Oracle® Fusion Cloud EPM

Reviewing, Signing, and Receiving Report Packages in Narrative Reporting

E94219-15

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1 Creating and Running an EPM Center of Excellence

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

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

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

The EPM CoE team:

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

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

How Do I Get Started?

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

Learn More

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

2

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.

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.

- Complete this Learning Path for a hands-on Narrative Reporting Basics: Report Packages and Doclets.

Report Package Components

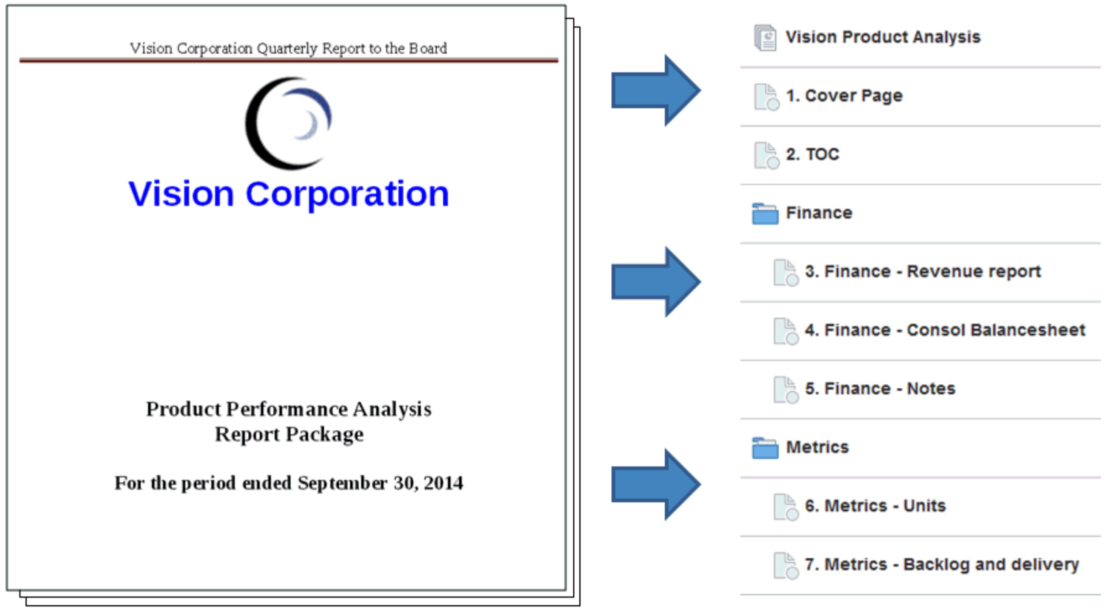
A report package is made up of several components:

- 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.

Reference Doclets

A Reference doclet 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).

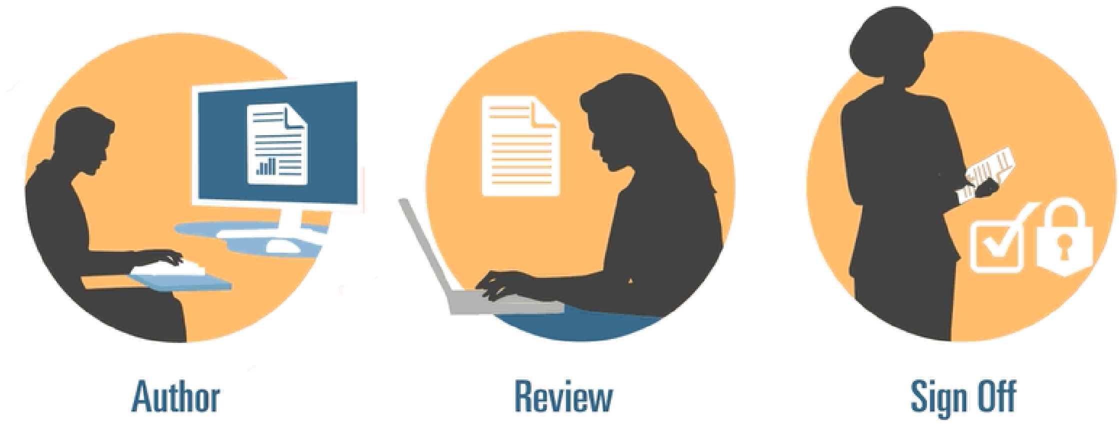
The file content for Reference doclets is not *directly* included in any report package outputs, such as preview, publish, review instances or signoff instances. However, embedded content within a consuming doclet is displayed as part of the report package outputs - even though the actual reference doclet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

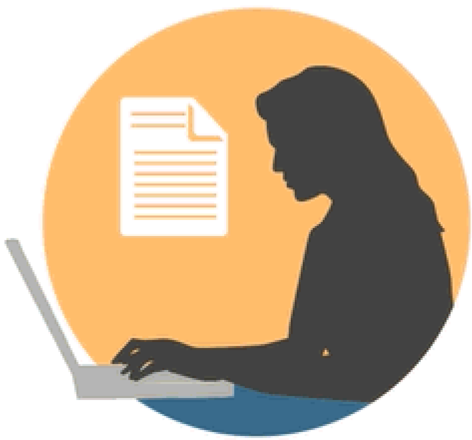
Using workflow, users scheduled for later in the review process can take control of a doclet sooner. For example, if a doclet is assigned to an author, an approver or the owner of the report package can take action on the doclet without waiting for the doclet author. This flexibility eliminates bottlenecks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

3

Performing Reviews on the Web

Reviewers provide feedback in the form of comments for report snapshots using the web. See this video also Reviewing Report Package Content for additional information. The following topics are covered in this chapter:

- About the Review Phase Process
- Reviewing a report instance in the review center
- Posting a comment
- Miscellaneous tasks
  - Filtering comments
  - Editing or deleting comments
  - Attaching files and customizing comment text
- Marking reviews complete
- Comparing Reviews

About the Review Phase Process

The review phase enables report stakeholders to review and provide feedback on the content in the report package. Reviewers provide commentary on their assigned areas of the report package. This could be the entire report package or a subset consisting of sections or specific doclets. Reviewers provide their feedback by using the review center on the web or in Oracle Smart View for Office to enter, review, and respond to comments.

The review phase process:

1. The report package owner creates the review instance and then starts the review cycle in the Narrative Reporting web interface.
2. Notification messages are sent to reviewers to begin their work.
3. Reviewers view a document called a review instance in either the web interface or in Smart View. A review instance includes only the reviewer's assigned content.

   > **Note:**
   >
   > Review instances do not include supplemental doclets of any file type.
   >
   > Though reviewers see only their assigned content, all comments are made and retained against the single review instance.

4. Reviewers highlight content and post comments, in plain text or in rich text format, which can include links and attachments.
5. Reviewers collaborate by adding to other comments in comment threads. If the review is iterative, reviewers are notified to begin their work at the start of each iteration.

6. Reviewers mark their reviews complete, indicating to the report package owner that they are finished with their review. If the reviewer wants to add additional comments after marking the review complete, the reviewer can "Reopen for comments", indicating to the report package owner that they are not done with their review.

   A report package may have multiple review cycles defined for it. All review cycles follow the same process.

Example 3-1 Collaborative Review Process

As reviewers, you collaborate by viewing and adding to other reviewers' comments, creating comment threads. For example, a previous reviewer may have asked a question that you know the answer to. You can add to their comment to provide the answer.

Example 3-2 Iterative Review Process

Reviews can be iterative, which means that a report package owner can schedule multiple review cycles depending on the type of review required. For example, for a multiple draft review process, the review process may include:

- Multiple review cycles; with three drafts
- Review assignments that vary by draft; for example:
  – First draft for manager level
  – Second draft for executive level
  – Third draft for CEOs, CFOs, and so on
- Review assignments that vary by area where you can assign users to review:
  – Entire report
  – Sections
  – Doclets

Key points to remember about the iterative review process:

- A new review instance incorporates content modifications.
- Comments persist across review cycles, so reviewers can see previous comments and how they were addressed.
- The review phase is complete when all review cycles are closed.

Working with Review Instances in the Review Center

You perform reviews by entering comments and providing your feedback in a review instance. The review instance shows you a draft version of the areas of the report package that you have been assigned to review (see Working with Review Instances in the Review Center.) The review instance may consist of the entire report or a subset of the report content.

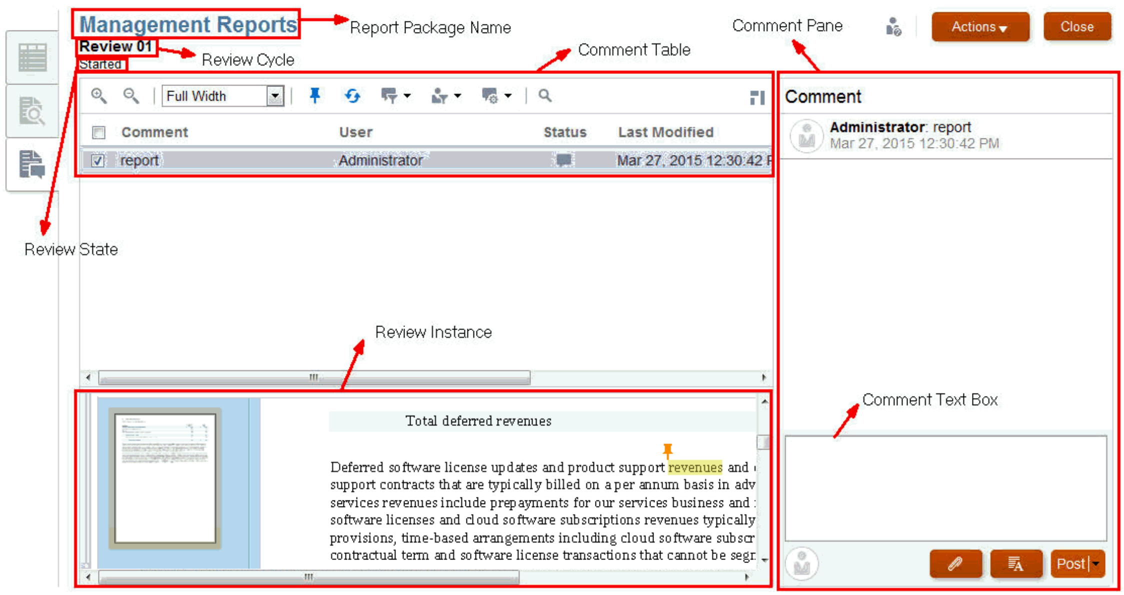
Hyperlinks in the Review phase, for both internal and external links are highlighted when you hover over the links. You can add a comment to the hyperlink text in the review instance, and open or navigate to the link. In order to open the link you have to hover over the link and select `Ctrl + Click`. When selecting an internal link, you are taken to the location in the document within the same tab of your default browser. When selecting an external link, a new tab is open in your browser and the external link is displayed.

> **Note:**
>
> If the report in the review center looks different from the downloaded or printed version, you may be using a font that is not in the cloud service. Contact your service administrator to upload your TrueType fonts to enhance the rendering of the report on the web. If you are using Firefox, navigate to **Tools**, then **Options**, then **General**, and then **Advanced**, and ensure that the check box for **Allow pages to choose their own fonts, instead of my selections above** is selected.

Watch this tutorial video, you'll learn how to compare multiple review cycles of a report package in Narrative Reporting.

-- Comparing Reviews In Report Packages.

Figure 3-1 Sample Doclet in the Review Center



Working with Review Instances in the Review Center callouts are referenced in the procedures below. These are most important:

- Comment Table—Contains the list of comments that have been entered which you can then filter using the filter icons.
- Comment Pane and Comment Text Box—Used to enter comment text and post.
- Review Instance—Where a review instance is displayed in the review center, and you highlight text for comment. Select or use the to toggle thumbnails for the review instance.

Note:

Use the to navigate within the document viewer.

Reviewer Workflow

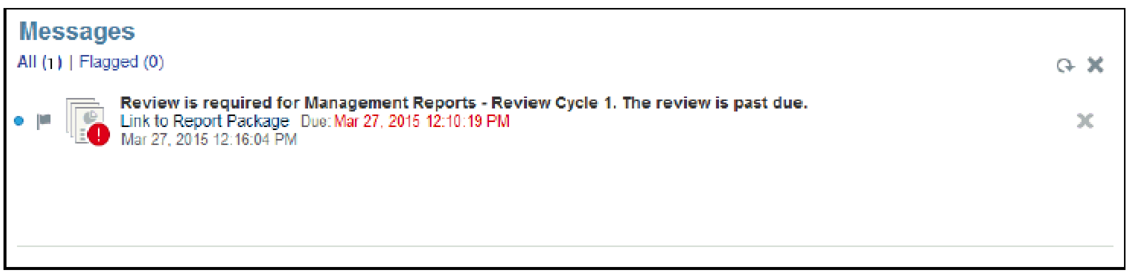
1. From a notification, select the link to view the review instance.
2. Post a comment. See Posting a Comment.
3. Add threads to comments made by others. For example, a previous reviewer may have asked a question that you know the answer to. You can add to their comment to provide an answer. See Posting a Comment.
4. Mark your review complete.

Receiving Notifications

When a report package is ready for review, a message notifies reviewers that they can begin their work. For example, in Working with Review Instances in the Review Center: see **Review is required for Management Reports - Review Cycle 1. The review is past due.**

Select the link to the report package to open the review in the review center.

Figure 3-2 Notifications



Posting Comments

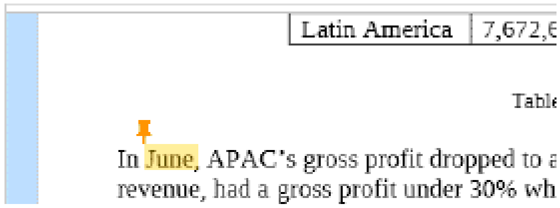
To post a comment:

1. Do either of the following:
   - For Word-based report packages, select the text that you want to comment on and enter your comment in the comment text box.

     Note:

     You cannot post comments on an automatic or custom Table of Contents.

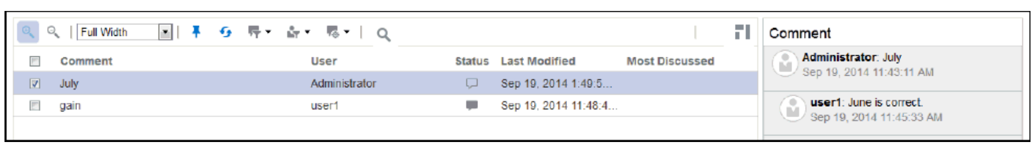
   - For PowerPoint-based report packages, click anywhere in the slide, including in the text or on a graphic, to drop a push pin for your comment, and then enter your comment in the comment text box.
2. Select Post for your comment areas to be highlighted and marked with a push pin.



You can also add a comment to a graphic image in a review instance. Simply drop a push pin anywhere on the graphic image and enter comments as you did above for commenting on text.

> **Note:**
>
> You cannot add a comment to ready-made shapes in Word-based review instances. Ready-made shapes in Word include rectangles and circles, arrows, lines, flowchart symbols, and callouts.

3. To add a comment to an existing comment:
   a. Select a comment in the comment table by selecting the check box next to it.
   b. Enter your comments in the comment text box. You can also use the rich text editor for a comment and attach a supporting file to your comment. See Customizing Comment Text and Attaching Supporting Files.
   c. Select **Post**. Your comment is displayed below the original comment in the comment pane, indented.



Miscellaneous Tasks

Reviewer can also do the following tasks:

- Filtering
- Editing or deleting a comment
- Attaching files and modifying text appearance

Filtering Comments

You can filter comments in the comment management panel. For example, you can show or hide comments, display open or closed comments, or display a particular user's comments. You can also mark comments as open, closed, or to be deleted.

To filter comments:

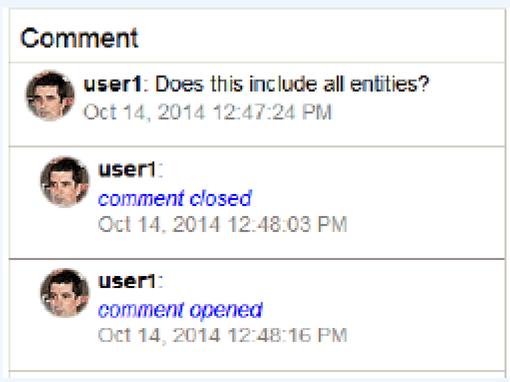
1. Select  to display or hide comment pins within the report.
2. Select  to see changes that were applied to comments by another user.

3. Select ▾ to view all comments, open comments, or closed comments.
4. Select ▾ to view only your comments, comments by a particular user, or all comments. Names displayed below the line are actual user names that you can select to see only their comments.

> **Note:**
>
> The default setting is to display your own comments.

5. Select the ▾ icon to open, close or to delete a comment. If a comment is closed, you can reopen it by selecting Open Comment from the drop-down list.

> **Note:**
>
> When you open or close a comment, the system indicates the change below the user name of the comment in the comment pane as follows,

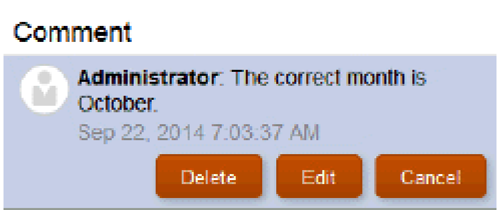


Editing or Deleting Comments

You can edit or delete a thread entry when it is the last entry in the thread that you posted.

To edit or delete comments:

1. Select a thread entry that you started in the comment pane, and select **Delete**, **Edit**, or **Cancel**.



> **Note:**
>
> When deleting a thread entry, it does not delete the entire thread. It delete's the last post, unless there is only one post.

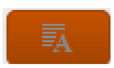
2. Select **Edit** to modify the comment text, and then select **Post** at the bottom of the comment pane.

Attaching Supporting Files and Customizing Comment Text

You can select a local file from your computer to attach to your comment. For example, you might want to associate a supporting document with one of your comments. Or, you may want to customize the text of a comment using the rich text editor. For example, you may want to make text bold or apply a different font color. You can also add a URL to a comment.

To attach files, customize comment text, or add a link to a web page:

1. Select a comment you started in the comment pane, and select **Edit**.
2. Select  to attach a local file.
3. From the **Attach Local File** dialog, browse to the file you would like to attach. You can also create a new name for the attached file you selected and then select 

.
4. Select  to change the text, for example you can change the color of the text, size, font type, add a URL link, and so on.
5. To add a URL in a comment:

   In the Comments text box, enter the URL; for example, enter: `http://www.oracle.com`.

   For URLs to be recognized, you must precede them with a valid URL protocol identifier, such as: `http://` or `https://`. For example: `http://www.oracle.com`.

   > **Note:**
   >
   > Oracle recommends testing URLs in a browser to ensure that they work before adding them to comments.

6. Once you are done with your changes, select 

to post the comment and set the status as open or post the comment and set the status as closed if you are done and the change to the comment requires no further review.

Addressing Review Comments

When a comment is added to a review instance, the comment status is "Open". When the questions or concerns raised in a comment have been addressed, users can change the comment status to "Closed."

Some comments may be addressed with a simple reply to the comment. Other comments may require revisions to the original doclet. Any user except for a viewer, can respond to or address comments. Following are examples of the actions that users can take in response to comments:

- Answer a question and then close the comment.

  For example, if a reviewer asked if a figure in a doclet represented an up-to-date number, a user with that knowledge can reply to the comment and mark it closed.

- Edit the doclet content and then close the comment.

  For example, if a reviewer suggests an edit, another user can check out and edit the doclet, and then reply to the comment that the edit was made, and then close the comment.

- Send the doclet back to the doclet author for additional revisions.

  For example, if a reviewer suggests that a doclet is using old data and needs to be updated with the latest figures, the report package owner can send the doclet back to the author. When a doclet is restarted, a notification is sent to the doclet author indicating that the doclet has been reopened, and the doclet status is changed to "Started". Note that the doclet due dates for authors and approvers may be changed by the report package owner.

Marking Reviews Complete

If you are satisfied with your review and you would like to notify the report package owner, mark your review complete by selecting **Mark Complete**. After you mark your review complete, it prevents you from adding new comments. However, you can still reply to existing comments. The button toggles to **Reopen for Comments**.

> **Note:**
>
> To add more review comments to the report package, select the **Reopen for Comments** button.

Comparing Reviews

You can compare multiple review cycles of a report to see where changes have been made. Change indicators are displayed in the report to represent where changes were made. You can then focus your secondary reviews on only the content of the report that has changed. To see detailed changes made to the report, use MS Word for Oracle Smart View for Office. See Figure 1 for areas to focus on when comparing reviews. To see how this is accomplished from Smart View, see Comparing Review Instances.

Watch the following video also.

Comparing Reviews In Report Packages in Narrative Reporting.

An example of the process could be as follows: You have been assigned as a report reviewer for review cycles 1, 2 and 3. and you would like to compare the changes that were made from review cycle two to three. The default setting is to compare the previous review to the current review. If there were five review cycles and you were only assigned to review cycle one, two and five. By default review cycle two is compared to review cycle five.

Figure 3-3 Review Compare - Sample UI

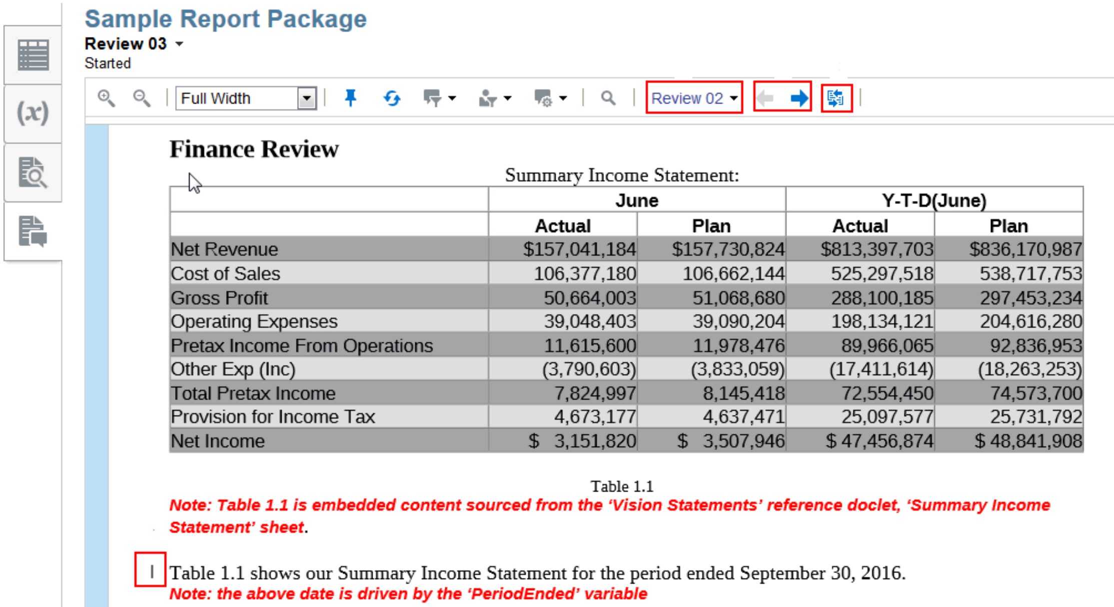
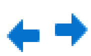
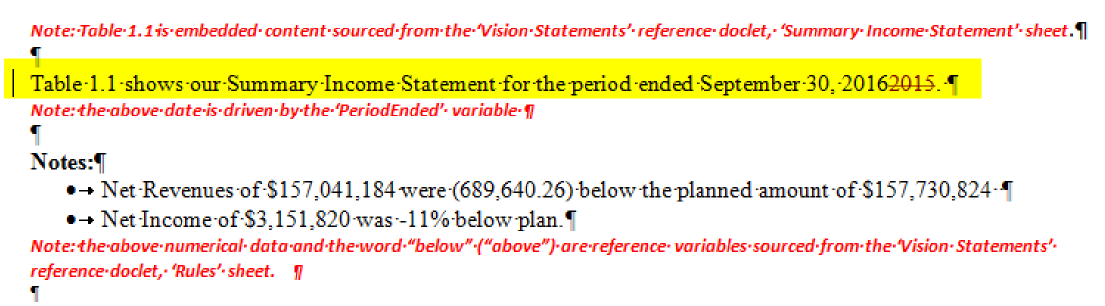


Table 3-1 Callouts for Figure

Callout	Description
	Detailed Comparison in Smart View.
	Next or Previous change.
Review 02	Review Instances.
|	Change Indicator Bars.

If a detailed comparison of the report is required, you can generate a comparison document within MS Word using Smart View. Download a detailed comparison document using the  as shown in the figure above in the toolbar area. See the figure below, highlighted area, for an example of a detailed comparison document displaying the actual changes using Smart View. As can be seen, the year was changed from 2016 to 2015.


Note: Table 1.1 is embedded content sourced from the 'Vision Statements' reference doclet, 'Summary Income Statement' sheet.¶
¶
Table 1.1 shows our Summary Income Statement for the period ended September 30, 2016~~2015~~.¶
Note: the above date is driven by the 'PeriodEnded' variable ¶
¶
Notes:¶
- Net Revenues of $157,041,184 were (689,640.26) below the planned amount of $157,730,824 ¶
- Net Income of $3,151,820 was -11% below plan.¶

Note: the above numerical data and the word "below" ("above") are reference variables sourced from the 'Vision Statements' reference doclet, 'Rules' sheet. ¶
¶

To compare reviews:

1. Open a review document. By default the review center opens to the current review cycle.

2. Select .
   You can select another review cycle from the review cycle drop down menu. Since the default is to compare your current review to the previous review, you have the option of selecting which of the previous reviews you want to compare.

   Select the or to navigate to the previous or next change.

3. **Optional:** Select the to open Smart View to get a detailed view of the changes made in the document as shown in Comparing Reviews. See Reverting to a Prior Version of a Doclet.

> **Note:**
>
> If using Firefox as your web browser to launch Smart View and Firefox opens a browser tab in an unresolved URL of `oraclesv:\\` , enable the extension for Oracle Smart View for Office from the Firefox "Add-ons Manager" and restart Firefox.

4 Performing Reviews Using Smart View

This topic provides a walkthrough for reviewers to review report packages in Oracle Smart View for Office. To review report packages in the Narrative Reporting web interface, see Perform Reviews on the Web.

Topics for performing reviews using Smart View include:

- About the Review Phase Process in Smart View
- Working with Review Instances in Smart View

5 Performing Sign Offs on the Web

Signers review finalized content in a report. See this video also Signing Off on Report Packages. They can either sign off on or reject the report. The following topics are covered:

- About the Sign Off Phase Process
- Signing Off on or Rejecting a Report

About the Sign Off Phase Process

The goal of the sign off phase is to gather final approvals from your key stakeholders. Stakeholders review finalized content and then sign off on or reject the report. All prior authoring and review phases must be complete, and all doclets must be checked in and completed as well. The sign off phase enables you to lock your report and ensures that approved content is not modified. This is beneficial for reports that rely on content to be locked down and to prevent changes.

The sign off phase follows this process:

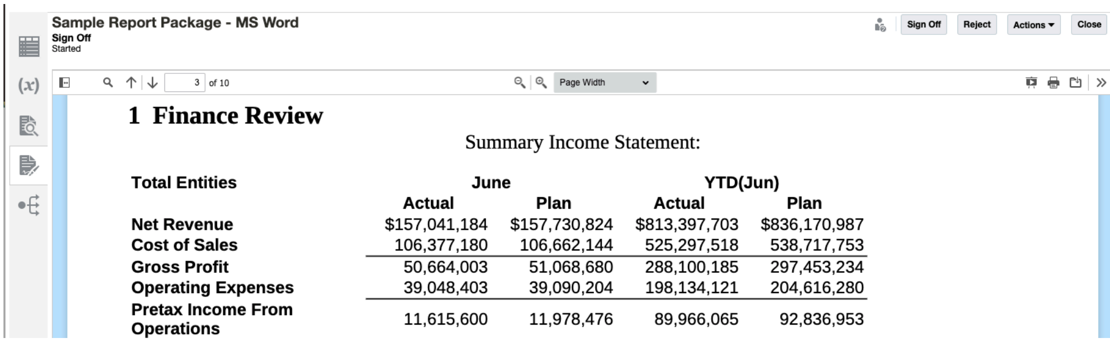
1. The report package owner creates the sign off instance, and then starts the sign off phase.
2. Notifications are sent to signers to begin their work.
3. Signers review finalized content in the form of a sign off instance, and can either sign off on or reject the report.

> **Note:**
>
> After all signers have provided approvals, the report package is marked final.

Signing Off On or Rejecting a Report

The signers review the final report and can either sign off on or reject the report. Signers can use the to search for text in the sign off instance. Additionally, signers can attach a note with details on their action. You can use the PDF preview tools to search on text, toggle thumbnails and other actions.

Figure 5-1   Example of Sign Off Center



Receiving Notifications

When a report package is ready for sign off, a message notifies signers that they can begin their work. For example, in notifications: see **Sign Off is required for Management Reports. The sign off is past due.**

Select the link to the report package to open the sign off instance in the sign off center.

Figure 5-2   Notifications

To sign off on or reject a report:

1. From a notification, open the report and review the report content.

> **Note:**
>
> If the report in the sign off center looks different from the downloaded or printed version, you may be using a font that is not in the cloud service. Contact your service admininstrator to upload your TrueType fonts to enhance the rendering of the report on the web. If you are using Firefox, navigate to **Tools**, then **Options**, then **General**, and then **Advanced**, and ensure that the check box for **Allow pages to choose their own fonts, instead of my selections above** is selected.

2. Do one of the following:
   a. If you are satisfied with your review of the report, select **Sign Off** in the sign off center. If the report is signed off, the report package process is complete, and the report is ready for publication. In **Add Note**, optionally add a note, and then click **Submit**.
   b. If you are not satisfied with the review of the report, select **Reject** in the sign off center. The report package owner can take corrective actions to address any issues noted. In **Add Note**, optionally add a note, and then click **Submit**.

After all signers have approved the report, the status of the report package is updated to "Final."

6 Performing Sign Offs Using Smart View

This topic covers:

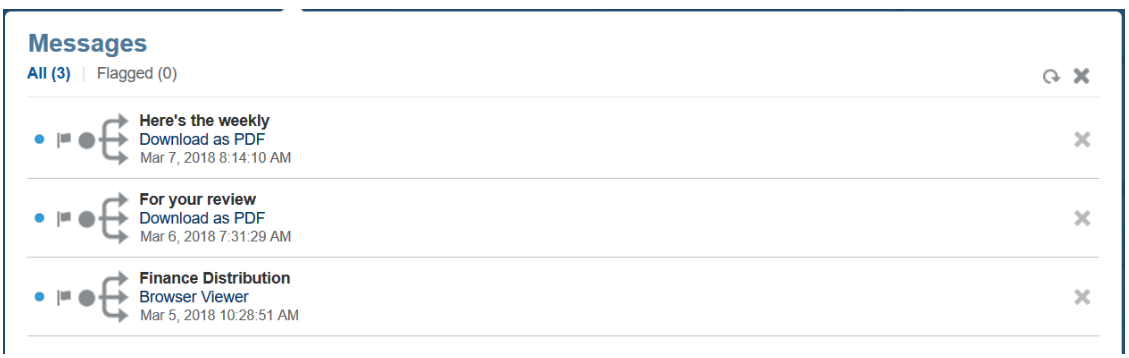
- About the Sign Off Phase Process in Oracle Smart View for Office
- Signing Off On or Rejecting a Report in Smart View

7
Viewing Distributions

Distributions enable a report package owner to send report content to stakeholders at any point in the report package development. As a recipient, depending on the options that the report package owner selects, you can view, download in native format, or download as PDF all of the report content that the report package owner assigns to you.

Notifications

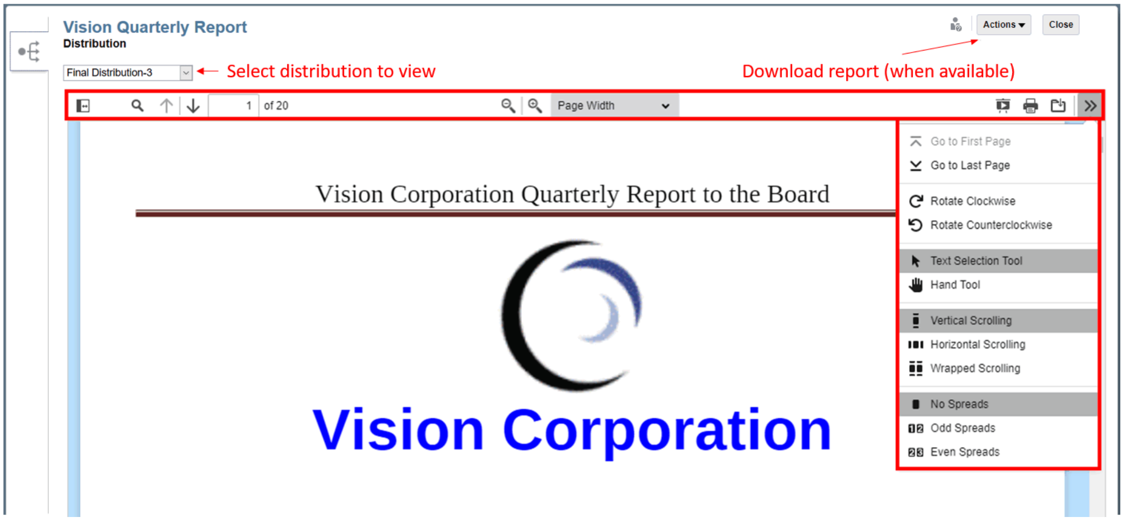
When a report package owner executes a distribution, notifications are sent to the recipients' email and the Messages tab on the web. The notifications contain links to access the distributed content. When you click the links from your email, the system will prompt you to enter your user name and password. After you provide your credentials, the report will be displayed in the Distribution Center in a browser window, or your browser will prompt you to download the source files or PDF, depending on the options the report package owner selected.



Viewing a Distribution

From the Distribution Center, you can view the current distribution, or you can view previous executions of the distribution (if available) by selecting them from the drop down menu under the Report Title. If the report package owner has selected the options to download the report in native or PDF format, use the **Actions** menu to download the report.

Use , , and the zoom drop down menu to zoom the report. Use to search the distribution for a text string.


Vision Quarterly Report
Distribution
Actions
Close
Final Distribution-3
Select distribution to view
Download report (when available)
1 of 20
Page Width
Go to First Page
Go to Last Page
Rotate Clockwise
Rotate Counterclockwise
Text Selection Tool
Hand Tool
Vertical Scrolling
Horizontal Scrolling
Wrapped Scrolling
No Spreads
Odd Spreads
Even Spreads
Vision Corporation Quarterly Report to the Board
Vision Corporation

8 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

9
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.

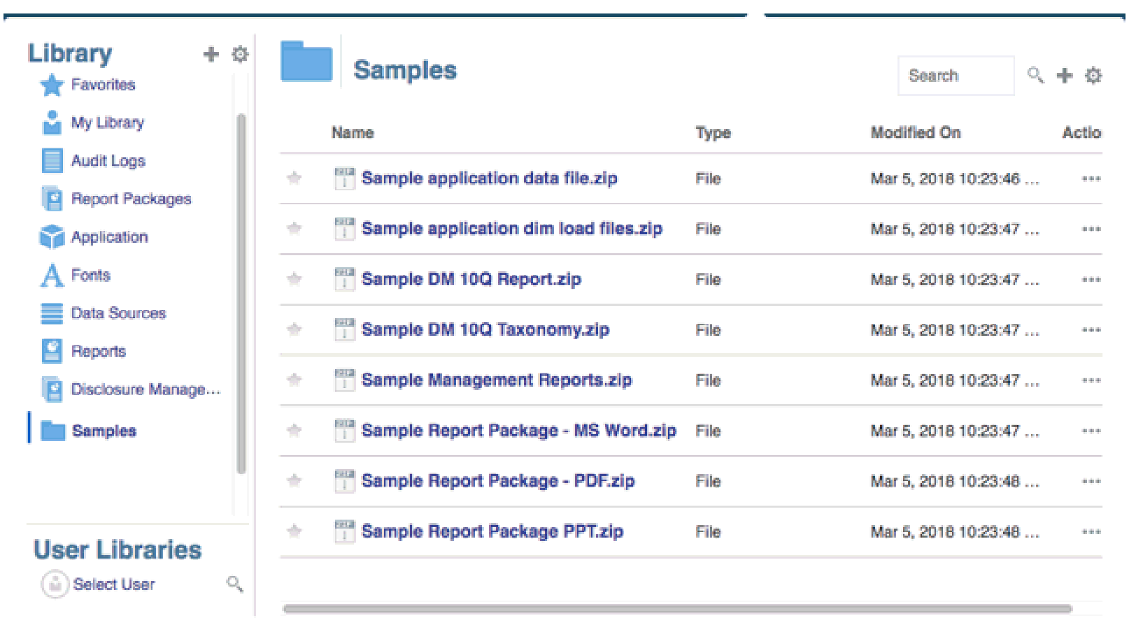
Use it to organize and manage content in a familiar, intuitive interface, which borrows from well-known applications. Its interface and functionality borrows from existing desktop and web-based file and document management systems. For example, use library folders to organize and store artifacts such 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 9-1 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.

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

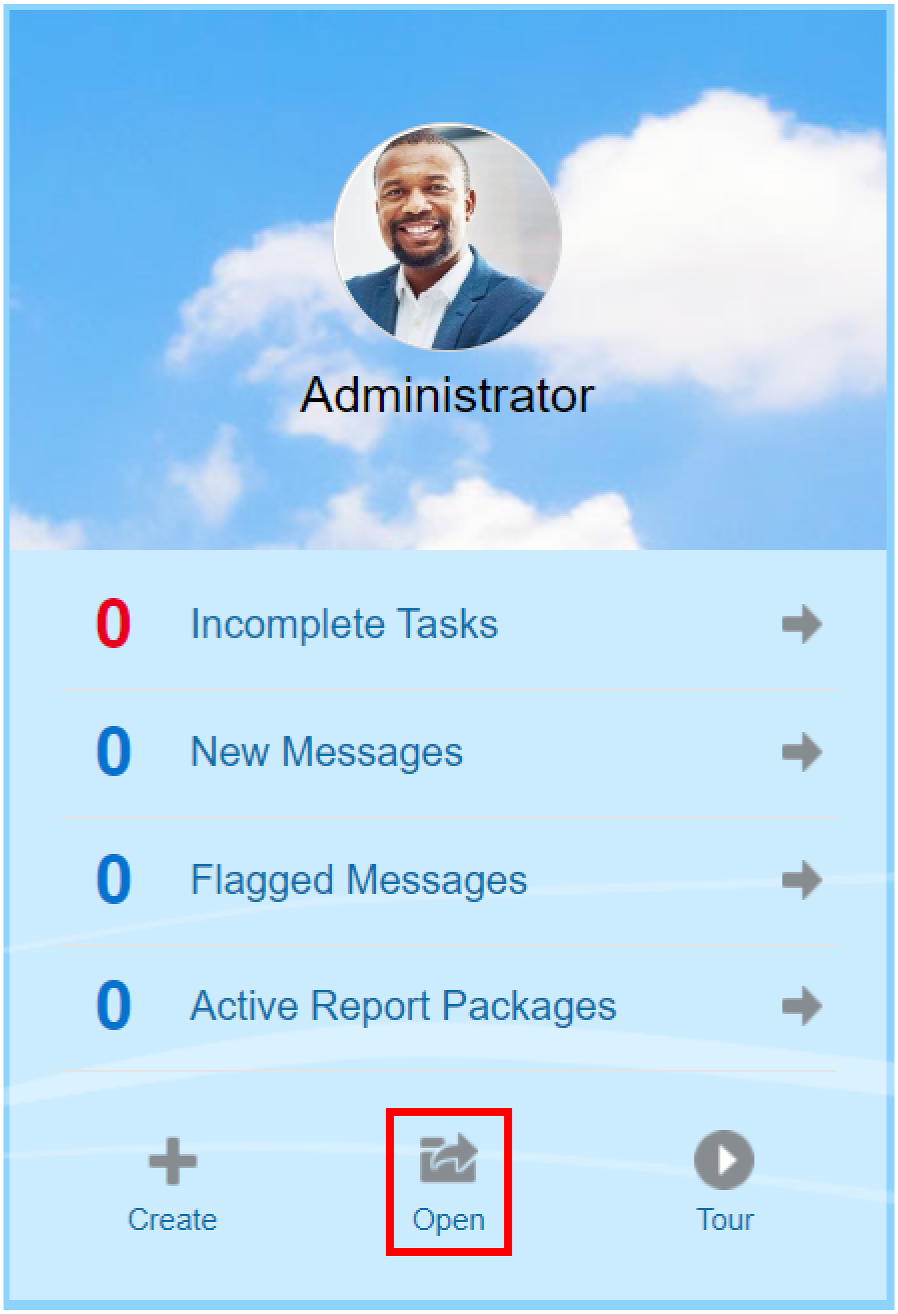
A user can customize their view of the library by Setting Default Views for Content Pane Folders and Artifacts. For example, set a default view preference for a folder or all folders and sort the contents of a folder. You can inspect or review a folder’s properties. For example, as a service administrator, 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.

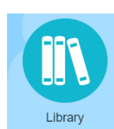
How to use the Library

There are different ways to open the library.

Select one of the following to open the library:

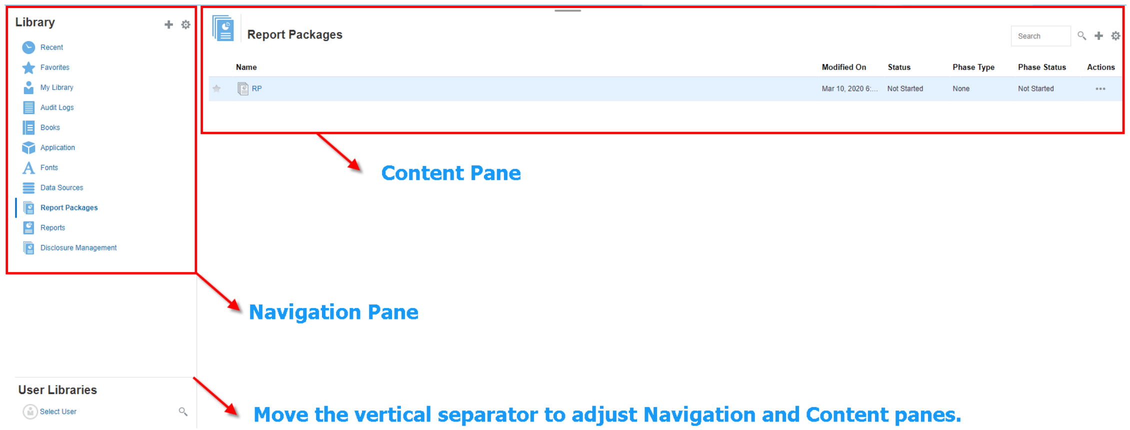
- From the Welcome Panel on the Home page, select **Open**:



- On the Home page, select .

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

Figure 9-2 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. 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 9-3 Locator Links in Content Pane

Using the Action Menus

Use the Actions menu to act on library artifacts:

- Use the Actions menu 

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

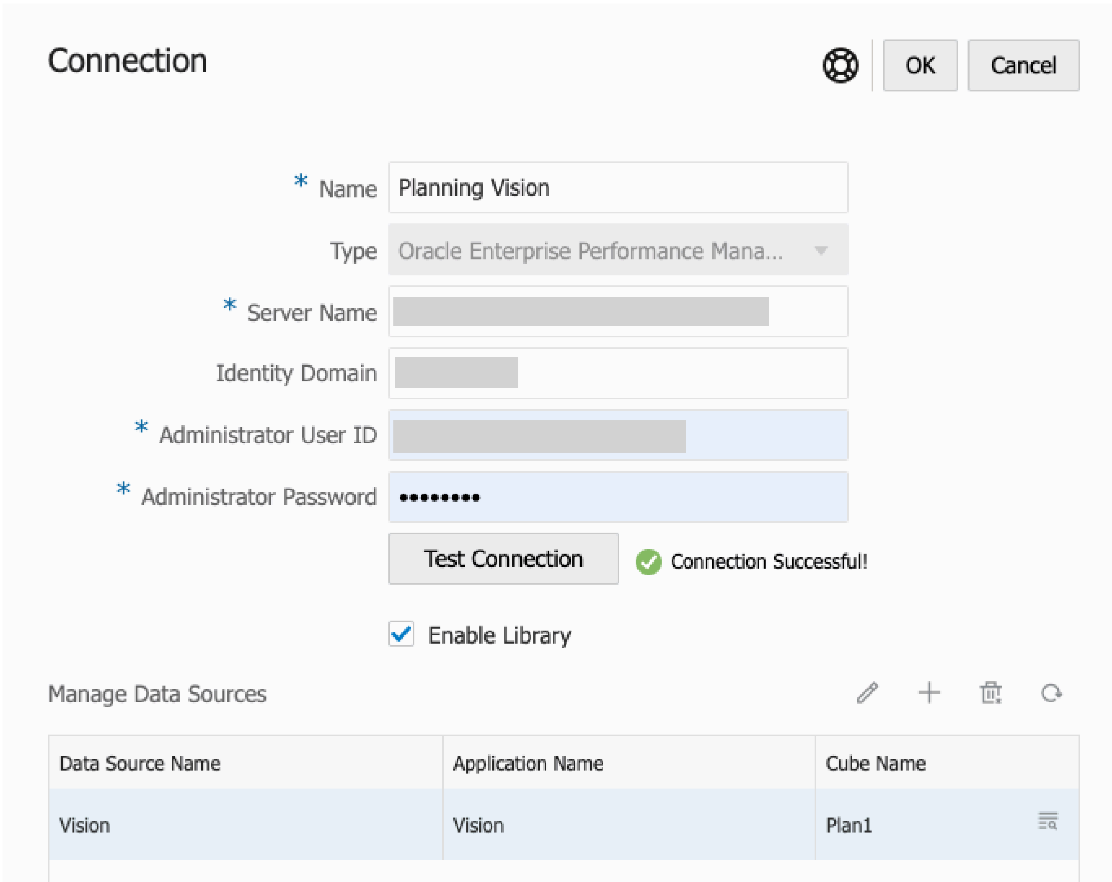
  Supported artifacts include **Reports** and **Report Snapshots**, **Books**, **Bursting**, **Microsoft Office** files, and **PDFs**.
- Only the Service Administrator role can create and maintain Connections.
- When users access a report in Narrative Reporting, their User ID is passed to the data source, 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).

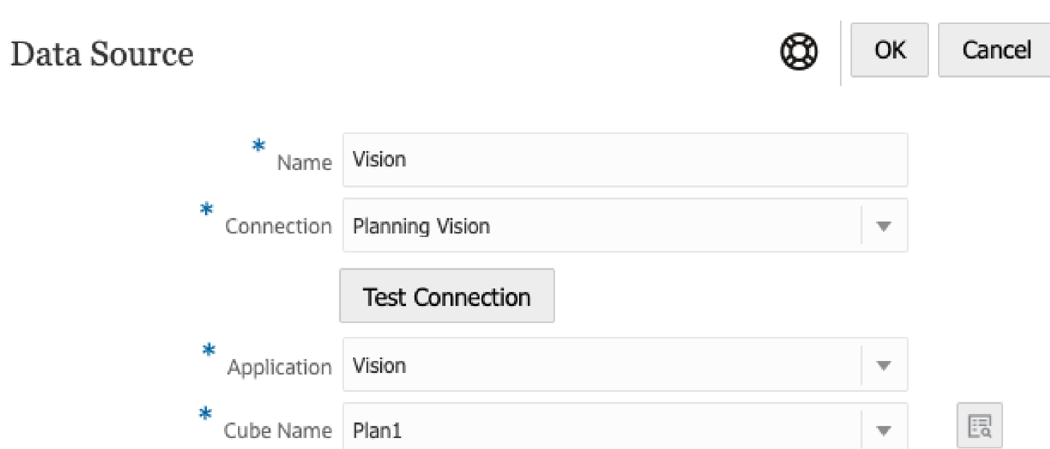
- Cloud EPM Platform Connections: You can access cubes for reporting and **Remote Libraries**.
- Essbase, Fusion ERP, Profitability and Cost Management (PCM) Connections: You can access cubes for reporting only.

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.

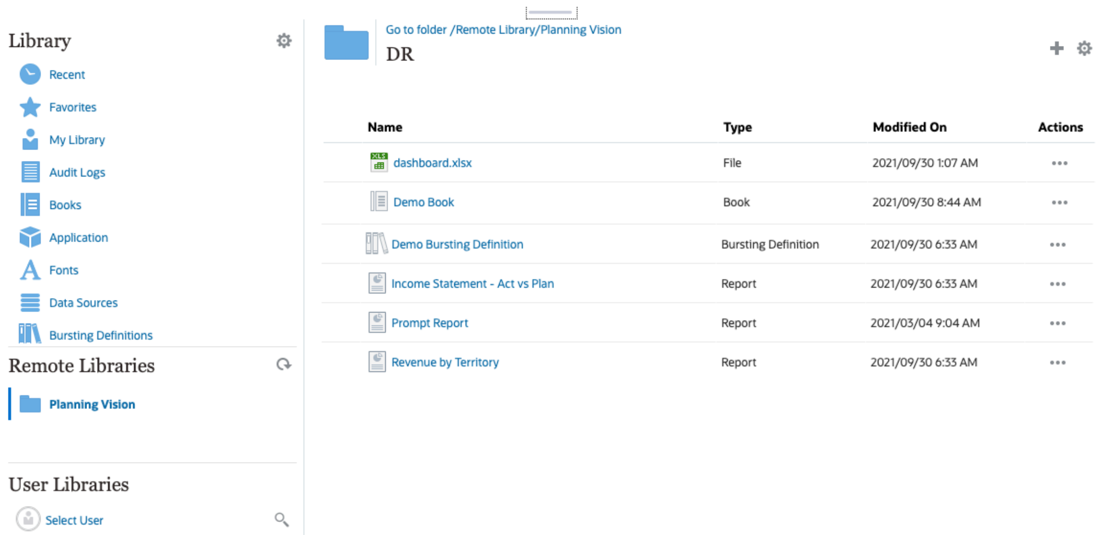
For Cloud EPM Platform connections, you can optionally enable a Remote Library for users to access reporting content from these connections in Narrative Reporting.



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.

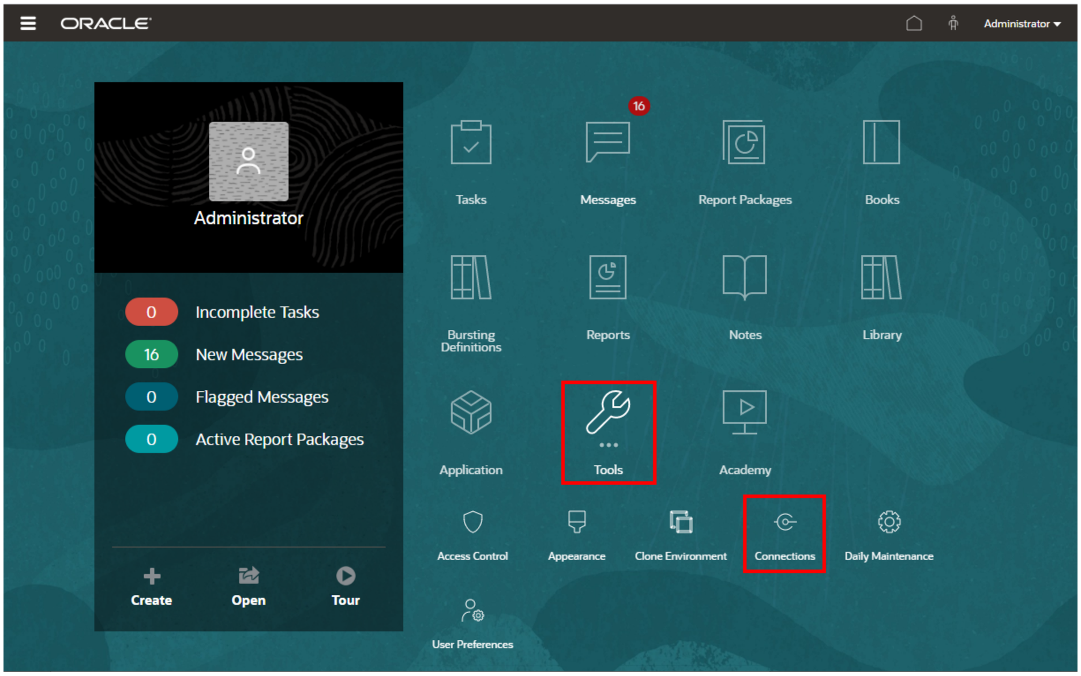
- Narrative Reporting users accessing a Remote Library need to be a user and must have access permissions to artifacts on the **Connections**.
- **Remote Libraries** cannot be enabled to access other Narrative Reporting instances, only Cloud EPM Platform instances (Enterprise Profitability and Cost Management, 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.

-- Working with Connections and Remote Libraries.

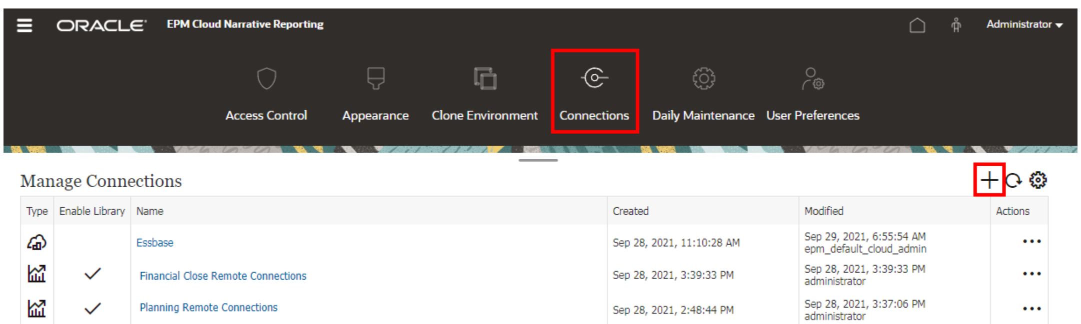
Creating and Editing Connections

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 ➕ 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 Enterprise Performance Management Cloud, used for:
     – Enterprise Profitability and Cost Management
     – FreeForm
     – Planning and Planning Modules
     – Financial Consolidation and Close
     – Tax Reporting
   - Oracle Essbase Cloud
   - Oracle Profitability and Cost Management Cloud Essbase Provider
   - Oracle Fusion Applications Essbase Provider

- Oracle Essbase Analytic Provider Services (APS)

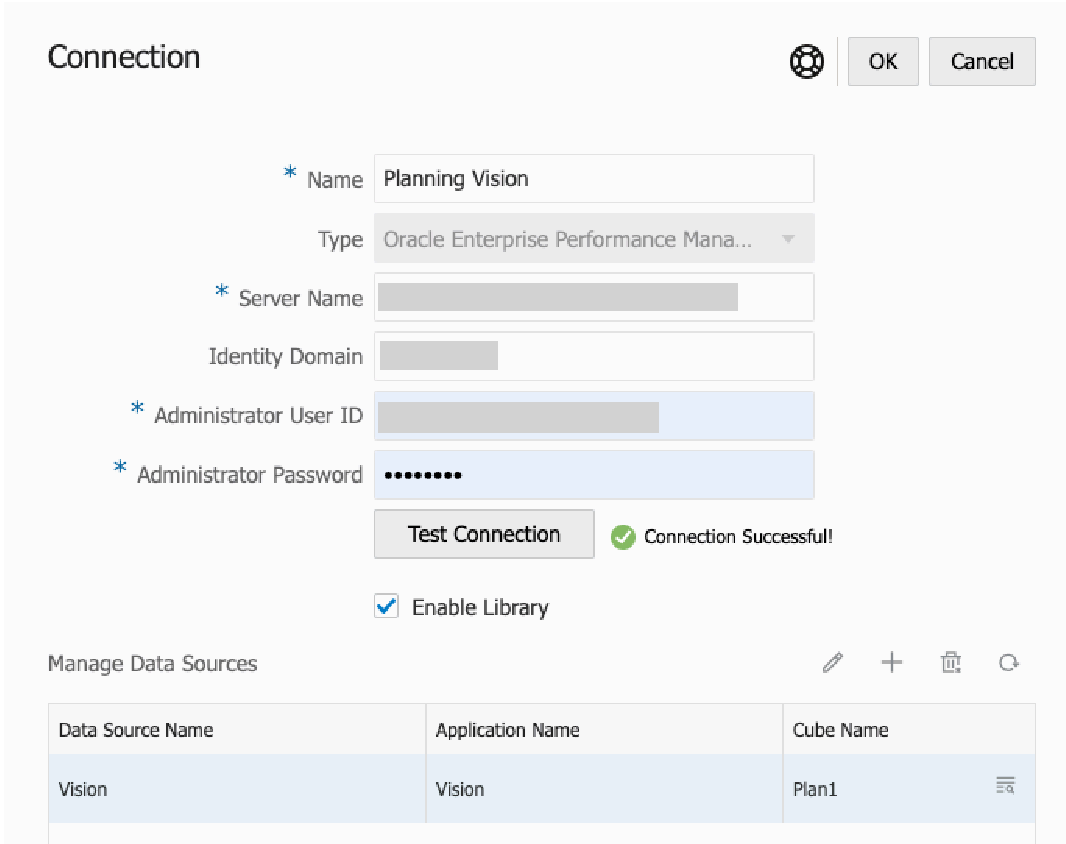
5. In **Server Name**, enter the data source server name with no protocol or URL. For example, for Cloud EPM, if data source URL is: `https://<servername>/HyperionPlanning`, the server name is: `<servername>`.
6. (Oracle Fusion Applications Essbase Provider and Oracle Essbase Analytic Provider Services (APS) 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 Cloud, Oracle Fusion Applications Essbase Provider or Oracle Essbase Analytic Provider Services (APS).
> - 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.

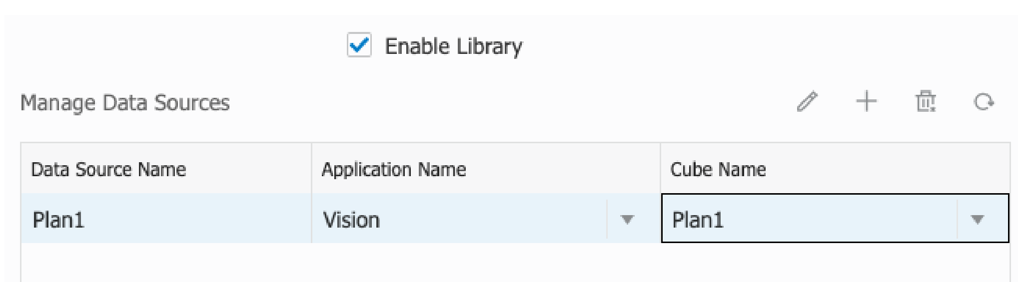
> **Note:**
>
> You must log in to Narrative Reporting with the administrator credentials for the data source that you want to create a connection to. For example, if your Planning Modules administrator is **PlanAdmin**, you must log in to Narrative Reporting with the **PlanAdmin** credentials to create 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 Cloud 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.

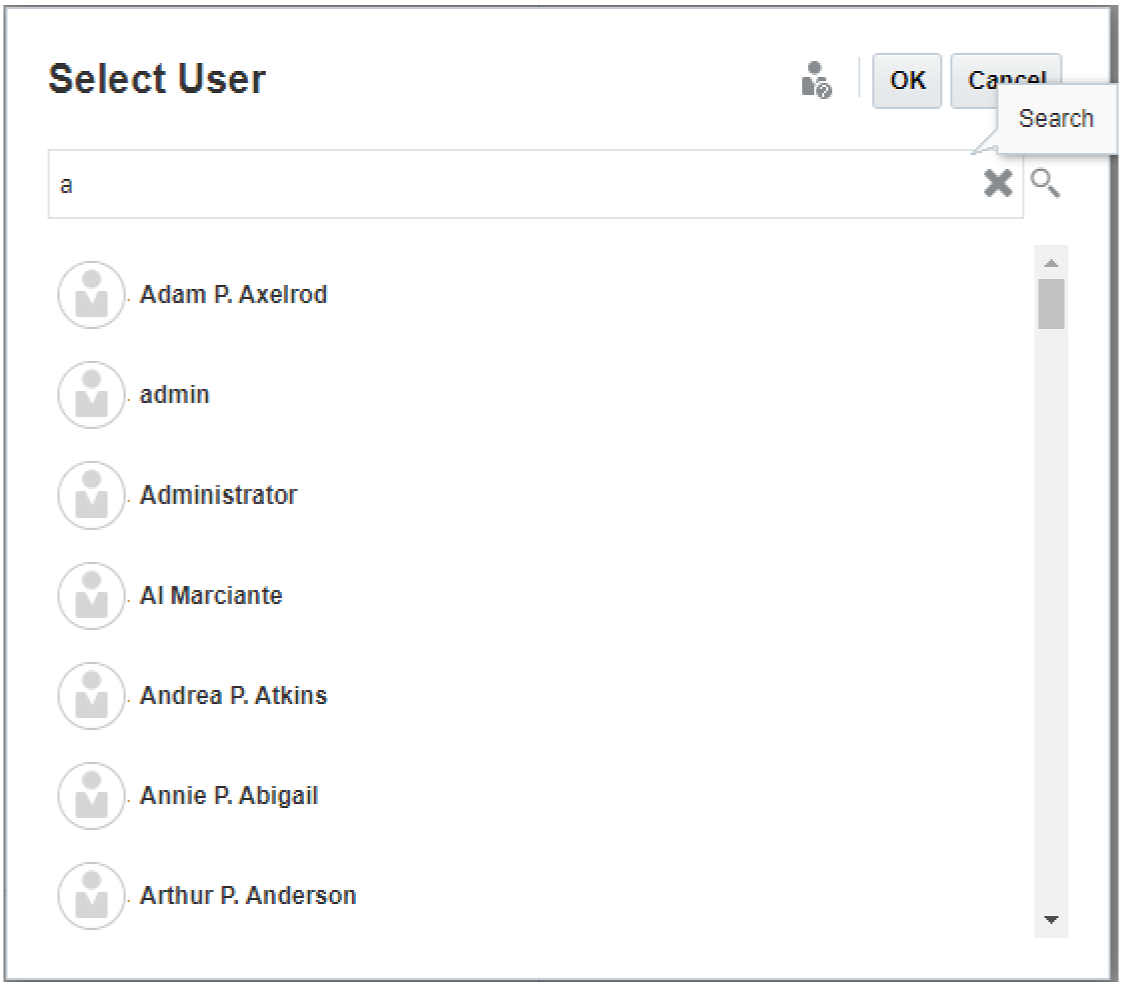
To import a **Connection**:

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.



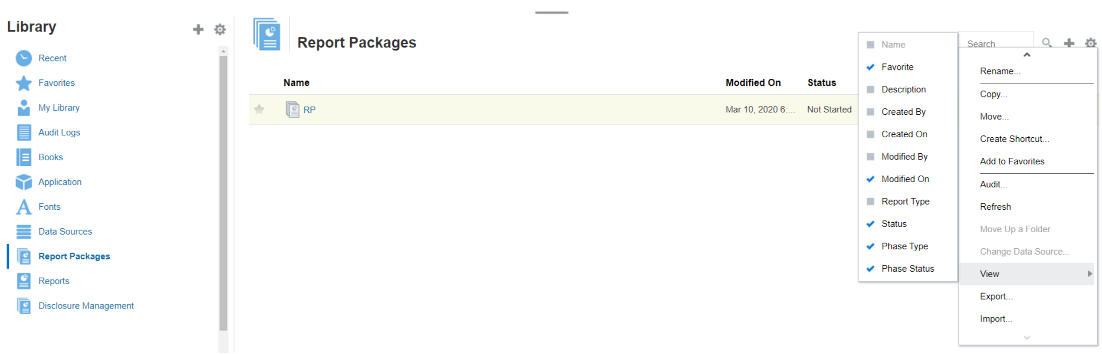
For information on granting access to library artifacts, see this video Granting Access to Library Artifacts.

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 9-4 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:

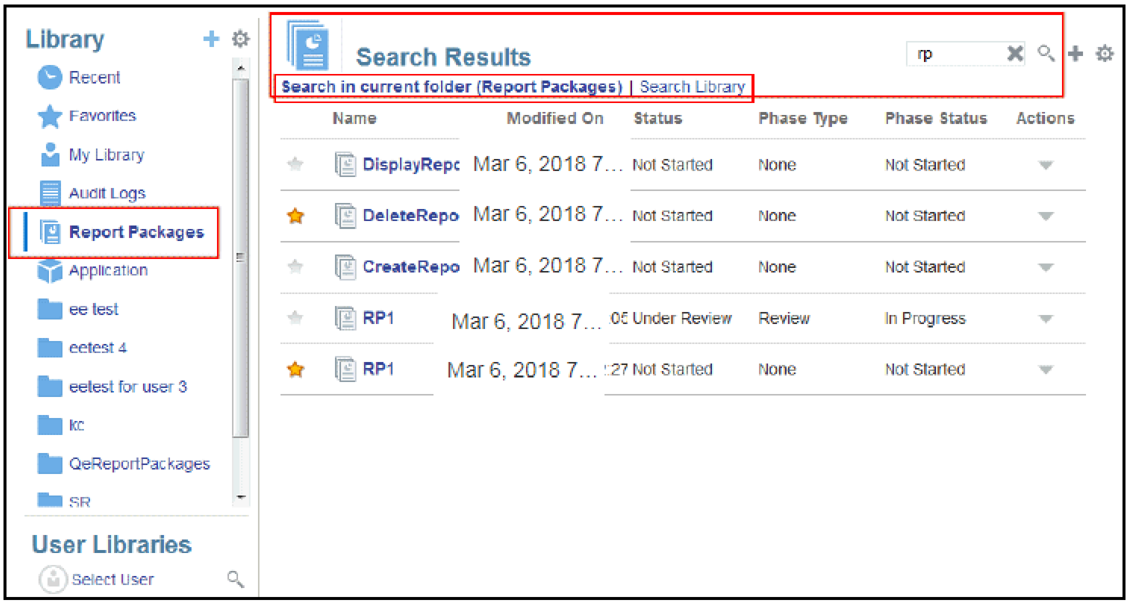
- Actions in the system are captured in a running system audit.
- Users can extract audit entries for folders or artifacts to which they have administrator permissions.
- Only audit log type artifacts are allowed in this folder.
- All users can view this folder, but are only allowed to view audit log 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 Searching the Library. 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 9-5 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  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  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.

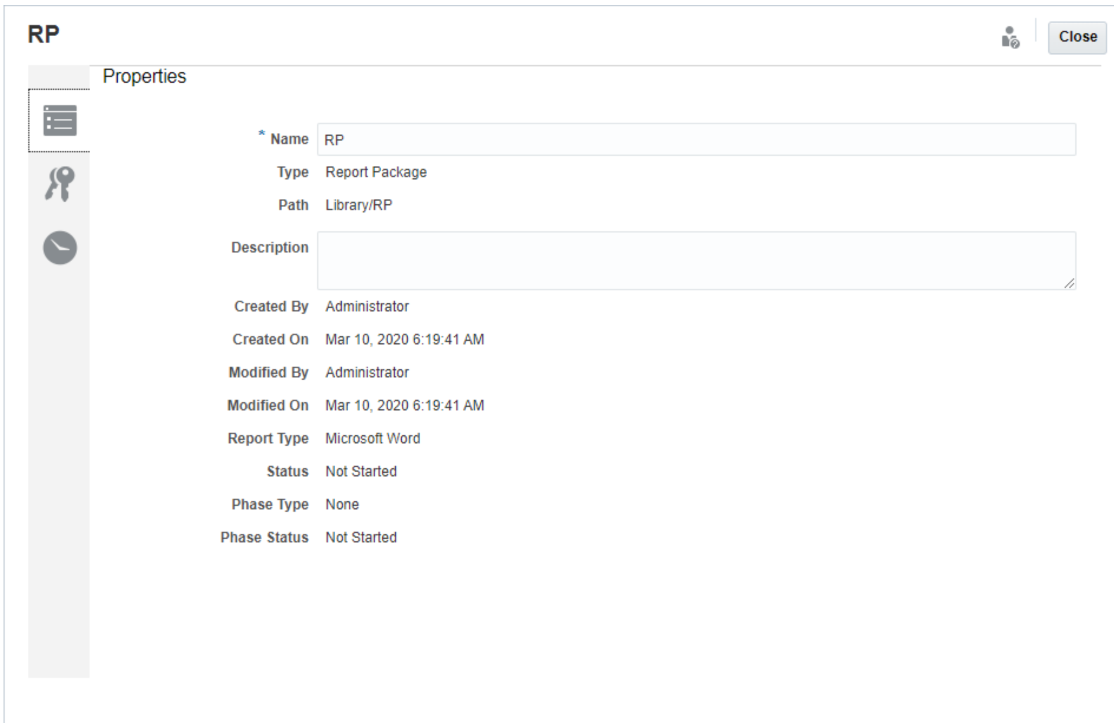
> **Note:**
>
> - You can also migrate **Note Templates**, **Notes**, and **Note Formats** via the Notes Manager. For more information, see Migrating Notes Artifacts from One Environment to Another.
> - You can also migrate **Connections** via the **Connection Manager**. For more information, see Working with Connections and Remote Libraries.

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 9-6 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.