Oracle® Fusion Cloud EPM
Administering Narrative Reporting

ORACLE®

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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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To provide feedback on this documentation, click the feedback button at the bottom of the page in any Oracle Help Center topic. You can also send email to epmdoc_ww@oracle.com.

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*.

2

Creating a Business Process

Two environments are created when you create an Oracle Fusion Cloud Enterprise Performance Management instance as a part of the activation process. See Creating an Environment in *Getting Started Guide for Administrators* . Initially, a Service Administrator signs into an environment and creates an application.

For instructions on signing into an environment, see Accessing Cloud EPM Environments in *Getting Started Guide for Administrators* . New customers, depending upon the type of subscription you purchased, will see one of the following pages:

- EPM Standard Cloud Service Landing Page
- EPM Enterprise Cloud Service Landing Page

The landing page is no longer displayed when you log in after you build a Narrative Reporting Business Process; instead, the home page is displayed.

EPM Enterprise Cloud Service Landing Page

The landing page is your starting point for creating an EPM business process and for viewing overview videos that help you get started.

Each subscription to the EPM Enterprise Cloud Service allows you to create one business process. Click **SELECT** under the business process description to see available options.

About Making Selections to Create a Business Process

The EPM Enterprise Cloud Service landing page presents the business processes that you can create.

> ⓘ **Note**
>
> After you initiate the creation of a business process, you cannot return to the landing page. If wish to return to the landing page to create a different business process, you must first reset your environment to its original state. See [Switching to a Different Business Process](#).

For Narrative Reporting

After you click **SELECT**, a message indicates that an initial pre-configuration of the environment will take approximately 20 minutes. Click **OK** to initiate the pre-configuration process. The environment is not available while the configuration is in progress.

Creating a Narrative Reporting Business Process

On the landing page, click **SELECT** under **Narrative Reporting** to create a Narrative Reporting business process. EPM Enterprise Cloud Service displays a message indicating that approximately 20 minutes are required to configure Narrative Reporting. Click **OK** to initiate the configuration process. The environment is not available while the configuration is in progress.

After the configuration is complete, use these steps to install samples or to design reports:

1. Sign in to the environment as a Service Administrator. See Accessing Cloud EPM Environments in *Getting Started Guide for Administrators* .

2. Complete a step:

   - Install samples to familiarize yourself with Narrative Reporting functionality. See Installing Samples in *Administering Narrative Reporting*

   - Create reports and report packages. See these information sources:

     – Designing Reports in *Designing with Reports for Oracle Enterprise Performance Management Cloud*

     – Creating Report Packages in *Creating and Managing Report Packages for Narrative Reporting*

Related Links:

- Working with Subscriptions in *Getting Started Guide for Administrators*

- Available Cloud EPM Subscriptions in *Getting Started Guide for Administrators*

- Ordering a Subscription in *Getting Started Guide for Administrators*

- Activating Cloud EPM Subscription in *Getting Started Guide for Administrators*

- Creating an Environment in *Getting Started Guide for Administrators*

EPM Standard Cloud Service Landing Page

The landing page is your starting point for creating a business process and for viewing overview video tours to help you get started.
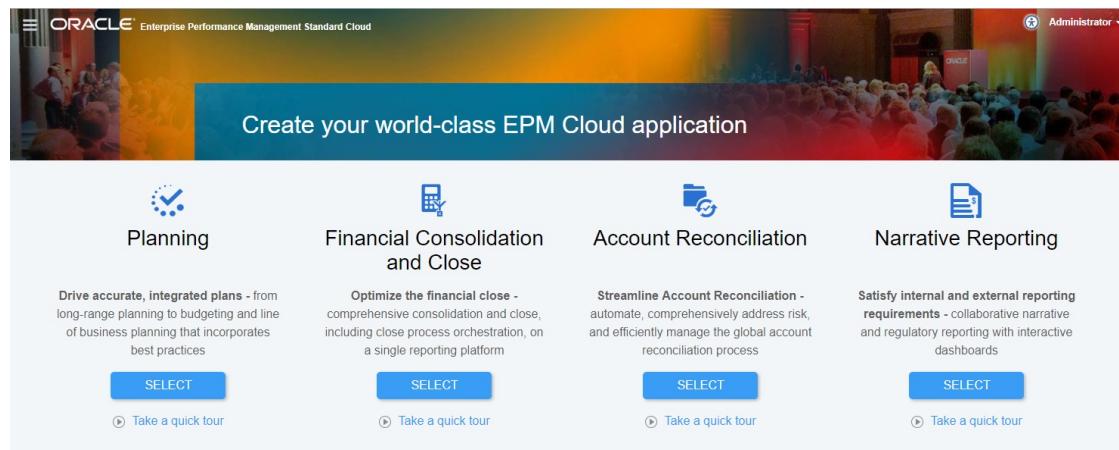
Each subscription to the EPM Standard Cloud Service allows you to create one business process.

About Making Selections to Create a Business Process

The EPM Standard Cloud Service landing page presents the business processes that you can create.

> ⓘ **Note**
>
> After you initiate the creation of a business process, you cannot return to the landing page. If wish to return to the landing page to create a different business process, you must first reset your environment to its original state. See Switching to a Different Business Process.

For Narrative Reporting

After you click **SELECT**, a message indicates that an initial pre-configuration of the environment will take approximately 20 minutes. Click **OK** to initiate the pre-configuration process. The environment is not available while the configuration is in progress.

Creating a Narrative Reporting Business Process

On the landing page, click **SELECT** under **Narrative Reporting** to create a Narrative Reporting business process. EPM Standard Cloud Service requires approximately 20 minutes to configure your environment for the business process. Click **OK** to initiate the configuration process. The environment is not available while the configuration is in progress.

After the configuration is complete, use these steps to install samples or to design reports:

1. Sign in to the environment as a Service Administrator. See Accessing Cloud EPM Environments in *Getting Started Guide for Administrators* .

2. Complete a step:

   - Install samples to familiarize yourself with Narrative Reporting functionality. See Installing Samples in *Administering Narrative Reporting*

   - Create reports and report packages. See these information sources:

     – Designing Reports in *Designing with Reports for Oracle Enterprise Performance Management Cloud*

  – Creating Report Packages in *Creating and Managing Report Packages for Narrative Reporting*

Related Links:

- Working with Subscriptions in *Getting Started Guide for Administrators*
- Available Cloud EPM Subscriptions in *Getting Started Guide for Administrators*
- Ordering a Subscription in *Getting Started Guide for Administrators*
- Activating Cloud EPM Subscription in *Getting Started Guide for Administrators*
- Creating an Environment in *Getting Started Guide for Administrators*

3
Overview of Narrative Reporting

Related Topics

- [Icons](#)
  Icons are used to define areas on the Home Page.

- [Settings and Actions Menu](#)
  This menu has options to select from, based on you role.

- [User Assistance](#)
  This menu is used for help on Narrative Reporting, a place to connect with other members, the support site, and to provide feedback.

- [Accessibility Settings](#)
  Use this for accessibility.

- [Welcome Panel](#)
  Quickly displays your status, create, open, or take a tour.

- [Conventions Used](#)
  These are the most popular icons used in Narrative Reporting.

- [Roles and Permission-Based Access](#)
  Based on your roles provisioned, you have access to certain roles.

- [Which Tasks Should I Do First?](#)
  Explains, to an administrator, what tasks to do.

- [How Do I Get Additional Help](#)
  This explains how to obtain user assistance.

- [Configuring SPF Record for Oracle Cloud Email Verification](#)
  Oracle publishes Sender Protection Framework (SPF) policy that identifies the Oracle server IP addresses and subnets that are permitted to send cloud services emails.

- [Using Translations](#)
  This tells you the languages translated for Narrative Reporting.

Icons

Icons are used to define areas on the Home Page.

There are up to twelve main icons accessible from the Home Page for a System Administrator.

> **ⓘ Note**
>
> The above image is captured using the **Redwood** theme. Click **Tools**, and then select **Appearance**. Explore the default Redwood theme.

Tasks
Displays tasks to perform such as reviewing a doclet or signing off on report packages.

Messages
Displays notifications about actions you need to take or others took; for example, confirmation that an export file was created.

Report Packages
Displays the list of report packages that you can access.

Books
Displays the list of books that you can access.

Bursting Definitions
The ability to run a report or book for more than one member of a single dimension for one data source, generating a PDF output for each member.

Jobs
Opens the Job Console, where you can schedule bursting definitions and manage scheduled jobs.

Reports
Opens Reports.

Notes
Opens the Note Manager.

Library
The central repository for report packages, reports, books, bursting definitions, folders, and other artifacts such as audit files.

Tools
The **Tools** card links to the following tasks in Narrative Reporting: **Access Control**, **Appearance**, **Clone Environment**, **Connections**, **Machine Learning Files**, **Daily Maintenance**, **Service Activity**, **User Preferences** and **Settings**.

- **Access Control**

  Used by administrators to can create and manage group, where as in Narrative Reporting, an Application Administrator can create and maintain all artifacts, such as applications, models, dimensions, and data grants.

- **Appearance**

  Used by administrators to set default display options for all users. For example, a company logo and background logo for the Home page.

- **Settings**

  – Used by administrators to configure Oracle Guided Learning (OGL). You can integrate OGL with Narrative Reporting. For information about creating an OGL application, see [Getting Started with Oracle Guided Learning](#).

  – Used by administrators to **Enable Generative AI** service. For information, see [Working with Generative AI in Reports](#).

  – Used by administrators to integrate Report Package contents to your third-party XBRL service provider. For information, see [Integrating with XBRL Services](#).

- **Clone Environment**

  Used by administrators to perform a Clone Snapshot on a specific target instance.

- **Connections**

  Used by administrators to create and manage remote connections directly from the Narrative Reporting Cloud page.

- **Machine Learning Files**

  Used by administrators to manage the machine learning properties files that are used with the Generative AI narrative generation feature.

- **Daily Maintenance**

  Used by administrators to set the daily maintenance time and perform backup and restore actions.

- **Service Activity**

  Used by administrators to view or download system or user login activity reports.

- **User Preferences**

  Used by administrators to upload a photo, set your language and time zone, set notification email addresses, and customize other display items.

Academy
Displays links to videos and to the Cloud Help Center on using Narrative Reporting.

Navigating the Icons

After you leave the Home Page, a springboard is displayed with icons at the top of your page. An indicator points to your location on the springboard. In the example below, the **Library** icon is being selected and pointed to.
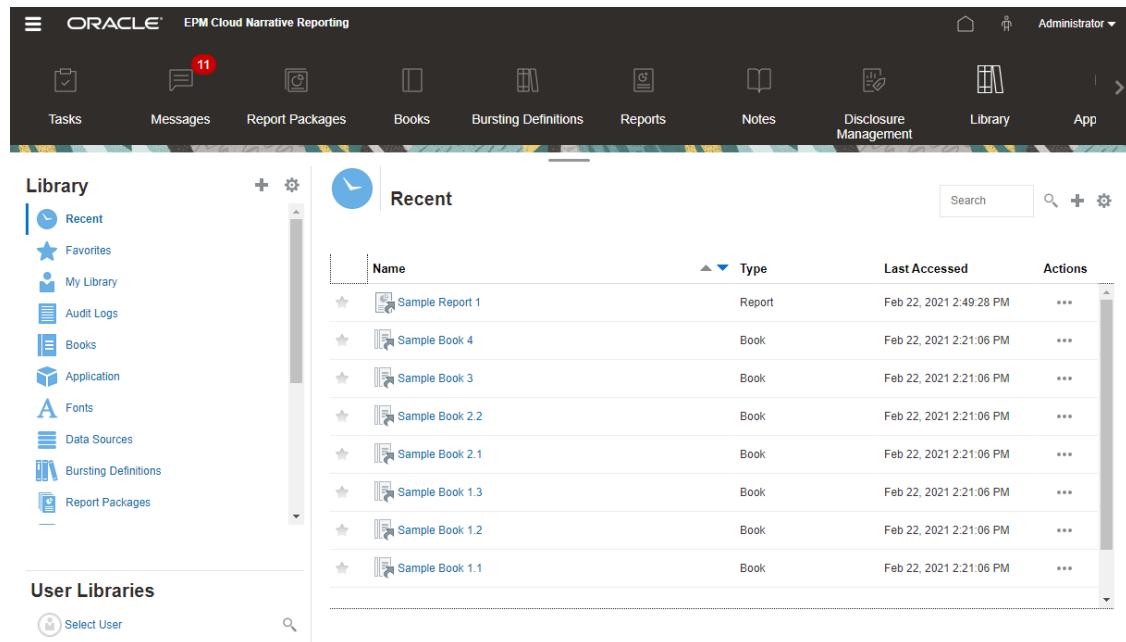
Select another icon to move to it.

Navigating to the Home Page

Use the Home icon in the upper right area of the Home page to return to the Home Page.

Settings and Actions Menu

This menu has options to select from, based on you role.

The actions from the Settings and Actions menu are:
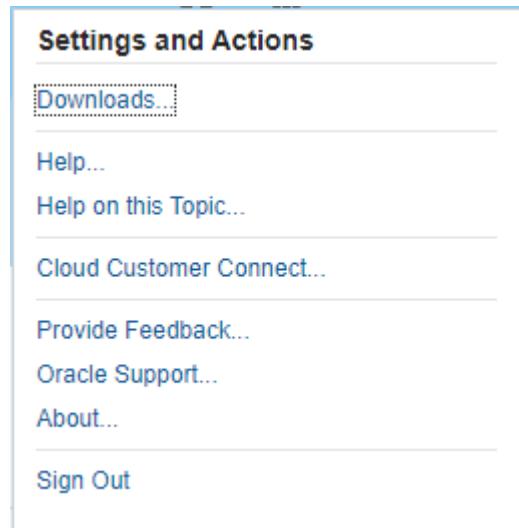
Select the caret beside your user name to display the Settings and Actions menu.

Preferences
Upload a photo, set your language and time zone, set notification email addresses, and customize other display items. See Managing User Preferences.

Downloads
Depending on your assigned roles, allows you to install the following client software:

- Sample Content – Selecting the Get Sample Content displays an information message that upload samples has completed and the Samples folder has been created at the Library root folder. See Install Samples.

- Oracle Smart View for Office – Download the latest version of Smart View from the Oracle Smart View for Office software download page. See Setting Up Narrative Reporting in Smart View.

- Smart View Extension for Narrative Reporting. Allows users to perform assigned tasks and analyze model data from within the Microsoft Office suite.

Help
Access videos and other task-related topics in the Oracle Cloud Help Center.

Help on this topic
Access specific help for a topic.

Cloud Customer Connect
Cloud Customer Connect is an exclusive community for members to connect with other members and discuss issues or share ideas. Select this option for a direct link to Cloud Customer Connect to access:

- Discussion forums to pose questions, explore ideas, and discuss Oracle Applications.

- News about upcoming events that showcase new release functionality, industry best practices, and more.

- Documentation and videos to help you prepare for a successful transition to the latest release.

- Idea Labs to share your ideas on product enhancements, vote, and comment on your favorites.

After you sign in, you can select **Enterprise Performance Management** to navigate directly to your Cloud product, to view release information, tips and tricks, and other posts.

Provide Feedback
A diagnostic utility called **Provide Feedback** is available within your Enterprise Performance Management cloud service. If you encounter an issue while using the service, use the Provide Feedback utility to describe the issue and the steps to reproduce it. See Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility.

Oracle Support
My Oracle Support site.

About
Contains Narrative Reporting notices and version information.

Sign Out
Exits Narrative Reporting.

User Assistance

This menu is used for help on Narrative Reporting, a place to connect with other members, the support site, and to provide feedback.

A User Assistance icon is available on certain screens. Click the icon to display the available options.
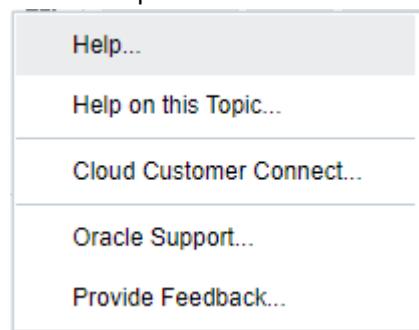
Help

This option displays help for Narrative Reporting.

Help on this Topic

This option displays online help for the current topic, if available.

Cloud Customer Connect

Cloud Customer Connect is an exclusive community for members to connect with other members and discuss issues or share ideas. Select this option for a direct link to Cloud Customer Connect to access:

- Discussion forums to pose questions, explore ideas, and discuss Oracle Applications.

- News about upcoming events that showcase new release functionality, industry best practices, and more.

- Documentation and videos to help you prepare for a successful transition to the latest release.

- Idea Labs to share your ideas on product enhancements, vote, and comment on your favorites.

After you sign in, you can select **Enterprise Performance Management** to navigate directly to your Cloud product, to view release information, tips and tricks, and other posts.

Oracle Support

Select this option to navigate directly to the My Oracle Support site to search for solutions, download patches and updates and create a service request.

Provide Feedback

> ⓘ **Note**
>
> Only in User Assistance Menu.

If you encounter an issue while using the service, use the Provide Feedback option to describe the issue and the steps to reproduce it. To expedite the resolution of issues that you find in the service, Oracle recommends that you add multiple screenshots to your feedback submissions. Adding a succession of screenshots that show your progress through a task enables you to create a storyboard that shows Oracle how to recreate your issue.

Each time a user submits feedback to Oracle, a feedback notification, a subset of the information that a user submits using the Provide Feedback function, is sent to Service Administrators and to the user who submits the feedback. These notifications enable Service Administrators to review submitted issues and suggest corrective actions. Feedback notification is enabled by default. Each Service Administrator can turn off the notification by clicking the Unsubscribe link embedded in the email. See Disabling Feedback Notification. Regardless of the subscription status, a notification is always sent to the user who submits the feedback. Before providing feedback, ensure that you are at the stage in the process when the problem was observed.

> **ⓘ Note**
>
> Using this option to provide feedback sends your submission to Oracle but does not create a service request. If a Service Administrator cannot resolve the issue, then you can create a service request using the information that you submit.
>
> 1. From any page, select **Send Diagnostics To Oracle**.
>
> 2. In **Feedback**, describe the issue that you encountered.
>
> 3. **Optional:** Select an option to highlight or darken areas of the screen in the next two steps:
>
>   a. Select **Highlight**, and then click and drag on the screen to highlight portions of the screen, for example, to highlight errors or issues.
>
>   b. Select **Darken**, and then click and drag on the screen to hide portions of the screen. Use this option to hide sensitive data in the screenshot.
>
> 4. Click to capture the screenshot.
>
> 5. Navigate to another page and select to capture another screen. The Captured Image is incremented for each screenshot.
>
> 6. Repeat steps above for additional captures.
>
> 7. When you have added all the screen captures, click **Submit**.
>
> 8. Review the browser, environment, and plug-in information. Click the right-pointing arrow to review screenshots.
>
> 9. Click **Submit**.
>
> 10. Click **Close**.

Accessibility Settings

Use this for accessibility.

To access accessibility settings, click the Accessibility icon at the upper right of the Home page.
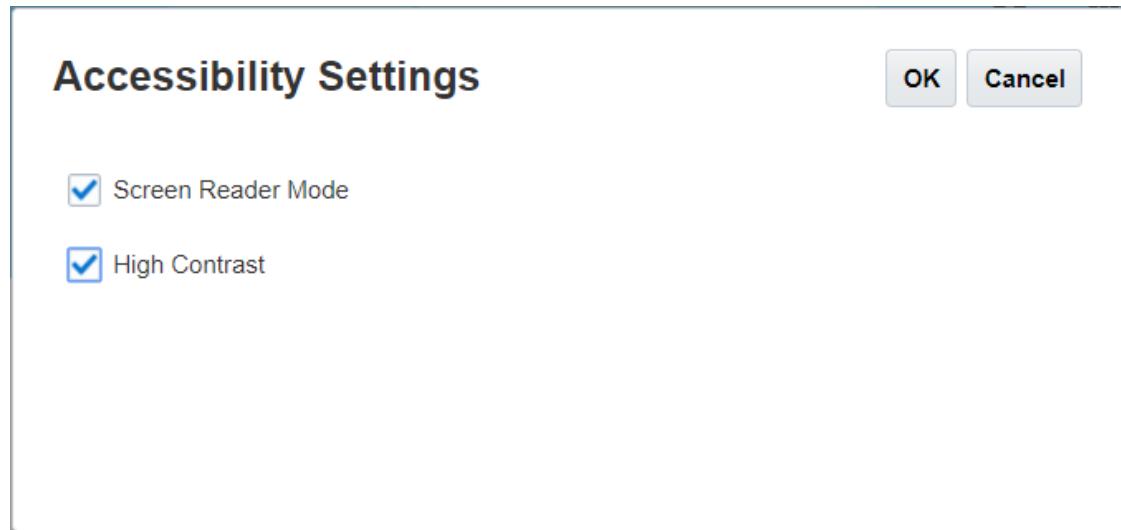
- **Screen Reader Mode** – Enables a screen reader to read the text on the screen.

- **High contrast** – Sharpens screen contrast.

Note: To increase the font size, use your browser settings.

Welcome Panel

Quickly displays your status, create, open, or take a tour.

The Welcome Panel gives you access to key areas while you use Narrative Reporting and helps you see your pending workload at a glance. Click the arrow to access each option.

Administrator

0   Incomplete Tasks

10   New Messages

0   Flagged Messages

0   Active Report Packages

Create   Open   Tour
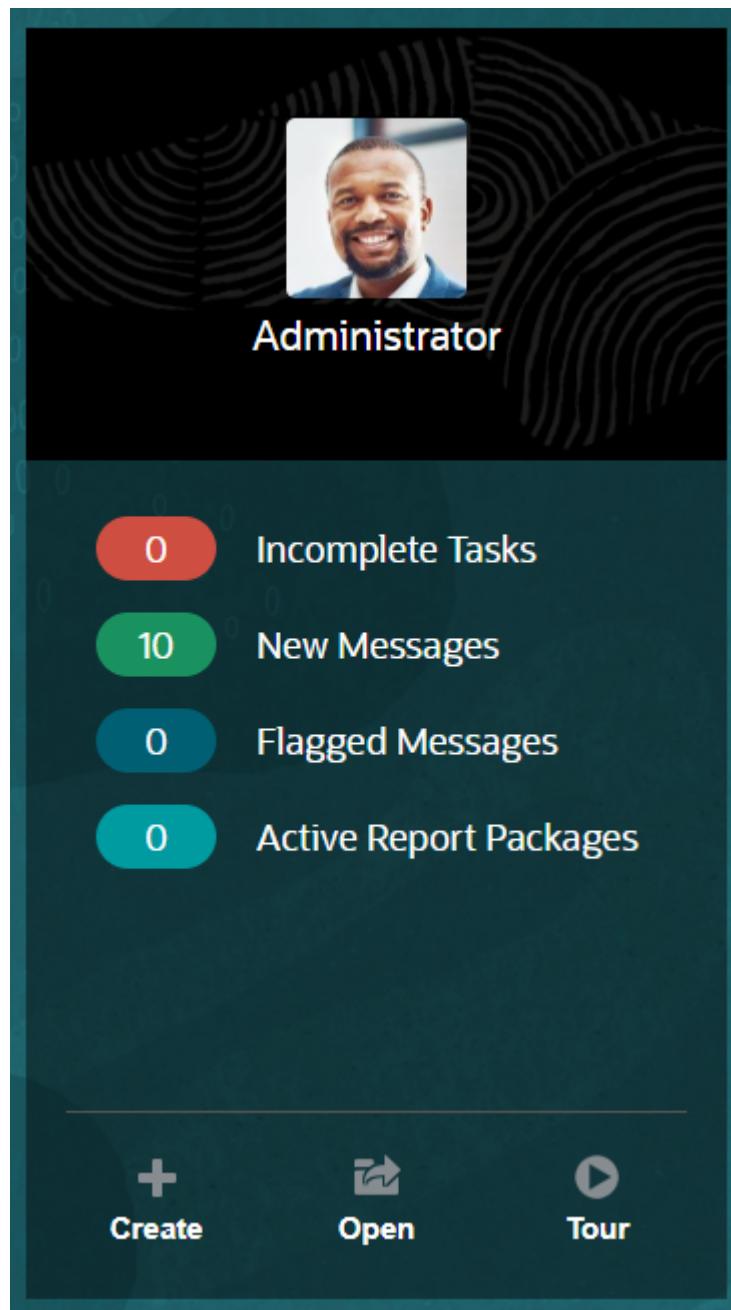
Upload Photo
Select the picture to upload a photo of yourself.

Incomplete Tasks
Shows the number of assigned tasks that have not been completed yet.

New Messages
Displays the number of unread messages.

Flagged Messages
Displays the number of flagged messages.

Active Report Package
The number of your current report packages.

Create
Depending on your permissions, lets you create a report, book, report package or system audit file.

Open
Opens the recently used list.

Tour
Takes you to the Oracle Cloud Help Center to access videos and documentation.

Messages

When you select Messages from either the Welcome Panel or the Messages icon, you will see items such as confirmation of an action or a notification that you're assigned a task. Click the blue text to perform the action that you need to take.

Tasks

You can access your incomplete tasks from the Welcome Panel or all of your tasks (current, future, completed) from the Tasks icon. Click either the icon or the blue text link to access additional task details.

Conventions Used

These are the most popular icons used in Narrative Reporting.

Conventions used in Narrative Reporting:

- An asterisk indicates a required entry.

- A plus sign indicates that you can create or add comment.

- An X indicates that you can remove or delete content.

- A curled arrow indicates that you can refresh your screen.

- A triangle caret indicates a drop-down menu with possible actions.

- A gear indicates actions or an actions menu.

In addition, a person indicates that you can get help from either the Oracle Cloud Help Center, Oracle Support site, or Provide Feedback. You can also access Oracle Customer Cloud Connect, a community gathering place for members to interact and collaborate on common goals and objectives, from this icon.

All Narrative Reporting icons have tooltips. Hover your cursor over tooltips for information about icons.

Roles and Permission-Based Access

Based on your roles provisioned, you have access to certain roles.

Secured access to Narrative Reporting is established by the roles that you have been provisioned within Oracle Cloud User Management Console, and access permissions that have been granted to you from within the service. Because the functionality is restricted to only the users who can perform a task, security is enforced. For example, look at the Home Page. A service administrator has access to all the functionality available within the service, but a reviewer only sees some of these tasks. If your roles and access grants are more restrictive, then you will only see a subset of the functionality.

Which Tasks Should I Do First?

Explains, to an administrator, what tasks to do.

When starting to use Narrative Reporting, perform these tasks after reading this topic.

All Users

- Learn about Narrative Reporting in Learn about Narrative Reporting.

- Find out about browser requirements as well as other requirements in Prerequisites.

- Find out how to access an instance of Narrative Reporting in Accessing EPM Cloud.

- Upload your photo, check the language and time zone, and set any other preferences listed in Managing User Preferences.

- Get familiar with Narrative Reporting by watching videos: Overview: Report Package Part 1 in Oracle Narrative Reporting and Overview: Report Package Part 2 in Oracle Narrative Reporting, Learn about Smart View, and reading this topic, Using the Library.

Administrators

- Learn about Narrative Reporting in Learn about Narrative Reporting.

- Get familiar with these additional features by watching these videos: Learn about working with applications, models, and dimensions and Learn about Security.

- For information to help you configure Oracle's Sender Protection Framework (SPF) see Configuring SPF Record for Oracle Cloud Email Verification

- Set the daily maintenance time in Settings. See Setting Service Maintenance Time.

- Create users and assign roles. See Managing Users and Roles in *Getting Started Guide for Administrators* .

- Review Known Issues on My Oracle Support where you can see if any known issues or helpful work arounds exist for this release.

- Review Readiness Information for Narrative Reporting, where you can review information about what's new in each release.

- Join Customer Connect, where you can join discussions, ask questions, and share information.

How Do I Get Additional Help

This explains how to obtain user assistance.

User assistance in Narrative Reporting is tailored to get you the right information based on your roles and permissions. See the Oracle Cloud Help Center for available information. Also watch overview videos and tutorial videos to increase your understanding.

> ⓘ **Note**
>
> Depending on your browser, the screenshots and procedures shown may look slightly different from what you see on screen. For example, a browse button may be presented as "choose file" in Chrome.

Configuring SPF Record for Oracle Cloud Email Verification

Oracle publishes Sender Protection Framework (SPF) policy that identifies the Oracle server IP addresses and subnets that are permitted to send cloud services emails.

You can use this information to assess the validity of the messages to determine whether or not to accept them. Additionally, you can use the information as a part of the message protection services.

Add the following in your SPF record to take advantage of this protection:

"v=spf1 include:spf_c.oracle.com -all"

Using Translations

This tells you the languages translated for Narrative Reporting.

The following items are translated for Narrative Reporting:

- The User Interface (UI) is translated into Arabic, Danish, German, Spanish, Finnish, French, Italian, Japanese, Korean, Dutch, Norwegian, Polish, Portuguese (Brazilian), Russian, Swedish, Turkish, Simplified Chinese, Traditional Chinese, and Canadian French.

- The overview video closed captions are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese.

> **ⓘ Note**
>
> Tutorial video closed captions are not translated.

The online Help and guides are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese. Additionally, theOracle Smart View for Office User's online Help and guide is translated to Dutch. See the Oracle Cloud Help Center Translated Books tab at Oracle Cloud Help Center.

> **ⓘ Note**
>
> The Sample Application and the contents are in English only.
>
> The translated documentation covers all features up to August 28, 2017, except for Working with Smart View for Enterprise Performance Management Cloud which covers features up to August 7, 2017.

4
Overview of Reports

Related Topics

- [Learning About Reports](#)
- [Report Components](#)
  Design Reports by using report components, report objects, and grid components.

Learning About Reports

Reports provides a user-friendly, robust report development framework along with an enriched report viewer experience. Reports is included with Narrative Reporting (Narrative Reporting deployment) where it enables you to insert charts and grids from multiple Oracle Fusion Cloud EPM sources, Essbase Cloud, and ERP Cloud Financials. Reports is also embedded in the Oracle Fusion Cloud Enterprise Performance Management Platform business processes and applications: Enterprise Profitability and Cost Management, Planning and Planning Modules, Financial Consolidation and Close, Tax Reporting, and FreeForm (Cloud EPM deployment) for single instance reporting.

Reports also includes books and bursting. Books provide the ability to group together one or more reports, Books, and other documents, to generate a single PDF or Excel output. Bursting enables you to run a single report or book for more than one member of a single dimension for one data source, and publish a PDF or Excel output for each member.

Reports can also be used to generate Cloud EPM System Reports (Enterprise licenses only), specifically for the Cloud EPM business processes and components, such as Task Manager, Supplemental Data, and Enterprise Journals. You can embed Data Tables within Reports to include system data, as required. You can accomplish this by inserting a relational table into a report, connecting to a Cloud EPM business process schema, selecting members, and then generating a system report based on Cloud EPM relational system data. You can also use some of the grid features in tables, such as member selector, prompts and POV, formatting, sorting, drill to content, conditional formatting/suppression, formulas, and grouping. The other Report features that are available with relational tables are charts, text boxes, books, bursting, and Excel output (reports only).

Reports in Narrative Reporting deployments includes Notes for POV-based narrative text which is then displayed in formatted reports along with grids and charts. You can utilize Notes where reporting structure and narrative requirements are uniform across Entities, Departments, and so on. Cloud EPM deployments do not include Notes.

Reports in Narrative Reporting deployments under the Enterprise subscription also contain the following features:

Reports provides an easy-to-use drag and drop interface for designing and editing reports. You can:

- Create, insert and position report objects (grids, charts, image, textbox) into a report.

- Design and preview the results of an individual grid or chart without having to run the entire report.

- In Narrative Reporting deployments, insert report objects contained in a shared report to use the report objects in multiple reports, providing a single point of maintenance for the shared report objects.

- Insert formulas to calculate grid values and text functions to dynamically retrieve report and grid metadata.

- Utilize enhanced charting with a variety of chart types and features.

- Use data source features in your reports such as dynamic member selection functions, substitution variables, cell text and file attachments, financial intelligence, UDAs, and Attributes.

- Apply conditional formatting, text, and suppression to format grid cells or suppress data based on member information or data values.

- Zoom on parent members to display detailed members and drill to other reports or source data.

In Narrative Reporting deployments, you can:

- Embed Reports into Narrative Reporting report package doclets to integrate them in the collaborative narrative reporting process, with centralized Point of View (POV) control and server-side refresh with automatic doclet updates.

- Combine cross-Cloud content into a single report. You create and define a data source connection to point to the desired data source.

- Reports, security, and POV selections are managed within Narrative Reporting. Artifacts are stored and managed in the Narrative Reporting Library.

- Reports, books, and bursting definitions can be exported and imported into another environment.

- Fonts are uploaded and managed in the Narrative Reporting Library.

- Scheduling for bursting definitions is done via the Narrative Reporting Job Console.

- Migrate Financial Reporting (FR reports) to Reports via Library import of Financial Reporting (FR) report artifact exports.

- Utilize Generative AI (GenAI) for generating narrative summaries in a text box or text segment, as well as to summarize Notes.

In Cloud EPM deployments:

- Reports does not include Notes or Gen AI functionality.

- Reports are integrated with Narrative Reporting via **Remote Libraries**, however Reports in Cloud EPM deployments cannot be inserted into **Report Packages**, or **Books** and **Bursting Definitions** in Narrative Reporting.

- Reports is embedded in each business process, with single instance reporting. You cannot point to other Cloud EPM instances. Data Sources are automatically created based on the Cloud EPM application cubes that are on the instance.

- Reports, security, and POV selections are managed by the Cloud EPM platform. Reports are stored in the Cloud EPM repository.

- Reports, books, and bursting definitions can be moved between environments using the Cloud EPM Lifecycle Management.

- Migrate Financial Reporting (FR reports) to Reports natively via the Financial Reporting card/tab.

- Fonts are uploaded and managed in Application Setting in Reporting Settings.

- Scheduling for bursting definitions is done via the Cloud EPM platform Job Scheduler.

Watch this overview video to understand the highlights of Reports.

▶ -- [Reports in Cloud EPM Narrative Reporting](#).

▶ -- [Reporting in the new Cloud EPM Platform](#).

Watch this tutorial video, you'll learn how to create reports.

▶ -- [Creating Reports in Narrative Reporting Cloud](#).

▶ -- [Creating Reports in Cloud EPM](#).

Report Components

Design Reports by using report components, report objects, and grid components.

Report Components

- **Header** — An area where you can display text on the top of each page of a report. You can also add images to a header.
- **Report Body** — The main area of the report where you can insert and display grids, charts, images and text boxes.
- **Footer** — An area where you can display text on the bottom of each printed page of a report. You can also add images to a footer.

Report Objects

- **Grid** — A report object in which you retrieve data in the rows and columns from a multi-dimensional data source, such as a cube from a Cloud EPM business process, Essbase, or Fusion ERP.
- **Table** — A report object in which you retrieve data from a Cloud EPM relational schema (Enterprise licenses only).
- **Chart** — A report object that displays data from a grid. Charts are graphical representations of the data in a grid
- **Text Box** — A report object that can contain text, or functions that retrieve data such as report settings, data values, point of view (POV) values, or dimension members.
- **Image** — A report object that contains a graphic or an image file. You can add images to the body of the report and to a header or footer.
- **Notes** — For Narrative Reporting deployments, you can insert a **Note Template** into a report for structured POV-based commentary entry.
- **Shared** — Shared objects (grids, charts, text boxes and image objects), which reside in a shared report, can be inserted in multiple reports, providing a single point of maintenance for the shared report objects.

Grid Components

- **Row** — A horizontal display of information in a grid. A row can contain text, data, or derived data from a calculation. You can format individual rows in grids.

- **Column** — A vertical display of information in a grid. A column can contain text, data, or derived data from a calculation. You can format individual columns in grids.
- **Cell** — An intersection of a row, column, page, and Point of View (POV) for a grid. You can format individual cells in a grid.

5
Overview of Report Packages

Related Topics

- **Learning About Report Packages**
  Report packages provide a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial, management and regulatory reports.

- **Why Use a Report Package?**
  Report packages enables you manage the lifecycle of your deliverable, such as: Gathering information, reviewing it for accuracy, and Presenting it are key to business.

- **What is a Report Package?**
  With report packages, 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 Package Components**
  A report package is made up of several components:

Learning About Report Packages

Report packages provide a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial, management and regulatory reports.

But what is a report package? Why would you use one? And how do they work? The following topics provide answers to these questions:

- **Why Use a Report Package?**
- **What is a Report Package?**
- **Report Package Components**
  - **Author Phase**
  - **Review Phase**
  - **Sign Off Phase**

See these videos - :

- **Overview: Report Package Part 1 in Narrative Reporting**
- **Overview: Report Package Part 2 in Narrative Reporting**.

Why Use a Report Package?

Report packages enables you manage the lifecycle of your deliverable, such as: Gathering information, reviewing it for accuracy, and Presenting it are key to business.

Financial reporting is a critical function in most companies. Reports can be internal, for board packages, management updates, or quarterly updates. Or they can be external, such as

statutory, regulatory, filing, or annual reports. For any report, gathering information, reviewing it for accuracy, and presenting it are key to businesses.

Creating reports is easy with one author and no review, but having multiple authors working on a report can be more complicated. Do all of the authors have the current version? How do you merge changes from multiple authors into a single document? As you add content creators, keeping everyone organized becomes more challenging.

The situation becomes even more difficult with several authors, multiple reviewers—each of whom might be responsible for different sections, and multiple signers who provides final sign off on the whole report. How do you keep all of your authors, approvers, reviewers, and signers organized? How do you handle versioning and manage workflow? Coordinating stakeholders by email can be daunting.

A better way to organize and produce a collaborative report is by using a *report package*.

What is a Report Package?

With report packages, 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.

Use report packages to create, for example, internal Reports that may require some level of collaboration to develop, but may not undergo a highly intensive review. Or, you can create external reports that require a high level of scrutiny, multiple reviews, and significant process management.

With report packages, you can:

assign content to multiple authors

gather comments from reviewers

provide an electronic sign off on the completed report

manage the report life cycle

combine data points with textual narrative

secure and control access to the report content

Report packages help you manage the lifecycle of your deliverables. With them, you can:

• Assign content to multiple authors, who each contribute individual pieces of the report

• Gather comments from multiple reviewers

• Provide an electronic sign off on the completed report

- Manage the report lifecycle by providing notifications to users, managing the workflow, and coordinating the processes

- Combine data points with textual narrative

- Secure and control access to the report content, enabling users to see only the content that they are permitted to see at the time that they are permitted to see it

Next, let's look at some key components of a report package.

Report Package Components

A report package is made up of several components:

- Doclets are individual pieces of a report that can be assigned out to authors to provide the content.

- **Optional**: Supplemental doclets are managed exactly the same way as a doclet, with respect to workflow and content management, except that the content of the files is not merged into the report package.

- Reference Doclets are managed exactly the same way as a doclet, with respect to workflow and content management, except that the content of the files is not merged into the report package.

- Sections help group and organize doclets in a report package.

- Development phases enable you to select which of three phases you require for your development: an author, review, and sign off phase.

Doclets

A core feature of report packages is the ability to break down a report into subcomponents called *doclets*. What makes up a doclet varies, depending on the type of report that you are creating. For example, a sales report might have separate doclets for each geographical region, and a financial disclosure might have doclets for each of the various financial statements, tax statements, and notes.

Alternatively, if one person is responsible for all of the income statement information in a report, for example, those income statement documents can be all classified as a single doclet. How you define a doclet is completely up to you. See "Identifying Doclets" in Report Package Design Considerations.
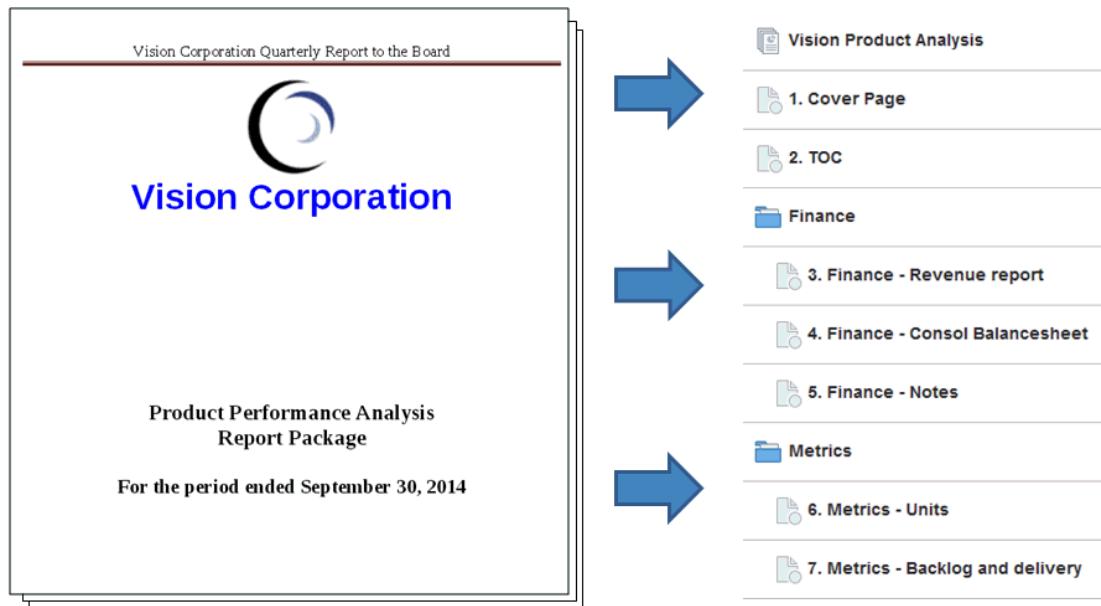
After you identify the doclets in a report, you assign them to authors, who provide content. For example, in a report that breaks down revenue by categories, you can have doclets for services, hardware, and software licenses. Then, you could assign each doclet to the management team in charge of that category.

Supplemental Doclets

Supplemental documents such as procedures, instructions, reference material, and so on, can be uploaded into a report package as a supplemental doclet. Supplemental documents can be any type of document file (for example, PDF, Excel, Word, and so on). As the content for supplemental doclets is not included within the merged report, these doclets are excluded from the review and sign off processes. The supplemental doclet contents cannot be viewed online, but users can download and use native programs to open the supplemental doclet in the same way that you can work with third party artifacts in the library.

See this video also ▶ [Managing Supplemental Doclets in Narrative Reporting](link).

Reference Doclets

A [Reference doclet](link) can be used as a container to store contents such as named ranges from an Excel file or charts and graphs created from Reports, see Adding a Report to a Reference Doclet and consumed by one or more regular doclets (non-supplemental).

The file content for Reference doclets is not *directly* included in any report package outputs, such as preview, publish, review instances or signoff instances. However, embedded content within a consuming doclet is displayed as part of the report package outputs - even though the actual reference doclet is not directly merged in the outputs. Reference doclets can participate in the author phase, but not in the review or signoff phases.

Sections

Sections enable you to group doclets for organization, or to keep doclets together that have a common format or are intended for a common viewership. For example, you can group all financial statements in a financial disclosure report into one section. Doing so provides a filtered view of only those doclets to the reviewers assigned to that section.

Development Phases

Report package development occurs in three phases:
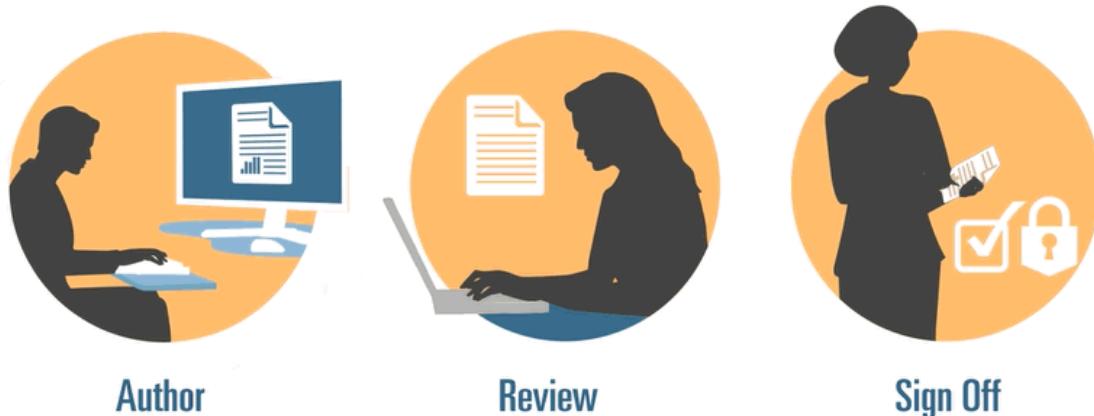
- Author phase—Compile the various report content and supporting details together into a cohesive report package.

- Review phase—Gather commentary on multiple draft versions and revise the report content accordingly.

- Sign Off phase—Gather electronic signatures from key constituents and secure report contents to prevent modifications.

You decide which development phases your report requires. If the report content is going to be provided primarily by one or two people, then you may not need an author phase. If your report is being developed for a small group of internal stakeholders and not a public audience, then you may not need a review phase. You can tailor the development phases to the type of report that you need. See "Determining Development Phases" in Report Package Design Considerations.

Lets's look at these development phases in a little more detail.

Author Phase

In the author phase, authors and approvers work with doclets to add content to a report package. Authors provide content, and approvers review and edit the content.

Benefits of the author phase include:

Content Management

Content management allows users to check doclets in and out of a central repository, ensuring that only one user at a time is updating a doclet. It also provides for version control. When a user checks in an updated version of a doclet, the previous version is automatically stored. Previous versions can be easily accessed for comparison. Users can store versions that they're still working on and can check versions in when they're ready for others to access them.

> ⓘ **Note**
>
> Doclet versioning has been 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.

Flexible Workflow

Workflow enables doclet content to be developed collaboratively. An author can update the doclet, and an approver can review and edit the content. You can set up multiple levels of approvals, and the number of approval levels can vary per doclet. For example, a doclet containing an introductory statement may not require an approval, and a doclet containing revenue information may require multiple approval levels.

Using workflow, users scheduled for later in the review process can take control of a doclet sooner. For example, if a doclet is assigned to an author, an approver or the owner of the report package can take action on the doclet without waiting for the doclet author. This flexibility eliminates bottlenecks and speeds up content development.

Process Reporting

Process reporting enables you to view the author phase status on two levels:

- **Summary level**—Provides statuses for the entire author phase, such as the overall completion percentage of the author phase, a summary of the status of all the doclets, and the due date and time remaining for the author phase.

- **Doclet level**—Provides the status for each individual doclet, the current responsibility, and whether the doclet is checked in or out. You can also tell at a glance the workflow level of the doclets, including the user assignments and the due dates by user.

Review Phase

In the review phase, reviewers provide feedback, ask questions, and recommend changes.

Benefits of the review phase include:

Multiple Review Cycles

In the review phase, multiple reviewers can review different versions of the report. For example, managers could review the first draft of the report, executives can review the second draft, and top management can review the third.

You can vary the review assignments by area. A user can be assigned to review the entire report, a section of the report, or a doclet.

Threaded Commentary

Reviewers provide feedback by commenting on different areas of the report. These comments are threaded so other reviewers can participate in the discussion. Reviewers can provide attachments or links to their comments to provide supporting details. Reviewers can close comments after the outstanding issue is addressed.

> ⓘ **Note**
>
> Comments persist across review cycles in context, so that reviewers can see how comments are addressed in subsequent drafts.

Multiple Platforms

You can comment on reports in these ways:

- Desktop or mobile web browser
- Microsoft Office, through Oracle Smart View for Office

Process Reporting

Process reporting enables the report package owner to view the review phase status on two levels:

- **Summary level**—Provides statuses for the entire review phase, such as the overall completion percentage of the review phase, the number and percentage of reviews completed, the number of open comments, and the due date and time remaining for the review phase.
- **Doclet level**—Provides review status for each doclet, such as the reviews completed per doclet and the number of open and closed comments raised for each doclet.

Sign Off Phase

The Sign Off phase enables you to finalize your report content and get sign off from your key stakeholders.

Benefits of the sign off phase include:

Locked Content

In the sign off phase, you lock your report to prevent changes. The report signers review the final report and either sign off or reject the report content. If the report is rejected, the report package owner can unlock and correct the report content. If the report is signed off, the process is complete, and the report is ready for publication.

Multiple Platforms

You can provide sign off in these ways:

- Desktop or mobile web browser

- Microsoft Office, through Oracle Smart View for Office

Process Reporting

Report package owners can view a summary of the sign off phase. The summary can include completion percentage, number of sign offs and rejections, due date, and days remaining, as well as who signed off and any sign off notes.

6

Overview of Smart View

Related Topics

- [Learning About Smart View](#)
  You can learn how to work with Oracle Smart View for Office and then try to interact with Narrative Reporting data and report packages.

Learning About Smart View

You can learn how to work with Oracle Smart View for Office and then try to interact with Narrative Reporting data and report packages.

What is Smart View?

Smart View uses a Microsoft Office interface designed for Oracle Enterprise Performance Management System, Oracle Business Intelligence, and Oracle Fusion Financials products. When working with report packages in Smart View, you can:

- Author doclets using familiar Microsoft Office tools to access and work with data without having to download and work on them locally.

- Complete review and sign off tasks for report packages.

- Perform complex analyses on your data.

Working with Smart View in Excel

In Excel, Smart View allows you to perform ad hoc queries on Narrative Reporting data and other EPM and BI data sources. You can easily embed data points from ad hoc queries into your report narratives in Narrative Reporting. The data points in your narratives are refreshable, meaning the data will always be the latest.

Working with Smart View Word or PowerPoint
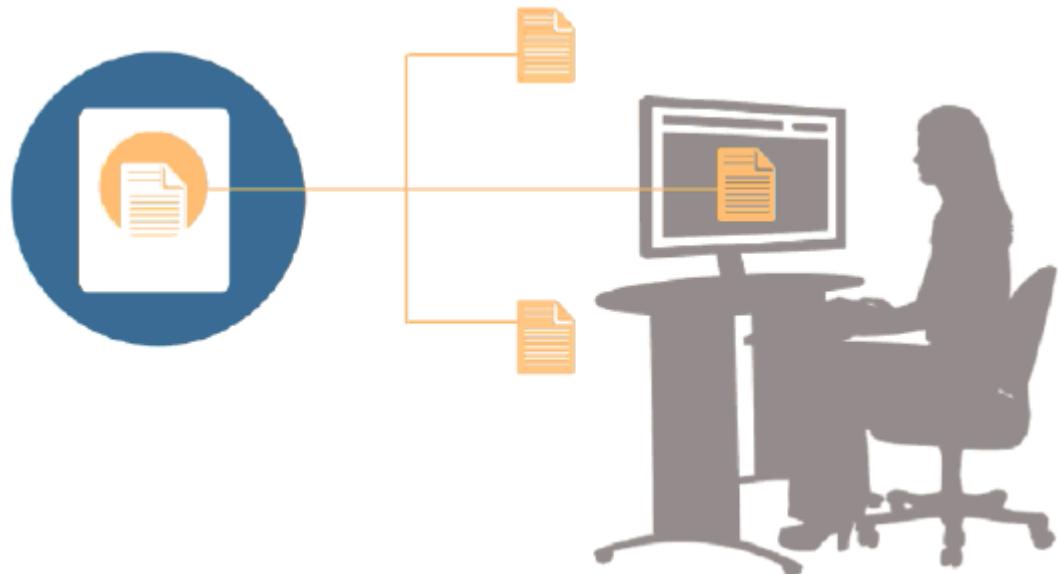
When you work with doclets in Word or PowerPoint, you can use Smart View to include data from Narrative Reporting data sources and other EPM System data sources, including on-premises and cloud data sources. For example, you can incorporate data from a profit and loss statement in Oracle Essbase Studio and an income statement from a Planning source. The data points for the areas that you copy remain in Word or PowerPoint, and you can refresh the doclet to see the latest data values.

For more information about working with Smart View in Narrative Reporting, see these topics:

- Setting Up Narrative Reporting in Smart View
- Authoring Doclets in Smart View
- Using Narrative Reporting Home
- Approving Doclets in Smart View
- Performing Reviews in Smart View
- Performing Sign Offs in Smart View
- Working with Distributions
- Example: Working with Narrative Reporting Data in Smart View
- Create New Report Package Structures in Smart View
- Assign Authors When Adding Doclets to Report Package Structures
- Validate Fonts in Excel Reference Doclets

7
Overview of the Library

Related Topics

• [Learning About the Library](#)
  The library is the Narrative Reporting artifact repository.

Learning About the Library

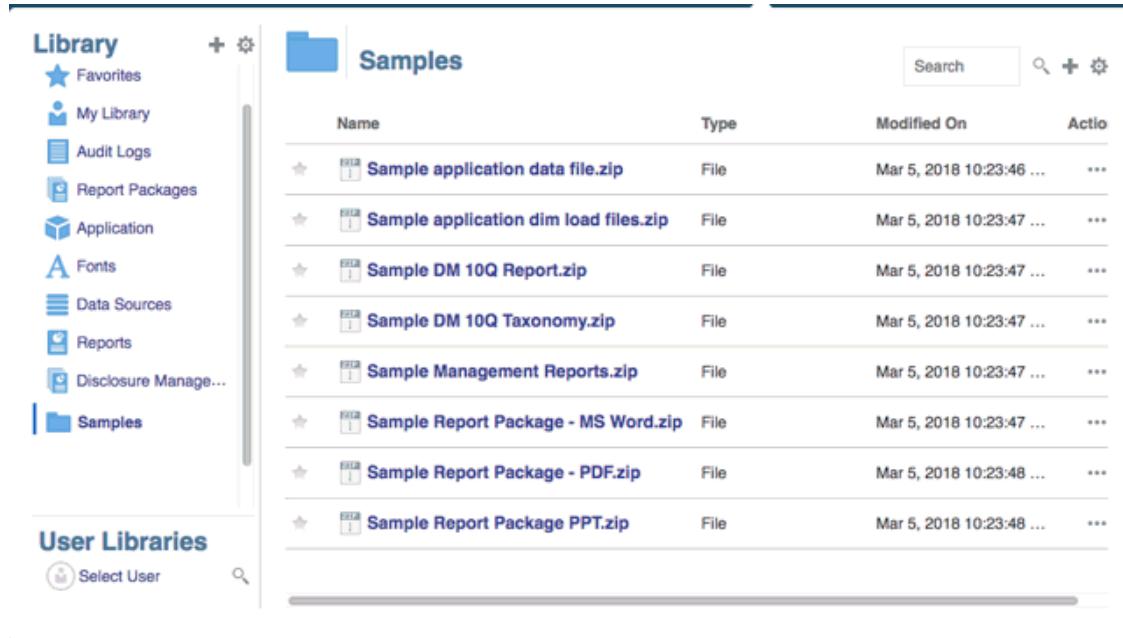The library is the Narrative Reporting artifact repository.

Use it to organize and manage content in a familiar, intuitive interface, which borrows from well-known applications. Its interface and functionality borrows from existing desktop and web-based file and document management systems. For example, use library folders to organize and store artifacts such as report packages, applications, audit log files, graphic files, Microsoft documents, and so on. You can also create shortcuts to artifacts, and use system-generated personal folders such as Recent, Favorites, and My Library to organize content. You can also create your own folders. After creating the folders, you can grant other users access to them.

Learn more about the library from this video [▶] [Learning About the Narrative Reporting Library](#).

Users with the library administrator role can:

• Create folders and see all child folders and folder contents however, they cannot open and view the contents of folders unless they have the appropriate permissions.

• Create shortcuts in any folder where they have write permissions.

Figure 7-1   Example of the Library

A user with the service administrator role has the complete ability to perform any of the actions or tasks to any artifact or folder in the library. The service administrator can see each users My Library folder and has unrestricted access to the service. However, they cannot see other users Favorites or Recent folders since these only contain shortcuts.

The library provides these benefits:

Migrating

You can migrate folders, Report Packages, Reports, Books, Bursting Definitions, Data sources, Notes, Fonts, Third-party files, and Applications (where applicable) between environments and within them. You can migrate artifacts using the export, download, and import functionality in the library or by using the EPM Automate Commands. For migrating Notes artifacts, you use the Notes Manager. See Migrating Notes Artifacts from One Environment to Another, Notes ManagerMigrate Artifacts, and EPM Automate Commands in *Working with EPM Automate*.

Auditing

An administrator of an artifact can run audit reports for their artifact. The service administrator can run additional audit reports for the entire system. Additional information on audits:

- Actions in the system are captured in a running system audit.

- You can extract audit entries for folders or artifacts to which you have administrator permissions.

- An extract file is created from the running system audit that falls within the time frame that you entered in Create Audit File and is saved in the Audit Logs folder in the library.

For more information on audits, see Using Audits.

Built-In Intelligence

The library is role-based, and a user is either shown content that they have been given explicit access to, or content that has been made available to them from the report package workflow. For example, a doclet author cannot see a report package in the library until the author phase has started. See Creating Artifacts in the Library.

Customizing and Inspecting

A user can customize their view of the library by Setting Default Views for Content Pane Folders and Artifacts. For example, set a default view preference for a folder or all folders and sort the contents of a folder. You can inspect or review a folder's properties. For example, as a service administrator, from the properties tab of the Inspect dialog you can edit the artifact name, view the artifact type, the location of the artifact in the library or path, the description, and so on. You can assign access for an artifact so only a limited audience can see or open it. You can also review the history and actions taken on an artifact. See Inspecting Folders and Artifacts.

How to use the Library

There are different ways to open the library.

Select one of the following to open the library:

- From the Welcome Panel on the Home page, select **Open**:
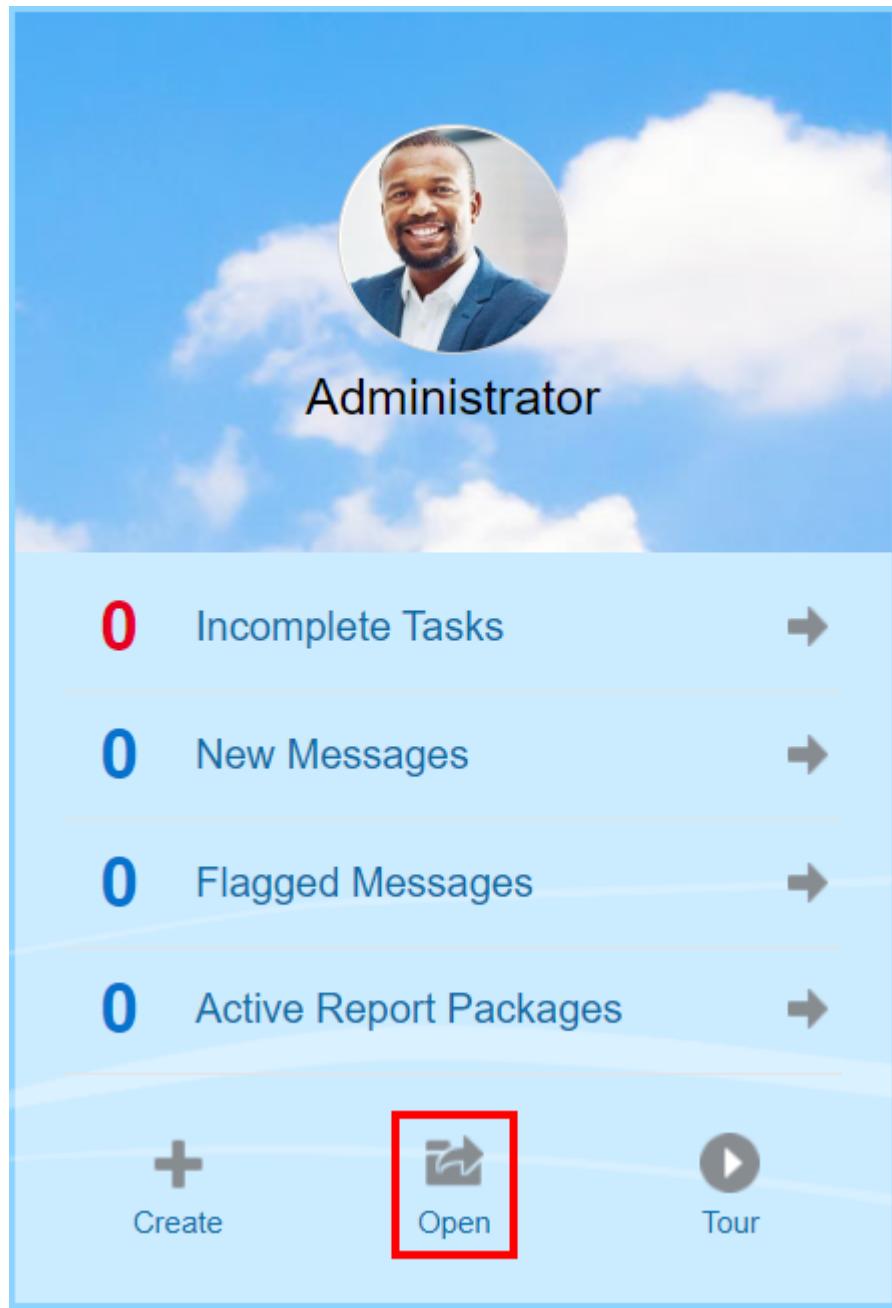
• On the Home page, select .

The library opens to the Recent folder by default. Example of the library UI:

Figure 7-2   Sample Library

Learning About the Navigation and Content Panes

The library's navigation pane contains a list of default, system-generated, and personal folders.
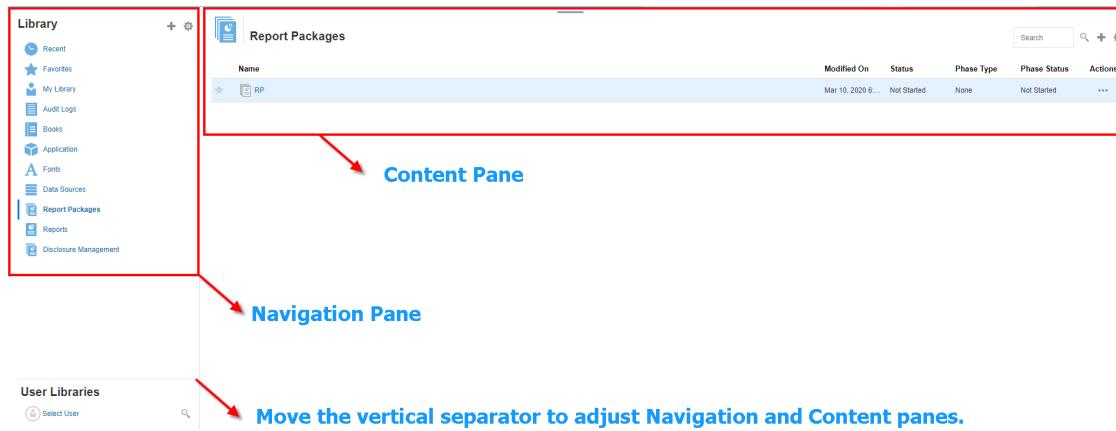
The content pane contains the contents of the folders in the navigation pane. Click and drag the vertical separator to adjust the windows.

The navigation pane's user-created folders and system-generated personal folders help you stay organized.

- User-created folders; for example `John Smith Report Packages.`

- System-generated personal folders; Recent, Favorites, and My Library:

> ⓘ **Note**
>
> The menus and actions available for the following are role based.

Recent
Contains shortcuts to recently accessed content. The number of recent shortcuts retained is set in preferences, see the Library tab in Managing User Preferences in *Administering Narrative Reporting*. You can inspect shortcuts, which are read only, to view artifact properties. Refresh to update the contents. See [Inspect](). See the [Using the Action Menus]() for more information on how to access the action menus to select these options. Additional rules for this folder are:

- Only the given user can see the shortcuts in this folder.

- The user cannot copy, move, or rename the shortcuts in this folder.

- The user can delete shortcuts in this folder.

- If the name of the artifact to which the Recent shortcut points to is changed, the name of the shortcut is also changed.

- If the source artifact is deleted, the recent shortcut is deleted.

- The ability of the given user to access the artifact that the Recent shortcut points to is governed by the user's permissions on the base artifact, not the shortcut.

- The artifact properties shown in the Inspect dialog for a recent artifact are from the source artifact.

Favorites
Contains shortcuts to artifacts marked as favorites. Includes the same options available as the Recent folder. Additional rules for this folder are:

- Only the given user can see the shortcuts in this folder.

- The user can rename and delete shortcuts in this folder, and add or change a description.

- The user can move a sub-folder or shortcut contained in this folder only within the Favorites folder or its children.

- The user cannot copy or move artifacts to or from outside the Favorites folder, this includes the copy and move of shortcuts.

- The name of the favorite shortcut does not need to match the source artifact, and if the source artifacts name changes, the name of the shortcut contained in the Favorites does not change.

- If the source artifact is deleted, the favorite artifact is deleted.

- The artifact properties shown in the Inspect dialog for a Favorites artifact (shortcut or folder) are from the favorites artifact.

My Library
Personal artifacts such as Excel spreadsheets, Word documents, shortcuts, and folders. Includes the same options as the Recent and Favorites folders, plus adds auditing. You cannot give another user access to the content in **My Library**. The audit type artifact file is created in the **Audit Logs** folder and audit is added to the artifact name, for example `Audit — reportpackageRP1`. Additional rules for this folder are:

- Only the service administrator or given user can see the artifacts in this folder.

- You can't create report packages in the **My Library** folder, or move or copy report packages to it. However, you can use shortcuts to report packages in the **My Library** folder.

- Other artifacts can be copied or moved into or out-of this folder.

System-generated folders; Audit Logs, Report Packages, Reports, Books, Bursting Definitions, Application, Fonts and Data Sources:

- [Audit Logs](#)—Contain system and artifact type audit files created from the system level or artifact.

- [Report Package](#)—Contain report packages that reside elsewhere in the folders of the library, where they are created.

- [Application](#)—Contain application that has been created.

- Fonts—Contain fonts that can be used for artifacts.
  Data Sources—Contain the data source connections created for Reports.

  [Reports](#)—Contain reports that reside elsewhere in the folders of the library, where they are created.

- Books

  — Contain Books that reside elsewhere in the folders of the library, where they are created.

- Bursting Definitions — Contain Bursting Definitions that reside elsewhere in the folders of the library, where they are created.

Using Locator Links

Use the locator link at the top of the content area to keep track of folder and artifact locations in the library.

Locator links especially helps when you are deep in a directory. Use the link to click back to previous directory levels. Use the link to click back to a previous level in the library structure.

Figure 7-3   Locator Links in Content Pane
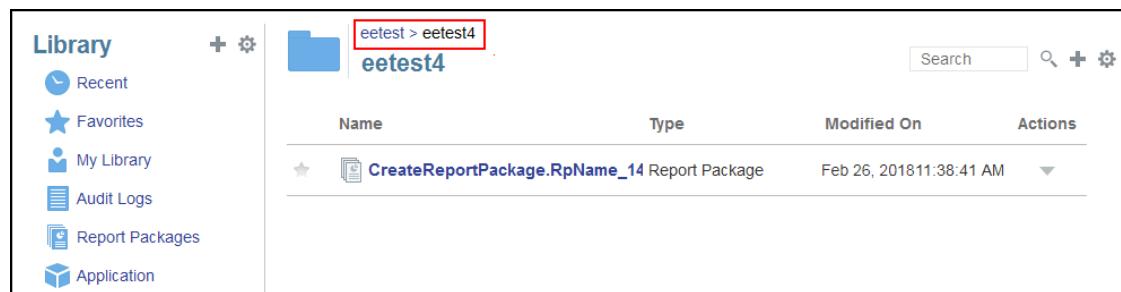
Using the Action Menus

Use the Actions menu to act on library artifacts:

- Use the Actions menu **Library** at the top of the navigation pane to take action on the folders in the navigation pane. The actions that you can take vary according to folder to your access permissions. Viewers, for example, cannot run Audits. For example, you can Inspect, Audit, and Refresh system-generated folders. You can take any action on folders that you have created.

- Use the Actions menu at the top of the content area to act on one or more artifacts in the content area. For example, you can use the Actions menu to edit the properties of a report package or select several folders to move or copy to another location.

Making a copy of an existing Report Package

You can make a copy of an existing report package and use that as the basis for the next reporting cycle. The copy function makes a complete copy of the report package definition. This includes all of the report package properties, all of the doclets, all of the user assignments, and all of the variables. The doclets contain the last checked in version of the doclet file(s). The copy does not include any of the details related to the development of the source report package. The copy will not include any of the history, prior versions, review instances, or sign off instances from the source report package. All that is required is to update the dates and check the assignments.

To make a copy of the report package:

1. From the folder in the Library where the original report package is located, select the report package you want to copy but do not open it.

2. Select ▼ next to the report package to be copied and then **Copy**.

3. Select an existing folder or create a new one using the ➕ for where you would like to place the copied report package.

> ⓘ **Note**
>
> If copying to an existing folder, you must have write-access to the folder where you are placing the copied report package.

4. Select **OK** from dialog displayed.

> ⓘ **Note**
>
> This topic also applies to other artifacts in the library you have access to, for example reports.

Moving a Report Package

You can relocate a report package to another location.

To move a report package:

1. From the folder in the Library where the original report package is located, select the report package you want to move but do not open it.

2. Select ▼ next to the report package to be moved and then **Move**.

3. Select an existing folder or create a new one using the ➕ for where you would like to move the report package.

> ⓘ **Note**
>
> When moving to an existing folder, you must have write-access to the folder where the report package is being moved to.

4. Select **OK** from dialog displayed.

> ⓘ **Note**
>
> This topic also applies to other artifacts in the library you have access to, for example reports.

Using the Create Menus

The Create menus allow users with the appropriate roles to create the following:

- Use the Create icon **Library** ⊞ ⚙ at the top of the navigation pane to create a folder to store artifacts.

- Use the Create icon [Search] at the top of the content pane to create artifacts. For example, create folders and report packages and upload files and system audit files.

> ⓘ **Note**
>
> When selecting the option to create report packages, the Create Report Package wizard is displayed. See Create Report Packages.

Working with Connections and Remote Libraries

Overview

Connections in Narrative Reporting enables you to define access to Reports data sources and **Remote Libraries**.

- Connections streamline the creation and maintenance of Reports data sources and provide a single area of credentials maintenance for multiple cubes in an application.

> ⓘ **Note**
>
> Data source artifacts in the **Library** can still optionally be used to maintain connections to cubes; however this can also be done in **Connections**.

- Connections also allow you to access reporting artifacts in Oracle Fusion Cloud Enterprise Performance Management platform instances on the same domain via **Remote Libraries**. In the Narrative Reporting Library, users can browse remote libraries for reporting artifacts to open, or to copy Reports from the Cloud EPM Platform to Narrative Reporting.

  Supported artifacts include **Reports** and **Report Snapshots**, **Books**, **Bursting**, **Microsoft Office** files, and **PDFs**.

- Only the Service Administrator role can create and maintain Connections. Both the Narrative Reporting and **Connections Administrator ID** need to be **native** users and not **Single Sign-On** (SSO). For more information, see Managing User Credentials for SSO-Enabled Cloud EPM and Oracle Enterprise Data Management Cloud Environments in *Getting Started Guide for Administrators* .

- When users access a report in Narrative Reporting, their User ID is passed to the data source, so their cube access permissions (data and member security) are applied to the report results.

Connections support all Reports data sources: Cloud EPM platform (Enterprise Profitability and Cost Management, FreeForm, Planning and Planning Modules, Financial Consolidation and Close, Tax Reporting), Essbase Cloud, Fusion ERP, Profitability and Cost Management (PCM).

- Cloud EPM Platform Connections: You can access cubes for reporting and **Remote Libraries**.

- Essbase, Fusion ERP, Profitability and Cost Management (PCM) Connections: You can access cubes for reporting only.

When creating a Connection, you select the connection type (based on the data source type) and enter the **Server Name** and **Admin Credentials**, as well as other fields, depending on the data source. You can also optionally select cubes to be added as data sources. The data

source artifacts in the **Library** use the **Connections** as parent artifact "containers", where you can select a Connection to use and select a cube from that connection.
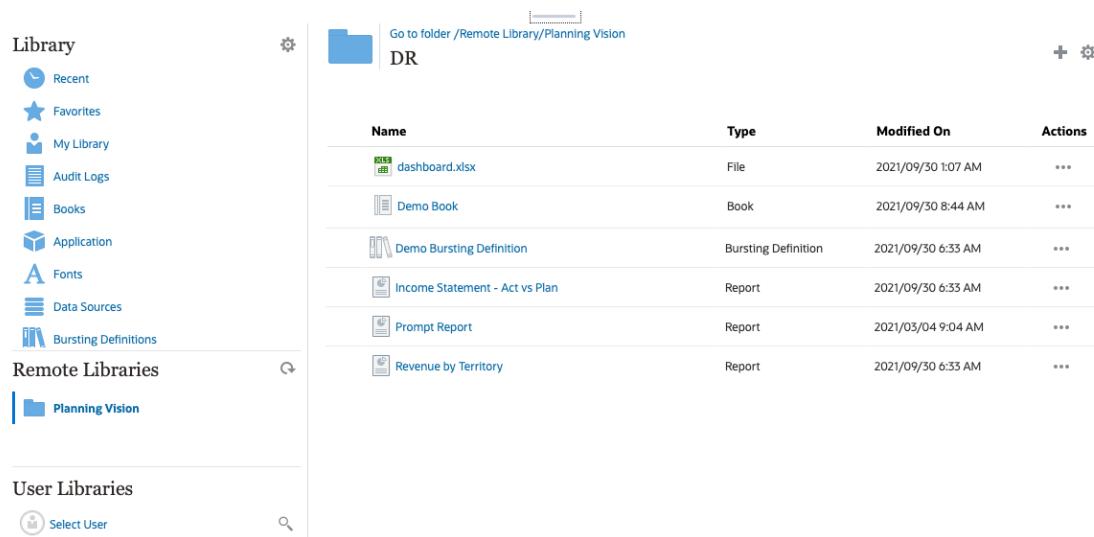
For Cloud EPM Platform connections, you can optionally enable a Remote Library for users to access reporting content from these connections in Narrative Reporting.

The **Connection** dialog, where you can create and edit **Connections**. For the Cloud EPM Platform connection, you can **Enable Library** to expose a Remote Library to the end-users. Under **Manage Data Sources**, you can create and manage data sources for Reports.

The **Data Source** dialog, where you can alternately create **Connections** to specific cubes. Cube connections can also be defined in the **Connections** dialog.

A Remote Library to an Cloud EPM Platform instance allows accessing reporting artifacts.

* Narrative Reporting users accessing a Remote Library need to be a user and must have access permissions to artifacts on the **Connections**.

* **Remote Libraries** cannot be enabled to access other Narrative Reporting instances, only Cloud EPM Platform instances (Enterprise Profitability and Cost Management, FreeForm, Planning and Planning Modules, Financial Consolidation and Close, Tax Reporting).

* You cannot edit any of the artifacts in a Remote Library. You can only open any of the artifacts or copy Reports. Artifacts can only be edited directly in the Cloud EPM instance and not from the **Remote Libraries** in Narrative Reporting.

> ⓘ **Note**
>
> **Remote Libraries** should only be enabled when they are regularly used and accessed, where the credentials defined in **Connections** are always valid. When the **Library** and related cards (For example: **Reports**, **Books**, and so on) are accessed for the first time in a session, the system performs checks on all **Connections** with **Remote Libraries** enabled. If the remote connection cannot be accessed due to expired credentials or an unavailable instance, there may be significant performance degradation when accessing the Library and related cards.

It is recommended to only enable **Remote Libraries** for **Connections** where regular access to reporting artifacts is required, also keep the **Connection** credentials up to date and do not leave stale or unused **Connections** defined with **Enable Library** selected.

▶ -- [Working with Connections and Remote Libraries](#).

Creating and Editing Connections

To create a Connection:

1. On the Narrative Reporting Home page, under the **Tools** icon, you can select **Connections**.
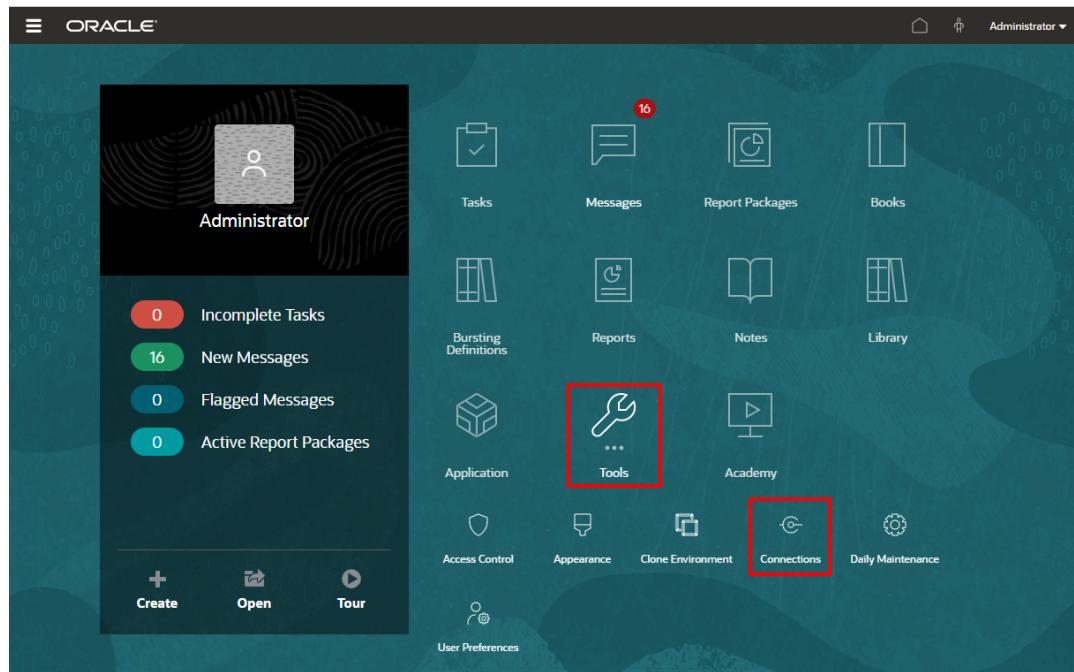
2. In the **Manage Connections**, click ![plus] to add new connections.
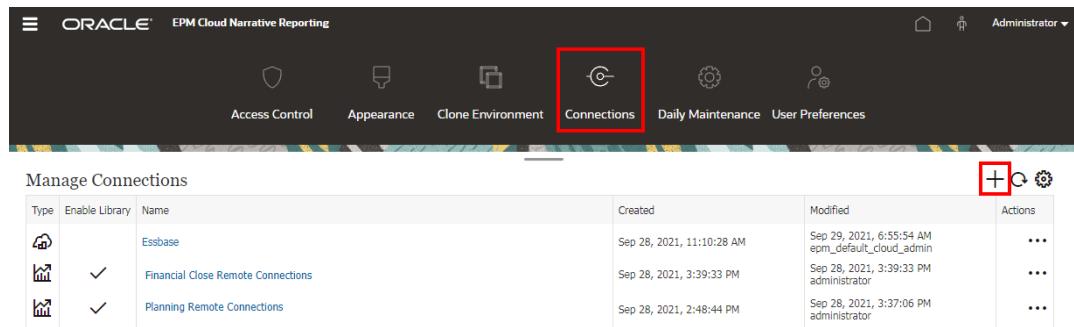
3. In **Name**, enter a descriptive identifier for the connection, such as a combination of the data source and server.

4. In **Type**, select the type of data source:

   • Oracle Fusion Enterprise Performance Management, used for:

      – Enterprise Profitability and Cost Management

      – FreeForm

      – Planning and Planning Modules

      – Financial Consolidation and Close

      – Tax Reporting

   • Oracle Essbase

- • Oracle Fusion Cloud EPM Profitability and Cost Management

- • Oracle Fusion Cloud Essbase

- • Oracle Essbase On-premises Deployment

5. In **Server Name**, enter the data source server name with no protocol or URL. For example, for Cloud EPM, if data source URL is: `https://<servername>/HyperionPlanning`, the server name is: `<servername>`.

6. (Oracle Fusion Cloud Essbase and Oracle Essbase On-premises Deployment only): In **Essbase Server Name**, enter the name of the Essbase server. By default for Fusion Applications, the server name is "Essbase_FA_Cluster" and for Essbase APS, the server name is "EssbaseCluster-1".

7. In **Identity Domain**, enter the identity domain of the data source pod.

> ⓘ **Note**
>
> - • Not required for Oracle Essbase, Oracle Fusion Cloud Essbase or Oracle Essbase On-premises Deployment.
>
> - • Not required for Cloud EPM deployments on Oracle Cloud Infrastructure (OCI).

8. Enter the administrator User ID and Password. The administrator User ID needs to be a Service/System Administrator role at the data source level, BI Administrator role for Fusion Applications.

> ⓘ **Note**
>
> - • Both the Narrative Reporting and **Connections Administrator ID** need to be native users and not **Single Sign-On** (SSO). For more information, see Managing User Credentials for SSO-Enabled Cloud EPM and Oracle Enterprise Data Management Cloud Environments in *Getting Started Guide for Administrators* .
>
> - • 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.

9. Click **Test Connection**.
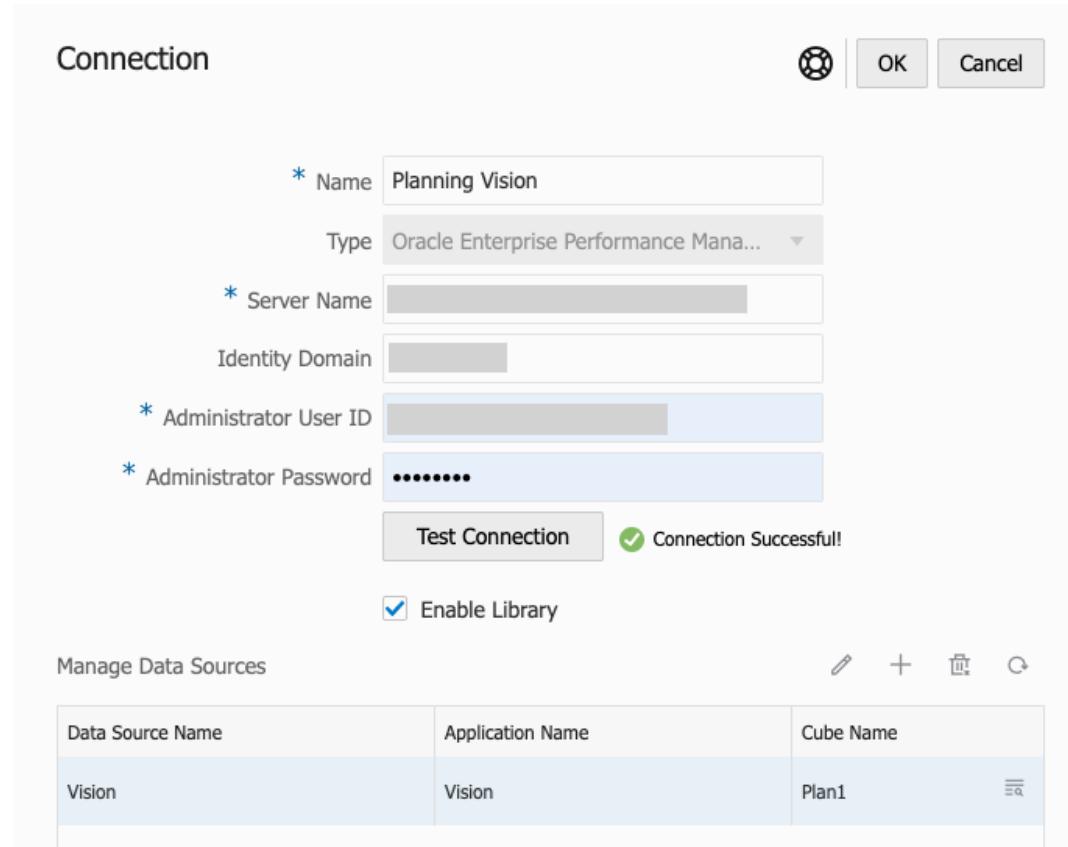
(Oracle Essbase only): Click **Yes** on the dialog box to trust the connection. This setting is stored so that you do not have to answer the question again.

10. For Cloud EPM connections, optionally select **Enable Library** to expose a Remote Library.

11. To select cubes to be added as data sources:

- Under **Manage Data Sources**, click ✚ **Add Data Sources** to add one or more cubes to connect Reports to.

- For each cube, enter a **Data Source Name**, select the **Application** and **Cube** names.
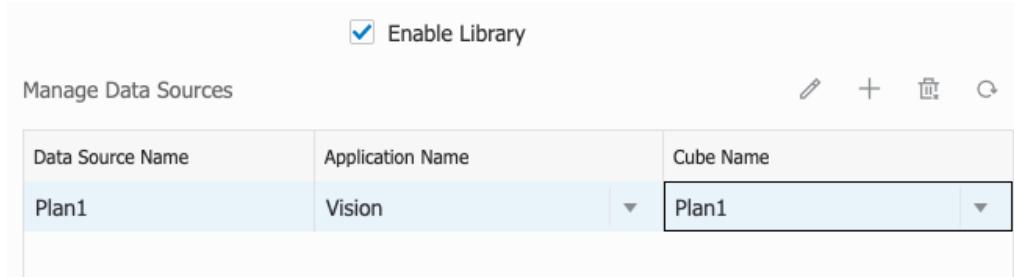
After selecting a cube, you can click on 🔍 to preview the dimension list.

- In the **Manage Data Sources** toolbar, you can: **Edit** an existing data source, create a **New** data source, **Delete** a data source and **Refresh** the view.

- Click **OK** to add the Connection. The connection will appear in the list under the **Manage Connections**.

To **Edit** a Connection:

In **Manage Connections**, select the **Connection**, and then select **Edit** from the **Actions** menu. When you edit a connection, you can change the **Connection Name** and **Server**, as well as the **Application** and **Cube** names.

> ⓘ **Note**
>
> - Changing the **Connection Name** does not affect any report objects that use the connection.
>
> - Changing the **Server**, **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 the connection.

Migrating Connections from One Environment to Another

You can migrate Connections from one environment to another in **Manage Connections** by exporting one or more Connections to a ZIP file and importing the ZIP file into another environment.

To export a **Connection**:

1. In **Manage Connections**, select one or more Connections to export. In Actions ⚙ , select **Export**. If only one Connection is selected, you can select **Export** from the selection Connection's **Action** ••• menu.

2. In **Select Folder for Export File**, select a destination **Library** folder and click **OK**. The ZIP file will be exported to the selected folder.

3. You can navigate to the destination **Library** folder and download the exported ZIP file to your local machine.

To import a **Connection**:

1. In **Manage Connections**, in the select Actions ⚙ , select **Import**.

2. In the **Import** dialog, select **Local** and browse to the export ZIP file that you want to import.

3. Select **Overwrite Existing Objects** to replace any existing artifact with the new imported artifact.

4. Select **OK**.

5. The import process will run in the background. Check Messages to view the notification once the import is complete.

6. Once the import process is complete, you will need to edit each Connection and re-enter the administrator credentials, as the credentials are not included in the export ZIP file.

Accessing other Users Libraries

System and library administrators can search for and retrieve the contents of another user's system-generated personal folders or user-generated folder, for example a **My Library** folder. These permissions enable service administrators to view and retrieve a file from another user who isn't available. For example, if someone is on vacation, the report package production workflow can continue.

The service administrators can search a user's library by selecting the select user icon from the User Libraries area of the navigation pane and entering John Smith's name in the search field for John Smith's library and to retrieve the missing file required to complete the report package in John Smith's personal My Library folder.
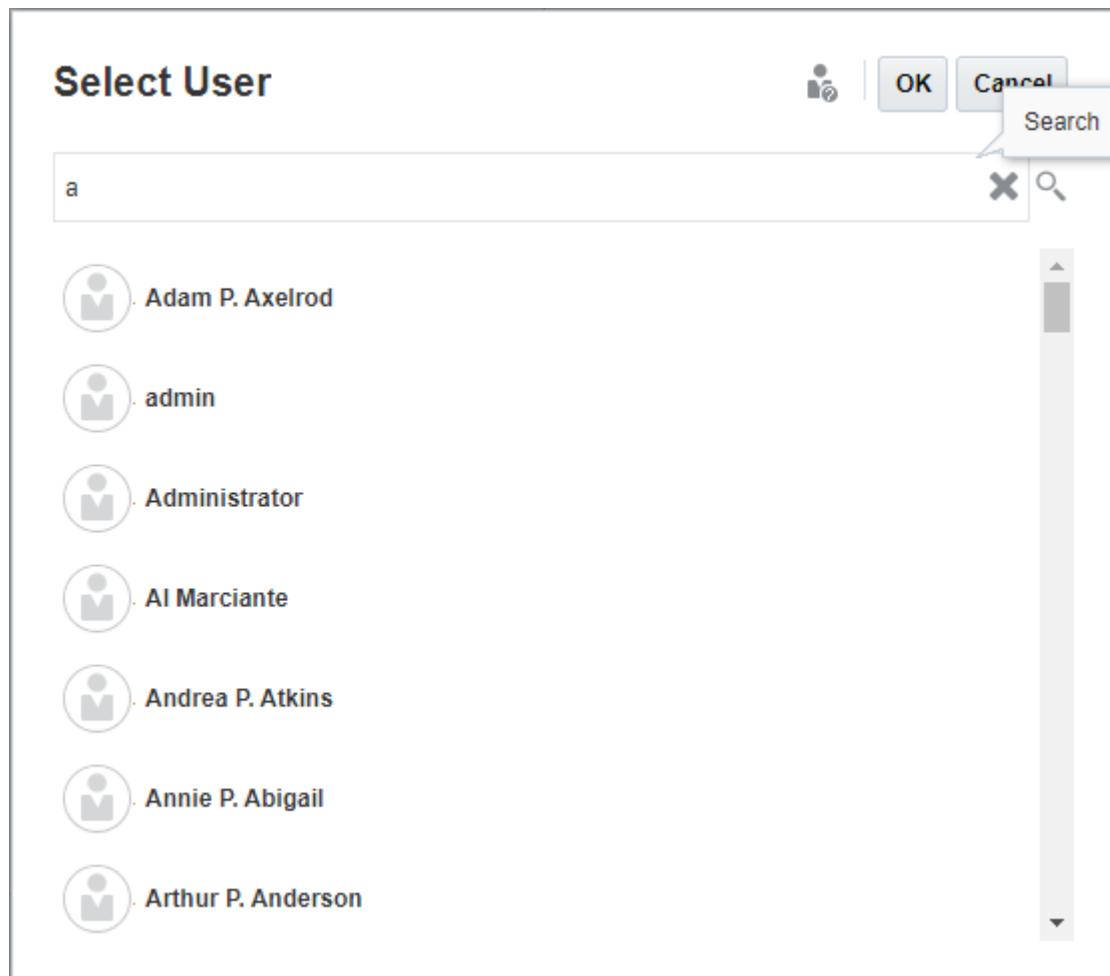
For information on granting access to library artifacts, see this video Granting Access to Library Artifacts.

Setting Default Views for Content Pane Folders and Artifacts

To set a default view for a folder or all folders and artifacts listed in the content area of the library select and clear available column names by selecting the Actions menu and then the **View** menu. See Setting Default Views for Content Pane Folders and Artifacts. For

example, in the figure below Favorite, Type, and Modified On are checked from the View menu, and the respective columns are displayed in the Content area of the library.

> ⓘ **Note**
>
> The list of column names that are displayed for the View menu are determined by artifact, folder type, and a user's privilege.

Figure 7-4   View Menu
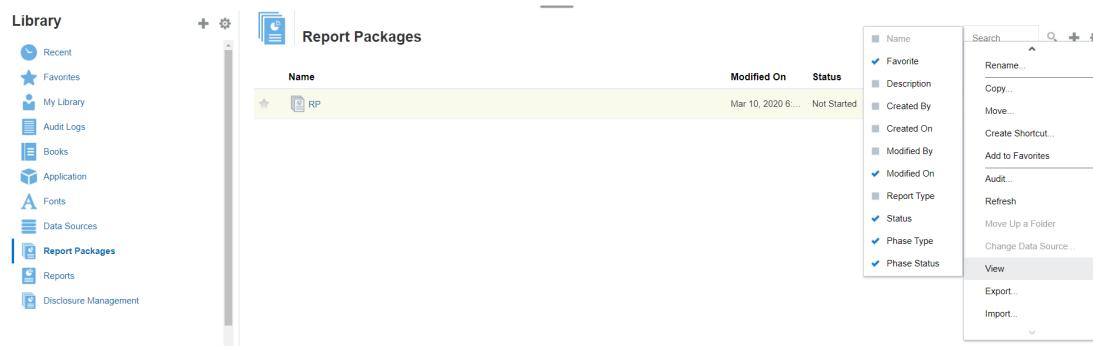
Sorting the Contents of a Folder

You can sort the contents of a folder from the header titles in tables by hovering your cursor in

the header title areas and selecting sort ascending or descending   △▽   icons.

Using Audits

Audits are stored in the system-generated **Audit Logs** folder. It contains system-generated audits for the entire system and audit reports that were run on specific artifacts. Audit-type extracts that can be run on library artifacts and folders by a service administrator. An audit extract allows you to view who made changes to an artifact or folder, when it was changed, and what was changed.

Considerations and actions for audits:

- Actions in the system are captured in a running system audit.

- Users can extract audit entries for folders or artifacts to which they have administrator permissions.

- Only audit log type artifacts are allowed in this folder.

- All users can view this folder, but are only allowed to view audit log artifacts that they created.

- Users with the Service Administrator role can view any audit log artifact.

- Users can't copy or move any artifacts into or out of this folder.

- Users can download an audit log artifact and delete an audit log artifact.

For more information, see Perform an Audit.

Searching the Library

To search for a folder or artifact in the library enter search text in the Search Text box at the top of the content pane and select the search ⌕ icon, see <u>Searching the Library</u>. Search results are displayed in the content area. By default, the search is performed in the current folder. Select **Search Library** to expand your search to include the entire library.

Figure 7-5   Search Result Options

Creating Artifacts in the Library

The library is adaptive and dynamically enforces specific folder rules and actions available on types of artifacts. The actions that are available in the library are location-specific. That is, the actions available to you depend on where in the library you are.

For example, you can create a personal folder to organize artifacts in the library. Click ✚ in the navigation pane or content pane. If you create a folder in the navigation area, the folder is added after the system generated folders but not within. In the content area, you can create a personal folder within any of the following folders that have been selected in the navigation pane to help with organization:

• Favorites

• My Library

• Application

• Any personal folder that you created or can access

Depending on the folder type selected in the navigation pane, you might have more options. For example, if the **My Library** folder is selected, you can inspect and audit.

> **ⓘ Note**
>
> For localized versions of Narrative Reporting, you should not create custom folders spelled the same as a translated system folder. This is due to certain implications when opening the same localized version of Narrative Reporting in English.

Organizing and Maintaining the Library

From the navigation pane, here are some of the actions available to organize and maintain the library using the Action **Library** ＋ ⚙ icon to organize or maintain the library.

> **ⓘ Note**
>
> Some of the following actions might not apply to system-generated personal folders or system personal folders.

- Inspect—Review and change properties, access, view history. See Inspecting Folders and Artifacts for more information.
- Move—Relocate a folder and the contents to a new location.
- Audit—Extract results that can be used to investigate a folder.
- Refresh—Update a folder to view the latest changes to the contents.
- Export—Makes a zip file of a folder and it's contents and adds it to a location of your choosing.

From the **content pane**, depending on the folder type or artifact selected and security applied to the location (folder) or artifact, here are some of the actions available to organize and maintain the library using one of the Action [Search] 🔍 ＋ ⚙ or ▼ icons:

- Download—Move or copy a folder or artifact to a different location.
- Inspect—Review or change; properties and access, and view history for a artifact or folder. See Inspecting Folders and Artifacts .
- Delete Favorites Shortcut—Removes shortcut from Favorites folder.
- Audit—Extract results that can be used to investigate a folder.
- Add to Favorites—Allows an artifact to be displayed in the system-generated Favorites folder.
- Export—Makes a ZIP file of a folder and its contents and saves it where you choose.
- Import—Imports a file from library or locally.
- Copy URL to Clipboard—Provides a direct URL to open a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file.

> **ⓘ Note**
>
> When an artifact is selected from the content pane of the library, it automatically opens the artifact in its native environment. For example, when you select a report package it opens in the report center. You are prompted to open or save third-party documents, such as XLSX files.

Taking Actions for Report Packages, Reports, and Applications

Actions that you can take on Library Artifacts vary.

Report Package

When you select a report package from the Report Packages folder of the library, it opens in the report center. The actions that you can take depends on your role and the status of the report package. See Create Report Packages. Available actions for report packages from the content pane:

- **Open**—Open a Report Package.

- **Edit**—Edit report package in the report center.

- **Inspect**—View and change; properties and view access, and view the history.

- **Copy**—Make a copy of a Report Package.

- **Copy URL to Clipboard**—Provides a direct URL to open a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file.

- **Move**—Move a Report Package to a different folder you have access to.

- **Audit**—Extract audit entries for a report package. See Perform an Audit.

- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See Migrate Artifacts.

- **View in Library Folder** —See the report package in its library location.

> **ⓘ Note**
>
> Available only when **Report Packages** folder is selected.

Reports and Books

When you select a Report or Book from the Reports or Books folder of the library, it opens the report or Book. The actions that you can take depends on your role and the status of the report. Some of the available actions from the content pane:

- **Open**—Open report in Reports.

- **Open As**:
    - Open **Report** in one of these formats: **Excel**, **HTML** or **PDF**.
    - Open **Books** via **Excel** or **PDF** format.

- **Edit**—Edit report in Reports.

- **Inspect**—View and change; properties and view access, and view the history.

- **Copy**—Make a copy of a report.
- **Copy URL to Clipboard**—Provides a direct URL to open a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file.
- **Move**—Move a report to a different folder you have access to.
- **Audit**—Extract audit entries for a report . See Perform an Audit.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See Migrate Artifacts.
- **View in Library Folder** —See the report in its library folder location.

> ⓘ **Note**
>
> Available only when **Reports** folder is selected.

- **Change Data Source** (Reports only)—Select a different source of data for a report.

Bursting Definitions

When you select a bursting definition from the Bursting Definition folder in the library, it opens the bursting definition for editing. Some of the available actions from the content pane:

- **Edit**—Edit Bursting Definition from the library.
- **Inspect**—View and change; properties and view access, and view the history.
- **Copy**—Make a copy of a bursting definition.
- **Move**—Move a bursting definition to a different folder you have access to.
- **Audit**—Extract audit entries for a bursting definition. See Perform an Audit.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See Migrate Artifacts.
- **View in Library Folder** —See the Bursting Definition in its library location.

Data Sources

When you select a data source from the Data Sources folder of the library, it opens the data source for editing. Some of the available actions from the content pane:

- **Edit**—Edit a data source.
- **Inspect**—View and change; properties and view access, and view the history.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See Migrate Artifacts.

Application

When you select the application from the **Application** folder of the library, it opens in the application center. The actions that you can take on the application depend on your role and permissions. Some actions that you can take from the content pane:

- **Inspect**—View and change; properties and view access, and view history from the Inspect dialog.
- **Audit**—Extract audit entries for a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file. See Perform an Audit.

- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose, see Migrate Artifacts.

Rules for this folder are as follows:

- Only the application artifact resides in this folder. Other child folders and artifacts are also allowed.

- All system users can see the folder and have read access. Additional access to its content is through access security.

- Service administrators, application administrator, and library administrator (specifically for creating child folders) have write access to this folder.

For more information on applications and tasks, see Learn About an Narrative Reporting Application.

Migrating Folders and Artifacts

From the navigation or content pane, depending on the folder type or artifact selected and security applied to the location (folder) or artifact, you can do the following using one of the Action ⚙ or ▼ icons:

- Export—Creates a ZIP file of a folder and its contents and you are prompted to select where to export the ZIP file, see Migrating Folders and Artifacts after the export is complete.

  – Select a folder to export, a Select Folder for Export File is displayed.

  – Select a folder for export. You will receive a notification when the export is complete.

  – A ZIP file is created in the folder you selected for export and the filename is prefixed with `Export —`.

> ⓘ **Note**
>
> To perform a successful folder export, the user must have administer access to all artifacts in the folder.

- Import—used as part of the migration process to import a file either from the library or locally, see Migrating Folders and Artifacts for more information on how to complete this task from the library.

> ⓘ **Note**
>
> - You can also migrate **Note Templates**, **Notes**, and **Note Formats** via the Notes Manager. For more information, see Migrating Notes Artifacts from One Environment to Another.
>
> - You can also migrate **Connections** via the **Connection Manager**. For more information, seeWorking with Connections and Remote Libraries in *Learning About Narrative Reporting*.

Inspecting Folders and Artifacts

The inspect dialog box has Properties, Access, and History tabs:

- Properties— Maintain properties as well as view other details for folders and artifacts.

- Access—Administer security, enable permissions from a parent folder, search for users and groups to assign to this folder or artifact and provide administrative, write, and view access. You can also remove user access to folders and artifacts.

- History—Review the history of artifacts and folders.

Figure 7-6   Sample Inspect Dialog Box
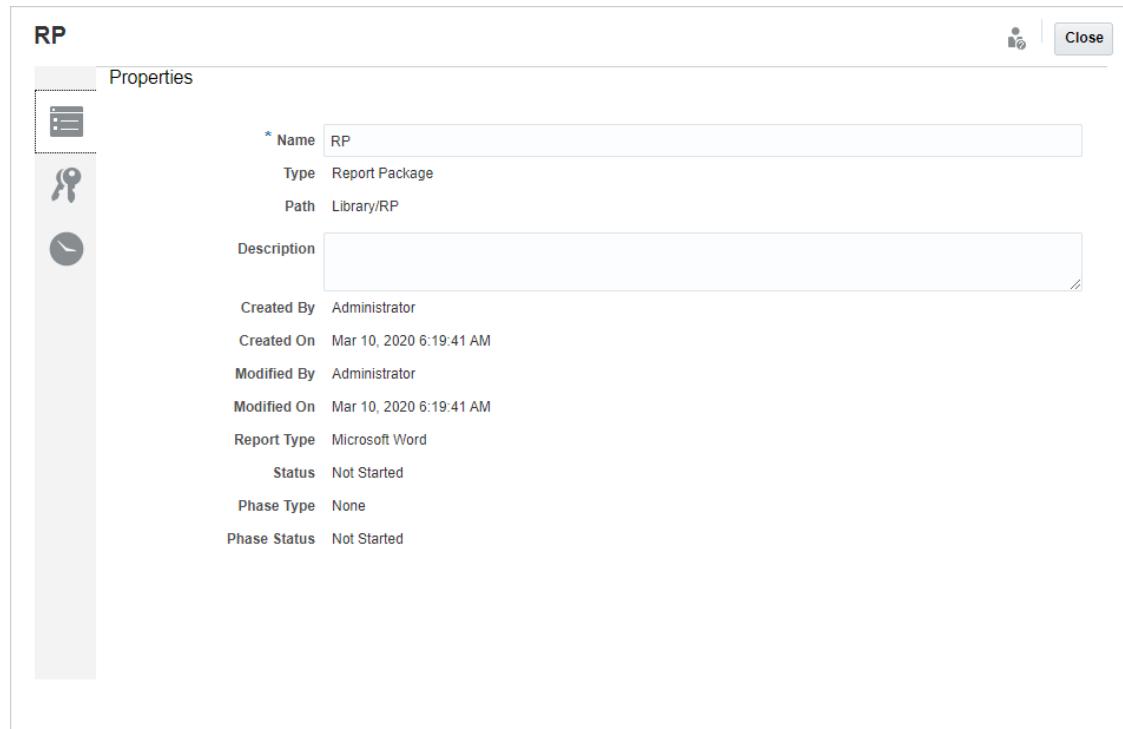
You can access Inspect from the navigation and content panes for folders and artifacts. From the navigation pane, you can review and inspect the properties tab for the following:

- System-generated personal folders:
  - Recent
  - Favorites
  - My Library

- System-generated folders:
  - Audit Logs
  - Report Packages
  - Application

> **ⓘ Note**
>
> For the Application folder, you can also review the Access and History tabs.

In Properties ⊞ ,you can edit names and descriptions of personal folders and folders that you created. You can also view properties related to a folder or artifact.

To assign or view access permissions for a folder or artifact and manage security for a folder or artifact, use the Access tab ⚷. The Access tab is available only for folders and artifacts that you have been given permission. For more information on the Access tab, see Granting Access.

In History 🕐 , you can view the history for a folder or an artifact. If you selected inspect for a folder from either the navigation or content panes, the history tab displays the results for the folder. Only administrators see history for all of the artifacts in a folder.

Copying a URL to Clipboard

The **Copy URL to Clipboard** feature provides the ability to copy the URL of a Library artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file. The URL will launch the artifact directly into a thin viewer or download the third-party file. Once copied, the URL can be distributed so users can easily access the artifact or file via a direct link. It can also be set up as a browser favorite.

The thin viewer that is launched with a native Library artifact allows basic functionality from the **Actions** menu, without the ability to **Save** the artifact. This feature is available in all Library systems and user-created folders (including cards on the **Home** page), and all users with at least View permissions to an artifact can copy a URL.

> **ⓘ Note**
>
> - This feature is not available for multiple selections, only a single selected artifact.
> - This feature does not apply to folders.
> - The user launching the copied URL will need at least View access to the artifact.

Copying a URL for Library Artifacts

To copy a URL, perform these steps:

1. Log into Narrative Reporting Cloud. On the **Home** page, select **Library**.

2. Navigate to a **Library** artifact such as **Report Packages**, **Reports**, **Report Snapshots**, or **Books**. For example, if you select **Reports**, highlight a Report, and then click the **Actions** icon to select **Copy URL to Clipboard**.

3. Paste the URL where needed. Upon clicking on the URL, the Library artifact will be launched in a browser window.

Copying a URL to download the Third-party File

To copy a URL and download third-party files such as an MS Office or PDF file, perform these steps:

1. Log into Narrative Reporting Cloud. On the **Home** page, select **Library**.

2. Navigate to, and highlight, a third-party file and then click the **Actions** icon to select **Copy URL to Clipboard**.

3. Paste the URL where needed. Upon clicking on the URL, a browser window will be launched. Select **Download** to view the file.

8
Service Activity Report

The Service Activity Report covers service and user activity in Narrative Reporting.

Service Administrators can view and download a service activity report through **Tools**. Activity reports are generated each day during the system maintenance time and help a Service Administrator determine how the service is being accessed and used.

The Service Activity Report provides detailed information on the number of users accessing the service by date, the resources that users accessed, duration of user activity, and the action that users performed in the service. This report is automatically generated each day during the system maintenance window and enables Service Administrators to understand Narrative Reporting usage.

Information contained in this report includes:

- Top seven requests and their duration
- Top 30 worst performing actions and their duration
- The browsers and their versions being used

To view or download the Service Activity report:

1. From **Tools**, click **Service Activity**.
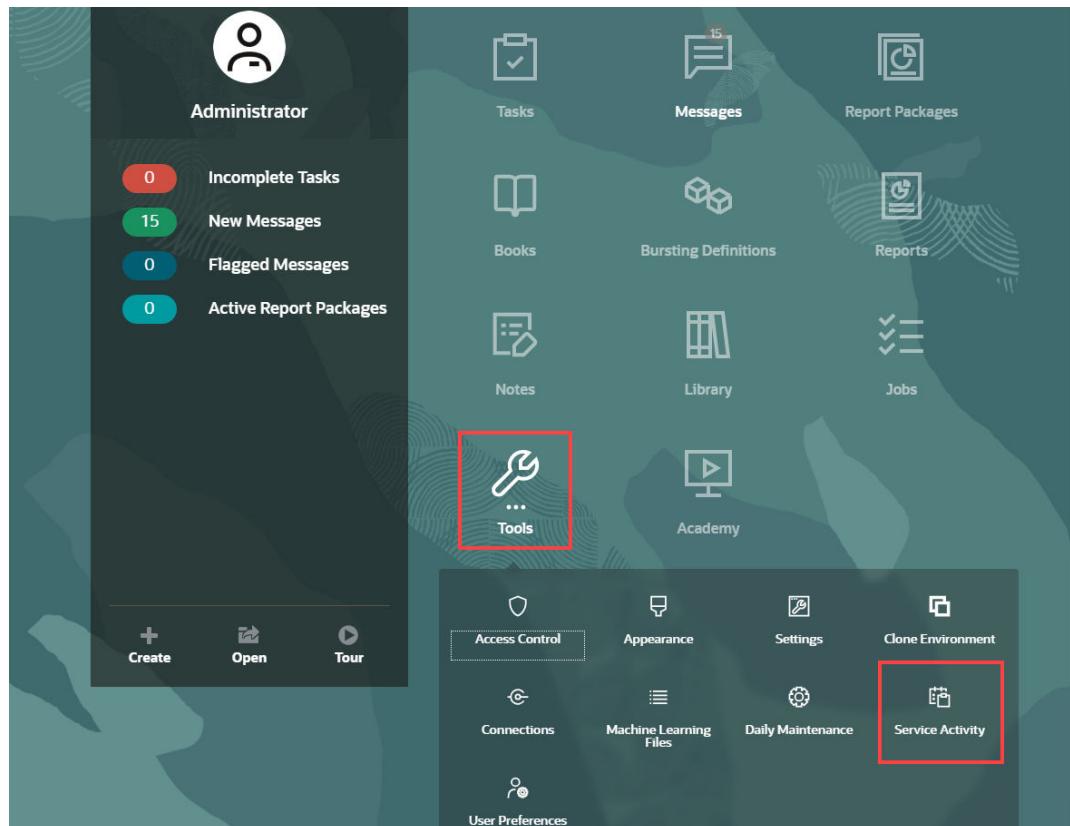
2. You can view or download the report.

Activity Reports

Date and Time	Activity Reports	Access Logs (All times in UTC)
2024-11-27 19:39:03	View	Download

For more information, see Using the Activity Report in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.

Activity Report Retention Policy

Oracle retains Service Activity Reports for the last 60 days only. You can either download the reports from the user interface or set up an EPM Automate automated downloads.

Automating Activity Report Download Using the EPM Automate Utility

You can also automate the downloading of the activity report on a preset schedule using the EPM Automate utility. See Automate Activity Report Downloads to a Local Computer in *Working with EPM Automate* .

9
Using the Appearance Icon

Change the theme of your display or add your company logo or a background image to the Home page.

On the **Appearance** page, you can change the general look and feel of your Oracle Fusion Cloud Enterprise Performance Management environment. Enabling the Redwood Experience not only provides a new application look and feel, but it also includes certain features, such as dynamic tabs, that are not available in the other themes. If you opt not to use the Redwood Experience, you can choose instead from a list of predefined classic themes with different background colors, icon styles, and so on. You can also add a branding logo and background images to the Home page and hide the business process name. For general information about using the Home page, see About the Home Page.

> ⓘ **Note**
>
> You can set your profile picture to display at the top of the Announcements panel of the Home page in **User Preferences**. Click **Tools**, and then **User Preferences**. For more information, see Using the General Tab.

To customize your display:

1. From the Home page, click **Tools**   .
2. From the **Tools** pane. Click **Appearance**.
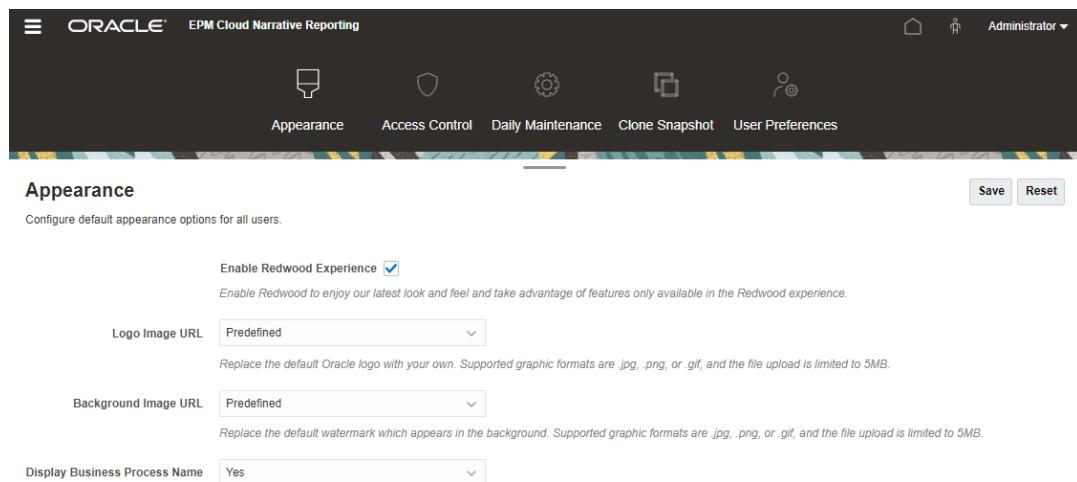
3. Choose from the following customization options:

- **Enable Redwood Experience**—Select to enjoy our latest user experience and to take advantage of features only available in the Redwood experience. If this option is disabled, the **Theme** option is displayed.

- **Theme**—Only available if you clear the **Enable Redwood Experience** option. Select an option from the list of predefined classic themes.

- **Logo Image** and **Background Image**—Replace the predefined Oracle logo and theme-based background image with your own images. Select **File** to choose a locally stored custom image file, or select **URL** to choose a custom image URL. Supported graphic formats are .jpg, .png, or .gif and the file upload is limited to 5MB. Select **Predefined** to choose the theme-based logo and background images.

- **Display Business Process Name**—By default, the business process name is displayed next to the logo on the Home page and on the tab when a browser tab is opened. If **No** is selected, the business process name is hidden on the Home page and **Oracle Applications** is displayed on browser tabs.

4. Click **Save**.

> ⓘ **Note**
>
> - You can't edit or delete predefined themes or create custom themes.
>
> - Both the logo and background image can be customized. Any logo image smaller than 125px wide and 25px high can fit without scaling. For large image logos, Oracle recommends that you maintain a 5:1 ratio so the image is scaled without distortion.
>
>   The default size for the background image is 1024x768. You can use a larger background image, however the image is scaled to fit the resolution setting of your display and the image is centered horizontally. If you want your background image to fit both a browser and a mobile device, Oracle recommends that you size the image so that it fits your biggest screen (or highest resolution device).
>
> - When switching to a new theme, customers using a custom background image might need to ensure that the color contrast for icons and labels is appropriate. To remedy, consider choosing a different theme or a suitable background.

10
Managing User Preferences

Manage your user badge photo, notifications, and other display items by modifying your personal preferences.
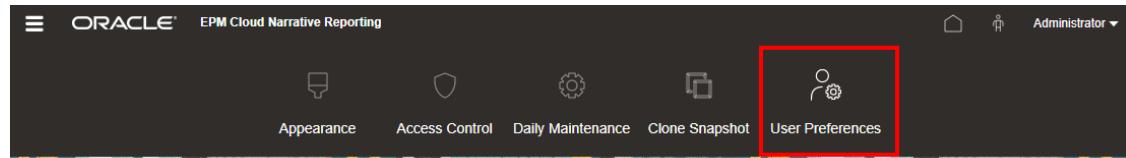
To modify User Preferences settings:
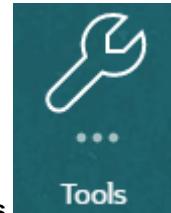
1. From the Home page, click **Tools** .

2. From the **Tools** pane. Click **User Preferences**.

As a user, most of the standard preferences are inherited from the browser or your operating system and set automatically. The following optional items on the General tab should be confirmed when you first start to use the service:

- My Photo—Photograph of user

- Locale—Language and Time Zone

- Show Confirmation Messages—Turn on or off system messages to the user

To modify settings, select **Preferences** from the menu beside your user name from the Home screen. Select one of the **Preferences** , located on the left side, to view and modify settings. If you decide not to keep the changes, see Resetting Preferences below.

User Preferences Icon

The following tabs are available from the Preferences dialog box:

- [Using the General Tab](#)
- [Using the Notification Tab](#)
- [Using the Formatting Tab](#)
- [Using the Library Tab](#)

Using the General Tab

Use the General tab to manage the main preferences such as the photo you want to associate with a user, the language you want to use, and whether or not to display system conformation messages:

- Under **My Photo**, select an image file to upload as a photo.

  Select the **Choose File** button as shown in the figure below to select and upload a photo.
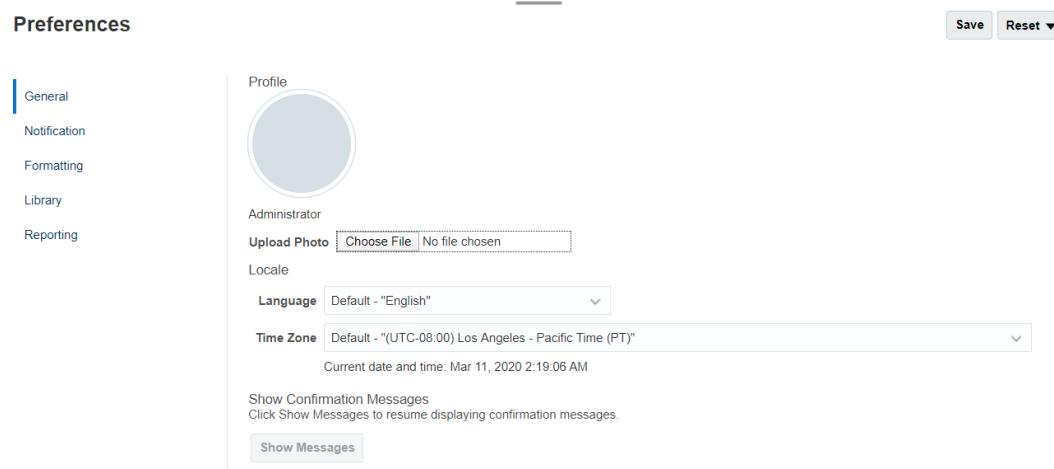
An example of how this photo is used is to display beside a workflow task in a report package.
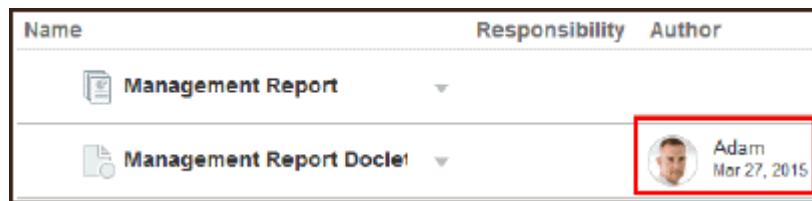
Use the Zoom control slide to size the image. Then, drag the highlighted square area to crop the image for best display or use the buttons. The supported formats for photos are: `jpg`, `.png`, and `.gif`.

- Under **Locale**, the default language for your browser is selected. Text, buttons, and messages are displayed in the selected language. You can select another language, if desired. If you do so, you must sign out and sign in again for the language setting to take effect. Select a time zone that you want to use for displaying time. The current date and time are displayed.

> ⓘ **Note**
>
> If you do not set your language in the **Preferences - General** tab, then the language displayed for the user interface is derived from your Browser settings. For email notifications, the default language is English. If you would like to receive notifications in a language other than English, select the specific language from the **Language** drop down menu (not Default - "*Language*") from the **Preferences - General** tab. For example, if you want Spanish to be your default language, select Spanish from the **Language** drop down menu.
>
> The time zone you select can be different than the time zone you are in.

- Under **Show Confirmation Messages**, if you have turned off the feature to display system confirmation messages, you can turn system confirmation messages on again by selecting **Show Messages**.
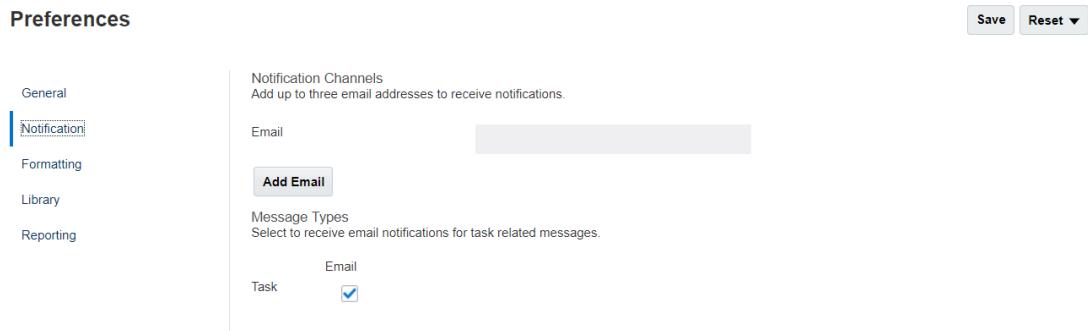
Using the Notification Tab

After the author phase of the report package is started, notifications are sent to advise users that are impacted of any tasks to which you have been assigned, such as creating a doclet, reviewing sections, signing off on a sign off instance, or approving a report package. You can also participate in email discussions related to the report package with other users.

> ⓘ **Note**
>
> Although you have set the Date and Time format in the Preferences – Formatting tab, notifications that you receive may have a different format due to internal architectural constraints.

An email notification channel is automatically assigned to the email address associated with your user profile set by your Identity Domain Administrator. You can add three additional email addresses. You can manage which email addresses receive notifications by selecting or deselecting the Email check box under Message Types.
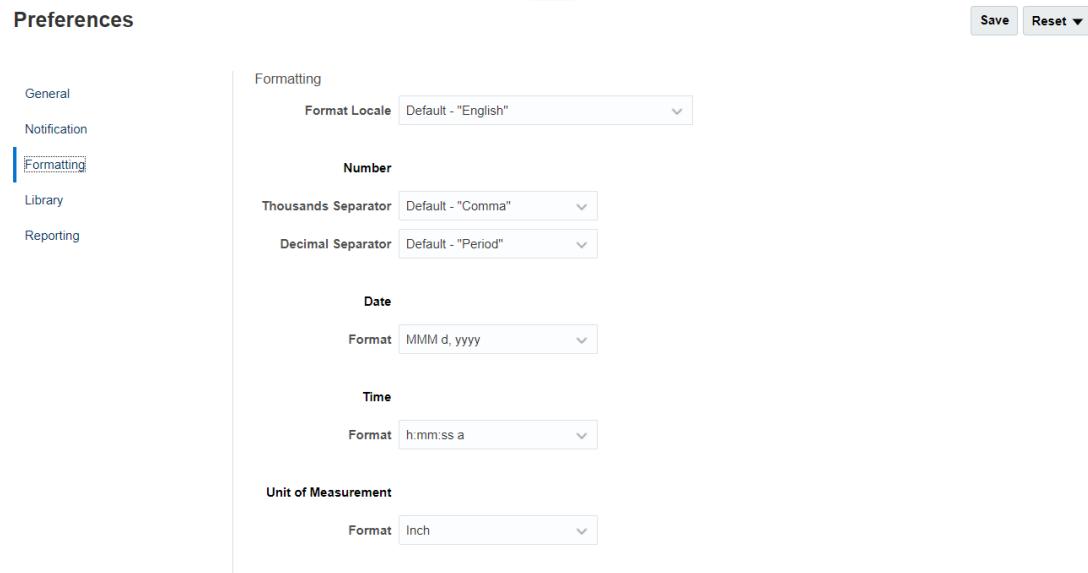

Using the Formatting Tab

You can define the display formats of numbers, dates, and times for your report packages with the settings on this tab as well as the unit of measurement for management reports for page size, margins, and indents.

Preferences

Save Reset ▼

Formatting

Format Locale Default - "English" ⌄

Number

Thousands Separator Default - "Comma" ⌄

Decimal Separator Default - "Period" ⌄

Date

Format MMM d, yyyy ⌄

Time

Format h:mm:ss a ⌄

Unit of Measurement

Format Inch ⌄

General

Notification

Formatting

Library

Reporting

Use the Format Locale menu to select default values for numbers, dates, and times for your location. For example, the "English (United States)" locale formats the thousands separator with a comma, the decimal separator with a period, and the date with the three-letter abbreviation for month, followed by the day and year.

You can either change these settings manually, or you can use the Format Locale menu to select the default values for a different locale. For example, the "Spanish (Spain)" locale formats the thousands separator with a period, the decimal with a comma, and the date with the day, month, and year.

The following commonly used formats are available for thousands and decimals separators:

- **Default** is the value provided from your operating system.

- **Comma** (for example, 100,000 or 95,91).

- **Period** (for example, 100.000 or 95.91).

- **Space** (for example, 100 000 or 95 91).

- **Apostrophe** (for example, 100'000 or 95'91).

Similarly, for Date and Time, select the format that you want to use for display purposes.

> ⓘ **Note**
>
> You can customize your time formats, using the Customize option which presents a text box to enter a custom sequence for your unique requirements using standard time formats.

Date formats:

- M—Month

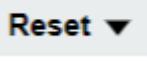- d—Day

- y—Year

- E—Day of the Week

Time formats:

- a—AM/PM

- h—Hour

- m—Minute

- s—Second

- z—Timezone

Using the Library Tab

You can set the maximum number of artifacts that you want to display on your Recent folder in the library. For example, if you select ten as in the figure below, the last ten artifacts you accessed are listed in the Recent folder.
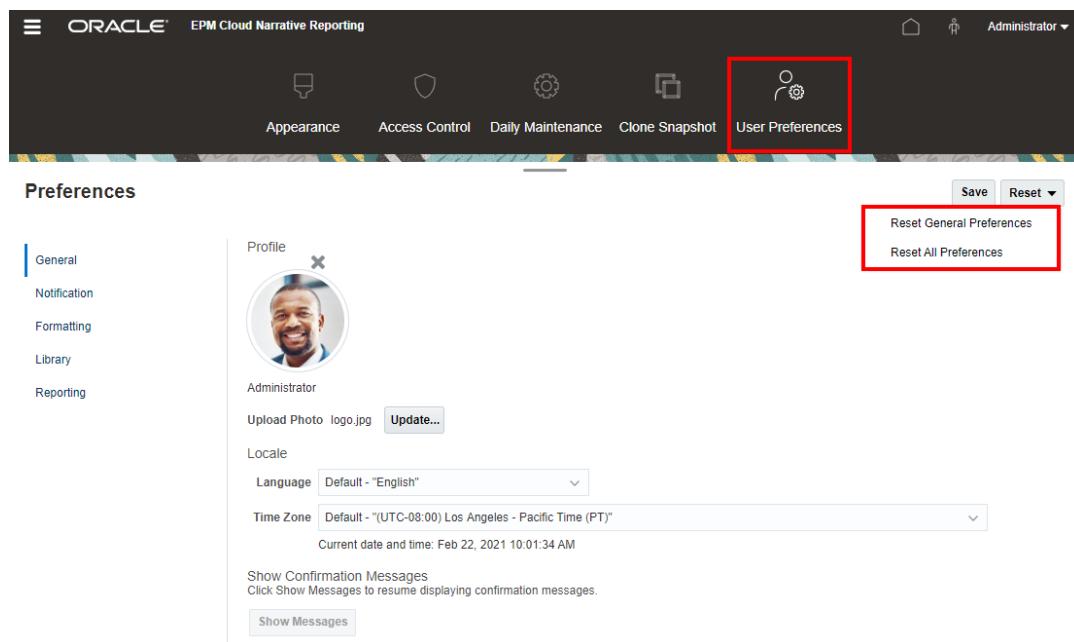

Resetting Preferences

To restore your preferences to the default values, select and use one of the following options:

- **Reset** *name of tab*, in this example **Reset General** to undo any modifications that were applied and restore default values on the Preferences tab.

- **Reset All Tabs to Default** option from any Preferences tab to reset every preference value on all tabs of the Preference dialog box to the original default values from initial use.

> ⚠ **Caution**
>
> All changes, whether applied or not, are removed.

Previewing a Report POV

In Narrative Reporting, after setting the **Preview POV** from the **Reporting** preferences that enables a user to preview the POV of a report. It also requires you to manually execute the report by selecting the **Run Report** button. A report user can also switch the report output type prior to selecting the **Run Report** button.

> ⓘ **Note**
>
> The default option for the **Preview POV** preference is disabled.
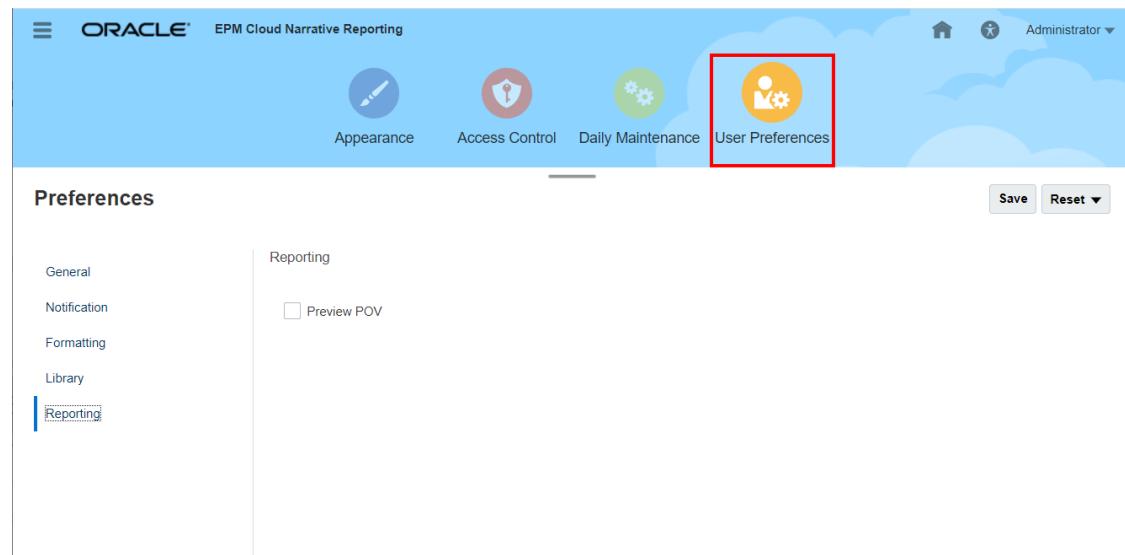
11
Integrating Cloud EPM and Cloud EDM with Oracle Guided Learning

Oracle Guided Learning (OGL) offers a robust framework for developing personalized, guided, and contextual training and user onboarding experiences. Beyond the EPM documentation, this versatile toolset includes the options to create custom process guides, display groups, message guides, smart tips, and more. It offers a comprehensive learning interface tailored to meet specific needs within Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management environments, enhancing user proficiency and operational efficiency. For a detailed overview, see Introduction & Overview of Oracle Guided Learning in *Oracle Guided Learning User Guide*.

The users have access to OGL Console, which allows them to define content that streamlines adoption by enabling them to design and activate in-application guidance tailored to specific workflows and requirements. For instance, you can create OGL guides for your Navigation Flows.

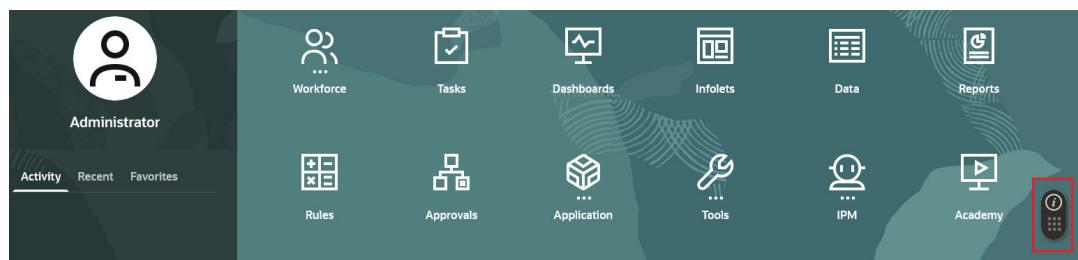**Configuring Settings in the Environment**

Before proceeding, ensure you have an active OGL account and at least one Application ID (App ID) set up. An App ID is a logical grouping of guides (contents). Each App ID can group guides customized for EPM workflows for a particular business process. For setup details, see Getting Started in *Oracle Guided Learning User Guide*.

> ⓘ **Note**
>
> When integrating an OGL App ID to use OGL Help within a Navigation Flow, configure it solely at the source environment. OGL setup is unnecessary on any of the connected environments.

Follow these steps to integrate an OGL application into your environment:

1. Narrative Reporting and Cloud EDM only: Navigate to **Tools**, then **Settings**

2. Enter the following Oracle Guided Learning Settings:

    - **Application ID**

    - **Server URL** - Depending on the location of your environment, enter the URL:

        – NA: `https://guidedlearning.oracle.com`

        – EMEA: `https://guidedlearning-emea.oracle.com`

        – APAC: `https://guidedlearning-apac.oracle.com`

3. Click **Save**. You'll need to log off and log back in for the OGL widget to display on your screen.

Configuring settings in the OGL Environment

Once the OGL Application is integrated into the Cloud EPM and Cloud EDM environments, the OGL widget will be accessible to the users. Only published guides are visible since the domains by default is configured to Production, which hides the guides that are in development mode.

To allow users to view both published and in-development guides from the environment, change the application's settings as follows:

1. Access the OGL Console application settings. See OGL Console Left Panel in the *Oracle Guided Learning User Guide*.

2. Navigate to the **Domains** tab.

3. Select the **Environment** to **Development** to display all guides.

4. Check the domain status to **Enabled.**

> ⓘ **Note**
>
> Please make sure to complete the domain entry configuration correctly so that OGL content displays correctly on all applications. Remember OGL content won't appear for domains not listed in OGL Cloud Configuration.

5. Click **Save Domain**.
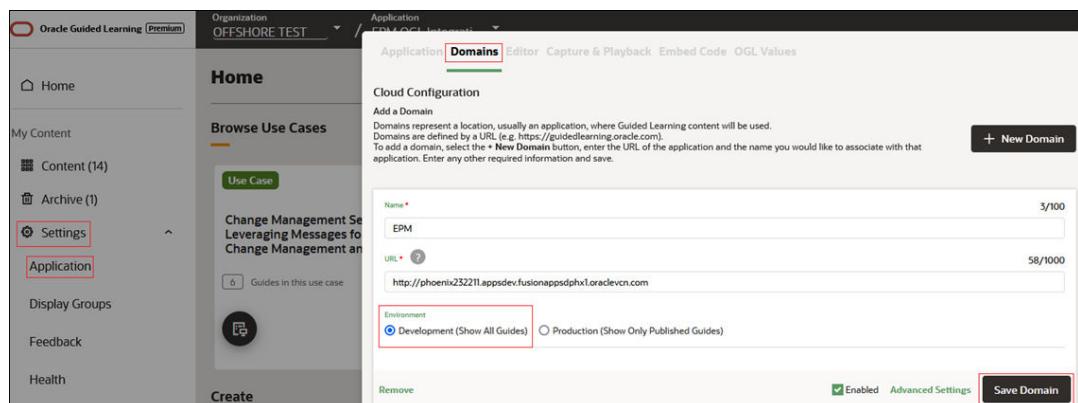
Key Considerations

• Cloud EPM and Cloud EDM environments are required to perform daily maintenance. Oracle generates a maintenance snapshot, known as an Artifact Snapshot, which captures existing artifacts and data. It's important to note that OGL configuration in Cloud EPM and Cloud EDM is not integrated, and therefor is not included in the Artifact Snapshot. For

more information, see [Exporting OGL Guide Content](#) in *Oracle Guided Learning User Guide*.

- If the Cloud EPM and Cloud EDM environments have Network Perimeter setup, the IP address of the OGL server or the outbound IP address of the region that hosts the OGL server must be added to the Network Perimeter. See Outbound IP Addresses of Cloud EPM Data Centers and Regions in *Operations Guide*.

Enabling Context-Based Activation of OGL Guides in Cloud EPM

Oracle Guided Learning (OGL) seamlessly integrates with applications to capture their workflows, enabling precise, in-application guidance tailored to user needs. The **Advanced Setting** feature in the **OGL Editor** further enhances this capability by allowing Service Administrators to:

- Configure conditional activation based on Navigation Flow name, cluster ID, card ID, tab, or sub-tab ID.
- Incorporate dynamic content and define custom triggers for guide activation.
- Control visibility and placement of guidance on-screen.

This flexibility ensures that OGL guidance can be fine tuned to meet diverse business requirements within the application environment. Upon integration, Oracle Fusion Cloud Enterprise Performance Management offers the following attributes for activating guides conditionally on pages or components, allowing advanced settings for context-based activation of OGL Guides in the Cloud EPM environments:

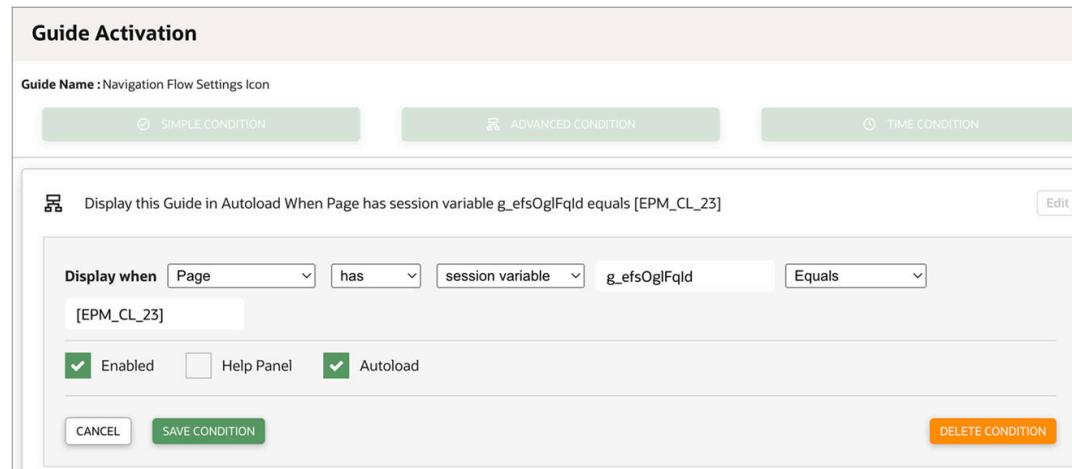**Attributes for Context-Based Activation in Cloud EPM**

For more information on updating attributes, see [Working with the Editors](#) in *Oracle Guided Learning User Guide*.

- **Activating Guides by Navigation Flow Name**: Use the attribute `g_efsOglNavigationFlowName` to activate a guide for specific Navigation Flow. For instance, the following condition activates a guide for all pages within the "Financial Flow" Navigation Flow.

- **Activating Guide Names by Page ID:** The attribute `g_efsOglFqId` enables activation at various levels within the navigation hierarchy:
  - `g_efsOglFqId/<SUB_TAB_ID>` - Activates the guide on the specified sub-tab.

- `g_efsOglFqId/<TAB_ID>/<SUB_TAB_ID>>` - Activates the guides on a sub-tab within a specific tab.
- `g_efsOglFqId/<CARD_ID>/<TAB_ID>/<SUB_TAB_ID>` - Activates the guide on a sub-tab within a tab within a specified card.
- `g_efsOglFqId/<TAB_ID>` - Activates the guides for all the pages within the specified tab.
- `g_efsOglFqId/<CARD_ID>` - Activates the guides for all the pages within the specified card.
- `g_efsOglFqId/<CLUSTER_ID>` - Activates the guides for all the pages within the specified cluster.

For instance, the following activation condition for OGL enables a guide for all pages defined in the cluster ID EPM_CL_23.

12
Uploading Additional Fonts

Oracle recommends that as an initial startup task, the service administrator uploads the TrueType fonts that your company uses to produce reports. This will ensure the most accurate rendering of the documents when viewing on the web.

Without these uploaded fonts, Narrative Reporting uses a font mapping utility that attempts to properly render the report package on the web and to properly render reports imported or exports to Excel. However, this mapping may introduce variances in the report layout when displayed on the web. Therefore, we highly recommend that you upload your TrueType fonts to the server when you set up the service, as well as ensure that the same fonts are deployed to users' local machines. If using the supplied Linux fonts when creating reports (for example, Liberation Sans, Liberation Serif, and so on) results in unexpected rendering or layout issues, Oracle recommends that you utilize your own TrueType fonts instead by uploading them to the Narrative Reporting service.

The Linux-based fonts that are included on the Narrative Reporting server are mapped to the following Microsoft-based fonts:

Table 12-1   Review the following Microsoft-based fonts are mapped to the Narrative Reporting Linux server

Linux fonts included with Reports	Mapped Microsoft fonts
Liberation Sans (Arial)	Arial
Liberation Serif (Times New Roman)	Times New Roman
Liberation Mono (Courier New)	Courier New
Albany (Japanese)	MS Mincho
Albany (Korean)	Batang
Albany (Simplified Chinese)	SimSun
Albany (Traditional Chinese)	MingLiU

> ⓘ **Note**
>
> The system is not redefining or changing the fonts leveraged in the report, the font mapping only applies to the report package rendered on the web and the report exported to Excel.

The service administrator can upload individual font files or zipped files containing multiple TrueType fonts to the **Fonts** folder in the library. You can also organize your font files by creating sub-folders in the Fonts directory.

The font file must be a TrueType font and cannot already exist in the font folder structure. If you do upload a duplicate font, you will receive an error message indicating the duplicate (or invalid) font file. If you uploaded multiple fonts in a zip file, all other valid files will be loaded.

When uploading a font, you must ensure whether that font has any variants such as **Regular, Italic, Bold,** and **Bold Italic** fonts which are part of the font family itself. In this case, you may

want to upload the complete font family as a zip file instead of uploading the regular font file that will be used within the system.

For more details about font family and its variants can be found here [Microsoft Font library](#).
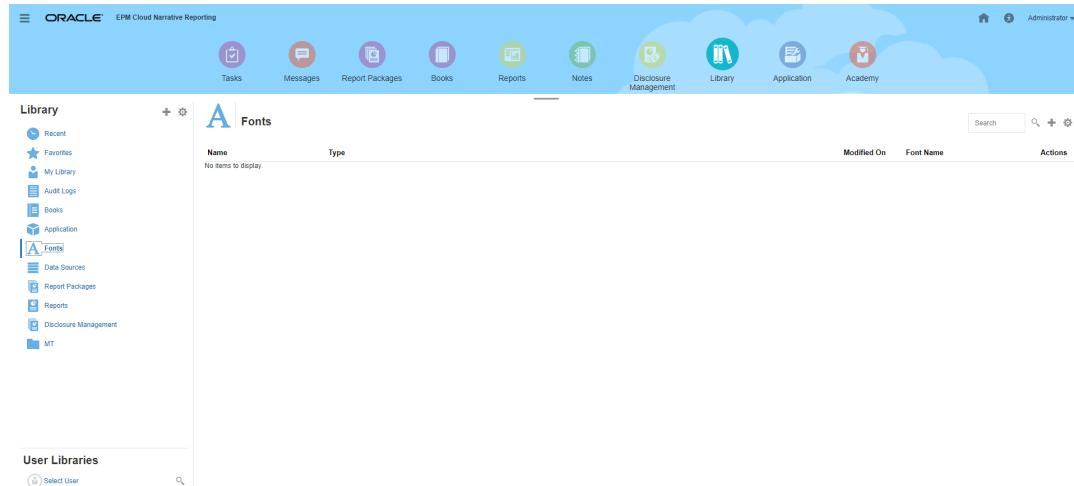
> ⓘ **Note**
>
> You can migrate font files like any other artifact from one environment to another or within the same environment. You can migrate using the export, download, and import functionality in the library. See Migrate Artifacts.

To upload additional font files:

> ⓘ **Note**
>
> When uploading additional fonts to Narrative Reporting, you are responsible for the proper licensing of the fonts from the font vendor. For example, if you upload the Microsoft font "Times New Roman," you must obtain the licensing from Microsoft to do so. Uploading a Microsoft font sourced from a Windows machine is not typically covered by the legal use agreement from Microsoft.

1. Locate your additional TrueType fonts. If more than one is to be uploaded, create a zip file.
2. From the Home Page, select **Library**.

3. Select the **Fonts** folder.

4. From **Create** ➕ next to the Search icon, select **Upload File**.

5. Click **Choose File** to navigate to the TrueType fonts that you want to upload, and then click **OK**.

> ⓘ **Note**
>
> Be aware that it may take some time to perform the upload depending on the size of the font file.

Upload File　　　　　　　　　　　　　　　　　　OK　Cancel

Name　extra_fonts.zip　Update...

Description　Additional Fonts
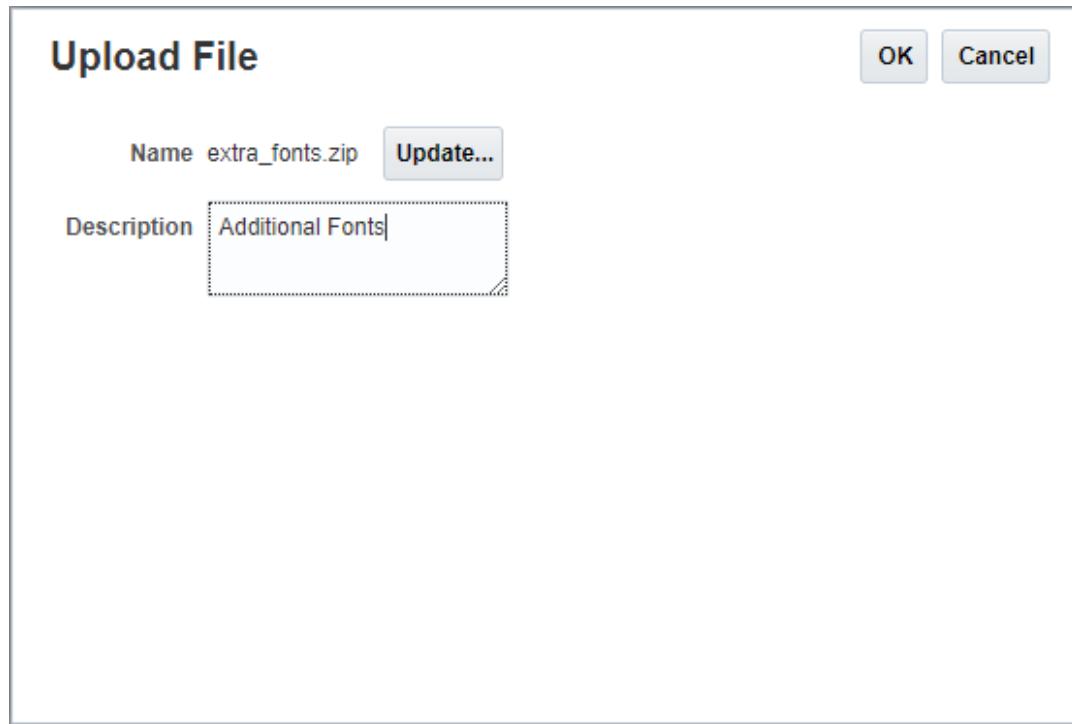
The zip file is unzipped, and all the uploaded fonts are automatically extracted to the Fonts folder. These fonts are now available when displaying your documents. Any custom fonts uploaded also appear in the font list for management reports. See the Designing With Management Reporting for Oracle Enterprise Performance Management Cloud and Working with Management Reporting for Oracle Enterprise Performance Management Cloud Guides.

> ⓘ **Note**
>
> For PowerPoint report package types, custom fonts take effect after the next scheduled daily maintenance. See Setting Service Maintenance Time.

> ⓘ **Note**
>
> Modifications to your service's uploaded fonts may temporarily cause Embedded Content images in PowerPoint to appear with overlapping or misaligned text when refreshed. This issue will be corrected after the next Daily Maintenance window. To expedite the resolution of this issue, your service administrator can use the `runDailyMaintenance` EPM Automate command.
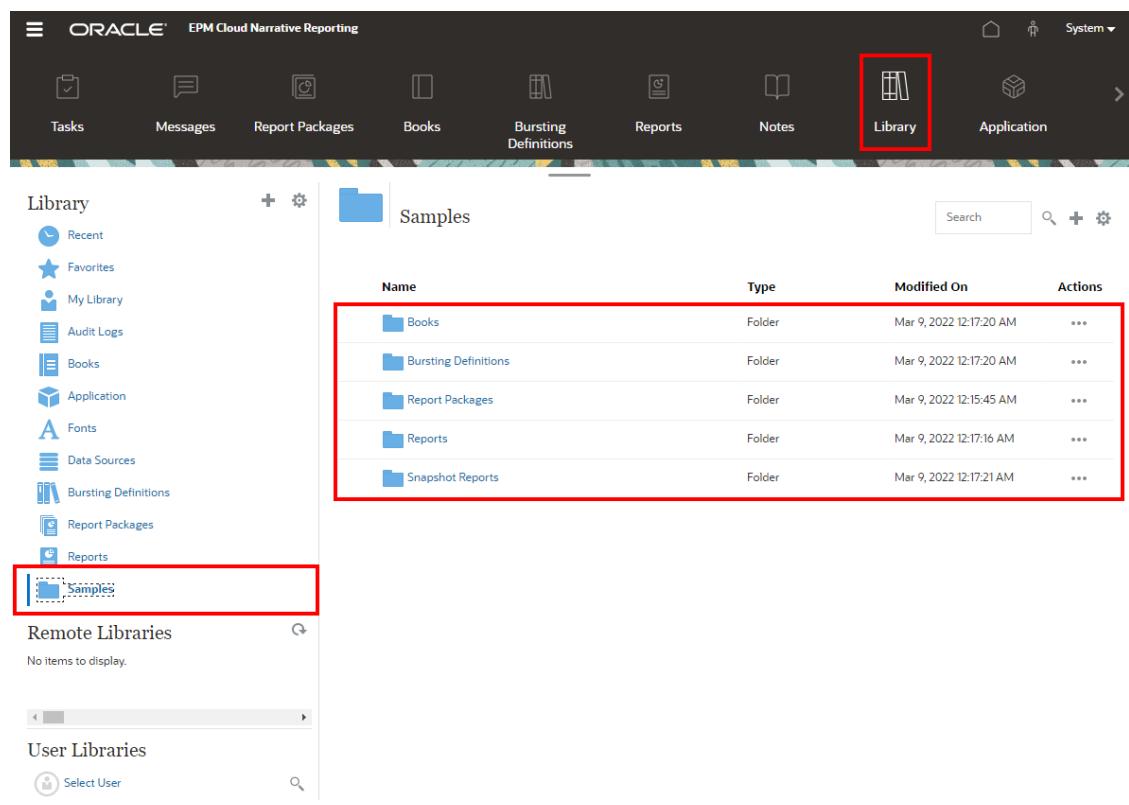
13
Installing Samples

Narrative Reporting provides samples to help you learn how to use report packages, applications, and management reports. You can use:

- **Sample Report Packages**, with MS Word, PowerPoint and PDF report package types, can help you become familiar with the report package functionality and content such as the report center, doclets, phases, embedded content and variables, where applicable. For all three sample report packages types, phases and user assignments have not been enabled and defined, however after importing the sample files, a report administrator can enable phases, define dates and assign users. To learn more how to use the sample report package, see Working with the Sample Report Package.

- **Sample Reports** can help you become familiar with the functionality of Reports.

- **Sample Books** can help you become familiar with the book functionality.

- **Sample Bursting Definitions** can help you become familiar with the bursting functionality.

Upon installation, all sample content will be automatically deployed and imported when you perform a **Get Sample Content** action from the **Downloads** menu. The **Samples** folder will be organized with subfolders for each artifact type (Report Packages, Reports, Snapshot Reports, Books, and Bursting definitions).

Installing samples

To work with sample files, a service administrator must install the samples from the User Menu.

To install samples:

1. On the Narrative Reporting Home page, access **Settings and Actions** by clicking your user name at the top right corner of the screen.

2. Select **Downloads**.
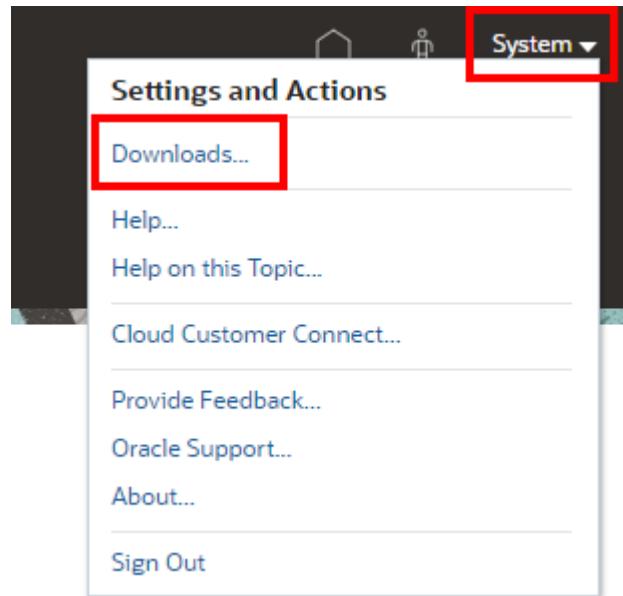
3. In the **Downloads** page, click **Get Sample Content**.

> ⓘ **Note**
>
> The sample application will be loaded and deployed and all sample library artifacts will automatically imported behind-the-scenes.

For Standard and Enterprise licenses, a sample application is generated and is populated with one model, seven dimensions, and corresponding data, upon installing samples. The sample application is a source for reports and report package reference doclets. It can also be queried in Oracle Smart View for Office. The sample application is automatically deployed while performing a **Get Sample Content** action.

For old Enterprise Performance Reporting SKUs (pre-June 2019), if you have deployed a custom application, the sample application will not be deployed. In this case, the reports and report package reference doclets will not be refreshable, since the sample application will not exist. If a custom application does not exist, the sample application will be deployed.

For more information, refer to the following topics:

- Reviewing the Sample Report Packages
- Reviewing the Sample Reports
- Reviewing the Sample Books
- Reviewing the Sample Bursting Definition Files

14
Working with the Job Console

The Narrative Reporting Job Console provides the ability to schedule various Jobs, allowing you to automate service activities, such as executing bursting definitions or refreshing report package data sources.

The Job Console also allows you to define additional job owners for a scheduled job.

> ⓘ **Note**
>
> You can assign only individual users as job owners, groups cannot be added.

You can schedule Jobs to run immediately or at a later date. You can also view and manage pending jobs and recent activity in the Job console.

> ⓘ **Note**
>
> **Bursting Definitions** should not be scheduled to run concurrently or in rapid succession. Adequate wait time between executions is necessary to prevent excessive use of server resources, which can degrade service response times—especially for bursting definitions that require longer processing times. In addition, parallel bursting definition executions by the same user can also affect performance due to resources being shared between executions.

Related Topics

- [Accessing the Job Console](#)
  To access the Job Console, from the Narrative Reporting Home Page, select **Jobs**.

- [Scheduling Jobs](#)
  Job scheduling is the process of assigning tasks at a predetermined time or when the appropriate event occurs.

- [Managing Jobs](#)
  This feature enables you to view and manage pending jobs and recent activity in the Narrative Reporting Job console.

- [Security - Roles and Access for the Job Console](#)
  This section provides controlled access permissions, based on a user or group role, to the Narrative Reporting Job console content and functionality.
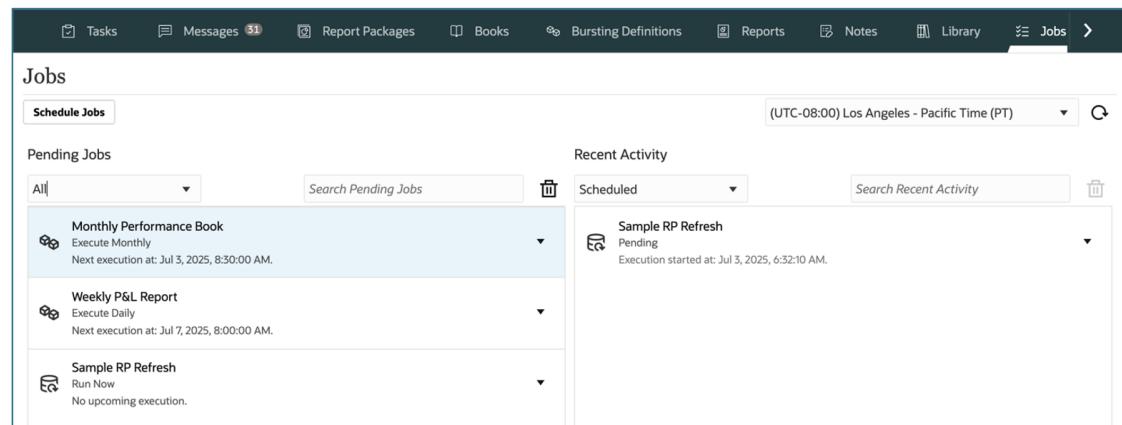
Accessing the Job Console

To access the Job Console, from the Narrative Reporting Home Page, select **Jobs**.

To access the Job Console:
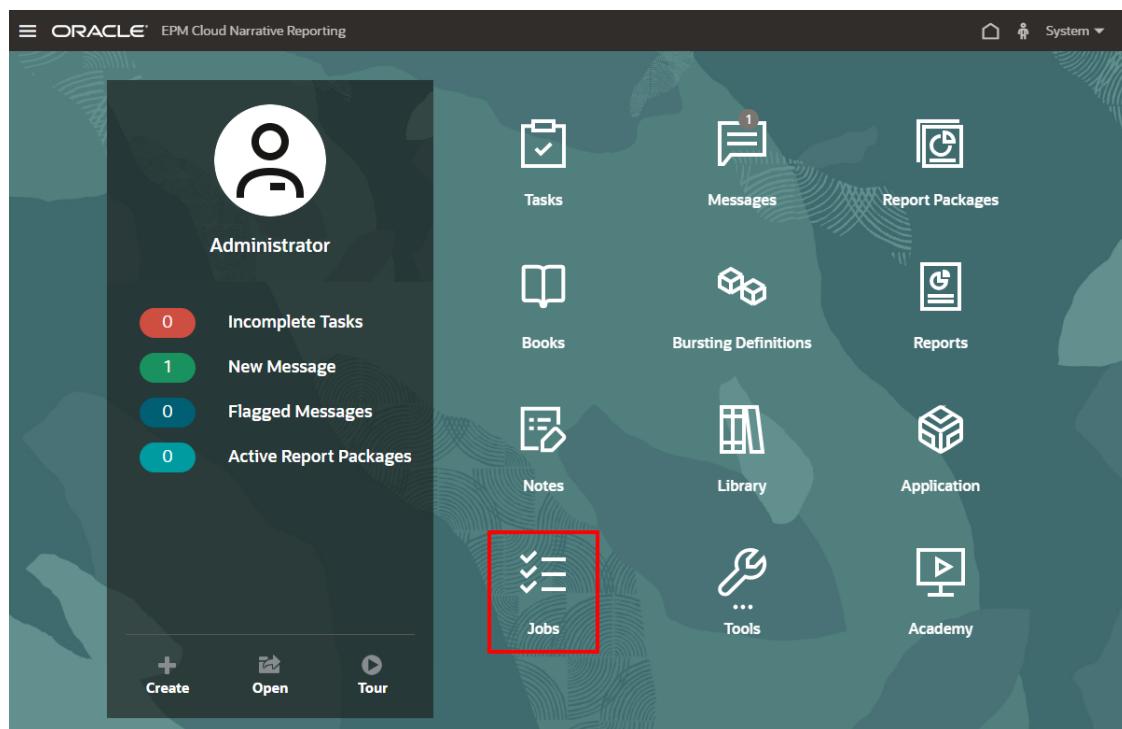
The Job Console has the following areas:

- **Schedule Jobs** – schedule a new job.

  Note: Only bursting definitions in the Narrative Reporting Library can be selected for scheduling. Remote library bursting definitions cannot be selected.

- **Pending Jobs**– lists and maintains all current and pending jobs, including recurring scheduled jobs.

  – You can filter the display to show **Pending** jobs (waiting to be executed) or **All** jobs (includes completed jobs).

  – You can filter the list of pending jobs by Job name by entering filter criteria text into the search text box.

  – You can **Delete Scheduled Jobs**, which deletes selected scheduled jobs in **Pending Jobs**.

- – For each pending job, you can either **Edit**, **Copy** or **Delete** a selected pending job. You can edit a completed job to run it again, editing the scheduling timing and recurrence.

- **Recent Activity**– lists and maintains all recent jobs, including bursting definitions and report package data source refreshes executed by a scheduled job and internal jobs such as import/export artifacts.

  - – You can filter the display between **System** (such as import/export artifacts), **Scheduled** (bursting definitions and report package data source refreshes) and **All.**

  - – You can filter the list of pending jobs by Job name by entering filter criteria text into the search text box.

  - – You can **Delete Activities**, which deletes selected jobs in the **Recent Activity** panel.

  - – For each recent job, you can either view the execution **Details** or **Delete** a selected recent job.

- **Time Zone** – select a time zone to view the scheduled jobs. The default time zone for a user in the Job Console is the time zone selected in user preferences.

- **Refresh** – refreshes both the **Pending Jobs** and **Recent Jobs** list.

Scheduling Jobs

Job scheduling is the process of assigning tasks at a predetermined time or when the appropriate event occurs.

To schedule a job:

1. From the Narrative Reporting Home page, select **Jobs**, and then click **Schedule Jobs**. the **Schedule Jobs** wizard will open.

2. Specify the following in the **General** area:

   - The **Job Name**, which identifies the Job in the Job Console.

   - The **Job Type**, select either **Execute Bursting Definition** or **Refresh Report Package Data Source**.

   - To set the schedule timing, select one of the options below:

     - **Run Now**

       OR

     - Select a **Recurrence**, to define how routinely you want the Job to run. If you selected a scheduled frequency, select a start date and time and an end date and time, as well as a time zone.

   - **Optional**: You can define additional Job owners for the scheduled Job. For additional Job owners, select [icon] and then add the user as a job owner in the **Manage Users** dialog box.

   > ⓘ **Note**
   >
   > You can assign only individual users as job owners, you cannot add Groups.

3. Click **Next**.

4. In **Job Parameters**, provide the execution **Parameters** for the selected **Job Type**:

   - For **Execute Bursting Definition**, select a bursting definition from the **Library**.

- For **Refresh Report Package Data Source**:

  – For **Report Package**, select a report package from the **Library**.

  – Select if you want to **Refresh All Data Sources** or select a specific data source to refresh under **Select Data Sources**.

5. Click **Next**.

6. Review your choices. If satisfactory, click **Finish**. The new job will be added to **Pending Jobs**. If the job was scheduled to **Run Now**, it will appear directly as a **Recent Activity**.

   To edit or delete a job after scheduling it, see Editing and Deleting Jobs

Managing Jobs

This feature enables you to view and manage pending jobs and recent activity in the Narrative Reporting Job console.

Editing and Deleting Jobs

You can edit the schedule for pending jobs and delete pending and completed jobs. You can't modify or delete jobs that are still processing.

To edit jobs:

1. From the Narrative Reporting Home page, select **Jobs**.

2. In **Pending Jobs**, to change when a job runs, click the **Actions** menu ▼ next to the desired job, then select **Edit** to open **Schedule Jobs** and modify the schedule.

> ⓘ **Note**
>
> When changing the frequency of a job, the job will not run at the new frequency until the next time it runs at the previous frequency; for example, if the job is set up to recur daily and you change the frequency to hourly, the job won't start running at the new hourly frequency until after the scheduled daily job runs the next day. If you want the job to begin running at the new frequency sooner, Oracle recommends that you delete the scheduled job and create a new one.

To delete jobs:

1. From the Narrative Reporting Home page, select **Jobs**.

2. In **Pending Jobs**, to delete a job, click the **Actions** menu ▼ next to the desired job, then select **Delete**.

Duplicating Jobs

You can copy a job from **Pending Jobs** and edit all its scheduling and other settings.

To copy a job:

1. From the Narrative Reporting Home page, select **Jobs**.

2. In **Pending Jobs**, to copy a job, click the **Actions** menu ▼ next to the desired job, then select **Copy** to open **Schedule Jobs** and modify the schedule.

NOTE: It is recommended to change the copied job name to distinguish it from the source job name.

Viewing the Detailed Status of Completed Jobs

You can view the detailed status of a completed job in the **Recent Activity** panel.

To view a completed job's details:

1. From the Narrative Reporting Home page, select **Jobs**.

2. In **Recent Activity**, to view the details of a job, click the **Actions** menu [▼] next to the desired job, then select **Details**.

3. The **Details** has three sections:
   - **Job Result**: displays the Summary and Details for the job completion.
   - **Job Configuration**: displays the **Job Name**, status and start and end dates.
   - **Job Parameters**: displays the bursting definition or report package name.

Security - Roles and Access for the Job Console

This section provides controlled access permissions, based on a user or group role, to the Narrative Reporting Job console content and functionality.

This console provides controlled access when security is enabled.

All user roles can access the Job Console in Narrative Reporting, but access to jobs is restricted by user role. The following are the access permissions, based on a user or group role, to the Job console content and functionality.

Table 14-1   Security Role and Access

| Role	Job Console Access
Service Administrator	Access all Job Console functionality, can create new Jobs, edit and view all Jobs.
Power User/Report Administrator	Access all Job Console functionality, can create new Jobs, edit and view only the Jobs created by the user and not all Jobs.
Viewer/User	No access to any Job Console functionality or Jobs.

15
Learning About Security

In this topic, you will gain a high-level understanding of the layers of security that you can implement in Oracle Narrative Reporting Cloud Service to ensure that each user has the appropriate access to information and system administration. The three layers of security:

*   [System Level Security](#)
*   [Artifact Level Security](#)
*   [Data Level Security](#)

Levels of Security

Oracle Narrative Reporting Cloud Service security is achieved through a combination of system level roles, corresponding artifact level permissions, and data security:

ENTERPRISE PERFORMANCE REPORTING SECURITY

System-level Roles

Artifact-level Permissions

Data Security
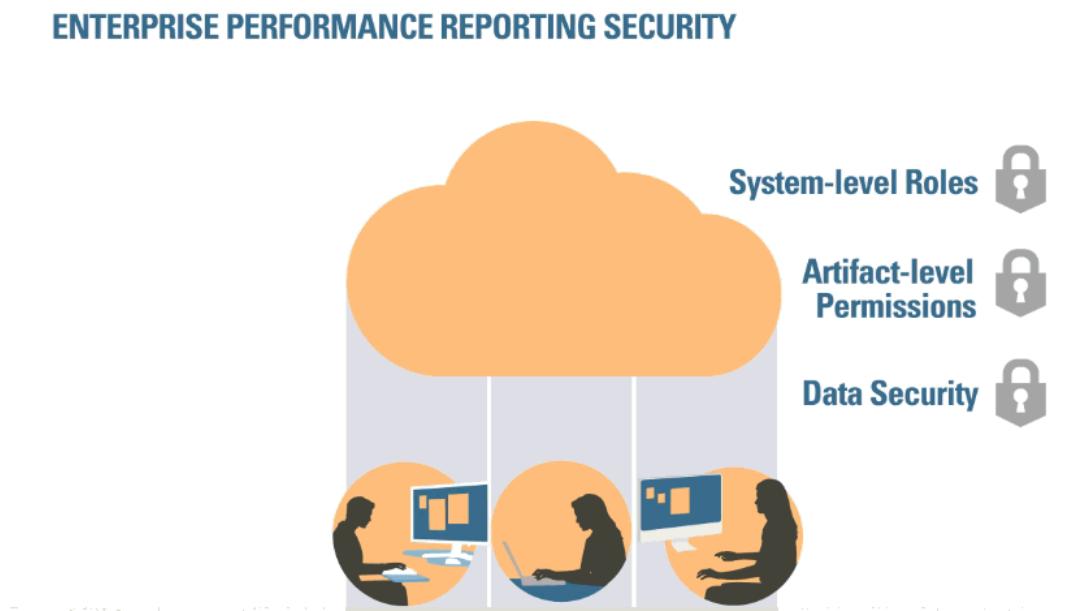
*   System Level security – Restricts Oracle Narrative Reporting Cloud Service to users that are created by the Identity Domain Administrator in Oracle Cloud, My Services and assigned at least one role.
*   Artifact Level security – Restricts access to report packages, third-party documents, folders, and the application by granting permissions to users and groups.
*   Data Level security – Identifies the users and groups that have specified access to data.

System Level Security

The first level of security is created at the Oracle Cloud, My Services Users level when the Identity Domain Administrator for your company creates users and assigns roles as outlined in: Learning About Security.

New Narrative Reporting Subscriptions to Support Standard Predefined Roles

New subscriptions of Narrative Reporting will support standard EPM Cloud predefined roles: Service Administrator, Power User, User, and Viewer.
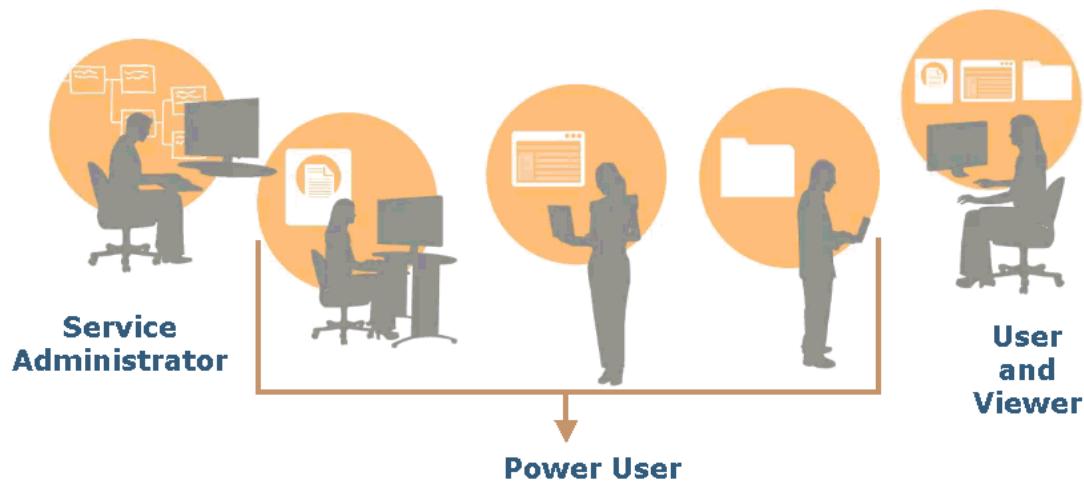
Service Administrator

Performs all functional activities, including granting predefined roles to Narrative Reporting users.

Power User

Creates Report Package, Reports definition, Book and Bursting definition.

Creates folders, including root-level folders.

Creates and maintains all artifacts, such as models, dimensions, and data grants.

User

Views Narrative Reporting artifacts to which the user has access.

Viewer

Views reports and other artifacts to which the user has access. This is the minimum role required to sign in to and use an environment.

Legacy Narrative Reporting (Enterprise Performance Reporting Cloud) Predefined Roles

Oracle Narrative Reporting Legacy (Enterprise Performance Reporting Cloud) Environments includes five predefined roles:

Service Administrators
Create and maintain all aspects of the system, except for user management

Reports Administrators
Create Report Packages, Reports definitions, Books and Bursting definitions

Application Administrators
Create and maintain all application artifacts, such as applications, models, dimensions, and data grants

Library Administrators
Create folders, including root-level folders

Users
The minimum role required to log in to and use the service, and to view artifacts to which the user has access

Artifact Level Security

The second level of security is the artifact level, in which access permissions are granted to users, groups, or users and groups for:

• Report packages

• External Third-Party Content such as PDFs, images and Microsoft Office documents

• Folders in the library

• An application

• Management Reports

When you see the keys in Oracle Narrative Reporting Cloud Service, you can grant access to users, groups, or users and groups.

When you create an artifact (report package, folder, application), you automatically have permission to edit, delete, and maintain that artifact. In addition, you can give other users, groups, or users and groups the ability to maintain or view that artifact by granting access to those users. Users who do not have access cannot see or access that artifact.

The permissions you can grant on an artifact depend on the artifact. For example, you can grant "Administer" or "View" permissions to Third-Party artifacts in a folder, whereas you can grant "Administer", "Write", or "View" permissions on a folder in a library. For an application, you can grant "ADMINISTER" or "USE" permissions. See Learning About Security for details on all the permissions.

You can grant permissions to artifacts in the library using the concept of "inherited permissions". This gives you the ability to easily grant the same permissions that you set at a parent folder to the child folder(s) and artifacts underneath it. By default, folders are created with the Inherit Permissions box checked by default, but you can clear it if you wish. And, you may also individually override the inherited permissions for certain users and/or groups by directly assigning or revoking a permission. Note that the inherited permission check box is not the default for a report package, since granting access allows other users to view it immediately. A report package owner usually waits until a more appropriate time in the report package lifecycle rather than granting access at creation time.

See Granting Access for more details.

Reports Permissions

1. In order to run a management report, the user must have at least the "View" permission on the artifact.

2. In order to save a management report as a snapshot the user must have "View" permission on the artifact. Saved management reports can only be written to folders to which a viewer has "Write" access.

3. When a management report snapshot is created, the system grants that user with the Report Administrator permission on the snapshot.

4. When a management report snapshot is created from the definition, the snapshot does not get the permissions applied to the management report definition.

Data Level Security

The third level of security is the data level, in which data access permissions can be granted to users. Data level security can be set in the following ways:

- You can take a broad approach and grant access on a dimension by dimension basis, either by setting the Default access on a dimension to READ from the default of NONE, or by granting access to a particular dimension to users, groups, or users and groups.

- On a granular level, you can create data grants to grant access to portions of data in a model. This grant can be individual or combinations/intersections of dimensions.

Access on a Dimension by Dimension Basis

You can grant access to users on a dimension by dimension basis. When you create the dimension, you can change the default access of NONE to READ to enable all users to see that dimension.

The challenge with dimension by dimension data access is that most often you want to restrict access on a more granular level. For example, if someone in your company is responsible for the Human Resources budget, that person needs access to all the expense accounts: salary, benefits, office supplies, travel and entertainment, etc. across the company. That same HR person is also responsible for the benefits account in every cost center. On a dimension by dimension basis, you would have to give them access to all cost centers. And that's not what you really want. Ideally, users would have access only to their own cost centers rather than all cost centers and access to the one they need such as "Benefits". A data grant addresses this need by granting access at dimensional intersections.

Creating Data Grants

A data grant allows you to specify the portions of data within the model that can be accessed by users, groups or users and groups. When you see the data grants icon, you can create and manage data grants. To create a data grant, select a model and specify, for each dimension,

the access that users and groups have for specific members. You "layer" each row so what you add for row 1 is the base layer, and each subsequent row refines the access you grant.

DATA GRANTS ARE CREATED IN LAYERS

The rows within a data grant determine the security outcome (effective permissions). The top row (base layer) is evaluated first. Some best practice ideas:

- Apply broad rules for the majority of cases, and then create exceptions. You can either grant the greatest access in the base layer, or start with a restrictive base layer and then grant greater access.

- Try to create security in the data grant in the fewest steps to simplify maintenance.

The key to creating data grants is to understand how the order of the rows affects the effective permissions and steering clear of creating conflicting rules between rows. In cases of conflict, the least restrictive access rules takes precedence. See Setting Up Data Grants for more details on the rules and logic applied to creating data grants in Oracle Narrative Reporting Cloud Service, The chapter includes sample data grants to increase your understanding of them.

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Granting Access

To control which users can access content within Narrative Reporting, you must grant access to users for the following artifacts:

- Report Packages

- Folders

- Reports

- Third-party Artifacts, such as MS Office documents, PDFs, and images

- Dimensions

- An Application (includes the application artifact, dimensions, and data grants)

> ⓘ **Note**
>
> Access to models and data is granted through Data Grants . See Set Up Data Grants. For System audit logs, no access can be granted to other users. Only the Service Administrator and the creator of the System audit log can view them.

Watch this tutorial video, you'll learn how service administrators grant access to library artifacts in Narrative Reporting. You can grant access to folders; third-party artifacts such as Microsoft Office documents, PDFs, and images; report packages, and applications.

-- Granting Access to Library Artifacts.

The access to artifacts is managed by a combination of the role assigned to the user and the associated permission that is assigned to a user for the artifact. As a general rule, access is managed as follows:

- The Role (such as Service Administrator, Reports Administrator, Application Administrator, Library Administrator, and User) enables an administrative user to create an artifact. For example, the report package owner creates the report package, or the Library administrator creates a root level folder. See Learn About Security for more information on security roles.

- Permission is granted to a selected user or group to maintain the specified artifact, based on the assigned permission, such as edit, view, administer, or remove.

You assign permission to access artifacts to individual users or groups. Generally, until access is assigned to an artifact, it is invisible to the user, with the following exceptions:

- The Administrator who created the artifact can always see it, as long as the administrator's permission has not been removed.

- Depending on the artifact, some Administrator roles can see it as part of their role.

- The Service Administrator can always see everything.

As a best practice, to minimize maintenance, you can group users who have the same access level. Permission is then assigned to the group rather than each individual user.

Types of Permission

The following types of permission may be granted on different artifact types:

Table 16-1   Types of Permission

Permission Type	Permission	Artifact Type
Administer	Users can create and manage the artifact. The Administrator has unrestricted access to the artifact.	• Report Packages • Folders • Reports • Third-party Content (such as MS Office documents, PDFs and images) • Dimensions
Write	For folders only, enables users to add content to the folder.	Folders
View	Users can view the artifact.	• Report Packages • Folders • Reports • Third-party Content (MS Office documents, PDFs and images)
Use	Users can see the Application in the library. The scope of the access to the application is governed by any additional restrictions or permissions for that user, such as: • View permissions applied to any artifact • Write permissions applied to a folder artifact • Additional permissions applied to the model, data, and metadata	Application

Direct and Inherited Permissions

For report packages, folders, and third-party content, you can assign permissions directly or by inheritance from the parent folder:

- **Direct permissions** are used to assign access for a single artifact to specified users and groups. Click the check box on the Access tab of the associated Inspect dialog box to add or remove that permission for the selected user or group. When you hover over the selected permission, it is identified as "Direct Permission."

- **Inherited permissions** are used to assign the permissions granted to a parent level artifact to all its children to avoid having to set individual user permissions for each artifact. The permissions applied to the parent flow down to all child artifacts for that parent. You can adjust the inherited permissions by revoking permission for a particular user or group, for example, if you have confidential data that you do not want everyone to see.

You can assign both Administer and View permissions at the folder level and the objects in the folder will inherit those permissions if **Inherit permissions from parent folder** is turned on.

By default, inheritance is turned on for folders and third-party artifacts. Inheritance is turned off by default for report packages and reports so users are granted appropriate access to the report package and reports during the development of the report.

The inheritance icon ▣ is displayed beside users with inherited permissions. Hovering over a permission displays the path to the location of the permission.

If you add or remove an inherited default permission on the Access tab, a new icon 📥 is displayed beside the modified permission to indicate the change. Click again to revert to the original inherited permission, if required.

Granting Access to Report Packages

Report package owners are automatically granted the Administer permission for the report package that they create. If you assign the Administer permission to other users on a report package, then they are also displayed as report package owners.

> ⚠ **Caution**
>
> As a best practice, Report Package Owners and Viewers should be assigned in the Report Package rather than the Library.

The report package owner can assign access to the report package, using one of the following methods:

- When creating the report package, select and assign users, as described in Create Report Packages.

- Through the Library, using the Inspect dialog box, as described in this document.

Available Permissions

Only Administer and View (report package viewer) permissions can be assigned through the Library. Report package authors, approvers, and reviewers must be assigned from the report package itself. See Create Report Packages for additional information.

The following permissions are available for the Report Package:

- **Administer**—Enables the user or group to edit, delete, and import or export the artifact to which the permission has been applied for that user or group. The Administrator user in the Report Package is displayed in the Library and the Access tab with direct Administer permission. If you assign other users the Administer permission on a report package, then they are also displayed as report package owners.

- **View**—Enables the user or group to see the report package. The View user in the Report Package is displayed in the Library, and from Inspect on the Access tabs of the report package as having direct View permissions.

To grant access to report packages:

1. From the Home page, select an option to access the report package:
   - **Report Packages** on the Home Page
   - **Library**, and then **Report Packages**
   - **Library**, and then **Folder**

   > ⚠ **Caution**
   >
   > As a best practice, Report Package Owners and Viewers should be assigned in the Report Package rather than the Library.

2. Highlight the report package to which you want to assign access.

3. Under **Actions**, select **Inspect**.

4. Select the Access tab .

5. Click and select the users to which you want to assign access, as follows:

   a. Select the user type:

- • Users

- • Groups

- • Users and Groups

b. On the **Select User** dialog box, enter the first few letters for the user name in the text box, and then click Search 🔍 to populate the list of names. To display all users and groups, enter an asterisk "*" as a wildcard in the Search field.

c. Select the users and groups to which you want to assign access, and then click **OK**.

6. From **Access** 🔑 , assign direct or inherited permission to the report package:

a. **Optional:** To assign direct permission for each user or group, click the check box under the appropriate columns, or by selecting **Grant Permission** from User or Group Actions ⚙ :

- • Select **Administer** to enable the user or group to edit, delete, and import or export all artifacts.

- • Select **View** to enable the user or group to see all or part of the report package. The user cannot modify the report package.

- • Select **Remove** to delete the selected user or group from the list. Highlight the name, and then click **X** to remove the name and any associated permissions immediately.

> ⓘ **Note**
>
> To remove the original administrator, you must assign the administrator permission to another user, who can then remove the original Administrator.

b. **Optional:** To apply inherited permissions, select **Inherit permissions from parent folder** to apply the parent-level permissions to artifacts.

Inheritance is turned off by default for report packages so users are granted appropriate access to the report package during the development of the report.

The inherited permissions provide the following access:

- • If **View** is inherited, users can view the Report Package in its current state, including Not Started. In addition, these users are displayed in the Report Package as Report Package Viewers.

- • If **Administer** is inherited, users can view, manage, and edit the Report Package in its current state, including Not Started. In addition, these users are displayed in the Report Package as Report Package Owners.

The icon 🔲 indicates inherited permission. When you hover over the inherited permission, the complete path to the original artifact is displayed.

7. Click **Close**.

Granting Access to Folders and Third-party Documents

Third-party documents or external content include artifacts that were generated outside of Narrative Reporting, such as MS Office documents, images, and PDFs. These artifacts are stored in created folders.

You assign access to folders and third-party content from the Inspect dialog box from the Library.

By default, inheritance is turned on for folders and third-party content. You can remove a user or group from inheritance, and assign direct permission to the artifact.

See the following video also [▶] [Granting Access to Library Artifacts](#).

Available Permissions

The following permissions are available for the folders and third-party content:

- **Administer** – Enable the user or group to read, edit and delete artifacts.

- **Write** – For folders only, enable the user to import third-party content or other artifacts as a new file into the parent container or folder.

- **View** — Enables the user or group to see all authorized folder artifacts within the application. The View permission may be applied directly to the artifact or inherited from a parent folder hierarchy.

- **Remove** – Allows the user to delete a selected user or group from the list. Highlight the name, and then click **X** to remove the name and any associated permissions.

To grant access to folders and third-party content:

1. From the Home page, select **Library**.

2. In the **Library**, select the folder or artifact for which you want to assign access.

3. Under **Actions**, select **Inspect,** and then **Access**.
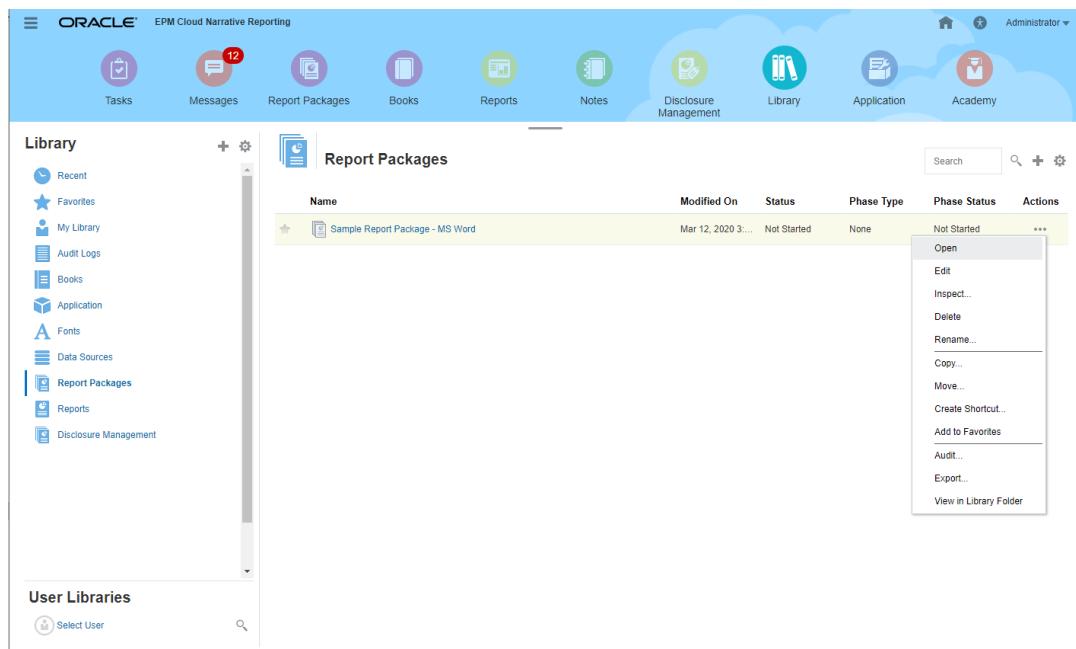
Users or groups who are inheriting permissions from the parent folder are indicated by the inheritance icon ▣ .

4. Click **Add User/Group** and select the users to which you want to assign access, as follows:

   a. Select the user type:

      • Users

      • Groups

      • Users and Groups

   b. On the **Select User** dialog box, enter the first few letters for the user name in the text box, and then click Search 🔍 to populate the list of names. To display all users and groups, enter an asterisk "*" as a wildcard in the Search field.

   c. Select the users and groups to which you want to assign access, and then click **OK**.

5. From **Access** 🔑 , assign direct or inherited permission to the report package using one of the following methods:

   a. **Optional:** To assign direct permissions for each user or group, click the check box under the appropriate columns, or select **Grant Permission** from User or Group Actions ⚙ .

      • Select **Administer** to enable the user or group to read, write and delete, and import or export artifacts.

      • Select **Write** for folders only to enable the user to import third-party content or other artifact as a new file into the parent container or folder.

      • Select **View** to enable the user or group to see all authorized folder artifacts within the application. The View permission may be applied directly to the artifact, or inherited from a parent folder hierarchy.

      • Select **Remove** to delete a user or group from the list. Highlight the name, and then click **X** to remove the name and any associated permissions immediately.

   b. **Optional:** To inherit the same permissions that have been assigned to a parent artifact, click **Inherit permissions from parent folder**. Inherited permission is indicated by the icon ▣ . When you hover over the inherited permission, the complete path to the original artifact is displayed

6. Click **Close**.

Granting Access to an Application

After an application is created by the Application Administrator, you must assign access to that application. You can grant permission directly from the Application icon on the Home Page, or from the Library Inspect dialog box.

• [To grant access to an application from the Home Page](#)

• [To grant access to an application from the Library](#)

Only direct permissions are available for an application.

> ⚠ **Caution**
>
> If you apply access to the Application system folder listed under the left column of the Library using the Inspect option without opening the application, the associated permission is applied to the system folder and not to the application itself.
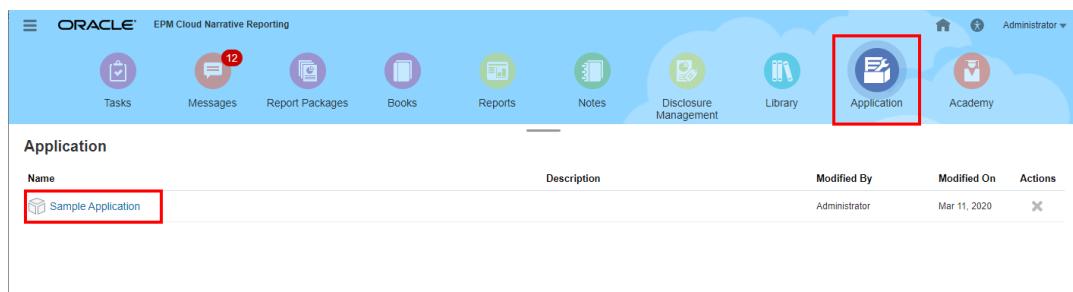
Available Permissions

The following permissions are available for the application:

- **Administer**—Allows the user or group to perform the following tasks within the application, to enable the ongoing management of all application artifacts:

    - See and manage all models in the application

    - Edit and delete any artifact in the application

    - Import and export all application artifacts (models, dimensions, and data grants)

    - Add, edit, and remove users and groups

- **Use**—Allows a user to see the Application in the Library. The level of access which the user is allowed is also governed by any additional permissions restricting the user, such as:

    - View permissions applied to any artifact

    - Write permissions applied to a folder artifact

    - Additional permissions applied to the model, data and metadata

Granting Access to an Application from the Home Page

To grant access to an application from the Home Page:

1. From the Home page, select **Application**, and then click the application name.

2. From the **Overview** screen in Application, select **Access** .

    The creator of the application is displayed as the Administrator.

3. Click and select the users to which you want to assign access, as follows:

   a. Select the user type:

      • Users

      • Groups

      • Users and Groups

   b. On the **Select User** dialog box, enter the first few letters for the user name in the text box, and then click Search to populate the list of names. To display all users and groups, enter an asterisk "*" as a wildcard in the Search field.

   c. Select the users and groups to which you want to assign access, and then click **OK**.

4. From **Access** , click the check box under the appropriate columns, or select **Grant Permission** from User or Group Actions to assign the level of access for each user or group:

   • Select **Administer** to enable the user or group to perform ongoing management of all application artifacts.

   • Select **Use** to allow a user to see the Application in the Library. The level of access which the user is allowed is also governed by any additional permissions restricting the user.

5. **Optional:** Select **Remove** to delete the selected user or group from the list. Highlight the name, and then click **X** to remove the name and any associated permissions:

6. Click **Close**.

Granting Access to an Application from the Library

To grant access to an application from the Library:

1. On the Home Page, select **Library**, and then, in the left pane, select the **Application** system generated folder.

2. Select the application in the Content pane, then **Actions** arrow next to application , and then select **Inspect**.

3. From **Properties** on the Inspect dialog box, select **Access** .

   The creator of the application is displayed as the Administrator.

4. Click **Add User/Group** and select the users to which you want to assign access, as follows:

   a. Select the user type:

      • Users

      • Groups

      • Users and Groups

   b. On the **Select User** dialog box, enter the first few letters for the user name in the text box, and then click Search to populate the list of names. To display all users and groups, enter an asterisk "*" as a wildcard in the Search field.

   c. Select the users and groups to which you want to assign access, and then click **OK**.

5. From the **Access** tab , assign the level of access for each user or group by clicking the check box under the appropriate columns, or select **Grant Permission** from User or Group Actions :

   • Select **Administer** to enable the user or group to perform ongoing management of application artifacts.

   • Select **Use** to allow a user to see the Application in the Library. The level of access which the user is allowed is also governed by any additional permissions restricting the user.

6. **Optional:** Select **Remove** to delete the selected user or group from the list. Highlight the name, and then click **X** to remove the name and any associated permissions.

7. Click **Close**.

Granting Access to Dimensions

Before you can assign access to dimensions, the user must be assigned access to the application and the dimensions must be created.

The Application Administrator can assign direct permission to users or groups to edit or delete dimensions. The permissions are applied through the application, rather than the Inspect dialog box.
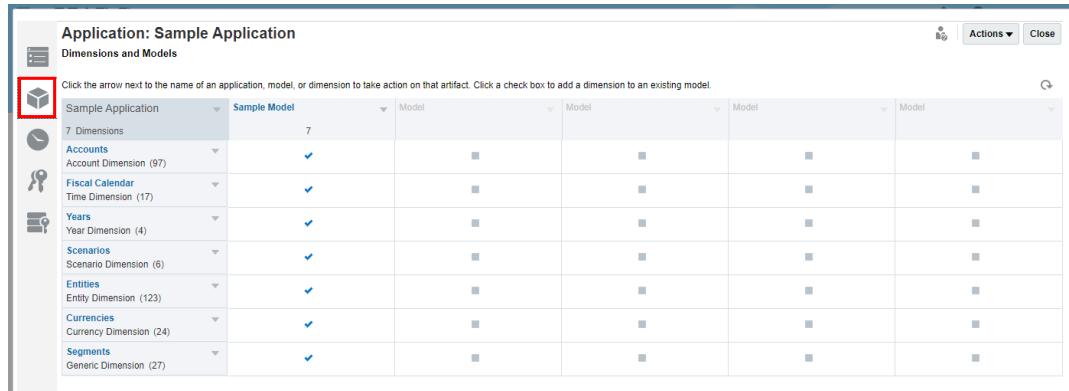
> ⓘ **Note**
>
> In addition to applying access to specific dimensions through the application as described in this document, you can also control access using data grants:

- Create data grants that restrict which portions of a model can be accessed.
- Set Default Access when you create or modify a dimension to READ from the Default NONE to enable all users to view but not modify the dimension.

For more information on data grants, see Set Up Data Grants.

To grant access to dimensions:

1. On the Home page, select **Application**, and then click the application name to display the Application Overview.

2. From the application **Overview** screen, select **Dimensions and Models**.

3. Click the name of the dimension for which you want to grant access.

4. From the Dimension Overview screen, select **Access**. The name of the selected dimension is displayed at the top of the screen.

5. Click and select the users to which you want to assign access, as follows:

   a. Select the user type:

      • Users

      • Groups

      • Users and Groups

   b. On the **Select User** dialog box, enter the first few letters for the user name in the text box, and then click Search to populate the list of names. To display all users and groups, enter an asterisk "*" as a wildcard in the Search field.

   c. Select the users and groups to which you want to assign access, and then click **OK**.

6. From the **Access** tab , select **Administer** to enable the user or group to view, modify, or delete the dimension.

7. **Optional:** Select **Remove** to delete the selected user or group from the list. Highlight the name, and then click **X** to remove the name and any associated permissions.

8. Click **Close**.

17
Setting Up Data Grants

Data grants enable you to apply a level of security to the data stored in a model and to control who can access sensitive or confidential information. You can create data grants for dimension intersections that identify users or groups who are allowed to access that data. At least one model must exist before you can apply a data grant.

Usually, you create data grants only for dimensions to which you need to allow or restrict access; otherwise, you can use the Default Access to set the access for the entire dimension. For example, in the Sample Application, you can set the Default Access to Read for the dimensions that do not need access restriction, and then set your specific data grants on the remaining dimensions, where Default Access is None, to grant access as required.

Carefully constructed data grants can ease security maintenance by adapting automatically to changes in your application, such as members being added or dropped.

See these sections for more information:

- [Understanding How Data Grants Work](#)
- [Selecting Member Functions](#)
- [Data Grants Processing and Conflict Resolution Rules](#)
- [Creating Data Grants](#)
- [Sample Data Grant](#)

Watch this tutorial video, you'll learn how to create data grants for Oracle Enterprise Performance Reporting Cloud. As an application administrator you create data grants to enable access to portions of data for users and groups. You create data grants in layers. Each layer refines access.

▶ -- [Creating Data Grants](#).

Understanding How Data Grants Work

Data grants are assigned to members or groups of members to manage who can access that information.

Data grants are created in layers or rows, with each successive layer refining the access to data by users and groups. Each row of a data grant defines an intersection of data to which a selected user will have READ or NONE access. When creating the data grants, you select member functions to define the set of members to be included. See [Selecting Member Functions](#).

Key to creating data grants is understanding the rules that affect how rows are processed and how conflicts between data grants are resolved. Row order determines the effective permission of the grant. The rows within a data grant are evaluated in sequence, starting with the first or base layer, and then refining the permissions with each additional row, until the final effective permission is established.

Let's look at the following simple example. The following assumptions apply:

- Default Access for the Scenario dimension has been set to None, so we are setting individual permissions from that baseline.

- The Accounting Manager is also part of the Accounting Group.

The rows are read in sequence, from the top down, and the results for each row culminate in the effective permission for the selected data. For more information on processing data grants, see Data Grants Processing and Conflict Resolution Rules.

ROW OF DATA GRANT	USER OR GROUP	DIMENSION	MEMBER	DATA GRANT PERMISSION
Row 1	Accounting Group	Scenario	Actual, Plan	Read
Row 2	Accounting Manager	Scenario	Forecast	Read

The result of the calculations returns the following effective permissions:

- The Accounting Group has access to Actual and Plan

- Accounting Manager has access to Actual, Plan and Forecast.

> ⓘ **Note**
>
> In the first row of the data grant, Actual and Plan are used in a single row because they have the same criteria. Alternatively, you can create two rows instead; however, combining members minimizes the number of rows in the data grant.

After the data grant is created, it is recommended that you validate the data grant. The Validate operation checks the data grants to determine whether member names used in the data grant are still valid. For example, if a member that was selected for a data grant is removed from a dimension, that data grant becomes invalid. If the data grant is not valid, an alert icon is displayed for the data grant and the data intersection row inside the data grant. Open the data grant to see the affected model, and correct the situation.

> ⚠ **Caution**
>
> The Validate operation does not automatically change any data grants.

After validating the data grant, review the assigned permissions on the Data Grants Access screen. Select each individual user or group, and verify that the data grants reflect the restrictions that you require. If you created multiple data grants, then conflicting rows likely exist. The background resolution of multiple competing or conflicting data grants may not create the final result that you expect, so you might need to refine your data grants to ensure the proper access.

Best practice suggestions:

- Grant the broadest rules that apply to the most people in your base layer for first row of the data grant, and then add exception rows to reduce access.

- Try to create your security model in the fewest possible steps, to ease maintenance.

For more details on the rules and logic applied to creating data grants in Narrative Reporting, see Data Grants Processing and Conflict Resolution Rules.

Selecting Member Functions

You can use member functions to select a set of members to include in a data grant. This selection method promotes flexibility and control, easing maintenance of data grants.
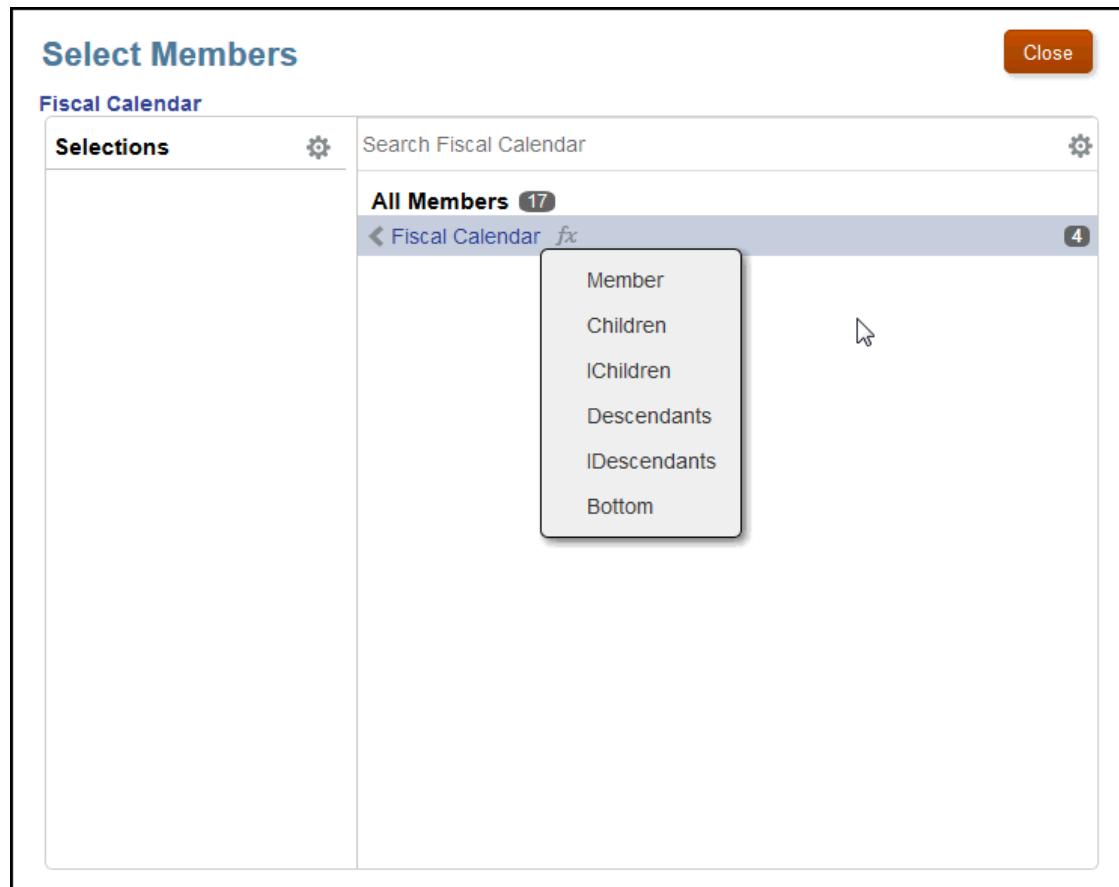
The function icon fx in the Select Members dialog box is available for every member level in the hierarchy, and offers the following member functions to select the members to be included in a data grant:

- **Member** —Assign the data grant to the selected member only.

- **Children**—Assign the data grant to the children of the member only. The member is not included.

- **IChildren (Inclusive Children)** —Assign the data grant to the target member and its children.

- **Descendants** —Assign the data grant to the entire tree under the selected member. The member is not included.

- **IDescendants (Inclusive Descendants)** —Assign the data grant to the target member and the entire tree under the selected member.

- **Bottom** —Under the target member, include all members that have no children (the lowest hierarchy members).

The following example shows the results for each assigned function based on the Fiscal Year dimension in the Sample Application:

Table 17-1   Member Functions Examples

Member	Function	Affected Members	Results
Fiscal Calendar	Member	Only the member	Fiscal Calendar
Fiscal Calendar	Children	Only the children but not the member	Q1, Q2, Q3, Q4
Fiscal Calendar	IChildren	Fiscal Calendar and its Children	Fiscal Calendar, Q1, Q2, Q3, Q4
Fiscal Calendar	Descendants	The tree under Fiscal Calendar but not the member	• Q1, Jan, Feb, Mar, • Q2, Apr, May, Jun, • Q3, Jul, Aug, Sep, • Q4, Oct, Nov, Dec
Fiscal Calendar	IDescandants	Fiscal Calendar plus the entire tree	• Fiscal Calendar • Q1, Jan, Feb, Mar, • Q2, Apr, May, Jun, • Q3, Jul, Aug, Sep, • Q4, Oct, Nov, Dec
Fiscal Calendar	Bottom	All members under Fiscal Calendar that have no children.	Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

As an example of automatic updating, if you set up dimension members as "Children" or "Bottom", when any dimension members are added or removed, the function performs its task as designed and selects current members of the function for the data grant. The changes are captured automatically based on their location in the hierarchy, rather than having to monitor individual members.

For example, if a Manager has access to the calendars for all the members of a Project team and the data grants are set to Bottom for the member Project, whenever a team member joins or leaves the team, the data grant will always correctly reflect the current Project team members and their associated calendars. You do not need to keep track of team members, and no changes are required until the process itself changes. Security is maintained because the Manager only sees the calendars for current members of the Project team.

Data Grants Processing and Conflict Resolution Rules

The following rules govern how data grants are processed and how row conflicts are resolved:

- Default access for the dimension must be set to **Read** or **None** for all members to set a baseline for the data grants.

- If you have two rows in the same data grant, the second (last) row takes precedence.

- If a parent/child relationship assignment within a Data Grant presents a conflict, it is resolved by row order.

- If you alter the sequence of rows within a data grant, you also change the effective permissions of that data grant.

- When processing a data grant, it does not matter whether the designated user is an individual or a group.

- If you have two different data grants for the same dimension, the least restrictive data grant takes precedence. In cases where there are conflicting rules between rows, the last row prevails.

Creating Data Grants

Before you begin, at least one model must have been created.

To create a data grant:

1. From the Home page, select **Application**, and then click the application name.

2. From the Overview screen in Application, select Dimensions and Models , and then click the name of the dimension to which you want to assign the data grant.

3. On the Dimension Overview for the selected dimension, under **Default Access**, check the default access setting for the baseline access for this dimension for **all** users because it may affect how you set the data grant:

   - If the default dimension access is set to **None**, you might need to allow permissions to **Read** in your data grant.

   - If the default dimension access is set to **Read**, you may need to restrict access to members in the dimension by setting the permissions to **None**.

   Determining the default access ensures a common starting point for all users, easing construction of the data grant. If your company prefers a most restrictive environment, create no more than one data grant per dimension and ensure all None rows are at the bottom or lower rows of the data grant.
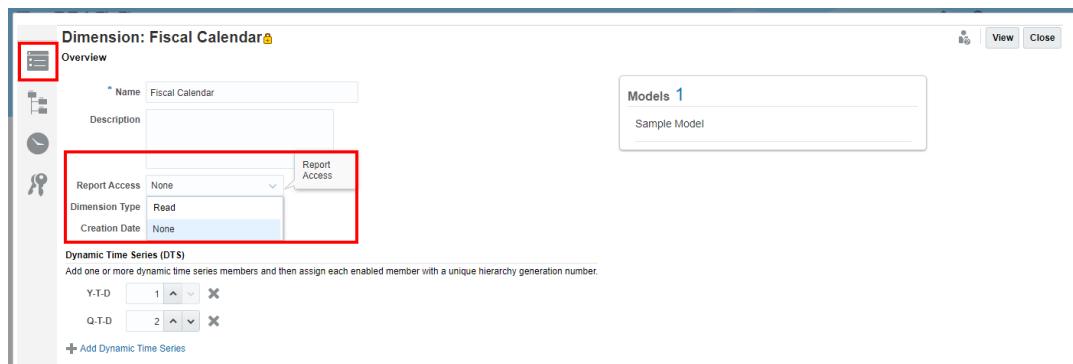
4. From the dimension Overview tab, select Data Grants .
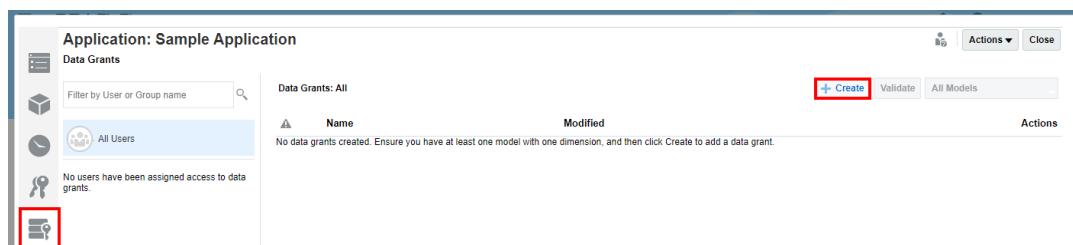
5. Click **＋ Create** to open a new data grant.

6. Enter a name for the new data grant, and then click Access 🔑 to set the permissions for the new data grant.

Data Grant: Untitled Data Grant 1   Close

* Name   Untitled Data Grant 1   Models 0

Description   Dimension 0

Created By   Administrator
Mar 12, 2020

Optionally, change the default name. Then select data using the Access tab.
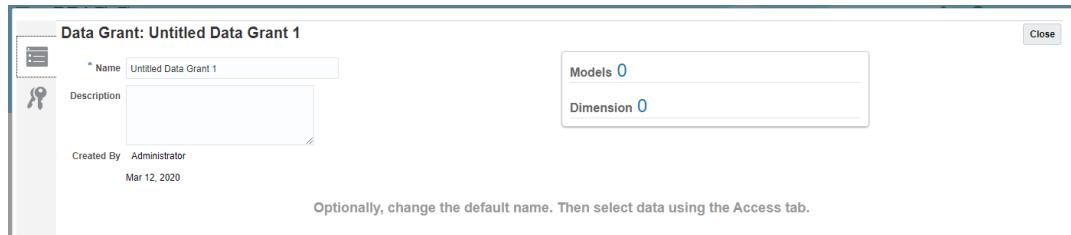
7. Under **Models**, select at least one model that contains the dimension for which you want to set the data grant. The screen is activated when the model is selected.

Data Grant: Untitled Data Grant 1   Save   Cancel   Close

Models
Models determine which dimensions are available for this grant. Select at least one model.

✔ Sample Model

Permissions
Rows are evaluated from top to bottom to determine the data available to users and groups.   ＋ Add Row   Select Dimension

Users	Permission	Dimension	
👤 Add	🔑		...
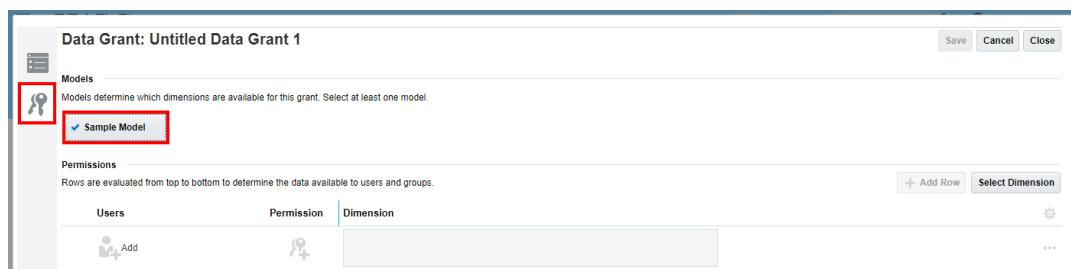
8. Click **Select Dimension** to select the dimension, and then click **OK**. The dimension name is displayed on the Permissions table.

Select Dimension   OK   Cancel

○ Years

○ Fiscal Calendar

○ Currencies

○ Scenarios

○ Segments

○ Accounts

○ Entities
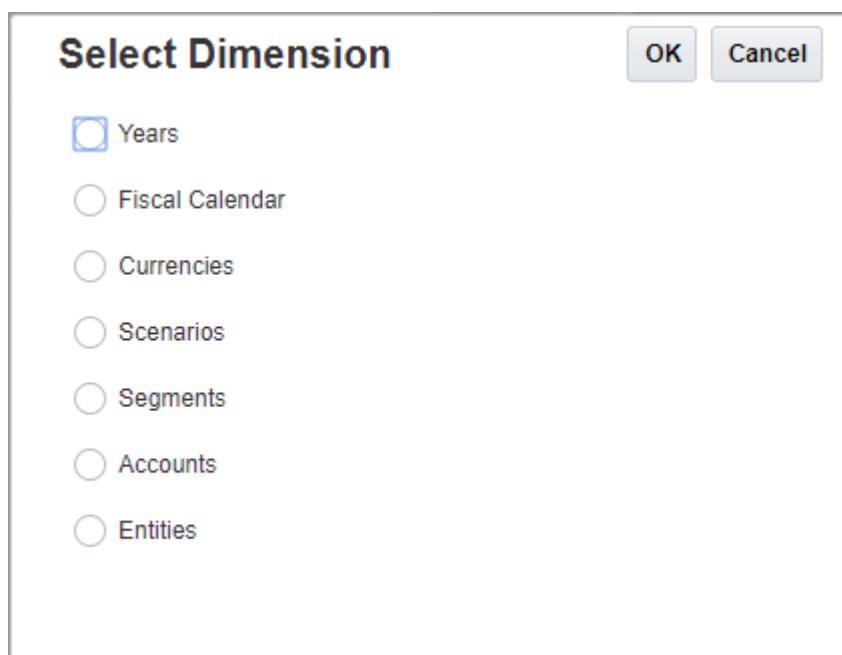
9. Under the dimension name (for example, Fiscal Calendar), click **Select Members** to display the Select Members dialog box.

10. Under **All Members**, click the member name to expand the list of members to the required level.
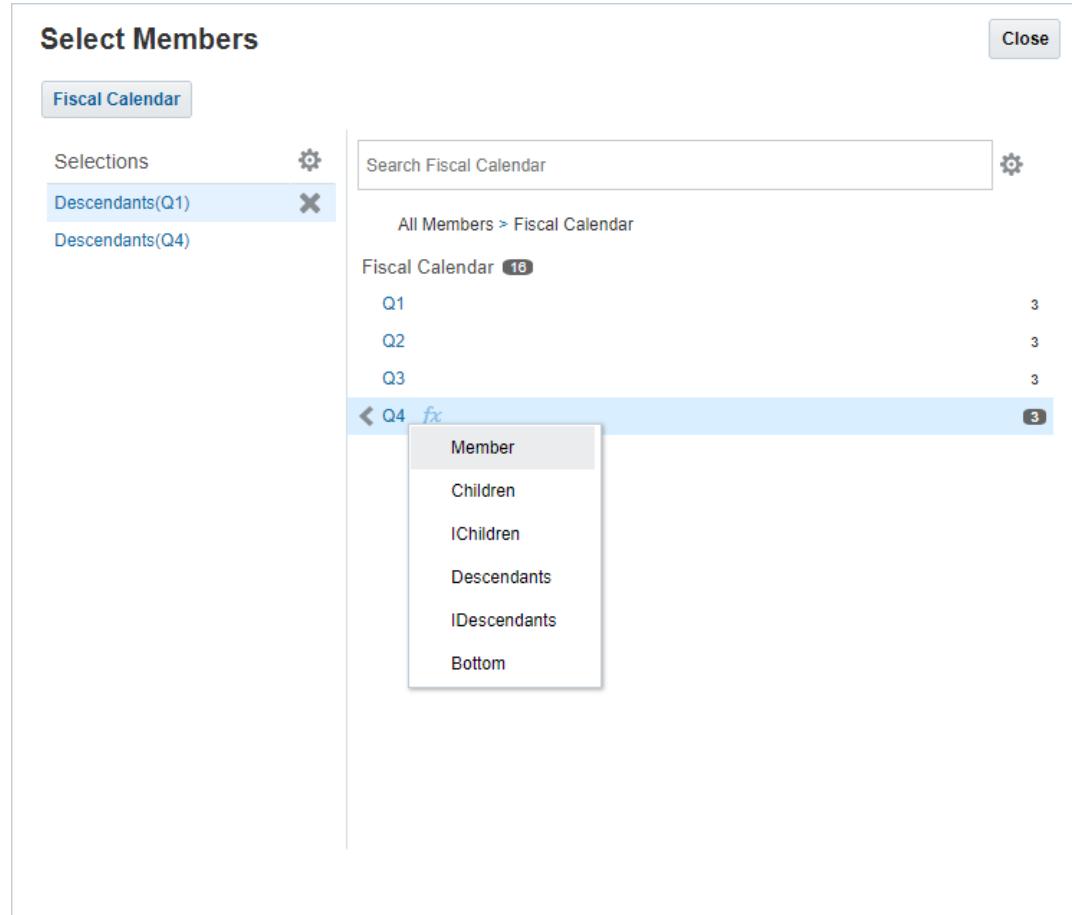
11. Click the function icon _fx_ beside the required level of member to select the functions for the members to be included in the data grant. The selections are automatically moved to the **Selections** column. For a list of member functions, see Selecting Member Functions.

To redisplay any members, click the previous level in the navigation.

12. **Optional:** On the **Select Members** dialog box, click **Actions** ⚙ to select one or more display options for the dimension and its members:

- Show Alias Instead of Name

- Show Member Counts

- Sort Alphabetically

13. Click **Close**.

14. Under **Users**, click **Add** to select the users and groups that you want to include in the data grant on the Select User dialog box.

15. **Optional:** Under **Users**, click the number of users to view all selected users in a list, or add another user.
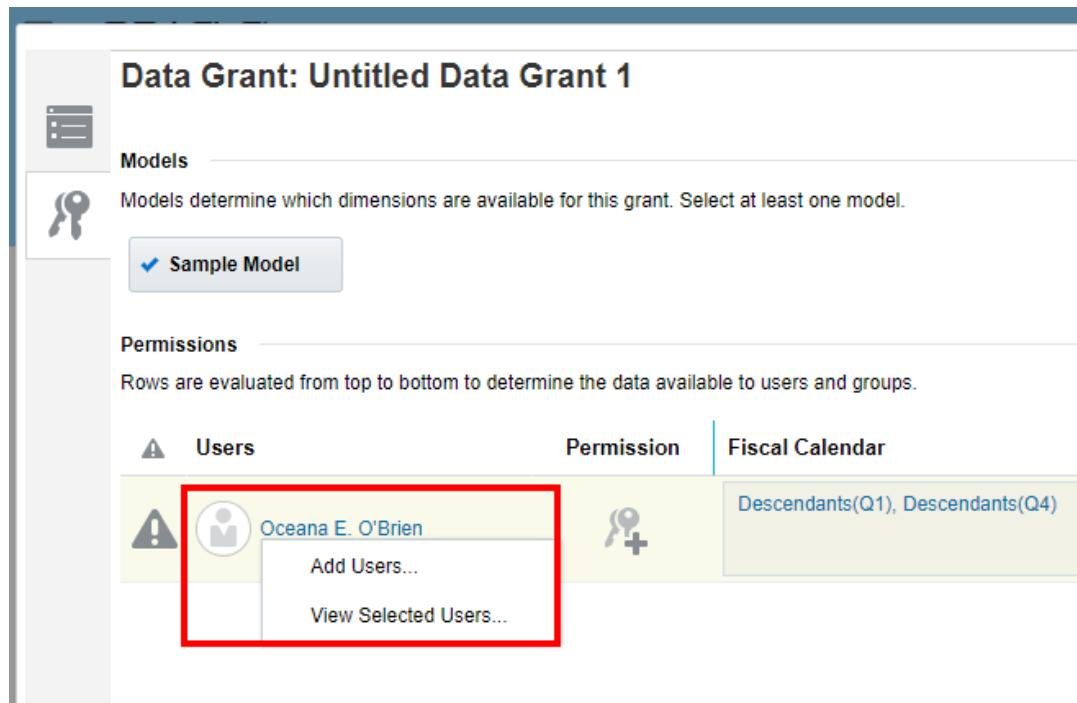
16. Under **Permission**, click **Select Permission** to display the Permissions dialog box, and then select the appropriate permission for the selected users:

    • **None** – The selected user cannot view or modify the specified member for the dimension.

    • **Read** – The selected user can view, but not modify the specified member for the dimension.

    • **Delete Permission** – Click to remove the entire permission from the Permissions table.

17. **Optional:** From the drop-down arrow beside each row in the data grant, select from the available options to perform other actions for permissions for the row:

   • **Add Another Permission**–Enables you to add another permission for the selected row, without re-entering the member details.

   • **Move Up** or **Move Down**–Moves the selected row up or down in the table rows. Because rows are evaluated from top to bottom to determine the data available to users and groups, you should be aware that any moves to the rows will affect the effective permissions.

   • **Add Row**–Use to add another row to the data grant.

   • **Duplicate**-Use to add another row with the same criteria to the data grant.

   • **Delete**-Use to delete the row for the data grant.
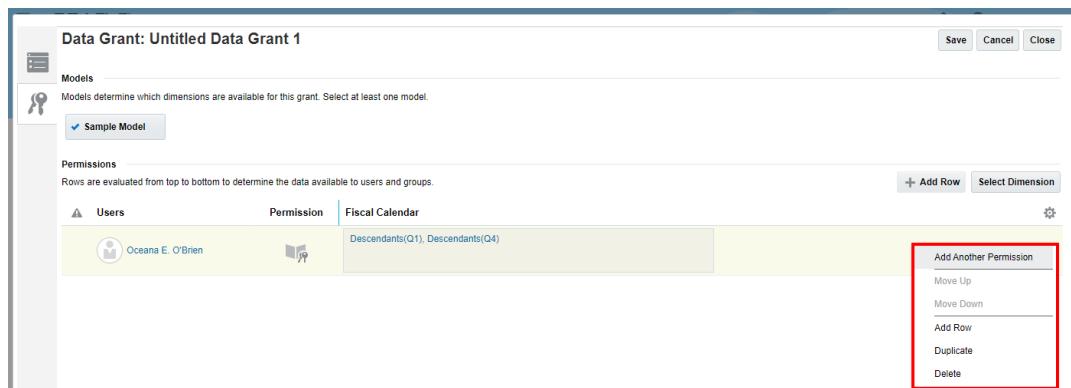
18. After all rows for the selected data grant are added, click **Save**, and then **Close.**

19. On the Data Grants tab , click .

   The Validate operation checks the data grants to determine whether the member names used in the data grant are still valid. For example, if a member that was selected for a data grant is removed from a dimension, that data grant becomes invalid. If the data grant is not valid, an alert icon is displayed for the data grant and the data intersection row inside the data grant. Open the data grant to see the affected model, and correct the situation.

   > ⚠ **Caution**
   >
   > The Validate operation does not automatically change any data grants.

20. From the list of users on the Data Grants **Access** tab , select the user or group that is assigned to this data grant, and verify that the assigned permissions are correct.

   Although the data grant may be valid, it might not accurately represent the access that you intended to assign. Review all data grants for the selected user or group to refine the access and ensure only the authorized user or group can access the required data.

Sample Data Grant

The following sample data grant shows a simple example of how you can create a data grant for your application.

1. Because the access restrictions will be set across only three dimensions, from the Overview for each dimension, set the Default Access for Entities, Scenarios, and Fiscal Calendar dimensions to **None**.

2. Set the Default Access for the remaining dimensions (Accounts, Years, Currencies, and Segments) to **Read**.

3. Set the access permissions for each user and dimension to **Read**, as follows:

Table 17-2   Sample Access Permissions

Dimension	Rodney P. Ray	Ocean E. OBrien
Entities	IDescendants (E01_101_300)	IDescendants (Total Entities)
Scenarios	Actual	Plan
Fiscal Calendar	IDescendants (Q1)	IDescendants (Fiscal Calendar)

4. Create one Data Grant for each dimension.

Because each user has differing member access permissions, each Data Grant will have two rows, one for each user, defining their member selection access in the dimension.

Figure 17-1   Data Grant: Entities

Figure 17-2   Data Grant: Scenarios

Figure 17-3   Data Grant: Fiscal Calendar

When logged in as Rodney, notice how the data grant is applied in an ad-hoc query in Smart View.

	A	B	C	D	E	F	G	H
1			Accounts	Years	Currencies	Segments		
2			Actual	Plan	Forecast	Act vs Plan Var	Act vs Plan Var %	Scenarios
3	E01_101_3300	Q1	-12439722.30	#No Access	#No Access	#No Access	#No Access	-12439722.30
4	E01_101_3300	Q2	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
5	E01_101_3300	Q3	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
6	E01_101_3300	Q4	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
7	E01_101_3300	Fiscal Calendar	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
8	E01_101_3100	Q1	-4733927.76	#No Access	#No Access	#No Access	#No Access	-4733927.76
9	E01_101_3100	Q2	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
10	E01_101_3100	Q3	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
11	E01_101_3100	Q4	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
12	E01_101_3100	Fiscal Calendar	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
13	E01_101_3200	Q1	-752938.93	#No Access	#No Access	#No Access	#No Access	-752938.93
14	E01_101_3200	Q2	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
15	E01_101_3200	Q3	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
16	E01_101_3200	Q4	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
17	E01_101_3200	Fiscal Calendar	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
18	E01_101_3000	Q1	-17926589.00	#No Access	#No Access	#No Access	#No Access	-17926589.00
19	E01_101_3000	Q2	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
20	E01_101_3000	Q3	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
21	E01_101_3000	Q4	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access
22	E01_101_3000	Fiscal Calendar	#No Access	#No Access	#No Access	#No Access	#No Access	#No Access

When logged in as Oceana, notice how the data grant is applied in an ad-hoc query in Smart View.

	A	B	C	D	E	F	G	H
1			Accounts	Years	Currencies	Total Segments		
2			Actual	Plan	Forecast	Variance	Variance %	Scenarios
3	Entities	Quarter1	#No Access	23835255.87	#No Access	#No Access	#No Access	#No Access
4	Entities	Quarter2	#No Access	25006652.07	#No Access	#No Access	#No Access	#No Access
5	Entities	Quarter3	#No Access	21281982.24	#No Access	#No Access	#No Access	#No Access
6	Entities	Quarter4	#No Access	25610333.05	#No Access	#No Access	#No Access	#No Access
7	Entities	Fiscal Calendar	#No Access	95734223.23	#No Access	#No Access	#No Access	#No Access

Setting Up Data Grants

Data grants enable you to apply a level of security to the data stored in a model and to control who can access sensitive or confidential information. You can create data grants for dimension intersections that identify users or groups who are allowed to access that data. At least one model must exist before you can apply a data grant.

Usually, you create data grants only for dimensions to which you need to allow or restrict access; otherwise, you can use the Default Access to set the access for the entire dimension. For example, in the Sample Application, you can set the Default Access to Read for the dimensions that do not need access restriction, and then set your specific data grants on the remaining dimensions, where Default Access is None, to grant access as required.

Carefully constructed data grants can ease security maintenance by adapting automatically to changes in your application, such as members being added or dropped.

See these sections for more information:

*   [Understanding How Data Grants Work](#)

- [Selecting Member Functions](#)

- [Data Grants Processing and Conflict Resolution Rules](#)

- [Creating Data Grants](#)

- [Sample Data Grant](#)

Watch this tutorial video, you'll learn how to create data grants for Oracle Enterprise Performance Reporting Cloud. As an application administrator you create data grants to enable access to portions of data for users and groups. You create data grants in layers. Each layer refines access.

▶ -- [Creating Data Grants](#).

18
Performing an Audit

Maintenance actions performed on artifacts and folders are tracked in a running system audit that details who modified an artifact or folder and which action was taken.

Report package maintenance and modifications, such as doclet check-in/out and Review phase initiation, are tracked in an artifact log for the report package, which details the actions taken, user id, time/date stamp, etc.

Report execution is also tracked in an artifact log. The log includes the report name, user id, time/date stamp, POV selections, and elapsed time.

The following artifacts and actions are not supported by the audit framework:

- Book preview and editing

- Bursting definition editing and execution

- Report design changes and saving

Two types of files can be generated for audits based on your role or permission:

- System Audit File—Only the Service Administrator can generate a System Audit File to capture all entries between the default first timestamp (date and time) for the system log and a selected end timestamp. The starting timestamp of the records cannot be edited.

- Artifact or Folder Audit File—Can be generated for selected artifacts or folders by the user who has Administer permission for the artifact or folder, or the Service Administrator. This audit file provides an extract of the transactions, based on a selected date range. An audit file can be created for the following system generated and system personal folders and user created folders:

  – My Library

  – Report Packages

  – Reports

  – Folders

> ⓘ **Note**
>
> You cannot create an audit log for the system generated Recent or Favorites folders.

The audit logs are stored in the system-generated Audit Logs folder in the library. All users can view the Audit Logs folder, but they can view only the audit files that they created. Users cannot copy or move artifacts into or out of this folder. You cannot grant access to audit logs to another user. Only the Service Administrator and the creator of an audit log can view them.

After you create the audit files, you can download them to your local file system for review.

Creating a System Audit

The system audit file includes all records in the audit log between the timestamps defined by the Service Administrator. By default, **From** displays the earliest timestamp in the audit log and cannot be changed. The Service Administrator can select the **To** timestamp to control the range for the system audit.

> ⚠ **Caution**
>
> When creating the system audit file, you can choose an option to remove all entries for the selected system audit file from the audit logs after they have been extracted. Because the entries have been removed, the new From timestamp for all entries changes to the first timestamp after the removed entries. For example, if you remove all entries up to Mar 16th, the new From timestamp becomes March 17.

To create a System Audit log:

1. On the Home Page, use one of these options:

- On the Welcome Panel, select **Create** ✛ , and then select **System Audit File**.
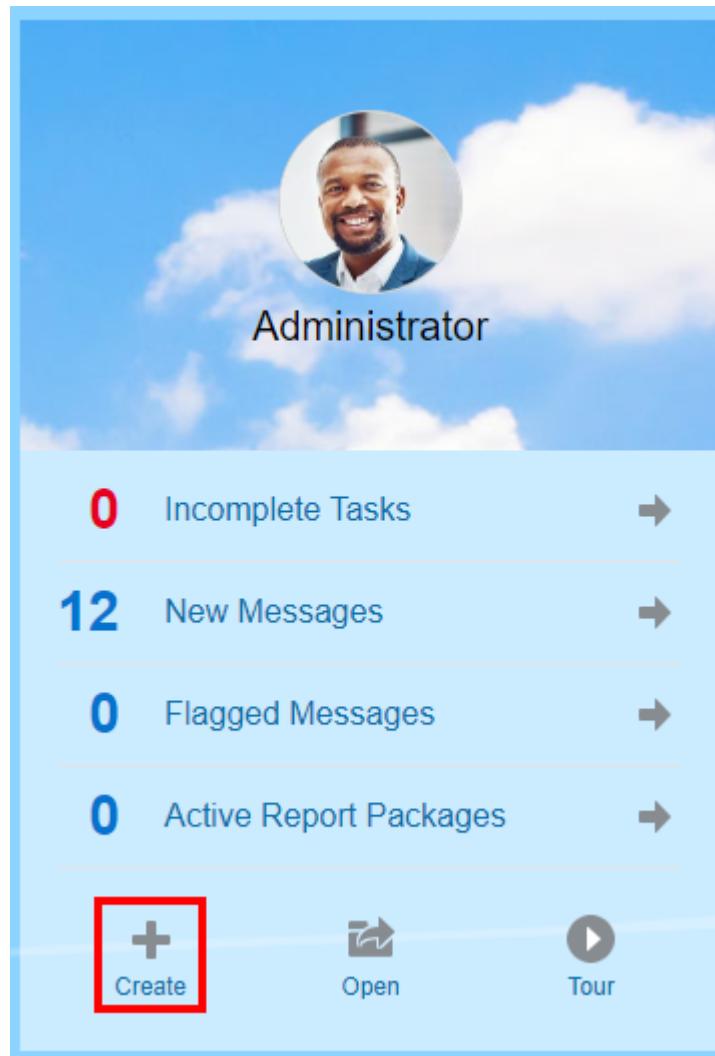
- From the Library, select **Audit Logs** in the left pane, and click **Create** ✛ in the right pane, and then select **System Audit.**

2. From the **Create System Audit File** dialog box, use the calendar icon to select the **To** timestamp for the end of the range for the audit file.

> ⓘ **Note**
>
> By default, **From** displays the earliest timestamp in the audit log and cannot be changed.

3. Enter the name for the audit file that will be automatically stored in the Audit Logs folder in the Library.

4. **Optional:** Select **Remove extracted entries from the active system audit log** to clear the entries in the audit log after the audit file has been created.

> ⚠ **Caution**
>
> If you remove extracted entries, the From entry in the System Audit file changes to reflect the next timestamp. For example, if the range for the audit extract that was removed covered the period from March 15th to March 31st, then the new From timestamp will be April 1st.

5. Click **OK** to create the audit file.

6. Click **OK** to dismiss the confirmation message. The audit file is created in the background, and a notification is sent when the audit log is complete.

7. **Optional:** On the Home page, select **Messages** to verify that the audit is complete.

8. From the **Library**, select **Audit Logs**.

9. Select the audit log that you want to view, then click **Actions**, and then **Download** to save the audit file to your local File System.

   You may need to scroll over to the far right on the screen to see the Actions menu. Make a note of the location to which you are saving the audit file.

10. Navigate to the audit file on your local File System to review the results.

   The System Audit Log contains details for each transaction, including the following:

   • Timestamp

   • User and IP Address

   > ⓘ **Note**
   >
   > In most instances, the IP address displayed may not be the user's actual IP address.

   • Event Category, Type, and Status

   • Artifact ID, Name, and Location

   • Actions and Changed Values

11. **Optional:** Click **Actions** to perform these additional tasks:

   - Select **Inspect** to review the audit log Properties and the History for the file.

   - Select **Delete** to remove the system audit file. A confirmation dialog box confirms the deletion.

   - Click **Rename** to enter a new name for the audit log file.

Creating an Artifact or Folder Audit

Any user who has Administer permission on an artifact or folder can create an audit file for it. That audit file can be viewed only by the user who created it and by the Service Administrator.

The audit file includes all records in the Audit Log between the timestamps defined by the user. By default, **From** displays the earliest timestamp in the audit log, and **To** reflects the latest timestamp.

An audit file can be created for the following system-generated and personal folders and user-created folders:

- My Library

- Report Packages

- Reports

- Folders

- Third-party content, such as PDFs

> ⓘ **Note**
>
> You cannot create an audit log for the system-generated Recent or Favorites folders.
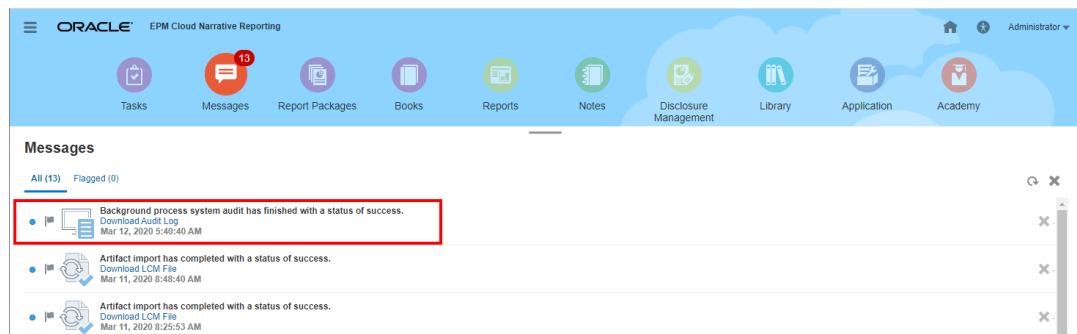
To create an Audit file:

1. On the Home Page, select **Library**, and then, in the left pane, select the artifact for which you want to create an audit log.

2. For the chosen artifact, select **Actions**, and then select **Audit**.

3. From the **Create Audit File** dialog box, use the calendar icon to select the **From** and **To** timestamp range for the audit file.
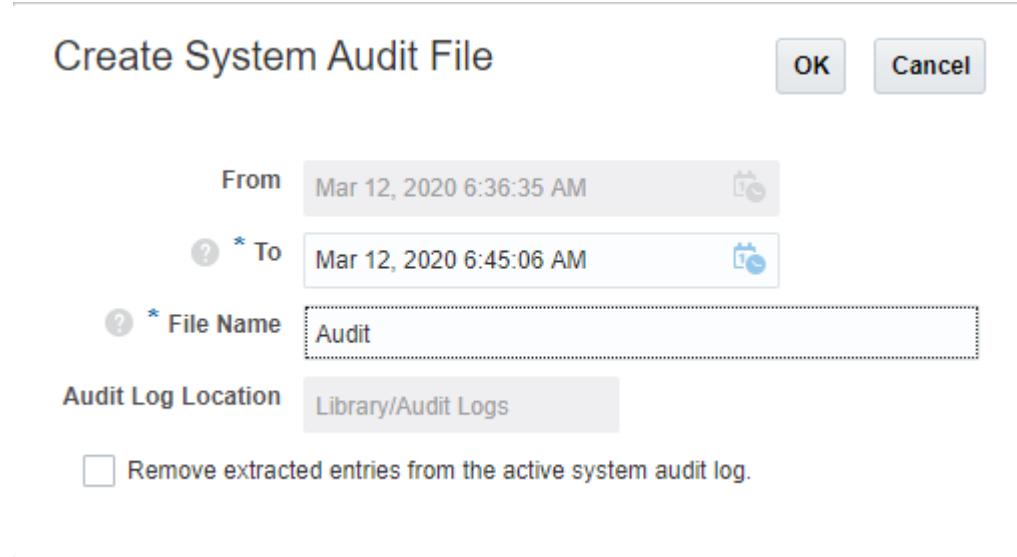
4. Enter the name for the audit file that will be automatically stored in the Audit Logs folder in the Library, and then click **OK**.

5. Click **OK**.

6. Click **OK** to dismiss the confirmation message. The audit file is created in the background, and a notification is posted when the audit log is complete.

7. **Optional:** On the Home page, select **Messages** to verify that the audit is complete.

8. From the **Library**, select **Audit Logs**.

9. Select the audit log that you want to view, then click **Actions**, and then **Download** to save the audit file to your local File System.

You may need to scroll over to the far right on the screen to see the Actions menu. Make a note of the location to which you are saving the audit file.

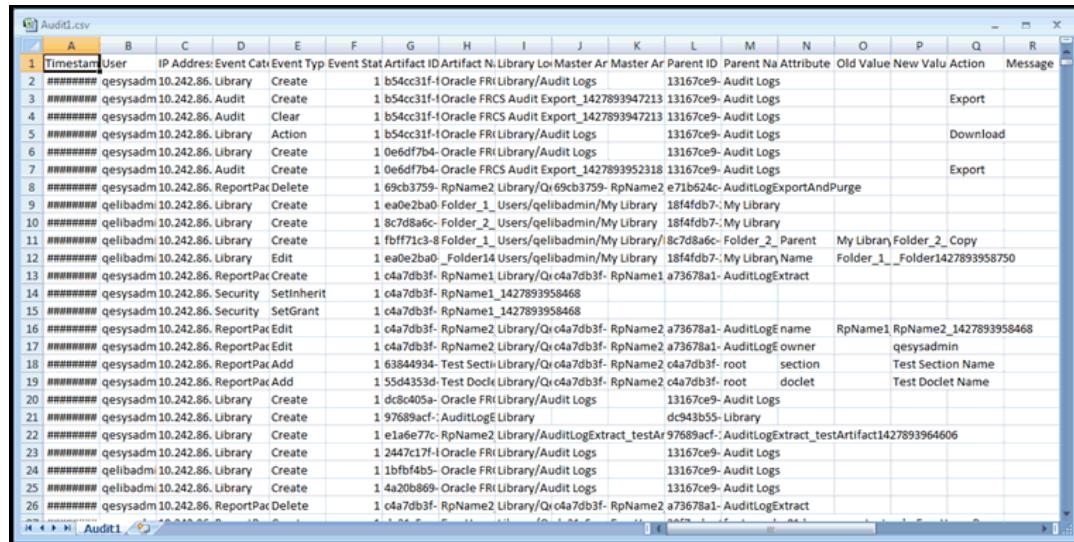**10.** Navigate to the audit file on your local File System to review the results.

The System Audit Log contains details for each transaction, including the following:

- Timestamp

- User and IP Address

> ⓘ **Note**
>
> In most instances, the IP address displayed may not be the user's actual IP address.

- Event Category, Type, and Status

- Artifact ID, Name, and Location

- Actions and Changed Values

11. **Optional:** Click **Actions** to perform these additional tasks:

    - Select **Inspect** to review the audit log Properties and the History for the file.

    - Select **Delete** to remove the system audit file. A confirmation dialog is displayed to confirm the deletion.

    - Click **Rename** to enter a new name for the audit log file.

19
Migrating Artifacts

In Narrative Reporting, you can migrate Folders, Report Packages, Reports, Books, Bursting Definitions, Data sources, Notes, Fonts, Third-party files, and Applications (where applicable) between environments and within them. You can migrate artifacts using the export, download, and import functionality in the library or by using the EPM Automate Commands. For migrating Notes artifacts, you use the Notes Manager.

- [Migrating Artifacts within the Same Environment](#)
- [Migrating Artifacts from One Environment to Another Environment](#)
- [Importing Artifacts into the New Environment Using the Library](#)
- [Exporting and Downloading Artifacts Using the Library](#)
- Migrating Notes, see Migrating Notes Artifacts from One Environment to Another.

Watch this tutorial video, you'll learn how administrators migrate Oracle Narrative Reporting Cloud applications from one environment to another.

▶ -- [Migrating Applications](#).

Migrating Artifacts from One Environment to Another Environment

Moving artifacts from one environment to another involves exporting the artifact, downloading the export file to your local file , and then importing into the new environment. Migrating from one environment to another consists of these high level steps:

> ⓘ **Note**
>
> Importing an application in the library replaces the exiting application in the library.

- Export the artifact from the current environment and download the export file to your local file
- Log into the new environment where you already have activated your service
- Import the downloaded export file from your local file into the new environment
- Optionally, move data from your application by extracting from the current environment and loading into the new environment or just reload data from the source.

> ⓘ **Note**
>
> Comments and statuses in a report package are not migrated with the report package.

Exporting and Downloading Artifacts Using the Library

To export an artifact (report package, folder, or an application) from your current environment and download to your local file system using the Library:

For more information, see these two EPM Automate commands:

- You can export an artifact - exportLibraryArtifact in *Working with EPM Automate*
- You can import an artifact - importLibraryArtifact in *Working with EPM Automate*

> ⓘ **Note**
>
> Oracle recommends that you use the EPM Automate Commands for export if the size of your artifacts (including folders) is larger than 256 MB.

To export and download artifacts using the library:

1. From the **Home** page, select **Library**.

2. Do one of the following, depending on the artifact:

   a. For a root level folder, in the navigation pane, select the folder, then click ⚙, then click **Export**

   b. For other artifacts (folder, report package, or application), in the right pane, select the artifact to export, then click ▼ then select **Export**.

3. Choose a folder to put the export file in, then click **OK**. The export process runs in the background. Check **Messages** to view the notification once the export is complete.

4. Validate that the export was successful by checking the folder you exported the artifact to and that the name of the export zip file is prefixed with `Export`. For example, `Export - MyReportPackage.zip`.

5. Download the export file to your local file system by clicking **Download** next to the export file name and save the export zip file to your local file system.

6. **Optionally:** If you want to move data in an application from your current environment, use the Extract Data procedure. See Load, Extract, and Clear Data.

7. Log out of the current environment.

Importing Artifacts into the New Environment Using the Library

To import artifacts in a new environment using the Library:

1. In your new environment, make sure Narrative Reporting is activated and log in to the service.

2. Select **Library** from the **Home Page**.

3. To import the artifact to a different location than the export file, navigate to that folder location. Otherwise, skip this step.

4. Select the ⚙ menu in the upper right corner of the Library and then **Import**.

5. Select **Local** and browse to the export zip file you want to import.

6. Select **Overwrite Existing Objects** to replace any existing artifact with the new imported artifact.

7. Select **Include Access Permissions** to include the already defined access permissions on the imported artifact to the existing one.

8. Select **OK**. The import process runs in the background.

9. Check **Messages** to view the notification once the import is complete.

10. Check in the library folder you specified to verify that the file has been imported.

11. **Optionally:** If you extracted data from an application in your current environment, you can now load the data into your new environment.

Migrating Artifacts within the Same Environment

Migrating artifacts within the same environment involves exporting the artifact, and then importing the export zip file. Migrating from one environment to another consists of these high level steps:

• Export the artifact from the current environment.

• Import the downloaded export file from your local file system into the new environment.

Exporting and Importing Artifacts Using the Library

Export an artifact (Folders, Report Packages, Reports, Books, Bursting Definitions, Data sources, Notes, Fonts, Third-party files, and Applications, where applicable) within your current environment using the Library.

To export and import artifacts using the library:

1. Select **Library** from the **Home Page**.

2. Do one of the following, depending on the artifact:

   a. For a root level folder, in the navigation pane, select the folder, then click ⚙, then click **Export**.

   b. For other artifacts (folder, report package, or application), in the right pane, select the artifact to export, then click ▼ then select **Export**.

3. Choose a folder to put the export file in, then click **OK**. The export process runs in the background.

4. Validate that the export was successful by checking the folder you exported the artifact to and that the name of the export zip file is prefixed with "Export". For example, `Export - MyReportPackage.zip`.

5. Check **Messages** to view the notification once the export is complete.

6. To import the artifact to a different location than the export file, navigate to that folder location. Otherwise, skip this step.

7. Select the ⚙ menu in the upper right corner of the Library and then select **Import**.

8. Select **Library** and browse to the export zip file you want to import.

9. Select **Overwrite Existing Objects** to replace any existing artifact with the new imported artifact.

10. Select **Include Access Permissions** to include the already defined access permissions on the imported artifact to the existing one. Then select **OK**.

11. The import process runs in the background.

12. Check **Messages** to view the notification once the import is complete.

13. Check in the library folder you specified to verify that the file has been imported.

20
Performing Backup and Restore (System Clone)

Every day, during the operational maintenance of the service, Oracle backs up the content of your service instance to create a complete backup snapshot of existing artifacts and data. Backup snapshots are created for use in the event that you ever want to restore your service to a prior known state.

> ⓘ **Note**
>
> Before attempting to restore your service from a backup snapshot, make sure the destination service is the same release or newer. You cannot restore a backup snapshot into a service that has an older release. You can confirm release numbers by selecting the **User** menu from the **Home** page, **About**, and then selecting **Version**.

Backup

Oracle recommends that you download the backup snapshots regularly to a local file system, using the EPM Automate Commands, so you have them available in case you wish to restore your service to a saved, prior snapshot. See [Saving Backup Snapshots](#).

> ⓘ **Note**
>
> During Daily Maintenance, the service automatically creates a backup snapshot of data and artifacts. When Daily Maintenance executes, it replaces the prior backup snapshot with a new backup snapshot. You should schedule the execution EPM Automate Commands on a daily basis to download the backup snapshot to a local computer.

A saved snapshot is used to provide a specific restore point. For example,

- The state of the system immediately when going live, or immediately after a critical point, like the finalization of a quarterly reporting period. In this case, the snapshot would be restored if you ever want to further review or investigate prior activities.

- A saved snapshot could also be used if you discover that something went wrong prior to the most recent snapshot. You can select one of the snapshots from your local file system that you saved in order to restore the service to a known state.

Restore

Restore can be done either through the Settings on the Home Page or by using the EPM Automate Commands. When you restore a backup snapshot, your system will return to that prior state. Any changes that may have occurred subsequent to the time of the backup, will not be reflected in the restored system. You can perform the following tasks:

- Restore using the most recent daily backup snapshot [Restore Using the Most Recent Daily Backup Snapshot](#).
- Restore using a saved backup snapshot from your local file system [Restore Using a Saved Backup Snapshot](#).

Saving Backup Snapshots

Oracle recommends that you periodically save backup snapshots to your local file system. You can save these backup snapshots by using the **EPM Automate Commands**.

> ⓘ **Note**
>
> The backup snapshots should be managed on the Service Administrator's local file system as part of the regular backup plan.

Restore Using the Most Recent Daily Backup Snapshot

You can perform a restore using the most recent daily backup snapshot.

To restore the service from the most recent daily backup snapshot:

1. Select **Settings** from the **Home Page**.
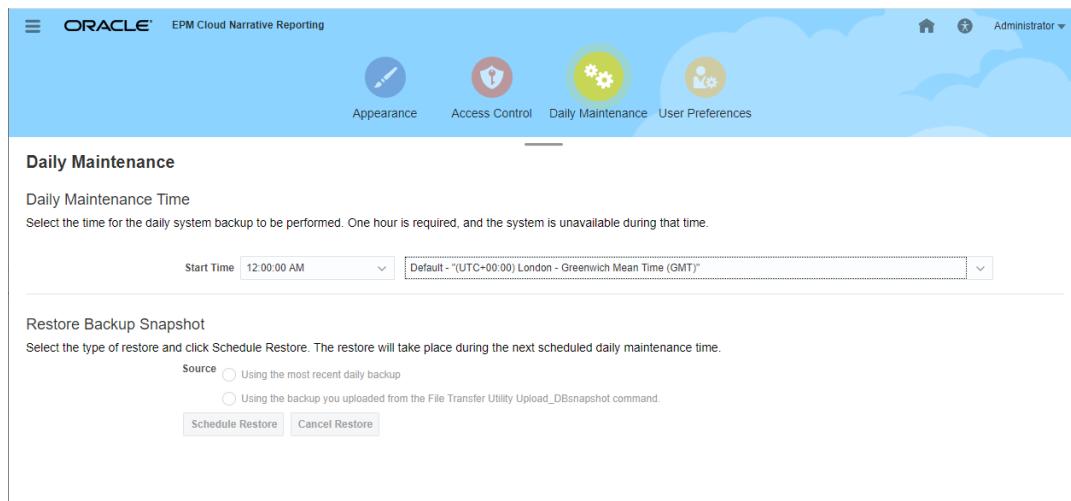
> ⓘ **Note**
>
> You must be a Service Administrator to access this.

2. Select **Using the most recent daily backup** option.

> ⓘ **Note**
>
> The most recent snapshot from the last maintenance window is always available.

3. Validate the daily maintenance time or reset the time.

4. **Optionally:** Notify the user community if the daily maintenance time is different than the usual set time since the service is unavailable during that time. For example, if the users usually expect the daily maintenance time to be 2:00 am, but the administrator decides this is an emergency and is taking it offline at 11:00 am, then the administrator should inform the user community.

For more information, see the following links:

- setDailyMaintenanceStartTime in *Working with EPM Automate*

- Managing Daily Maintenance in *Getting Started Guide for Administrators*

- Daily Maintenance Operations in *Getting Started Guide for Administrators*

- Setting the Maintenance Start Time for an Environment in *Getting Started Guide for Administrators*

Restore Using a Saved Backup Snapshot

You can restore using a saved backup snapshot.

To restore using a saved backup snapshot from your local file system, you can use **EPM Automate Commands**.

> ⓘ **Note**
>
> A message indicates that the snapshot will be restored at the next daily maintenance time. If you need to cancel the scheduled restore, see Cancel a Scheduled Restore.

Cancelling a Scheduled Restore

You may cancel a scheduled restore.

To cancel a restore that is currently scheduled to take place:

1. Select **Settings** from the **Home Page**.

> ⓘ **Note**
>
> You must be a Service Administrator to access this.

2. Select **Cancel Restore** to cancel the scheduled restore option.

3. Select **OK** in response to the warning prompt to continue with the cancellation of the restore.

Cloning Environments

The backup and restore procedures in this topic also serve as a way to clone from one service instance to another.

To clone environments:

1. On the source instance, download the backup snapshot as outlined in [Saving Backup Snapshots](#).

2. On the target instance, restore the backup snapshot that you downloaded to your local file system. See [Restore Using the Most Recent Daily Backup Snapshot](#) or [Restore Using a Saved Backup Snapshot](#).

3. Verify and adjust the daily maintenance time on the target instance, if necessary.

Related Topics

• [Cloning Cloud EPM Environments](#)

• [Steps to Clone an Environment](#)

• [Tasks to Perform After Cloning Environments](#)

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Best Practices and Troubleshooting Topics

Use these topics for Narrative Reporting Best Practices and Troubleshooting.

This table provides links to the troubleshooting topics.

Category	Troubleshooting Topics For	See this Section
Login	Resolving Login Issues	Resolving Login Issues in *Operations Guide*
Unresponsive server	Managing the Environment When the Server is Down	Dealing with Down Environments in *Operations Guide*
Clone Environment	Cloning Issues	Resolving Clone Environment Issues in *Operations Guide*
EPM Automate	Fixing EPM Automate Issues	Resolving EPM Automate Issues in *Operations Guide*
REST API	Identifying REST API Problems	Diagnosing REST API Issues in *Operations Guide*
Access Control	Fixing Problems with User, Role, and Group Management	Resolving User, Role, and Group Management Issues in *Operations Guide*
Reports Performance Issues	Performance Issues with Reports	Troubleshooting Reports Issues in *Operations Guide*
Smart View	Fixing Problems with Smart View	Fixing Smart View Issues in *Operations Guide*

Frequently Asked Questions about Cloud EPM

This FAQ provides links to resources for frequently asked questions about administrative tasks in Oracle Fusion Cloud Enterprise Performance Management

Frequently Asked Questions (FAQs) in EPM Cloud in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*