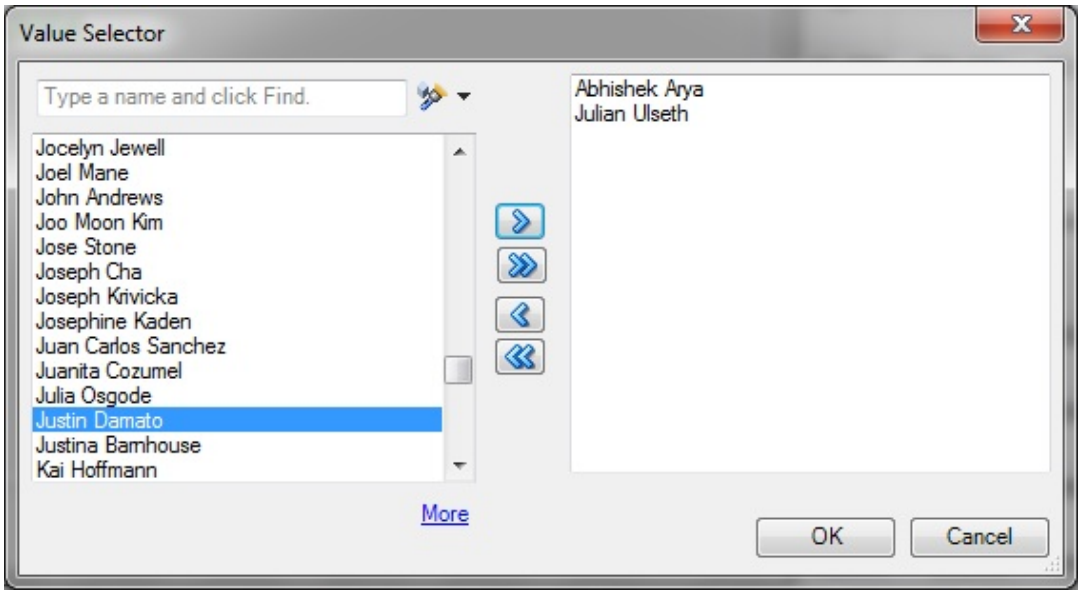
In some cases, the data to choose from can be exceedingly long. To accommodate loading large amounts of data in the Value Selector, Oracle Smart View for Office presents values in groups. Scroll and make selections from the first group shown, then click **More** to view and make selections from the next group. Continue clicking **More** until you have viewed and made selections from the entire data list. Figure 1 shows an example.

Figure 28-20 Value Selector Showing "More" for Large Amounts of Data



6. **Optional:** If required, click the logical operator button in **Filter Expression** and make a selection to change the operator:

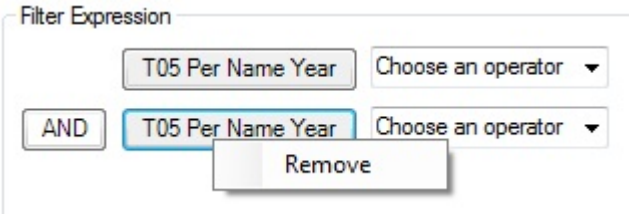
   - **AND**
   - **OR**

   The default logical operator is **AND**.

   Changing the logical operator on one line of the filter expression automatically changes the operator for all lines in the expression so that the operator is the same for all lines.

7. **Optional:** To remove a line from the filter expression, right-click the column button in the line, and then select **Remove**, as shown in Figure 2.

Figure 28-21 Remove Option that is Displayed When Right-clicking a Column in a Filter Expression



8. When you are finished defining filters, click **OK** to insert the view into Excel.

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Filter Operators

Use the guidelines in Table 1 when choosing an operator and specifying the required values. The operator list from which you can choose is populated based on the function that you are performing (for example, creating a filter or creating a dashboard prompt) and the type of column that you selected.

Table 28-3 Guidelines for Choosing an Operator When Creating a Column Filter

Operator	Usage Guidelines
is equal to / is in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column matches the value in the filter.
is not equal to / is not in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column does not match the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results include only records where the data in the column is less than the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value. Results include only records where the data in the column is greater than the value in the filter.
is less than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is less than or the same as the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.
is between	Valid for a column that contains numbers or dates. Specify two values. Result include only records where the data in the column is between the two values in the filter.
is null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the absence of data in the column. Results include only records where there is no data in the column. Sometimes it might be useful to know whether any data is present, and using the is null operator is a way to test for that condition. For example, suppose your business has a worldwide address book and you want to extract the United States addresses only. You could do this by checking for the presence or absence of data in the "State" field. This field should be unpopulated (null) for non-United States addresses and populated (not null) for United States addresses. You can obtain a list of United States addresses without the need to check the column for a specific value.

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Table 28-3 (Cont.) Guidelines for Choosing an Operator When Creating a Column Filter

Operator	Usage Guidelines
is not null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results include only records where there is data in the column.
is ranked first	Valid for a column that contains text or dates. Specify a single value. Results include only the first n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list that contains the first 10 brand names in alphabetical order.
ranked last	Valid for a column that contains text or dates. Specify a single value. Results include only the last n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the dates of the last 10 sales transactions.
is in top	Valid for a column that contains numbers. Specify a single value. Results include only the first n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the top 10 sales in dollars.
is in bottom	Valid for a column that contains numbers. Specify a single value. Results include only the last n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the customers reporting the fewest problems.
contains all	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column contains all of the values in the filter.
does not contain	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column does not contain any of the values in the filter.
contains any	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column contains at least one of the values in the filter.
begins with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results include only records where the data in the column begins with the value in the filter.

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Table 28-3 (Cont.) Guidelines for Choosing an Operator When Creating a Column Filter

Operator	Usage Guidelines
ends with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results include only records where the data in the column ends with the value in the filter.
is LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You may specify up to two percent sign characters in the value. Results include only records where the data in the column matches the pattern value in the filter.
is not LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You may specify up to two percent sign characters in the value. Results include only records where the data in the column does not match the pattern value in the filter.

Publishing Views

The ad hoc view definition that you create in View Designer can be published to the Oracle BI Presentation Catalog in Oracle Analytics Cloud after you have inserted it in Oracle Smart View for Office. When you publish an ad hoc view, a new analysis in Oracle Analytics Cloud is created with the default views of compound view and title view, along with the applicable user-created view.

When publishing a view that you were editing, you have the option of overwriting the view in the Oracle BI Presentation Catalog, or specifying a new name for the view and publishing the edited version, keeping two versions of the view in Oracle Analytics Cloud.

To publish a view to the Oracle BI Presentation Catalog:

1. Position the cursor within the view that you just created or edited in View Designer.
2. In the Oracle Analytics Cloud ribbon, click the **Publish View** icon (Publishing Views).

Figure 28-22 Publish View Icon

3. In **Save Report**, click next to **Catalog Root**, and then navigate to the location in the Oracle BI Presentation Catalog where you will save the view.
4. In **Analysis Name**, provide a name.

   If you are publishing an edited view, you have the option of overwriting the view you edited by providing the same name, or providing a new name and keeping the original version of the view intact.

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5. Click **Save**.

   The default naming convention is applied to the components of the view that is saved; for example, Table 1, Pivot Table 1, Chart 1, and so on.

Example 28-1 Notes

- If you are publishing a view that was created and then edited in Smart View, you may overwrite it.
- An error message is displayed if you attempt to overwrite an existing view in the Oracle BI Presentation Catalog if the view was created in Oracle Analytics Cloud.
- To view the changes made in Oracle Analytics Cloud, you must re-insert the view.
- Once published, you may make changes to the view as follows:
  - If the view was created in Oracle Analytics Cloud, then use Oracle Analytics Cloud.
  - If the view was created in Smart View, you may edit it either in Smart View or Oracle Analytics Cloud.
- You may refresh the data in views created in View Designer.

  Ad hoc views created in View Designer remain as a snapshot and will not be kept in sync with the analysis published to the catalog.
- Changes made to the view in Oracle Analytics Cloud will not be reflected into the ad hoc view that you rendered in Excel. You must reinsert the view from the catalog tree into a new sheet in Smart View in order to view the changes that were made in Oracle Analytics Cloud.

Editing Views Created in View Designer

Related Topics

- About Editing Views Created in View Designer
- Guidelines for Editing Views Created in View Designer
- Accessing the View to Edit
- Determining Where a View was Created
- Editing Views Created in View Designer

About Editing Views Created in View Designer

Use the View Designer in Oracle Smart View for Office to edit the views you created or edited in View Designer.

Do not use the View Designer in Smart View in these cases:

- To edit the views you created in Oracle Analytics Cloud
- To edit views you created in Smart View and then edited in Oracle Analytics Cloud

The process flow for editing views involves the following tasks:

- Reviewing the information in Guidelines for Editing Views Created in View Designer
- Accessing the View to Edit
- Determining Where a View was Created
- Editing Views Created in View Designer

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Guidelines for Editing Views Created in View Designer

- Only views created and inserted from the View Designer in Oracle Smart View for Office can be edited using the View Designer.
- Views created in Smart View may also be edited in Oracle Analytics Cloud. However, views created in Smart View and then further edited in Oracle Analytics Cloud cannot afterward be edited in View Designer.

> **Note**
>
> To edit views created in Oracle Analytics Cloud, use the Oracle Analytics Cloud application (see Editing an Analysis in Oracle Analytics Cloud).

- When you use View Designer to edit a table view or pivot table view, Smart View performs a replace operation, effectively replacing the view on the sheet with the newly-edited view; that is, the table on the sheet is deleted and a new table is inserted. If the new table has more rows or columns than the previous table, any content or formulas that you may have added to the sheet prior to editing the view in View Designer may be removed and you will need to add them again.

Accessing the View to Edit

> **Note**
>
> This procedure applies to views that were created in View Designer.

To access views to edit:

1. Access a view in one of following ways:
   - **During the design session**—For example, after you created the view in View Designer and clicked OK to insert the view, select the view in the Office document and click the View Designer icon to relaunch the View Designer for editing.
   - **From a view in a saved Office document**—Select the view in the Office document and click the View Designer icon to relaunch the View Designer for editing.
   - **From a published view in the Presentation Catalog**—Use the **Load view in View Designer** command to load the view from the catalog tree into the View Designer in Oracle Smart View for Office. When you select a view, the **Load view in View Designer** command is available in the Action Panel or from the right-click menu.

     Remember, to select a view to edit from the catalog tree, *do not* try to insert it first into the Office document. Be sure to use the **Load view in View Designer** command when you want to edit.
2. Continue with the processes described in Determining Where a View was Created to determine if you should edit the view in View Designer.

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> **Note**
>
> Do not use View Designer in Smart View to edit views that were created in Oracle Analytics Cloud. Views may not load in cases where the View Designer does not support the formatting and design features that were used to create the view in Oracle Analytics Cloud. For this reason, use the View Designer to edit only those views that were created and inserted using the View Designer in Smart View.

Determining Where a View was Created

You need to know if a view was created in the View Designer in Oracle Smart View for Office if you want to edit it in Smart View.

If you are unsure whether a view on a sheet was created in Smart View or Oracle Analytics Cloud, you can verify the origin of the view in the Document Contents pane.

To determine the origin of a view:

1. Open the Office document containing the view.
2. Locate the view in the Document Contents pane, then right-click the view name, and then select **Properties**.
3. Check that the value in the **View Source** field is **AdHocDesigner**.

   The possible values are:

   - **AdHocDesigner**—View originates from the View Designer in Smart View
   - **Catalog**—View originates from the Oracle BI Presentation Catalog in Oracle Analytics Cloud
   - **CopyFromAnswers**—View was copied from Oracle Analytics Cloud and pasted into the Smart View Office document

   The views marked **AdHocDesigner** are the only views that should be edited in View Designer.

   Note that, in some cases, views created in Oracle Analytics Cloud may be loaded in to the View Designer in Smart View. Keep in mind that when you attempt to work in View Designer with views from Oracle Analytics Cloud, you are doing so at your own risk; editing these views in View Designer is not supported. Oracle only supports using the View Designer to edit those views that were created and edited using the View Designer in Smart View.
4. If the **View Source** property is **AdHocDesigner**, the view can be edited in View Designer.

   If the **View Source** is **Catalog** or **CopyFromAnswers**, edit the view in Oracle Analytics Cloud.

Editing Views Created in View Designer

Refreshing Data in a View Created in View Designer

You may refresh views created in View Designer in the same way you refresh views that were inserted into an Office application from the catalog tree.

See Specifying Preferences for Refreshing Views and Refreshing Views for information.

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Smart View and Essbase Cloud

Related Topics

- About Smart View and Essbase Cloud
  Oracle Essbase is a subscription-based business analytics solution that is built for and deployed on Oracle Cloud Infrastructure via Marketplace and Oracle Analytics Cloud.
- Running the Smart View Installer
  Before running the Oracle Smart View for Office installer, review the Smart View prerequisites.
- Creating Data Source Connections to Essbase
  After installing Oracle Smart View for Office, you can create connections to Oracle Essbase.
- Tracking User Activity with Audit Trail
  An audit trail tracks user activity on an Oracle Essbase cube.

About Smart View and Essbase Cloud

Oracle Essbase is a subscription-based business analytics solution that is built for and deployed on Oracle Cloud Infrastructure via Marketplace and Oracle Analytics Cloud.

Using Oracle Smart View for Office, you can interact with Essbase data in Microsoft Office to analyze, model, collaborate, and report.

> **Note**
>
> In this chapter, Essbase and Essbase cloud refers to Essbase on Oracle Cloud Infrastructure via Marketplace, and includes:
>
> - Essbase 19c
> - Essbase 21c
>
> Essbase cloud also refers to Oracle Analytics Cloud - Essbase.

Use the topics in this section to install and connect to Essbase:

- Running the Smart View Installer
- Creating Data Source Connections to Essbase

Then you are ready to begin working with data in Essbase. Information on using Smart View with Essbase is contained throughout this guide:

- Dimensions and Members
- Data and Data Cells
- Ad Hoc Analysis
- Enabling Attribute Association Processing in Ad Hoc Grids

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- General Operations
- Smart Query
- Smart Slices
- Query Designer and MDX Queries
- Smart View Options
- Functions
- Free-Form Mode
- Smart View Diagnostics and Health Check

Information on using Audit Trail is in this chapter. See Tracking User Activity with Audit Trail.

Running the Smart View Installer

Before running the Oracle Smart View for Office installer, review the Smart View prerequisites.

Smart View Prerequisites

- The latest release of Smart View

  On Oracle Technical Resources, **Downloads** tab, the latest release for Smart View is always certified.
- Microsoft Office
- Microsoft .NET Framework

Specific version requirements are noted in:

- *Using Oracle Essbase*, Download and Run the Smart View Installer, "Smart View Prerequisites"
- *Using Oracle Analytics Cloud - Essbase*, Download and Run the Smart View Installer, "Smart View Prerequisites"

Installing Smart View

1. Log into Oracle Essbase.
2. Access the Smart View download page on Oracle Technical Resources:
   - Oracle Essbase 19c, 21c:
     a. Log into Essbase.
     b. Click **Console**.
     c. On the **Desktop Tools** tab, click the Browse icon to the right of **Smart View for Essbase**.
   - Oracle Analytics Cloud - Essbase:
     a. On the Applications home page, click **Utilities**.
     b. On the **Utilities** page, select **Smart View for Essbase**.
3. On the Smart View download page on Oracle Technical Resources, click **Accept License Agreement**, and then click **Download Now**.

   If the Oracle sign-in page is displayed, then sign in with your Oracle user name (usually your email address) and password.

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4. Follow the steps for your browser to download the .zip file, and save it to a folder on your computer.
5. Go to the folder that you used in the previous step, and then double click smartview.exe to start the installation wizard.
6. Select a destination folder for Smart View, and then click **OK**.

   For new installations, Smart View is installed by default in: C:\Oracle\smartview. If you are upgrading an installation of Smart View, then the installer defaults to the folder where you previously installed Smart View.
7. When the installation is complete, click **OK**.

Continue the setup process with Creating Data Source Connections to Essbase.

Creating Data Source Connections to Essbase

After installing Oracle Smart View for Office, you can create connections to Oracle Essbase.

Connections require information about the server and port. Your cloud service administrator should provide you with the information you need to create the connection. Use the quick connection method to create a private connection to the cloud service.

To create a private connection using the quick connection method:

1. In Excel, select the Smart View ribbon, and then click **Panel**.
2. On the Smart View Panel, click the arrow on the **Switch to** button , and then select **Private Connections** from the list.
3. Still in the Smart View Panel, in the text box, enter the URL for the data source to which you want to connect.

   The URL syntax:

   https://server/essbase/smartview
4. Click **Go**, or press **Enter**.
5. On the login window, enter your login credentials, and then select a data source from the drop-down menu.

You can now begin working with data in Essbase. See the functional areas listed in Smart View and Essbase Cloud for more information.

Tracking User Activity with Audit Trail

An audit trail tracks user activity on an Oracle Essbase cube.

Related Topics

- About Audit Trail
- Launching Audit Trail
- Export Audit Trail Content to a Sheet
- Refresh the List of Audit Trail Entries
- Starting an Ad Hoc Grid from an Audit Trail Entry

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About Audit Trail

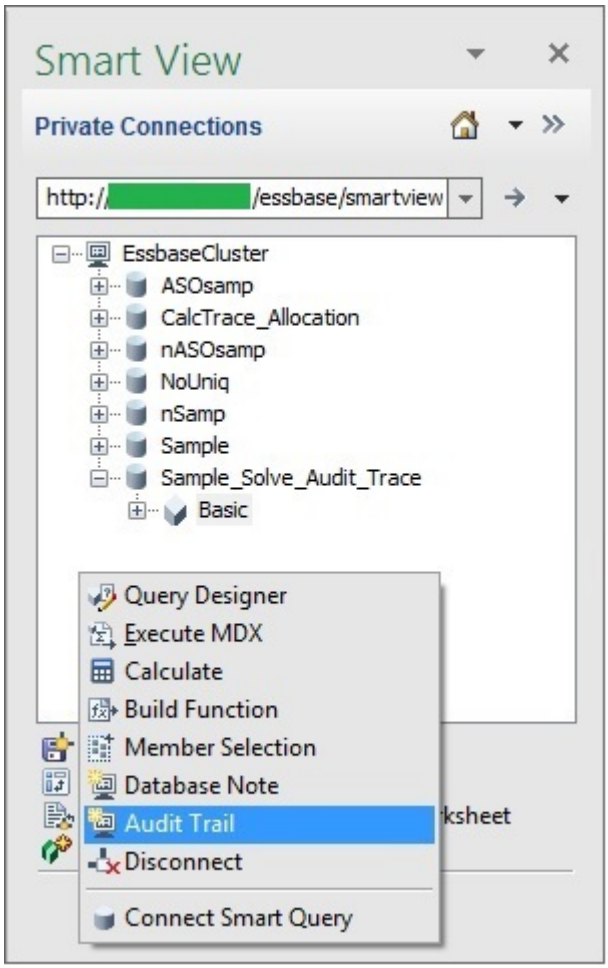
Data source types: Oracle Essbase Cloud

An audit trail tracks user activity on an Essbase cube.

Starting in Oracle Smart View for Office 11.1.2.5.710, data entry or input can be tracked when connected to Essbase. For example, when Audit Trail is activated, then updating and submitting data in all writable cells in an ad hoc grid would be tracked and displayed as a list items of in the audit trail.

Smart View logs audit trail activity in a pane within the Smart View Panel. After connecting to a cube, you access the Audit Trail pane by selecting **Audit Trail** from the Action Panel.

Figure 29-1 Audit Trail Selected from the Action Panel Context Menu



The Audit Trail pane is displayed within the Smart View Panel. For example:

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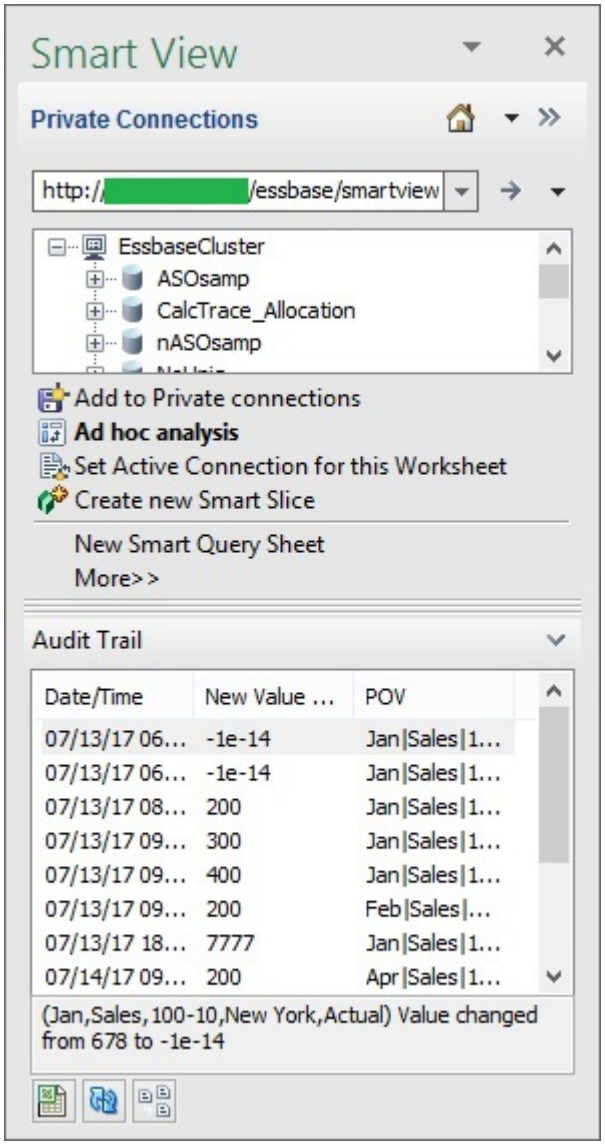
Figure 29-2 Example Audit Trail Pane



For each user activity tracked, the following information is stored:

- User ID
- Date/Time
- Type of Operation
- Comments/Linked Reporting Objects (LRO)
- New Value
- Old Value
- POV Members

Only Date/Time, New Value, LRO, and POV are displayed in the Audit Trail pane. Selecting an log entry within Audit Trail provides additional information at the bottom of the pane. And you can export the details of the entry to view all available information for that entry.

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You can also refresh the list of log entries in the Audit Trail pane, and launch a selected entry on a separate sheet to view the POV for that entry.

Launching Audit Trail

You launch the Audit Trail pane from the Action Panel in the Smart View Panel.

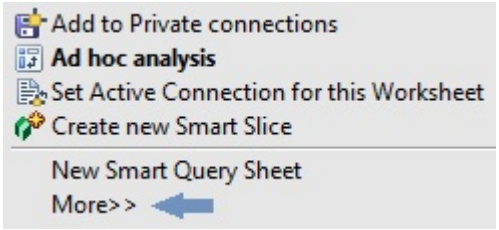
To launch the Audit Trail pane:

1. Sign on to your Oracle Essbase data source using a private connection, and connect to the cube.

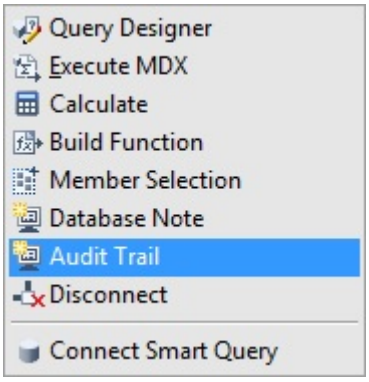
   See Connecting to Data Sources for more information.

2. In the Action Panel, select **More**, and then select **Audit Trail** from the popup menu.

   The Action Panel is located at the bottom of the Smart View Panel, and contains action items specific to the data source and cube to which you are connected.



When you select **More**, a popup menu is displayed where you can select **Audit Trail**.



The Audit Trail pane is displayed in the bottom portion of the Smart View Panel

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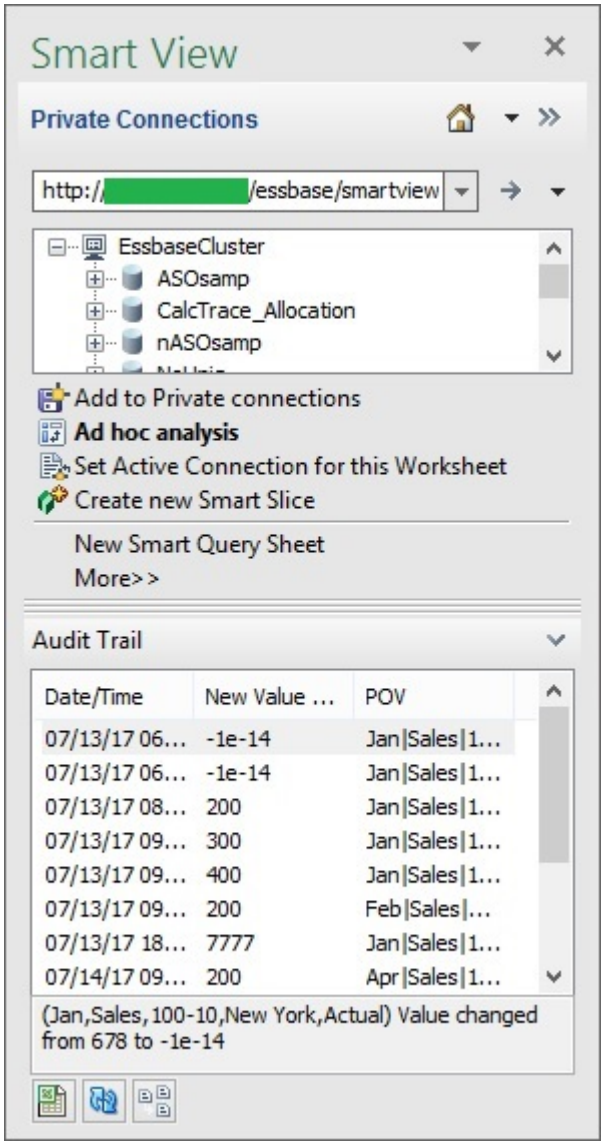

Now you can work with the items in the **Audit Trail** pane using these three buttons at the bottom of the pane:

3. Perform an action:
   - Export the contents of the audit trail onto a separate sheet

     See Export Audit Trail Content to a Sheet.
   - Refresh the list of items in the **Audit Trail** pane

     See Refresh the List of Audit Trail Entries
   - Launch an ad hoc sheet based on an item in the audit trail list

     See Starting an Ad Hoc Grid from an Audit Trail Entry

Export Audit Trail Content to a Sheet

You can export the items in an audit trail, including the detail for each entry, to an Excel sheet which you can save and analyze.

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To export audit trail content to a worksheet:

1. Launch the **Audit Trail** pane for a particular Oracle Essbase cube, as described in Launching Audit Trail.

2. At the bottom of the **Audit Trail** pane, click **Export to Sheet**, .

   All entries, along with the additional detail that is not displayed in the **Audit Trail**, are exported to a new worksheet. Details include:

   - User ID
   - Date/Time
   - Type of Operation
   - Transaction ID
   - Scenario
   - Comments/Linked Reporting Objects (LRO)
   - New Value
   - Old Value
   - POV Members

   The entries on the sheet can be sorted and filtered. Some columns may need to be widened in order to view the headings and entries.

   Following in an example of the content of an audit trail when it is first exported to a sheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	User	Date/T	Cell No	New V	Old Val	Operat	Scenari	Transac	Membe	Membe	Membe	Members	Members
2	<user>	########		200	99	INPUT		0	Jan	Sales	100-10	New York	Actual
3	<user>	########		949	645	INPUT		0	Feb	Sales	100-10	New York	Actual
4	<user>	########		99	2200	INPUT		0	Jan	Sales	100-10	New York	Actual
5	<user>	########		1212	4860	INPUT		0	Jan	Sales	100-10	Market	Scenario
6	<user>	########		112	111	INPUT		0	Jan	Sales	100	East	Actual
7	<user>	########		111	2105	INPUT		0	Jan	Sales	100	East	Actual
8	<user>	########	[http://www.oracle.com] with			INPUT		0	Jan	Misc	Product	Market	Budget
9	<user>	########	[TestFunction.xlsx] with descri			INPUT		0	Jan	Misc	Product	Market	Actual
10	<user>	########	[Some Cell Note Here] is attach			INPUT		0	Jan	Misc	Product	Market	Scenario
11	<user>	########		23	75	INPUT		0	Jan	Misc	Product	Market	Scenario
12	<user>	########		21321	17378	INPUT		0	Jan	Margin	Product	Market	Scenario

   Some columns may need to be widened in order to view the headings and entries.

3. You can save the worksheet, or just close it.

Refresh the List of Audit Trail Entries

After launching **Audit Trail**, you may have performed several actions that were logged in the audit trail. To view the latest entries, you must refresh the **Audit Trail** pane.

To refresh the **Audit Trail** pane:

1. Launch the **Audit Trail** pane for a particular Oracle Essbase cube, as described in Launching Audit Trail.

2. After performing various actions on the sheet, click Refresh, .

3. View the recent entries that have been added to the **Audit Trail** pane.

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Starting an Ad Hoc Grid from an Audit Trail Entry

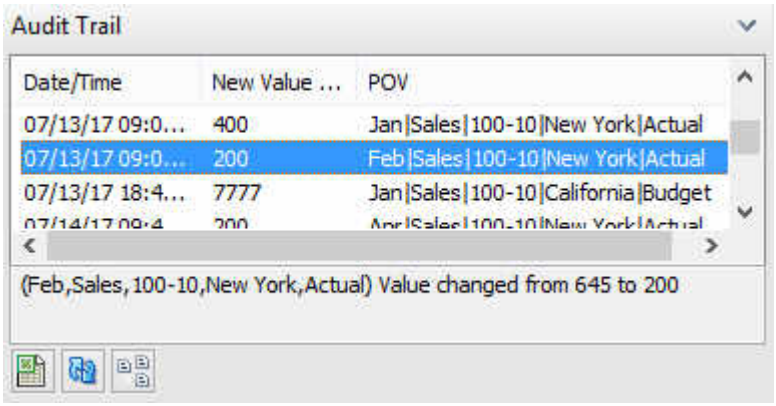
You an start an ad hoc grid by selecting an entry from the list in the **Audit Trail** pane. The ad hoc grid will be structured according to the POV of the selected audit trail entry.

To start an ad hoc grid from an entry in the audit trail list:

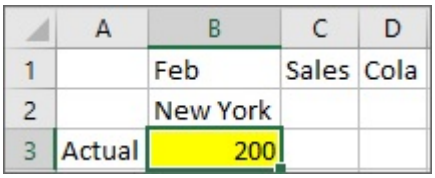
1. Launch the **Audit Trail** pane for a particular Oracle Essbase cube, as described in Launching Audit Trail.
2. Select an entry in the **Audit Trail** pane and, at the bottom of the pane, click **Ad Hoc on Selected POV**, .

   An ad hoc grid based on the POV of the selected entry is launched onto the active worksheet.

   For example, suppose we selected this entry, where the new value is 200, and the POV is Feb, Sales, 100-10, New York, and Actual, as noted under the entry list:



   Clicking the would result in the following ad hoc grid:



3. Work with the grid as you would any other ad hoc grid.
4. Repeat these steps for any other audit trail entries, as you require.

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Smart View Diagnostics and Health Check

Related Topics

- About Smart View Diagnostics and Health Check
  The Oracle Smart View for Office Diagnostics tools to help you collect information for Oracle Support. **Health Check** can help you to optimize Smart View performance and quickly review information about your system.
- Working with Smart View Diagnostics Tools
  Use the Oracle Smart View for Office Diagnostics tools to collect information to assist Oracle Support in troubleshooting issues.
- Performing a Health Check On Your System
  You can perform a "health check" on your system to optimize performance.
- Performing a Health Check on Microsoft Office Documents
  You can perform a "health check" to optimize performance of a Microsoft Excel workbook, Word document, or PowerPoint presentation.

About Smart View Diagnostics and Health Check

The Oracle Smart View for Office Diagnostics tools to help you collect information for Oracle Support. **Health Check** can help you to optimize Smart View performance and quickly review information about your system.

While working with Smart View, an issue may arise that you cannot resolve on your own. Use the tools in the **Diagnostics** group in the Smart View ribbon to create and collect files and screenshots to send to Oracle Support. The files and screenshots you collect are used by Oracle Support to troubleshoot and resolve your issue.

You can also use the **Health Check** dialog to optimize performance and to get information about your machine, Microsoft Office version, Smart View version, and the extensions you have installed.

Related Topics:

Working with Smart View Diagnostics Tools

Performing a Health Check On Your System

Performing a Health Check on Microsoft Office Documents

Working with Smart View Diagnostics Tools

Use the Oracle Smart View for Office Diagnostics tools to collect information to assist Oracle Support in troubleshooting issues.

Related Topics

- Displaying the Diagnostics Group in the Smart View Ribbon
  You can choose to display or hide the **Diagnostics** options in the Smart View ribbon.

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- Customizing Diagnostics Features
  You can customize certain features of the Diagnostics tools.
- Using the Smart View Diagnostics Tools
  Use the Oracle Smart View for Office Diagnostic tools to collect data about your issue in the form of log files and screenshots.
- Using the Trace Traffic Tool
  Use the **Trace Traffic** tool to view network traffic logs easily in real time, capture them, and import them for further diagnostics.
- Cleaning Up the Diagnostics Folder
  Once you have transmitted your diagnostics zip file to Oracle Support, you can clear the files in the diagnostics folder.

Displaying the Diagnostics Group in the Smart View Ribbon

You can choose to display or hide the **Diagnostics** options in the Smart View ribbon.

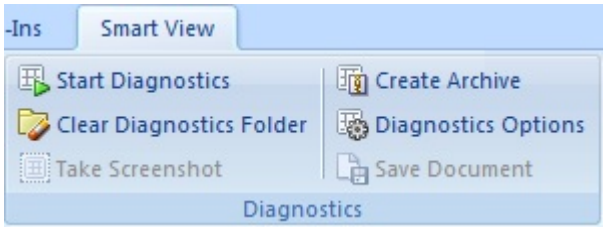
When you first install Oracle Smart View for Office and open it, the **Diagnostics** options are not displayed.

To display the **Diagnostics** group of options:

1. Open the Office application where you are experiencing the issue.
2. From the Smart View ribbon, select **Options**, and then select the **Advanced** tab.
3. In **Advanced**, select **Show Diagnostics Group on Smart View Ribbon**, and then click **OK** to close the **Options** dialog box.

   The **Diagnostics** group is automatically displayed in the Smart View ribbon (see Figure 1). You do not need to the restart the Office application.

Figure 30-1 Tools in the Diagnostics Group in the Smart View Ribbon



4. Repeat this procedure in each Office application where you are experiencing the issue.

> **Note**
>
> You must enable the **Diagnostics** group in each Office application individually. The **Diagnostics** group will not display in other Office applications until you enable it.

5. **Optional:** When finished using the **Diagnostics** tools, to hide the **Diagnostics** group in the Smart View ribbon, clear the **Show Diagnostics Ribbon Tab** check box in the **Advanced** tab of the **Options** dialog box.

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Customizing Diagnostics Features

You can customize certain features of the Diagnostics tools.

The procedure in this topic walks you through each of the options available in the **Diagnostic Options** dialog box.

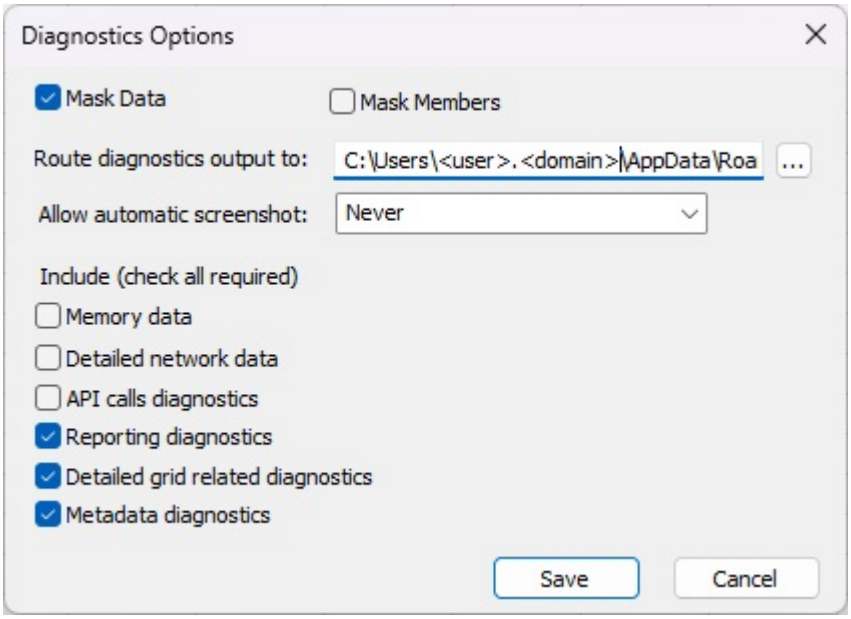
> **Note**
>
> All steps in the following procedure are optional.

To customize the **Diagnostics** tools:

1. In the **Diagnostics** group in the Smart View ribbon, select **Diagnostics Options**.

   The **Diagnostics Options** is displayed, as shown in Figure 1.

Figure 30-2 Diagnostics Options Dialog Box



2. To hide data values in the Office document, select **Mask Data** (selected by default).

   Ensure that this option is selected if data values in your output should be hidden for confidentiality purposes.

   > **Note**
   >
   > Selecting either **Mask Data** or **Mask Members** (see next step), or both, can impact performance significantly on large grids; for example, on grids of 10,000+ cells.

3. To hide member names in the Office document, select **Mask Members**.

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Select this option if member names in your output should be hidden for confidentiality purposes.

4. To direct the diagnostics output files to a folder other than the default, in **Route diagnostics output to**, click and navigate to the folder location to store the files.

   You can also enter the folder location manually.

   The default folder location is:

   C:\Users\<*user.domain*>\AppData\Roaming\Oracle\SmartView\Diagnostics

5. To allow automatic screenshots for each warning or error message that is displayed, select an option:
   - **Errors**
   - **Warnings**

   If you do not want automatic screenshots, select **Never** (the default).

6. Select the following options as you require:
   - **Memory data**
   - **Detailed network data**
   - **API calls diagnostics**
   - **Reporting diagnostics**—Selected by default
   - **Detailed grid related diagnostics**—Selected by default
   - **Metadata diagnostics**—Selected by default

   As noted above, certain items are selected by default. In many cases, these are all that is needed for diagnosing your issue.

   You may select the remaining items if you feel those are the problem area or if you are advised by Oracle Support to do so. You may also deselect items that you feel are not relevant to your issue.

   > **Note**
   >
   > When diagnostics is enabled and the **Memory data** option is selected, Oracle Smart View for Office performance will be slower, in some cases up to two times slower than normal.
   >
   > You should select this option only if you are running into memory issues. For example, on 32-bit machines, if Smart View terminates abnormally or takes an excessive amount of time to load large spreadsheets, then you should select **Memory data** when collecting diagnostics.

7. Click **Save** to save your option selections.

Using the Smart View Diagnostics Tools

Use the Oracle Smart View for Office Diagnostic tools to collect data about your issue in the form of log files and screenshots.

The data you collect is stored in a session folder (either in the default diagnostics folder location or a location you designate in Customizing Diagnostics Features). When you are

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finished collecting diagnostic data, you use the diagnostic tools to zip up the files. Then you transmit the ZIP file to Oracle Support for analysis.

The procedure in this topic explains how to collect the diagnostic data, zip it up, and send it to Oracle Support.

To use the Smart View Diagnostics tools:

1. Click **Start Diagnostics**.

   When you click **Start Diagnostics**, a message is displayed regarding restarting Microsoft Office. You are not required to restart Office; however, Oracle recommends that you do so. Restarting Office enables the diagnostics tools to collect more information, including the steps that led to the issue you may be experiencing.

   > **Note**
   >
   > After you click **Start Diagnostics**, the menu toggles to **Stop Diagnostics**.

2. If you restarted Office, perform the steps in Smart View that led to the issue you are diagnosing.
3. **Optional:** Use the **Trace Traffic** action to launch the **Network Traffic Trace** dialog, where you can view and capture network traffic details comprising request and response logs in a chronological order.

   To use the **Trace Traffic** tool, see Using the Trace Traffic Tool.
4. Click **Take Screenshot** to take screenshots that you feel will be helpful in documenting your issue.

   > **Note**
   >
   > The screenshot includes the entire screen, not just the application. Be sure to minimize any confidential information that you may have on your screen so that it is not included in the screenshot.

5. Click **Save Document** to save the currently-opened Office document to the diagnostics folder for the current session.

   You can perform multiple saves of the document, if necessary. Oracle recommends that you save the document at different points during the work you are doing in order to best demonstrate and show your issue. Each time you save, Smart View adds a suffix to the file name, (0), (1), (2), etc.; no documents are overwritten.

   The documents are stored in the current diagnostics session folder; the default location is:

   C:\Users*username.domain*\AppData\Roaming\Oracle\SmartView\Diagnostics

6. When you are finished gathering the diagnostics you require to adequately document your issue for Oracle Support, click **Stop Diagnostics**.
7. Click **Create Archive** and in the **Create Archive** dialog box, specify a folder to store the archive and a file name, or use the default folder location and file name.

   The files are stored in your system's My Documents folder as follows:

   My Documents\Documents

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The file is named in the following format:

SmartView_Diagnostics_*ddmmyyyy*.zip

8. Attach the zip file in your Service Request (SR) for the issue on Oracle Support.

Using the Trace Traffic Tool

Use the **Trace Traffic** tool to view network traffic logs easily in real time, capture them, and import them for further diagnostics.

Oracle Smart View for Office's built-in **Trace Traffic** tool helps users to view and capture network traffic details specific to Smart View in real time, and improves Oracle Support's ability to debug issues.

The **Trace Traffic** tool is available starting in Smart View release 24.200.

Using the **Trace Traffic** tool, you can:

- View network traffic logs easily in real time while capturing them, described in Viewing and Capturing Network Traffic Logs
- Import captured network traffic logs for further diagnostics, described in Importing Captured Network Traffic Logs

Viewing and Capturing Network Traffic Logs

You can either start diagnostics before starting the network traffic trace or you can directly start tracing network traffic without starting the diagnostics first. Network traffic logs are also captured when you use the **Start Diagnostics** option. However, with the **Trace Traffic** option, you can view the request and response logs in real time in the **Network Traffic Trace** dialog.

To view and capture network traffic logs in real time:

1. On the Smart View ribbon, under **Diagnostics**, click **Trace Traffic**.

> **Note**
>
> The **Diagnostics** group actions appear on the Smart View ribbon when you enable the **Show Diagnostics Group on Smart View Ribbon** option in the **Options** dialog, **Advanced** tab.

2. In the **Network Traffic Trace** dialog, select the **Smart View Traffic** option from the **Capture** list, and click **Start Capturing**.
   You can view the network traffic details comprising the request and response logs getting captured in a chronological order.
   - To see the request and response timestamps for each log entry, select the **Show Times** check box
   - To clear all the request and responses that you can view in the current session in the **Network Traffic Trace** dialog, click **Clear**. Note that only the view is cleared. The network traffic log files are not deleted from the **Diagnostics** folder.

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> **Note**
>
> - Once clicked, the **Start Capturing** button toggles to **Stop Capturing** .
> - You can always start tracing traffic without starting the diagnostics first. When you click **Start Capturing** in the **Network Traffic Trace** dialog, the **Start Diagnostics** menu automatically toggles to **Stop Diagnostics** indicating that the diagnostics are being captured along with traffic details.

3. Once you have captured the actions you want to trace, then click **Stop Capturing** and click **Close** to close the **Network Traffic Trace** dialog.
   The network traffic logs are stored in the **Diagnostics** folder in this default location:

   C:\Users\[computeruserfolder]\AppData\Roaming\Oracle\SmartView\Diagnostics

Importing Captured Network Traffic Logs

The previously captured network traffic logs can be imported in the **Trace Traffic** tool for further diagnostics and analysis.

> **Note**
>
> Only the network traffic logs generated and captured using Oracle Smart View for Office 24.200+ can be imported in the **Trace Traffic** tool. Diagnostics logs generated using previous versions of Smart View are not supported for import in the **Trace Traffic** tool.

To import captured network traffic logs:

1. On the Smart View ribbon, under **Diagnostics**, click **Trace Traffic**.

   > **Note**
   >
   > The **Diagnostics** group actions appear on the Smart View ribbon when you enable the **Show Diagnostics Group on Smart View Ribbon** option in the **Options** dialog, **Advanced** tab.

2. In the **Network Traffic Trace** dialog, click **Import**. The folder selector dialog is launched. The default location opens to the Diagnostics folder:

   C:\Users\[computeruserfolder]\AppData\Roaming\Oracle\SmartView\Diagnostics

   In this folder, you will notice at least one timestamped folder.

3. Select the timestamped folder to which to import the document, and click **Import**. Generally, you would pick the timestamped folder that corresponds to the date and time that you're performing this trace.

   For example, the folder might look something like this:

   2024-09-10T09.50.45_2712Smart View

   Be sure to select the timestamped folder, and not a subfolder, such as the XML folder, within the timestamped folder. If you select a subfolder, nothing will be imported.

4. For each log entry, review the details in the Request Headers, Request Cookies, Request Body, Response Headers, Response Cookies, and Response Body tabs.

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- To view the request and response body details in Notepad, click **Open in Notepad**.
- To open the current working directory where the current request and response files are being saved, click **Open Location**.

5. Click **Close** to close the **Network Traffic Trace** dialog.

Cleaning Up the Diagnostics Folder

Once you have transmitted your diagnostics zip file to Oracle Support, you can clear the files in the diagnostics folder.

> **Note**
>
> Clearing the diagnostics folder while Diagnostics is running clears all folders, except for the current session folders for currently-opened Microsoft Office applications. Clearing the diagnostics folder when Diagnostics is not running clears all diagnostics folders, including all the latest session folders.

Clearing All Diagnostics Folders, Except the Current Session Folders

To clear all diagnostics folders except the current session folders:

1. Verify that Diagnostics is running.
2. Click **Clear Diagnostics Folder**.
   This action clears all diagnostics folders except those created for the currently-running Office applications.

Clearing All Diagnostic Folders, Including the Latest Session Folders

To clear all diagnostics folders, including the latest session folders:

1. If you have not already done so, in the **Diagnostics** group in the Smart View ribbon, click **Stop Diagnostics**.
2. Close any opened Office applications, including the one in which you are experiencing an issue.
3. Open any Office application and click **Clear Diagnostics Folder**.
   This action clears all diagnostics folders including the latest session folders for Office applications.

Performing a Health Check On Your System

You can perform a "health check" on your system to optimize performance.

With the Health Check, you can also get information about your machine, such as certain registry settings, Microsoft Office version, Oracle Smart View for Office version, and the extensions you have installed.

> **Note**
>
> The Health Check feature is only available when using Smart View with Excel.

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To perform a health check:

1. From the Smart View ribbon in Excel, click the arrow next to **Help**, and then select **Health Check**.

   The **Health Check** dialog is displayed.

2. View the following system information; you cannot edit this information:

   - **Version Information**—Operating System, Excel Version, Smart View Version, Internet Explorer Version, WebView2 Runtime Version, .NET Framework Versions

   > **Note**
   >
   > – If Microsoft Edge WebView2 Runtime is installed, then a version number is displayed in **WebView2 Runtime Version**. See the **WebView2 Runtime** option in the **Smart View Options** group in the next step to enable or disable WebView2.
   >
   > – If WebView2 Runtime is not installed, then **WebView2 Runtime Version** displays **None** and the **WebView2 Runtime** option is not displayed in the **Smart View Options** group.

   > **Note**
   >
   > Smart View uses the following Dynamic Link Library files (DLLs) to implement certain functionalities:
   >
   > – **BIPlusConnector.dll:** This is used to manage functionalities such as extensions, reports, search, cell actions, and drill-through in new sheet.
   >
   > – **Profiler.dll:** This is used to manage diagnostics.
   >
   > – **HsSpread.dll:** This is used to manage the spreading functionality.
   >
   > You can view the release version and registration status.
   >
   > – If a DLL is registered correctly, the status appears as "Registered". For example, 24.100 / Registered.
   >
   > – If a DLL is not registered correctly, the status appears as "Not Registered". In such cases, you can select the **Register** option from the drop-down list in the **Fix/Update/Help Link** column and click **Update Settings** to initiate the registration.

   - **Hardware Information**—RAM Memory, Processor, Smart View Installed Drive Space
   - **Excel Add-ins**—Depends on the Excel add-ins that are installed
   - **COM Add-ins**—Depends on the COM add-ins that are installed

3. Update the following information as you require; if you change any settings, click **Update Settings** to apply the changes.

   Optionally, click **Recommended Settings** to set all options to those most optimal to Smart View.

   These are the editable settings:

   - **Registry Information**

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HTTP session timeouts can occur when working with large queries that take a long time to run, or when you are experiencing slower internet connections. To reduce timeout occurrences, you can set timeout values. (If you change any of the timeout values, you must restart all Microsoft Office applications in order for the new value to be applied.)

- **KeepAlive Timeout**—The default value is 900 seconds. To change the value, click in the **Fix/Update/Info** column, enter a new value, and then click **Update Settings**.
- **Receive Timeout**—The default value is 900 seconds. To change the value, click in the **Fix/Update/Info** column, enter a new value, and then click **Update Settings**.
- **ServerInfo Timeout**—The default value is 900 seconds. To change the value, click in the **Fix/Update/Info** column, enter a new value, and then click **Update Settings**.
- **Current Resolution**—Read only. The current resolution of the system display.
- **USER Process Handle Quota**—Read only. The number of process handles. Process handles regulate Oracle Smart View for Office's access to system resources.
- **Enable Per Process System DPI**—Windows 10 Display Settings only. For drag-and-drop to work correctly if you use Office applications at a scaling level different than 100%, select **Enable**. The default value is **Disabled**.

  If you're using a high DPI display as your primary monitor and a regular DPI display as your extended monitor, drag and drop may not work on the extended regular DPI display monitor. This is due to mouse drivers giving incorrect coordinates for mouse actions, resulting in faulty drag-and-drop behavior.
- **Browser Emulation Mode**—Adds the required registry key to all Office applications (Excel, Word, PowerPoint, Outlook) so that certain browser-based screens in Smart View and Smart View extensions render properly.

  Select the option that corresponds to your browser version:

  * **12001**—Microsoft Edge compatibility
  * **11001**—Internet Explorer 11 compatibility
  * **10001**—Internet Explorer 10 compatibility
  * **Disable**

  This option is enabled by default and shows the value, **Default**.

- **Smart View Options**
  - **Undo Buffer**—The number of Undo and Redo actions permitted on an operation. The default value is 9. To change the value, click in the **Fix/Update/Info** column, enter a new value, and then click **Update Settings**. You can enter a value between 1 and 100. (See Using Undo and Redo).
  - **Improve Metadata Storage**—This option pertains to interoperability between different versions of Smart View. It allows for more efficient storage of internal data structures.

    The default value is **Checked**. If all users in your organization are on Smart View 9.3.1.6 or higher, then this option should always be checked.

    When this option is **Unchecked**, two copies of metadata are maintained for compatibility purposes, which may result in slower overall performance. Uncheck this option in the following situations:

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* You send an Excel workbook to users on Smart View releases earlier than 9.3.1.6, or to users on Microsoft Office 2002 and earlier, regardless of the Smart View release.
* You open a workbook sent from users on Smart View releases earlier than 9.3.1.6, or from users on Microsoft Office 2002 and earlier, regardless of the Smart View release.

> **Note**
>
> If you change this option to **Unchecked**, the value in the **Fix/Update/Help Link** column changes to **Fix**. If you are having issues with your system and want to optimize performance, you should "fix" this setting by changing the value back to **Checked**.

– **Compatibility**—Manage the compatibility of forms and regular ad hoc grids between Smart View for Office and Smart View for Office (Mac and Browser). The default value is **Disabled**.

* To enable compatibility, click in the **Fix/Update/Help Link** column, select **Enable**, and then click **Update Settings**.
* To disable compatibility, click in the **Fix/Update/Help Link** column, select **Disable**, and then click **Update Settings**.

For more information, see Working Compatibly on Forms and Ad Hoc Grids Between Smart View and Smart View (Mac and Browser).

– **WebView2 Runtime**—Select an option to enable or disable the installed version of Microsoft Edge WebView2 Runtime:

* **Enable for UI**—When enabled, WebView2 is used by Smart View to assist with some authentication scenarios at login. During runtime, Smart View detects the presence of WebView2 Runtime installed on the machine and launches the WebView2-based dialog to host the login page. Webview2 also works in conjunction with the Microsoft Edge browser to display the wizard when importing reports from Financial Reporting (cloud and on-premises).
* **Enable for All**—This is the default setting. Works with the authentication scenarios described in **Enable for UI**, and also enables WebView2 for networking. This option is recommended for use in diagnosing connection issues.
* **Disable**—Select to disable WebView2.

Whether enabled or disabled, the installed WebView2 Runtime version is displayed in **WebView2 Runtime Version** in the **Version Information** group; if WebView2 Runtime is not installed, then **WebView2 Runtime Version** displays **None** (see the previous step).

For WebView2 requirements, see Microsoft Edge WebView2 Support in the *Oracle Smart View for Office Readme*.

- **Graphic Setting**

The following two options improve the user experience by helping to reduce flickering in Microsoft Office:

– **Disable Windows Transitions on Addin Task Panes**—The default value is **Enabled** To disable this option, click in the **Fix/Update/Help Link** column, select **Disable**, and then click **Update Settings**.

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Note: If you change this option to **Disabled**, the value in the **Fix/Update/Help Link** column changes to **Fix**. If you are having issues with your system and want to optimize performance, you should "fix" this setting by changing the value back to **Enabled**.

- **Disable Animations**—This setting disables Office animations. The default value is "Enabled." To disable this option, click in the **Fix/Update/Help Link** column, select **Disable**, and then click **Update Settings**.

  Note: If you change this option to **Disabled**, the value in the value in the **Fix/Update/Help Link** column changes to **Fix**. If you are having issues with your system and want to optimize performance, you should "fix" this setting by changing the value back to **Enabled**.

4. Click **Update Settings** to save the changes you've made.
5. **Optional:** If you change any of the information in the **Health Check** dialog box, and want to get back to the default values, click **Recommended Settings**.

   When you select **Recommended Settings**, a dialog is displayed showing you the settings that will be changed. Click **Yes** in the dialog. Then, click **Update Settings** to save the changes.

> **Note**
>
> Once you click **Recommended Settings**, the button is disabled. If you then make further changes to the settings in the **Health Check** dialog, the button remains disabled. To use the **Recommended Settings** button again, you must close and then reopen the **Health Check** dialog.

6. **Optional:** Click **Export to Excel** to export the Health Check information to a new Excel spreadsheet.
7. Click **Close** to close the **Health Check** dialog box.
8. Restart Excel and log in.

Performing a Health Check on Microsoft Office Documents

You can perform a "health check" to optimize performance of a Microsoft Excel workbook, Word document, or PowerPoint presentation.

Related Topics

- About Health Check
  Use the Health Check tool in Oracle Smart View for Office to optimize performance in a Microsoft Excel workbook, Word document, or PowerPoint presentation.
- Performing a Health Check

About Health Check

Use the Health Check tool in Oracle Smart View for Office to optimize performance in a Microsoft Excel workbook, Word document, or PowerPoint presentation.

The actions you take with the Health Check tool will fix and/or delete some non-Smart View-related objects, optimizing Smart View performance.

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You can also use the Health Check tool to get information about specific items in each Office application, such as named ranges, styles, tags, query objects, and other objects.

You access the **Health Check** dialog in the **General** group in the Smart View ribbon.

Health Check Items for Microsoft Office

When you launch the **Health Check** dialog, a copy of the selected Excel workbook, Word document, or PowerPoint presentation opens, and the dialog lists the following items:

- Workbook Health Check for Microsoft Excel
  - Named Ranges
  - Shapes
  - Styles
  - Links
  - Hyperlinks
  - Sheets
- Document Health Check for Microsoft Word
  - Tables
  - Inline Shapes
  - Shapes
  - Styles
  - Query Objects

> **Note**
>
> To improve performance, click **Fix** to remove duplicate queries for data points pasted into Word.

  - Hidden Query Objects
  - Comment Objects
  - Variables
  - Bookmarks
  - Content Controls
- Presentation Health Check for Microsoft PowerPoint
  - Shapes
  - Tags
  - Slides

You can preview each item and delete or fix the items accordingly. Any changes are made in the copy of the Microsoft Excel, Word, or PowerPoint document. Performing a **Save** will save your changes in the copy. To save the file with the original file name, you must close the original file, and then perform a **Save As**.

Narrative Reporting: If you want to perform a health check *and* refresh a doclet of any Office type (described in Performing a Health Check on Microsoft Office Documents), perform the

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health check first, and then save the temporary file with the correct doclet name. Next, upload and check in the saved doclet (see Checking In Doclets. Then check out the doclet, perform the refresh, and then upload the doclet and check it in.

Performing a Health Check

You can perform a "health check" to optimize the performance of a Microsoft Excel workbook, Word document, or PowerPoint presentation. You can also use the Health Check tool to get information about specific items in each Office application, such as named ranges, styles, tags, query objects, and other objects.

> **Note**
>
> The Health Check feature is only available when using Oracle Smart View for Office with Microsoft Excel, Word, and PowerPoint.

To perform a health check:

1. From the Smart View ribbon, perform a task:
   - Excel: Click the arrow next to **More**, and then select **Workbook Health Check**.
   - Word: Click **Document Health Check** in the **General** group.
   - PowerPoint: Click **Presentation Health Check** in the **General** group.

   The **Health Check** dialog is displayed, and a copy of the active Excel workbook, Word document, or PowerPoint presentation opens.

   > **Note**
   >
   > In the **Health Check** dialog, the first item is selected by default and displays information about limitations provided by Microsoft Office or Smart View.

2. In the **Health Check** dialog, select an item, and perform a task:
   - **Preview**—Lists the names or IDs of the selected item.
   - **Fix**—Based on the selected item, fixes the issue.
   - **Fix All**—Deletes applicable non-Smart View-related items and fixes Smart View objects.
   - **Delete**—Deletes the applicable non-Smart View-related objects of the selected item.
3. Click **Close** to exit the dialog
4. To save the file copy you have been working in, click **Save**.

   A **Save** will save your changes in the file copy. To save with the original file name, you must close the original file, and then perform a **Save As**.

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A
Finding Information

Related Topics

- Best Practices
  Best practices for working with Oracle Smart View for Office
- Frequently Asked Questions (FAQs) about Smart View
  This FAQ provides links to helpful resources for frequently asked questions about Oracle Smart View for Office.
- Accessibility
  This topic provides information about the accessibility documentation available for Oracle Smart View for Office.
- VBA Functions
  Information about Oracle Smart View for Office VBA functions is in *Developing Applications for Oracle Smart View for Office*.
- Troubleshooting Issues
  This section provides resources for troubleshooting issues in Oracle Smart View for Office.
- Data Provider Information Resources
  On the Oracle Help Center, you can find documentation and other user assistance resources for data providers that work with Oracle Smart View for Office.

Best Practices

Best practices for working with Oracle Smart View for Office

Use these best practices for working with Smart View.

This table provides links to the best practices mentioned in this guide.

Table A-1 References for Best Practices

Category	Best Practice For	See This Section
Managing Connection URL Mappings	Working with saved workbooks containing ad hoc grids	About Managing Connection URL Mappings
Smart View Options—Sheet	Using the Reset option	Sheet Options
Smart View Options—Advanced	Using the Clear Log File on Next Launch option	Advanced Options
Smart View Options—Cell Styles	Guidelines for working with Cell Styles	Cell Styles
Smart View Options—Extensions	Enabling and disabling extensions	Enabling and Disabling Extensions
Smart View Options—Extensions	Initially checking for available extensions	Initially Checking for Available Extensions
Smart View Options—Extensions	Installing extensions	Installing Extensions

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Table A-1 (Cont.) References for Best Practices

Category	Best Practice For	See This Section
Smart View Options—Extensions	Updating extensions	Updating Extensions
Dimensions and Members	Working with numeric member names	Best Practices for Numeric Member Names
Member Selector	Searching members	Selecting Members from the Member Selector
POV Manager	Working with POV Manager	POV Manager
Data and Cells	Using the Submit Data options	Best Practices for Using the Submit Data Options
Drill-Through Reports	Copying and pasting POV details	Viewing the Drill-Through Report Source POV
Attachments	Attaching files	Adding Attachments
Data Forms	Working with forms in Excel	Working with Forms in Excel
Flex Forms	Working with flex forms	Best Practices for Working with Flex Forms
Ad Hoc Analysis	Starting ad hoc analysis	Starting Ad Hoc Analysis
Excel Formulas in Oracle Essbase	Preserving formulas outside grid	Preserving Excel Formulas Within and Outside of Essbase Ad Hoc Grids
Calc on the Fly	Performing calculations without having to submit changes (Calc on the Fly)	Guidelines and Considerations
Multiple Grids on a Worksheet	Working with multiple grids on a worksheet	Guidelines and Best Practices
Cascading Reports and Ad Hoc Grids	Entering member names	Cascading Reports and Ad Hoc Grids
Books	Running installer	Downloading and Running the Smart View Installer
Books	Using quick connection	Creating Connections to Cloud EPM Business Processes
Books	Using language settings	Working with Downloaded Books in Smart View
Free-Form Mode	Working in free-form mode	Guidelines and Best Practices for Free-Form
Copying and Pasting	Copying and pasting in Excel	Excel Copy and Paste Guidelines and Best Practices
Office Documents in Cloud EPM Library	Saving Office documents to Cloud EPM Library	Saving Office Documents to Cloud EPM Library Using Smart View
Metadata	Copying, pasting, and importing metadata	Guidelines and Best Practices for Importing Metadata
Sheet Information	Viewing sheet information	Sheet Information Guidelines
Web Launch of Forms and Ad Hoc Grids	Launching from web applications	Opening Forms and Ad Hoc Grids from Web Applications (Web Launch)
Percentage Values in Forms and Ad Hoc Grids	Entering percentage values	Entering Percentage Values in Forms and Ad Hoc Grids

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Table A-1 (Cont.) References for Best Practices

Category	Best Practice For	See This Section
Compatibility between Smart View Products	Working compatibly between Smart View products	Best Practices on Working Compatibly between Smart View Products
Functions	Using functions	Using Functions
Function Builder	Using Function Builder	Creating Functions in the Function Builder
Function Builder	Using cell references	Using Cell References
Functions	Creating functions manually	Function Syntax Guidelines
Functions	Using the Fix Links option	Fixing Links in Functions

Frequently Asked Questions (FAQs) about Smart View

This FAQ provides links to helpful resources for frequently asked questions about Oracle Smart View for Office.

Frequently Asked Questions

- Where can I find the Smart View Support Matrix and Compatibility?
- Is Smart View compatible with Microsoft Office 32-bit and 64-bit versions?
- What is the impact on Smart View with Microsoft decommissioning Internet Explorer 11 on June 15, 2022?
- How to address a provider error in Smart View ad hoc analysis?
- How to address a Member Out of Place error when refreshing a Smart View ad hoc sheet?
- How to prevent Smart View from failing when clicking outside a modified cell in a form?
- How to clear Smart View and WebView2 cookies?
- How to address the HTTP Error with Code -1 connection error?
- How to prevent HTTP session timeouts?
- How to limit memory usage, prevent instability, and improve performance in Smart View?
- How to enable and disable Smart View and Office Add-ins?
- How to prevent Excel from failing on using the Disconnect All command while using WebView2?
- Why is it necessary to enable the .NET installation option while installing Microsoft Office?
- Why Smart View should not be installed in the Windows Program Files Folder?
- How to use diagnostics tools and perform health checks in Smart View?
- How to ensure that all Office applications are closed while installing, updating, or removing extensions?
- How to clean up any extension installation issues?
- How do I prevent the add-in or AddIn class error on startup?

Where can I find the Smart View Support Matrix and Compatibility?

Find information on Smart View support matrix and compatibility in the following topics:

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- Smart View Prerequisites in *Getting Started Guide for Administrators*.
- Installation Information in *Oracle Smart View for Office Readme*.

Is Smart View compatible with Microsoft Office 32-bit and 64-bit versions?

Yes, Smart View uses a single installer for 64-bit and 32-bit versions of Microsoft Office. During Smart View installation, the installer automatically detects the corresponding Operating System and Microsoft Office bit type and installs accordingly. For more information, see About Installing Smart View in *Oracle Smart View for Office Installation and Configuration Guide*.

Why Smart View should not be installed in the Windows Program Files Folder?

On Windows operating systems, such as Windows 10, non-administrator users are not authorized to modify the Program Files folder or the Program Files (x86). If an administrator installs Smart View in Program Files or Program Files (x86), a non-admin user will not be able to uninstall Smart View.

The default installation folder for Smart View is C:\Oracle\SmartView. Oracle advises that you do not install in Smart View in the Program Files or Program Files (x86) folder. For guidelines and procedure on installing Smart View, see Installing Smart View in *Oracle Smart View for Office Installation and Configuration Guide*.

What is the impact on Smart View with Microsoft decommissioning Internet Explorer 11 on June 15, 2022?

Get information and recommendations on this in Internet Explorer 11 End of Support and Smart View in *Oracle Smart View for Office Installation and Configuration Guide*

Why is it necessary to enable the .NET installation option while installing Microsoft Office?

During Microsoft Office installation, you must enable the .NET installation option. When enabled, files are placed in your Office installation that support interoperability between Office and other programs and add-ins, such as Smart View and Smart View extensions. For more information, see Office .NET Installation Option Requirement in *Oracle Smart View for Office Installation and Configuration Guide*.

How to ensure that all Office applications are closed while installing, updating, or removing extensions?

For extensions to be properly installed, removed, or updated, all Office applications must be shut down. If any instance of Office is still running, Smart View is unable to apply the extension updates correctly. To check if all Office instances are closed properly, open the Windows Task Manager and look for Office application names as explained in Extension Updates and Office Applications Remaining Open in *Oracle Smart View for Office Installation and Configuration Guide*.

How to clean up any extension installation issues?

While installing extensions, the installer message window indicating success or failure status may sometimes lose focus and hide behind other open windows. The inability to see the status message may lead users to try installing the extension again, causing an error due to the previous open message window having a hold on the folder and files. To clean up such extension installation issues, first remove prior and pending extension installations trying the installation again as explained in Extension Installation from Cloud EPM and Message Window Focus in *Oracle Smart View for Office Installation and Configuration Guide*.

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How to enable and disable Smart View and Office Add-ins?

You can enable and disable Smart View and other Microsoft Office add-ins from the **Add-Ins** tab in Excel Options. In some cases, Smart View performance can be improved when other Office add-ins are disabled. For more information, see Enabling and Disabling Smart View and Other Office Add-ins in *Oracle Smart View for Office Installation and Configuration Guide*.

Smart View ribbon does not display after installation. What should I do?

If you installed Smart View as a non-admin and the Smart View ribbon does not display, try the instructions explained in Smart View Ribbon Fails to Display After Non-Admin Installation in *Oracle Smart View for Office Installation and Configuration Guide* to troubleshoot this issue.

How do I prevent the add-in or AddIn class error on startup?

You may see either of these errors when starting Office after installing Smart View: "Unable to set the installed property of the add-in class." or "Add method of AddIns class failed." To prevent these errors, follow the instructions in either Error When First Launching Excel After Installing Smart View or Errors when Launching Office after Installing Smart View in *Oracle Smart View for Office Installation and Configuration Guide*.

How to address a provider error in Smart View ad hoc analysis?

Verify your connection URL syntax and credentials, and clear Smart View cookies. Find information to address this in these topics in *Oracle Smart View for Office Installation and Configuration Guide*:

- Diagnosing Login Issues
- Clearing Smart View Cookies

While performing ad hoc analysis, if an error appears similar to "Ad hoc grid cannot be opened as there are no valid rows of data" then, clear the Suppress Rows, Suppress Columns, and Suppress Missing Blocks options in Smart View Options dialog. For more information, see Starting Ad Hoc Analysis in *Oracle Smart View for Office User's Guide*.

How to address a Member Out of Place error when refreshing a Smart View ad hoc sheet?

To resolve this error, try the following:

- After copying content from one ad hoc sheet to the other, use the Smart View Import Metadata command to ensure that additional metadata is carried over to the other sheet. For more information, see Importing Metadata in Office Applications in *Oracle Smart View for Office User's Guide*.
- Set the required alias table at the private connection level, so that it is applied by default every time you open the connection. For more information, see Selecting an Alias Table for the Connection in *Oracle Smart View for Office User's Guide*.
- In the row drop-down member selector in forms, you can now enter and submit data without facing this error. When selecting and working with shared members or members associated with duplicate alias names, the drop-down member selector now displays member names for shared members and duplicate aliases, not their qualified or distinct alias names. For more information, see Using the Drop-down Member Selector on Row Dimensions in Forms in *Oracle Smart View for Office User's Guide*.

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How to prevent Smart View from failing when clicking outside a modified cell in a form?

Starting Smart View Release 21.110, Excel no longer terminates intermittently after entering data in a form and clicking outside the modified cell. Please ensure that your Smart View version is updated to release 21.110 or later.

How to clear Smart View and WebView2 cookies?

Occasionally, you may need to clear Smart View cookies and WebView2 cookies to facilitate signoff and subsequent login processes. Clearing cookies also works if you are not getting the login dialog in Smart View for connecting to your business processes. For more information, see the following topics in the *Oracle Smart View for Office Installation and Configuration Guide*:

- Clearing Smart View Cookies
- Clearing WebView2 Cookies

How to address the HTTP Error with Code -1 connection error?

Smart View may fail to connect to Planning or Planning Modules with the script error,

An HTTP error occurred with the code "-1"

To resolve this error, see the workaround suggested in Connection Error in the *Oracle Smart View for Office Installation and Configuration Guide*.

How to prevent HTTP session timeouts?

HTTP session timeouts can occur, for example, when working with large queries that take a long time to run, or when you're experiencing slower internet connections. To prevent HTTP session timeouts, you may add DWORDS values to the Internet Settings key in your Windows Registry as explained in Smart View HTTP Session Timeout in the *Oracle Smart View for Office Installation and Configuration Guide*.

How to limit memory usage, prevent instability, and improve performance in Smart View?

Smart View is a Microsoft Office add-in. As an add-in, it is loaded in to the Microsoft Excel process. When a report is imported into Excel through Smart View, the Excel process consumes memory and this can negatively impact performance.

To limit memory usage and improve performance, you can take the actions listed in Performance and Memory Usage Considerations for Smart View with Excel in the *Oracle Smart View for Office Installation and Configuration Guide*.

Some third-party tools monitoring Microsoft Office, such as MacAfee or Trellix, may also interfere with Smart View and cause stability issues for Office and Smart View. For workaround, see Third-Party Monitoring Tools May Impact Smart View Stability in *Oracle Smart View for Office Installation and Configuration Guide*.

How to prevent Excel from failing on using the Disconnect All command while using WebView2?

If you are using WebView2 and have issues with the Disconnect All command not working or Excel failing during a Disconnect All operation, try adding the registry flag, PreserveThirdPartyCookies, and set it to "0" as explained in WebView2 and Disconnect Issues in *Oracle Smart View for Office Installation and Configuration Guide*.

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How to use diagnostics tools and perform health checks in Smart View?

When an issue arises while using Smart View that you cannot resolve on your own, use the Smart View Diagnostic tools to create and collect log files and screenshots to send to Oracle Support. You can perform a "health check" on your system to optimize performance and to get information about your machine, Microsoft Office version, Smart View version, and the extensions you have installed.

For more information, see the following topics:

- Diagnostics Tools and Health Check in *Oracle Smart View for Office Installation and Configuration Guide*
- Using the Smart View Diagnostics Tools in *Oracle Smart View for Office User's Guide*
- Performing a Health Check On Your System in *Oracle Smart View for Office User's Guide*

Accessibility

This topic provides information about the accessibility documentation available for Oracle Smart View for Office.

The *Accessibility Guide* covers information on accessibility features of Smart View. This guide is available on the Books tab of every Oracle Fusion Cloud Enterprise Performance Management business process on the Oracle Help Center.

The accessibility guide covers useful information on the following topics:

- Enabling accessibility for Smart View
- Working with JAWS
- Using Microsoft Office themes (including Dark theme)
- Using access keys for accessing ribbons and panels in Smart View

VBA Functions

Information about Oracle Smart View for Office VBA functions is in *Developing Applications for Oracle Smart View for Office*.

Developing Applications for Oracle Smart View for Office is available on the **Books** tab of supported Oracle Fusion Cloud Enterprise Performance Management business processes. Go to the Oracle Enterprise Performance Management (EPM) page on the Oracle Help Center, and locate your Cloud EPM business process.

Troubleshooting Issues

This section provides resources for troubleshooting issues in Oracle Smart View for Office.

The *Operations Guide* provides detailed information on how to troubleshoot issues in Smart View. It includes tips and workarounds on installation issues, extension updates, performance improvements, and diagnostic tools.

For more information, see Fixing Smart View Windows Plug-in Issues in the *Operations Guide*

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Data Provider Information Resources

On the Oracle Help Center, you can find documentation and other user assistance resources for data providers that work with Oracle Smart View for Office.

To open the Smart View documentation library, from the Smart View ribbon, click the arrow next to **Help** and then **Documentation**.

In general, this guide provides only procedural information for using the data provider features that Smart View supports. For detailed information about the data providers, see the product documentation available on the Oracle Help Center.

- For Oracle Fusion Cloud Enterprise Performance Management user assistance, click **Cloud Applications** on the Oracle Help Center, and on the Cloud Applications Suite page, locate your Cloud EPM product under Enterprise Performance Management.
- For Oracle Analytics Cloud and Oracle Essbase user assistance, go to the Oracle Analytics Cloud page on the Oracle Help Center.

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