Oracle® Cloud

Viewing Financial Reports on a Mobile Device for Oracle Enterprise Performance Management Cloud

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1 Accessing Financial Reporting From a Mobile Device

Users can view, launch, and interact with Oracle Hyperion Financial Reporting reports from mobile devices.

➤ To access Financial Reporting from a mobile device:

1. **Open a new browser page.**
2. **Enter the following URL:**

   `https://`*`pod#`*`.planning.us0.oraclecloud.com/hr/mobile/HRMobileLogon.jsp`

   where *pod#* is the specific number for your companies assigned pod.
3. **Enter user name and password when prompted.**
4. **Press OK.**

   The Financial Reporting repository is displayed.

After you access the repository, you can:

- Select and display reports, snapshot reports, books, and snapshot books. See Chapter 2, “Viewing Reports and Books”.
- Work with reports and books, including responding to prompts and using expansions. See Chapter 3, “Working With Reports and Books”.

When using Financial Reporting on a mobile device, be aware of the following differences between using Financial Reporting on a mobile device and using it on other platforms:

- A menu of report interactions is available at the top of reports that offers the following interactions:
  - HTML Preview
  - Refresh
  - PDF Preview
  - Preview User Point of View
- A PDF preview of a report only displays the page area that is currently visible within the mobile device screen. To scroll to another page or down within the same page, tap the **Launch Out** link at the top left of the screen. The report is then displayed in a separate browser tab that enables full interaction with all pages of the PDF report.

- To launch a report or book in PDF Preview on a mobile device, tap the PDF icon next to the report or book name in the repository list.
- Preview user POV and prompts are displayed on separate browser tabs.
- For devices such as iPad and Android tablets, the folder and object list is displayed in one pane when a report or book is open, and the open report or book is displayed in another. However, for devices such as iPhones and Android phones, when a report or book is opened, the report or book contents replace the folder and object list on the screen. Use the phone navigation buttons to move between the open report or book and the repository list.
- When accessing Financial Reporting from a mobile device, users create reports, books, or batches; schedule batches; or edit Planning and Budgeting Cloud Workspace user preferences.
- Exporting a report to Microsoft Office is not supported on mobile devices.
- Annotations are not supported on mobile devices.

2 Viewing Reports and Books

If reports contain dimensions on the user POV, they are displayed above the report or book. Setting dimensions on the user POV enables modification of the dimensions, which results in a modified POV and requires regeneration of the report or book.

Note: In the repository, you can display the current user POV settings page before reports or books are run. Current user POV settings can be edited after reports or books are run.

Reports viewed in PDF are generated using the user POV and output in PDF. Reports with multiple page members are generated for all page members and displayed. HTML reports are generated using the user POV.

➤ To view a report:

1 Select **Explore.**

2 Select **File**, then **Open**, and then **Document.**

3 Select a report or book.

The file opens in PDF or HTML, as set in **Preferences**.

4 **Optional**: If the Preview User POV Settings dialog box is displayed, change the settings, and then click **OK.**

If the page is displayed, User Point of View is selected in **Preferences** for Financial Reporting.

5 On the POV bar located on top of the report, select a dimension to invoke member selection. Select another member, and then click **OK.**

The report content changes to reflect the POV change.

6 Select **View**, and then **Preview User Point of View.**

7 In Preview User Point of View, click **Select** to change dimension selections.

8 In Member Selection, select another member, and then click **OK.**

The report is refreshed.

You can view books in HTML or PDF. In PDF, you can view the entire book or individual reports in the book. When you select a report name, the report is generated for all member combinations specified in the book.

You can preview the user POV before running books. When you view books, the user POV and Tables of Contents are displayed. The user POV specifies members for dimensions not defined on report grids. You can change the user POV members and then run the book to display new-member data.

Use the Table of Contents to locate reports that you want to view and to set options.

Note: The time required to generate and display books varies, depending on book size. You can cancel books at any time.

➤ To view a book:

1. **From the list of files, select View, then Display Items of Type, then Hyperion, and then Book.**
2. **Right-click the book, select Open In, and then HTML Preview or PDF Preview.**

   When a book contains HTML content, and you select "Complete Book in PDF," the rendered and printed book will not include HTML content. This is expected behavior.
3. **Optional: If the Current User POV Settings page is displayed, change the settings, then click OK.**

   If the page is displayed, User Point of View is selected in the Preferences dialog box for Financial Reporting.
4. **Optional: Modify the User POV, from the Book Table of Contents page, and view the report for the new POV.**
5. **To view a specific document, highlight the document and click Show Report.**

3 Working With Reports and Books

In This Chapter

Changing User POV

User POV, which specifies members for dimensions not defined on report grids, is available for dynamic reports and books, as specified during design time. You can change user POV members before running reports and books and then run the reports and books to display new-member data. You can also modify user POVs after running reports and books.

When you view a report or book in HTML, the user POV can be displayed above the report or the book Table of Contents in the Content area.

Each dimension or member is a link. When a link is selected, it displays a Member Selection page from which you can select members for the dimension. The members for a dimension are shown in Tree view, which is a hierarchal view of the members of the dimension. By default, Tree view shows only the top-level member. You can expand a member to see its children. If a user does not have access to parent members, the parent and child hierarchy cannot be rendered in a tree. The use is presented with a large flat list.

Note: The tree view is limited to Service Administrators who have full access. All other users are presented a flat list.

Member-search methods:

- Expand data-member rows, and search visually. You can use the Expand all Rows button to expand the rows.
- Use the Find text box to search by member or alias and description. Search criteria can include wildcards, such as * and ?.

Responding to Prompts

Subtopics

- Responding to Prompts in Planning and Budgeting Cloud Workspace
- Responding to Prompts in Oracle General Ledger

Responding to Prompts in Planning and Budgeting Cloud Workspace

Some reports are designed with prompts, which are displayed when you view the reports or books containing the reports. You respond to prompts and provide requested information by selecting members from prompt lists.

➤ To respond to a prompt when previewing a report or book:

1. In Planning and Budgeting Cloud Workspace, in the repository list, navigate to a report or book that has prompts.
2. Right-click the report or book, then select **Open in**, and then **HTML Preview.**
3. Do one of the following:
   - In the Selection text box, enter the member name for the respective prompt, if known. If the text box is disabled, the prompt contains alias names. To edit the text box, key over the existing text. Separate each member with a comma (,).
   - If the member name is not known, click **Go to Member Selection** . **Select Members** is displayed. Make your member selections, and then click **OK**.
4. Click **OK** to run the report for viewing.

Note: To undo any changes, click **Reset** in **Respond to Prompts**.

Responding to Prompts in Oracle General Ledger

Some reports are designed with prompts, which are displayed when you view the reports or books containing the reports. You respond to prompts and provide requested information by selecting members from prompt lists.

➤ To respond to a prompt when previewing a report or book:

1. From the Oracle General Ledger Tasks bar, select **Launch Workspace.**
2. In Planning and Budgeting Cloud Workspace, select **Navigate,** then **Applications**, and then **BI Catalog.**
3. Select a report or book that has prompts and open in HTML or PDF.
4. Right-click the report or book, then select **Open in**, and then **HTML Preview.**

5 **Do one of the following:**

- In the Selection text box, enter the member name for the respective prompt, if known. If the text box is disabled, the prompt contains alias names. To edit the text box, key over the existing text. Separate each member with a comma (,).
- If the member name is not known, click **Go to Member Selection** . **Select Members is** displayed. Make your member selections, and then click **OK**.

6 **Click OK to run the report for viewing.**

Note: To undo any changes, click **Reset** in **Respond to Prompts**.

Using Expansions

Expansions, available only when viewing HTML reports, and not books, enable report viewers to see children of members and their corresponding data. Rows and columns for which expansions are enabled are displayed with right-facing triangles, which you click to view associated detail. After expansions are executed, pages are positioned near the rows or columns selected for expansion. Expansions are set up during design time.

When using expansions:

- Click the right-facing triangle for a row or column to view the next level of detail.

  Click multiple times, to see multiple levels of detail.
- Click the down-facing triangle for an expanded row or column to collapse its members.

Using Related Content

Related Content links to other Financial Reporting documents and to documents on other Oracle servers. Related Content, set up by report designers, is available in HTML only. You view Related Content links by clicking grid values, which are underlined by default.

Members of the cell selected for Related Content are passed to the user POV and used in the related content report. Thus, the context of the Related Content report is the cell selected in the primary report. For example, if you select the Margin row in the row cell, Boston column cell, Oracle Hyperion Financial Reporting sets the user POV for the Account dimension to Margin and for the Entity dimension to Boston and then displays the Related Content report. See the *Designing with Financial Reporting Studio for Oracle Enterprise Performance Management Cloud*.

Related Content rules:

- If only one action (HTML) is enabled for the object, actions are not listed on the Related Content page.
- The default action (HTML) is listed next to the object label.
- Folders open in the Related Content area.

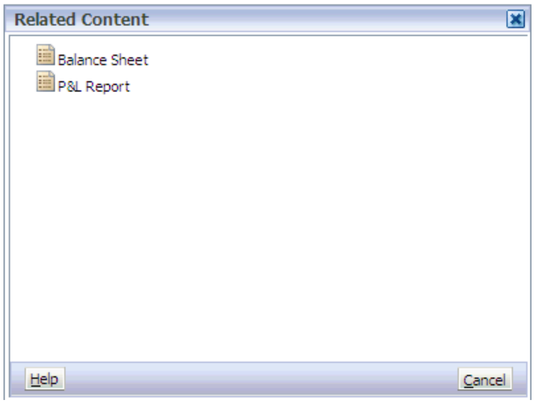
- Object-level security is observed inside folders and when reports are requested to be viewed.

➤ To use Related Content:

1 **In a report, click a Related Content link.**

The report opens if a single report is selected in the list of Related Content and only one action is specified. If multiple reports are selected or multiple actions are specified, the Related Content page is displayed in a separate browser window.

2 **If Related Content is displayed, click a link.**



If the link you click is not a folder, the document or action combination clicked is displayed.

Changing Page Members

You can change a page member only if, during report design, multiple members are assigned to the page axis of a grid. You change a page member to see different report views—HTML reports only. After you change a page member, the report is refreshed and populated with the new page member.

➤ To change a page member:

1 **Open a report with page-axis members in a grid.**

2 **From Page, select a member.**

The report is run, and data is displayed for the selected member.

For PDF, data for page members is displayed on different pages.