Oracle® Cloud

Working with Reporting Settings for Oracle Planning and Budgeting Cloud Service

Oracle Cloud Working with Reporting Settings for Oracle Planning and Budgeting Cloud Service

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1 Using Reporting Settings

In This Chapter

Personalizing Reporting Settings

Subtopics

- Subscribing to Documents
- Working with Favorites

Subscribing to Documents

When documents are changed or updated, subscribing users can be informed:

- By email notifications with attached files
- By images that represent bookmarks

For information on subscribing to documents, see Chapter 5, "Viewing and Organizing Information."

Working with Favorites

Favorites provide quick access to frequently used items and documents. With appropriate access permissions, you can add items (push items) to other users' favorites.

For information on working with favorites, see "Using Favorites" on page 50.

Reporting Settings Toolbars, Menus, and Shortcut Commands

Reporting Settings includes the following toolbars, menus and shortcut commands:

- **Standard Toolbar**—Includes options to create documents, open documents, and display the repository as a file management system.
- **Explore Toolbar**—Includes options to create folders, navigate, cut, copy, paste refresh, and open the Properties dialog box.
- **Schedule Toolbar**—Includes options to run and schedule batches.
- **Favorites Menu**—Includes options to set up favorites and to select from a list of favorite documents.
- **Shortcut Commands**—Shortcut menu commands are displayed by right-clicking an item. Command availability depends on the content of the current window and the area in Planning and Budgeting Cloud Services Workspace from which the menu is accessed.

Setting Preferences

Subtopics

About Financial Reporting Preferences

Preferences include options for previewing documents, POV settings, export options, and formatting options; preferences for designing reports, the language to use, units of measure, and guidelines for document layouts. You access Explore, Oracle Hyperion Financial Reporting, and Oracle Hyperion Planning preferences from the Preferences dialog box:

To access the Preferences dialog box, select **File**, and then **Preferences**.

Setting Explore Preferences

In Explore preferences, you define default folders and default permissions for items that you create or import. You can specify default permissions for users, groups, or roles. If you do not set these preferences, the Default folder and New Document folder are set to the top-most, or root folder and permissions for items are set to Empty.

You can modify the following Explore Preferences:

- **Default Folder**—Your default folder is shown when you use Explore. Set it to the folder you access most frequently.
- **Default File Permissions**—Applied when you create a folder or import artifacts. These permissions determine the ability of a user, group, or role to access the item and whether to automatically push the item to the user, group, or role favorites.

Note: Default file permissions are automatically applied to all artifacts you create or import. You can override these defaults by manually changing the permissions when you create or import the artifact.

➤ To set default folders:

1. Select **File**, then **Preferences**, and then **Explore.**
2. Set the Default folder and New Document folder.
3. Click **Select**, and do one of the following steps:
   - From Look in, select a folder.
   - From the list of names, select a folder.

   To navigate, double-click a folder. The folder that you select is displayed in the Name text box.
4. From Default File Permissions, select one of the following:
   - All Other Documents
   - Folders
5. Click **Set Permissions** to set default permissions for users, groups, and roles.
6. Click **OK.**

Formatting Preferences

The following preferences can be set for all reports created in Planning and Budgeting Cloud Service Workspace:

- "Default Formatting Preferences" on page 13
- "User Preferences and Formatting Options" on page 14

Default Formatting Preferences

Default Formatting preferences specify default data formatting for all subsequently created reports. Options are organized by their ability to amend, format, or replace data returned from the data source.

Table 1 Default Formatting Preferences

Formatting Options	Description
Leading and Trailing Formatting	
Currency Symbol	Inserts the following currency formatting symbols into the Positive Prefix and Negative Prefix text boxes: Dollar ($), Cents (¢), Pound (£), Euro(E), Deutschmark (DM), Franc (F), and Yen (¥).
Positive Prefix	Character to precede positive numeric values
Positive Suffix	Character to follow positive numeric values

Formatting Options	Description
Negative Prefix	Character to precede negative numeric values. **Warning:** The minus sign (-) is the default prefix. Deleting the default prefix without replacing it causes negative values to display positively.
Negative Suffix	Character to follow negative numeric values
Numeric Formatting	
Grouped Thousands Check Box	Numeric digits grouped by thousands
Minimum Decimals	Minimum number of decimal places to display
Maximum Decimals	Maximum number of decimal places to display
Scale	Abbreviated values by tens, hundreds, thousands, ten-thousands, hundred-thousands, millions, and billions.
Use Negative Color Check Box	Negative numbers are signified by a selected color
Select Negative Color	Color representing negative values
Samples	
Update Samples	Updates the samples panel based on the most recent formatting selections
Replace Missing With	Replaces missing values with either a text string or zero

User Preferences and Formatting Options

User preferences are global settings applied to new documents. User Preferences can be overridden by database connection formatting and document-based formatting.

Order of Formatting Precedence:

1. Options saved with documents
2. Options saved with the database connection
3. Options specified in the User Preferences dialog box

Spreadsheet user preferences and chart user preferences are identical to spreadsheet options and chart properties. They are applied only to subsequently created documents.

Personalizing Planning and Budgeting Cloud Service Workspace for Reporting Settings

When using Planning and Budgeting Cloud Service Workspace, you can customize the appearance of the user interface. Use the View menu or user preferences for customization.

Note: User interface settings set on the View menu override default settings defined in the General Preferences tab and remain in effect until you log off.

Table 2 Customization Tasks for Workspace Modules and Menu Commands

Customization Task	Modules	Menu Bar Command
Show/hide View pane	All modules	View, then View Pane
Show/hide Masthead	All modules	View, then View Masthead
Resize View pane and content area or Masthead	All modules	See "Resizing the View Pane and Content Area" on page 15 or "Resizing the Masthead" on page 15
Which file types are listed in the content area	Explore	View, then Display Items of Type. See "Displaying Specific File Types" on page 16
Whether to show hidden files in the content area	Explore	View, then Show Hidden
Which item properties are displayed in the content area	Explore	View, then Show Columns. See "Displaying Columns" on page 15
Sort items in the content area	Explore	See "Sorting Items" on page 16

Resizing the Masthead

➤ To resize the masthead:

1 **Point to the header border between the View pane and content area and the masthead.**

The Masthead Area Adjuster is displayed as a faint double line in the border.

2 **When the pointer changes to a horizontal double-headed arrow, drag the border up or down.**

Resizing the View Pane and Content Area

➤ To resize the View pane and content area:

1 **Point to the column border between the View pane and the content area.**

The View Pane/Content Area Adjuster is displayed as a faint double line in the border.

2 **When the pointer changes to a horizontal double-headed arrow, drag the border right or left.**

Displaying Columns

From Explore, items and properties are displayed in the columns within the content area. Column settings are retained after you log off.

➤ To hide or display columns:

1 **Select View, and then Show Columns.**

2 **Display or hide columns by setting or clearing its check box.**

For example, select the check box for Size to be displayed as a column in the content area.

3 **To specify the column width, click a column check box, and enter the new column width in pixels.**

You cannot specify the column width for exceptions, priority, or versions.

4 **Click Save.**

➤ To reorder columns, do one of the following:

- Select **View**, and then **Show Columns**. In the Show Columns dialog box select a column and use the  and  arrows.
- From the content area in Explore, drag the columns to the desired location.

➤ To resize column widths:

1 **Point to a column border in the column header.**

2 **When the pointer changes into a horizontal double-headed arrow, drag the border to the right or left.**

Sorting Items

From Explore, you can alphabetically sort the items in the column. You can sort using any column heading. Date columns are sorted chronologically.

Displaying Specific File Types

From Explore, you can specify which file types to display in the content area.

Note: Your role and permissions also determine if an item is displayed.

➤ To display specific file types:

1 Select **View**, then **Display Items of Type**, and then select an option:

- **All Files**—Displays all files in Explore
- **Select from a list of file type groups**—See step 2.
- **Standard**—Displays standard files, see “Standard Files” on page 17.
- **Other**—Select a file from the dialog box displayed.

2 **Optional:** For the list of file type groups, you can select only one file type group from the list.

Table 3 File Type Groups

Option	Description
External Links	All items imported as a URL
All Office Files	Microsoft Word, Excel, Power Point, and Project files. It also displays files with the file extensions `.mht`, `.mhtml`, or `.nws`
All Reports	Financial Reporting reports, snapshot reports, books, snapshot books and batches

Option	Description
All Financial Reporting Objects	All Financial Reporting reports, snapshot reports, books, snapshot books and batches
All Images	All image files with the following extensions: ● .gif ● .jpg ● .png ● .bmp ● .tif ● .xbm ● .xwb
Standard	All files with the following extensions: ● .xls ● .doc ● .mpp ● .ppt ● .pdf ● .html ● .txt ● .xml ● .zip ● .rtf
Other	From the list of file types, select one file type to be displayed.

Standard Files

Standard files include text files, log files, HTML files, and Microsoft Office files. The administrator sets up the types of files that the repository supports. See Chapter 3, "Exploring and Managing Items." Open the following standard file types from Planning and Budgeting Cloud Service Workspace:

- .xls
- .doc
- .mpp
- .ppt
- .pdf
- .html
- .txt
- .xml
- .zip

- .rtf

2 Using Search Services

In This Chapter

Introduction

Search Services enables you to search for and retrieve documents and reports from any repository in Planning and Budgeting Cloud Service Workspace. The search operation returns a list of results based on locating the users keywords in document-specific metadata; for example, document name, date created or author (for Financial Reporting Word or PDF documents only), and extracting content-based information from documents.

You can perform the following searches:

- **General search**—Search keywords in any part of all supported content published in Planning and Budgeting Cloud Service Workspace.
- **Context-sensitive search**—Search keywords associated with aspects of some content in all supported content published in Planning and Budgeting Cloud Service Workspace.
- **Search within a hierarchy**—General or context-sensitive searches restricted to selected branches of Planning and Budgeting Cloud Service Workspace or to selected repositories (Scorecard for example).
- **Data or metadata search**—If content is static in nature, then both metadata and data is indexed (for example, filter name and selected values for the filter). If content is dynamic in nature, then only metadata is indexed (for example, column name only).

When a search is initiated, Search Services searches for terms entered in the request. The results are returned on another page as a list of document references and synopses, ranked in order of relevance.

Search results are:

- Categorized based on content type, modified date, and file locations within Planning and Budgeting Cloud Service Workspace

- Sorted by relevance or by modified date
- Authorized; user credentials ensure that only user-authorized content authorized is returned

Using the Search Service

You can initiate a search by entering keywords in a text box located in the upper right of all Planning and Budgeting Cloud Service Workspace screens, and then either pressing Enter or clicking the Search button.

➤ To use the Search Service:

1 **Enter a keyword in the Search text box.**

A Suggestion feature is available that spell-checks text and suggests alternative keywords if available.

The search results are displayed on a separate page and include:

- File name (clicking on this launches the document)
- Description
- Document type
- Last modified date
- File path (double-clicking on this launches the folder)

If a Planning result is selected, a Planning tab is launched and supporting detail is displayed.

2 **Optional: Order the search results according to Score or Last modified date.**

By default, search results are sorted by score. A document's score or relevance is determined by how many times the keyword appears in the document and how many other keywords are in the document. For example, a document where the keyword appears three times but only has five words scores higher than a document where the keyword appears 10 times but with 1,000 other keywords.

3 **Optional: Filter the search results according to document type, modified date, or publish location.**

Using Advanced Search

Search Services includes an Advanced Search feature that provides a convenient way to generate advanced search queries.

➤ To use advanced search:

1 **Click the Advanced Search link on the Search Results page, or select Tools, and then Advanced Search.**

2 **Enter or select the desired search criteria and the click Search.**

Advanced search options:

- **All words**—Each document in the search results contains all the keywords entered.
- **At least one word**—Each document in the search results contains at least one of the keywords entered.
- **Without the words**—Each document in the search results does not contain any of the keywords entered.
- **Written in (language)**—Restricts the results to documents written in a specified language.

  The language is determined by an entry in the metadata and may not be applicable to all document types.

  To refine a search to allow for multiple languages, edit the search text field at the top of the Search Results page.
- **Created in the past**—Restricts results to documents created within a specified time frame.

  The **Custom date** option activates a calendar control to search for documents created on a specified date.

  The **Custom date range** option activates calendar controls to search for documents created in a specified date range.
- **Modified in the past**—Restricts results to documents modified within a specified time frame.

  The **Custom date** option activates a calendar control to search for documents last modified on a specified date.

  The **Custom date range** option activates calendar controls to search for documents last modified in a specified date range.
- **In folder**—Restricts results to a specified repository and folder name.
- **Only search (document type)**—Restricts results to documents of a specified MIME type.

  To allow for multiple document types, edit the search text field at the top of the Search Results page. For example, change `sales +MimeType:application/x-brioquery` to `sales +(MimeType:application/x-brioquery MimeType:application/pdf)`.
- **Hidden file options**—Defines whether to retrieve hidden files. The "hidden" attribute of a file is set within the context of its repository. For example, it can be viewed or altered by the Properties dialog in the Planning and Budgeting Cloud Service Workspacerepository.
- **Priority**—Restricts the results to documents of High or Normal priority. The “priority” attribute of a file is set within the context of its repository. For example, it can be viewed or altered by the Properties dialog in the Planning and Budgeting Cloud Service Workspace repository.
- **Order by**—Defines the sort sequence of the search results.

Table 4 Advanced Search Examples

Search Term	Request
"sales +LanguageCodes:de"	Documents that contain the term “sales” and the language to be German

Search Term	Request
"sales +(LanguageCodes:de LanguageCodes:es)"	Documents that contain the term “sales” and the language to be German, or documents that contain the term ‘sales’ and the language to be Spanish

Search Syntax

The basic Search Services syntax follows a number of rules. Terms can be logically grouped using the following operators:

Table 5 Search Syntax Operators

Syntax	Description
+	AND
-	NOT
( )	Parenthesis—Apply an operator to a group of keywords
“ “	Quotation marks—Search for the exact occurrence
[ ]	Brackets—Search for a range value
*, ?	Wild-card—Used in the middle or at the end of words to indicate any values in place of the *

You can further restrict searches by searching for or excluding a specified category. The syntax for a category is of the form `category:search_term`. Use quotation marks to search for exact strings in categories. Use AND and NOT operators to logically add or remove categories.

Examples

Search for documents containing *sales* but not *oracle*:

```
+sales -oracle
```

Search for documents containing the phrase *radio sales*:

```
"radio sales"
```

Search for documents containing *sales* but not *oracle*, or *sales* but not *radio*:

```
+sales -(oracle radio)
```

Search for documents containing the terms *sales* and *oracle*:

```
+sales +oracle
```

Search for documents containing the terms *rent* and *sales* or *rent* and *oracle*:

```
+rent +(sales oracle)
```

```
(+rent +sales) (+rent +oracle)
```

Search for documents that have a file name starting with *revenue* but are not in the *Sample Content* folder:

```
+FileName:revenue* -Path:"Sample Content"
```

Search for documents modified in the date range 15th Dec 2007 and 21st Dec 2007

```
+LastModifiedDate:[2007-12-15 TO 2007-12-21]
```

Search for documents modified in 2007

```
+LastModifiedDate:[2007]
```

Search for documents modified in December 2007

```
+LastModifiedDate:[2007-12]
```

Supported MIME Types

The following MIME types are indexed by Search Services and can be used with Search expressions.

Table 6 MIME Types

MIME Type	Description
application/hyperion-annotation	Annotations
application/hyperion-reports-batch	Financial Reporting Batch
application/hyperion-reports-book	Financial Reporting Book
application/hyperion-reports-chart	Financial Reporting Chart
application/hyperion-reports-grid	Financial Reporting Grid
application/hyperion-reports-image	Financial Reporting Image
application/hyperion-reports-report	Financial Reporting Report
application/hyperion-reports-row_column	Row and Column Template
application/hyperion-reports-snapshot_book	Financial Reporting Snapshot Book
application/hyperion-reports-snapshot_report	Financial Reporting Snapshot Report
application/hyperion-reports-text	Financial Reporting Text
application/msword	l/c File (.pdf)
application/pdf	PDF File (.pdf)
application/rtf	RTF File (.rtf)
application/vnd.ms-excel	MS Excel File (.xlsx,. xls)
application/vnd.ms-powerpoint	PowerPoint File (.pptx,. ppt)
text/html	HTML File (.htm,. html)

MIME Type	Description
text/plain	text/plain Plain Text (.txt)

Security

End user queries return results and related content without breaching the security of documents or data. Search results are based on a user's security profile. The results do not include documents that users are not authorized to see.

3 Exploring and Managing Items

In This Chapter

Using Explore

Use Explore to list and navigate repository contents, manage and control files and folders, and use elements, like the Open dialog box, that present the repository as a file management system. Users' roles determine what parts of the user interface is shown. As a result, some documents are displayed in the content area and others can also be opened in their own studios.

Access privileges or permissions determine which items you can view, modify, run, and delete in the repository.

Actions

- Documents, files, and folders can be opened in four formats:
  - Interactive HTML
  - PDF
  - Text files
  - Operation messages, which are generated by applications or services and stored in logs
- Financial Reporting users can subscribe to documents. Users are informed when documents are updated.

- Financial Reporting users must import documents before the documents can be accessed by other users. Importing distributes previously private information for public consumption.

Locations

User preferences specify default startup options:

- The Content area can be Explore, documents, repository locations, or the Planning component.

  Tip: Set a folder to the directory which contains the most frequently-accessed content.

- A **Favorites** folder contains a user's most frequently sought repository content. All user profiles feature Favorites folders, the files of which are accessed through the Favorites menu. Favorites Manager can push content to users' Favorites folders, providing one access point for content.

File Permissions

Planning and Budgeting Cloud Service Workspace file permissions determine who has access to files and folders and which operations they can perform. You obtain access items as a user, as a group member, or through a role given to you by the Service Administrator. The level at which you can access items and perform tasks is called *access privilege*.

Access to repository items is controlled by the document owner. Access to operations, such as importing or updating document POV, is controlled through roles.

Tip: When equivalent permissions conflict with each other, the permission that grants lesser access takes precedence.

When you import a file, you become the file owner, and you specify the access level of other users. You might specify that all users can read the file, your group can modify the file, and only you can delete, change access for, and move the file.

Items

Subtopics

- Documents
- Collections
- Supporting Files
- Other Standard Files
- Folders

Items are objects stored in the repository, including files, folders, URLs and shortcuts. Items are HTML files, batches, documents, and reports.

All items have properties that store information about files such as attributes and access control information. Properties include: type, a description of the file, and search keywords.

Documents

Documents include Financial Reporting reports and snapshots. You use Explore to list and view documents. The items that you open in Explore are displayed as tabs at the top of Planning and Budgeting Cloud Service WorkspacePlanning and Budgeting Cloud Service Workspace.

Documents can contain and generate Reports, which are formatted data values and interactive elements. Reports are displayed in tabular, grid, or chart formats.

Collections

Collections contain references to groups of documents, such as books. You use Explore to list and view collections. The items that you open in Explore are displayed as tabs at the top of Planning and Budgeting Cloud Service WorkspacePlanning and Budgeting Cloud Service Workspace

Table 7 Collections in the Repository

Type	Description	Created in	File Extension
Books	Collection of Oracle Hyperion Financial Reporting Studio documents. Dynamically specify dimension sections and dimension changes for Books.	Planning and Budgeting Cloud Service Workspace	.kbk
Snapshot Books	Generated books containing static data.	Planning and Budgeting Cloud Service Workspace	.kbt
Batches	Collection of executable Reporting Studio documents and books with special properties and are executed to generate reports.	Planning and Budgeting Cloud Service Workspace	.bch

Supporting Files

The following tables lists Planning and Budgeting Cloud Service Workspace supporting files used when authoring or managing documents or collections.

Table 8 Workspace Supported File Types, Descriptions, Studio Created in, and File Extensions

Type	Description	Studio created in	File Extension
Folder	Containers that contains other folders and files.	NA	none
Shortcut	Pointer to a repository item. Creates shortcuts when you want an item to display in folder A, though it is stored in folder B.	NA	none
URL	Link to websites or HTML pages.NA	NA	none
Grid	Reporting Studio object containing data from external sources. Grids contain rows, columns, and optionally, a page axis.	Reporting Studio	`.rog`
Chart	Reporting Studio object containing charts.	Reporting Studio	`.roc`
Image	Reporting Studio image object.	Reporting Studio	`.roi`
Text	Reporting Studio text object.	Reporting Studio	`.rot`
Row and Column Template	Templates used to author Financial Reporting reports.	Oracle Hyperion Financial Reporting Studio	`.ros`

Other Standard Files

Other standard files include text files, log files, and Microsoft Office files. Administrators set the types of files that the repository supports.

Folders

Folders exist with the repository and are arranged in a hierarchical structure. Folders are used for organization, and they can contain subfolders and items such as documents, and URLs. The *root* folder contains all files and folders.

Basics of Explore

Use Explore to list, find, and view content. Items opened in Explore display as tabs at the top of Planning and Budgeting Cloud Service Workspace. The View pane displays folders.

When items have high priority, multiple versions, or are manually flagged as an exception, an icon is displayed. In order to see these icons the priority, version, or exception column must be displayed.

Note: When entering names for items in the repository such as files and folders, you can use uppercase and lowercase letters and numbers. Spaces cannot be used at the beginning or end of folder names. Invalid Name characters: \,/,%,?,+,<,>,|,`,*,". Invalid Path characters: \,%,?,+,<,>,|,`,*,".

Note: Because importing Financial Reporting objects with invalid characters in their Names/ Path is still allowed, you should rename the objects after they are imported into Planning and Budgeting Cloud Service Workspace should be renamed. Scheduled Batches containing object names with invalid characters will fail when PDF and HTML are selected as output options.

Viewing Priorities, Exceptions, and Versions

When an item is listed in Explore, an icon indicates priorities, exceptions, or multiple versions. You can view and set the following conditions:

- **Priority**—High or low priority.

Table 9 Priorities

File Type	Description
All items that have versions	Use version properties to set an item's priority to Normal or High. Only available if your administrator activated the priority feature.

- **Exceptions**—Indicator of conditions or results such as a threshold being reached.

Table 10 Exceptions

File Type	Exceptions
Items with versions	Manually flag an exception on an item. See "Version Properties" on page 46.

- **Versions**—Indicates an item has multiple versions. See "Working with Versions" on page 45.

➤ To display the priority, versions, or exceptions column:

1. Select **View**, and then **Show Columns.**
2. Click **Priority**, **Version**, or **Exception.**

Managing Files

Subtopics

Opening Files or Folders

After opening a file or a folder, its contents display in the content area. Items have multiple versions. Imported files are collections containing a single version. You can later save or import additional versions. Versions can be revisions of the same file or completely different files.

➤ To open files using the shortcut menu:

1. From the content area of Explore, right-click a file.
2. From the shortcut menu, select **Open In**.
3. Select a format:
   - For Financial Reporting items, see *Designing with Financial Reporting Studio for Oracle Planning and Budgeting Cloud Service*.
   - For generic files, select an option to open the file.

➤ To open files using default formats:

1. From **Explore**, double-click the file or folder.
2. To view or interact with the opened item, see "Using Different File Types" on page 49.

➤ To open or select a file or folder:

1. Select **File**, then **Open**, and then **Document**.
2. Navigate to the file or folder, and perform the following:
   - From the **Name** column, double-click the file or folder to open.
   - From **Look in**, select a folder.
   - To filter the list of items, from the **Type** list box, click the arrow, and then select the file type.

   Tip: Click **Go Up A Level** to move up the folder hierarchy specified in the **Look in**: text box.
3. Click **Open**.
4. **Optional**: To open a file with another application:

- Click **Options**.
- From **Open As:** Select an application to open the file.

Note: Every file type on your local system maintains information about which application will launch that type of file, and where the application resides.

5 **Optional**: To open a version of the item, from **Versions** list, select the version, click **Open.**

6 To view and interact with the opened item, see "Using Different File Types" on page 49.

Saving Files

You can save the following files in Planning and Budgeting Cloud Service Workspace:

- Snapshot Book
- Book
- Batch

Creating Documents or Collections

You can create the following documents or collections:

- Book
- Snapshot Book
- Batch

For more information, see *Designing Documents with Financial Reporting for Oracle Planning and Budgeting Cloud Service*.

Moving or Copying Files and Folders

You can move or copy a file or folder to another location. The following applies to copying:

- Copying of all document types in the Planning and Budgeting Cloud Service Workspace repository is supported. Users must have a minimum of View access.
- The user who copies the repository object becomes the owner.
- Multiple documents can be selected for copy and paste.
- All metadata associated with a document is copied except for schedules.
- Folders and its contents can be copied except for objects within a folder that have No Access permission.
- Hidden files are copied if a user has View access.
- Copying of nested folders is not allowed.

Searching for Files or Folders

Search Services enables you to search for and retrieve documents, reports, and dashboards from any repository in Planning and Budgeting Cloud Service Workspace. The search operation returns a list of results based on locating the users keywords in document-specific metadata; for example, document name, date created or owner (for Financial Reporting Word or PDF documents only), and extracting content-based information from documents.

Creating Email Links to Repository Items

You can create email links to repository items. Rules for linking:

- Recipients must be defined as a user with a Planning and Budgeting Cloud Service Workspace user name and password to open the linked item in a web browser.
- Recipients need proper access privileges to view the item.
- Items in the link can be viewed in web browsers. A link to the item is sent; not the item. When you click the link, Planning and Budgeting Cloud Service Workspace is opened, and the item is displayed.
- You cannot send an email link to a folder.
- You must select and send email links individually.
- You can add text to the email message.

➤ To create email links:

1. From the repository, select the item to email.

   Tip: If the email link option does not display for an item, that item cannot be sent as an email link.

2. Select **File**, and then **Email Link.**

   The **Email Link** dialog box, containing the URL links is displayed.

3. Perform one of the following tasks:

   - Enter the recipient's email address.
   - Use the Email Recipient List

4. **Optional:** Update the Subject text associated with the email message.
5. Click **Send.**

   Note: You cannot recall a message after it is sent.

Using the Email Recipient List

Use the email recipient list to organize a list of recipients to which you send email links. Two email recipient lists are maintained; one to email links, one to email batch notifications.

➤ To use the email recipient list:

1 Select **File**, and then **Email Links**.

2 Click **Select** to display **Email Link**, and select recipients.

3 **Optional**: To add a recipient, in **New Recipient**, type the email address and click the Add To arrow.

4 **Optional**: To remove an email from the **selected recipient list**, select an email and click the Remove From arrow.

Using Ambiguous Items

It is possible for items to have the same name and reside in the same folder. These are ambiguous items. When an ambiguous item is accessed, a list of items with the same name is displayed. Select the item that you want to use.

➤ To select ambiguous items:

1 From the list, select the item.

2 To determine the differences between the items, do the following:

- To view the item properties, right-click the item, and then select **Properties**.
- To open and view the item, see "Opening Files or Folders" on page 30.

Exporting Items

From Explore, only Financial Reporting items have an export option. Export items for the following uses:

- Locations outside of Planning and Budgeting Cloud Service Workspace. You can import items into a Studio or back into Planning and Budgeting Cloud Service Workspace later. Financial Reporting items can export from testing environments to production environments.
- For use in Smart View, see "Exporting to Smart View for Office" on page 34.

➤ To export items:

1 Select **Navigate**, and then **Explore**.

2 Select **File**, and then **Export**.

3 Navigate to items:

- From the **Look in**: list box, select a folder.
- To filter the list of items, from the **Type** list, select the file type.

4 Select the items, and then click **OK**.

5 Click **Save**.

6 Navigate to the location where you want to save the exported file.

7 Click **Save**.

Exporting to Smart View for Office

Subtopics

- About Smart View Export Options
- Importing Content for Financial Reporting
- Installing Smart View From Planning and Budgeting Cloud Service Workspace

Oracle Smart View for Office provides a common Microsoft Office interface for the Financial Reporting and Planning components.The centralized interface enables simultaneous use these components and improves integration with Microsoft Office.

Smart View exports the current page of the current data object to Excel, Word, or PowerPoint and notifies you when you can upgrade to a new Smart View release.

About Smart View Export Options

Smart View enables the following export options:

- Export the current page of the current data object to Word, PowerPoint or Excel as an image. After insertion, you can query the corresponding web application again to refresh the image.
- Export documents to Microsoft Excel as either query-ready HTML or formatted HTML.

  When you export content as query-ready HTML, the current page of the current data object is converted to HTML and Hyperion-specific formatting is removed. This enables Smart View to query the data source independent of the web application.

  When you export content as Formatted HTML, the current page of the current data object is converted to HTML with the Hyperion formatting definitions and calculated members. This formatting content prevents Smart View from directly querying the data source, but enables Hyperion content to be leveraged by Office applications.

Not all export options are supported by all data sources and web applications. The following table indicates export options for Smart View:

Table 11 Smart View Export Options

Web Applications	Export Image to Microsoft Word, and PowerPoint	Export Formatted HTML to Excel	Export Query-Ready HTML to Excel
Planning	Yes	Yes	Yes
Financial Reporting	Yes	Yes	Yes

Because Excel worksheets prevent users from entering data into read-only cells, some Excel functions, such as AutoSum and F9, and some formatting functions, are disabled in Smart View.

Importing Content for Financial Reporting

Using Smart View, you can import Financial Reporting through Planning and Budgeting Cloud Service Workspace. You can use smart tags to import Reporting Settings.

Based on the type of Financial Reporting report that you select to import, you may be asked to respond to prompts other than the default or log on to data source. The report may contain default User POVs, Grid POVs or Page members that you can change or allow for expansion. For additional information, see *Designing Documents with Financial Reporting for Oracle Planning and Budgeting Cloud Service*.

- Responding to prompts
- User POV
- Grid POV
- Page members
- Expansion
- Changing a data source

➤ To import Financial Reporting documents, on the Preview screen, select your options:

- Select **All Pages** to import all pages for members listed in the **Page** drop-down; clear **All Pages** to import only the current page listed in the **Page** drop-down.
- For Microsoft Excel only: Select **Split Pages across worksheets** to place each member page you selected in the **Page** drop-down on separate worksheet tabs; clear **Split Pages across worksheets** to place all member pages you selected in the **Page** drop-down on the same worksheet.
- Option for Excel only: To revert to the Planning and Budgeting Cloud Service Workspace Point of View, select **Refresh Using Workspace Point of View**.
- In **Import Document As**, select one of the following:
    - **Fully-Formatted**—For Microsoft Excel only: Select to display a fully formatted report in HTML.
    - **Query-Ready**—For Microsoft Excel only: Select to run an ad hoc analysis on a report using Financial Management or Analytical Services data sources. Query-Ready is not supported for Snapshot reports.
    - **Image**—For Microsoft Word or PowerPoint only: Select to import the report as an image.

Click **Finish** to import the report in your Microsoft Office application.

Installing Smart View From Planning and Budgeting Cloud Service Workspace

You must install Smart View from Planning and Budgeting Cloud Service Workspace. This Office client component is displayed as a menu and toolbar within the Microsoft Office suite.

Note: Before installing Smart View, exit all Microsoft Office applications and enable pop-ups.

➤ To install the Smart View client from Planning and Budgeting Cloud Service Workspace:

1. Select **Tools**, then **Install**, and then **Smart View**.
2. Select **Run** to run the installer, or select **Save** to save the installer `.exe` file to your desktop.
3. Accept the default installation options.

   By default, the installation wizard installs Oracle Smart View for Office program files to `C:\Oracle\SmartView`. You can specify an alternative installation directory.
4. Reopen the Microsoft Office application.

   Note: If Word fails to display the menu, create a data source connection in Excel, and then restart Word.

4 Importing Artifacts

In This Chapter

Importing

Subtopics

- Importing Artifacts
- Importing Files
- Importing Multiple Files
- Importing HTML Files
- Importing URLs

Importing Artifacts

Importing artifacts to the repository makes them available to others. You might give some users the ability to modify one artifact, while limiting others. See "Setting Permissions and Pushing Artifacts" on page 39 for detailed information on permissions.

Note: If you try to import an artifact whose MIME type is not defined, you get an error message. Contact your Service Administrator to create the MIME type.

Table 12 Artifacts Associated with Reporting Settings

Artifact	Description
Financial Reporting	● Dynamic report (*.des) ● Snapshot reports (*.rpt) ● Books (*.kbk) ● Snapshot Books (*.kbt) ● Batch files (*.bch) ● Supporting files, see "Supporting Files" on page 28 **Note:** To import these files, you must use the **Import, Financial Reports** menu item.

Importing Files

Import files into the repository with the following exceptions:

- For importing Financial Reporting files, see *Designing Documents with Financial Reporting for Oracle Planning and Budgeting Cloud Service*.
- For importing URLs, see "Importing URLs" on page 39.

➤ To import files:

1. **From Explore, navigate to the folder where you want to import the artifact.**
2. **Select File, then Import, and then File.**
3. **Browse to the file that you want to import.**
4. **Enter a description, and then click Next or select Finish without specifying Advanced options.**

   If you select **Finish**, skip the following steps.
5. **Enter properties, see "Advanced Properties" on page 44.**
6. **Complete permissions.**
7. **Click Finish.**

Importing Multiple Files

- Files must be imported to the current folder.
- Import different file types together, for example, import text files, HTML files, and image files.

➤ To import multiple files:

1. **From Explore, navigate to the folder in which you want the files to reside.**
2. **Select File, then Import, and then File.**
3. **Click Multiple Files.**
4. **Select the files to import.**

5 **Optional:** Enter a description, and then click **Finish** to complete the import without specifying Advanced options.

6 Click **Next**.

7 Enter properties, see "General Properties" on page 43 and "Advanced Properties" on page 44.

8 Click **Finish** to import the artifact.

The artifacts are imported into the current folder.

Importing HTML Files

HTML image links and other HTML files are dependent on their folder locations. Ensure the links remain functional after you import them:

- Use relative links in the HTML.
- Create folders that mirror the folder structure.

Importing URLs

➤ To import URLs:

1 From **Explore**, navigate to the folder where you want to place the artifact.

2 Select **File**, then **Import**, then **URL**, and then enter the URL name.

3 **Optional:** Enter a description, and then click **Finish** to complete the import without specifying Advanced options or Permissions.

4 Click **Next**, and then see "General Properties" on page 43 and "Advanced Properties" on page 44.

Required properties are marked with an asterisk.

5 Complete step 3, Permissions. To specify permissions for the artifact.

6 Click **Finish**.

Setting Permissions and Pushing Artifacts

Access permissions define your level of access: view, modify, full control. When you import artifacts, you:

- Specify who gets access and to what level.
- Have full control over the artifacts you import, and can change the permission level for all roles, groups, and users.
- Efficiently grant permissions through roles or groups rather than to individual users.

Set artifact permissions when you import or select an artifact. Push artifacts to be accessible to Favorites.

Rules for setting permissions and pushing artifacts:

- To push artifacts, you need proper permissions and a role that enables you to push them. You can push any artifact except folders.
- Make artifacts accessible in the repository by changing their permissions.
- Make artifacts accessible on Favorites by pushing them to Favorites.
- To apply permissions to artifacts within folders, you need the proper permission and role.

➤ To edit permissions for files and folders:

1 From **Explore**, right-click the file or folder whose permissions you want to modify.

You can select multiple items in Explore and apply Edit Permissions. Permissions can be applied only to items that a user has Full Control permission.

2 Select **Edit Permissions.**

3 Complete the **Apply Permissions to Children** dialog box.

➤ To apply permissions to artifacts in a folder:

1 Right-click on a folder in Explore.

2 Select **Apply Permissions to Children.**

3 Enter information in the **Apply Permissions to Children** dialog box. See Chapter 4, "Importing Artifacts."

4 Set permissions for the children of the folder.

The columns displayed for selected users, groups, and roles in the **Apply Permissions to Children** dialog box depend on the artifact type within the folder. Use the description for each of the permissions as a guideline:

- **Inherit**—Not set; inherit defaults to No Access.
- **No Access**—Users cannot see the object.
- **View**—Users can view but cannot modify the document.
- **Modify**—Users can make changes but cannot delete the document.
- **Full Control**—User can access the **Apply Permissions to Children** dialog box (add/edit/delete permissions to other users/groups/roles).

5 After making selections, select **OK.**

Note: Permissions are applied only to artifacts within a folder in which a user has Full Control permission.

➤ To change permissions or push artifacts:

1 Specify selected users, groups, and roles.

a. To populate the list with all users, groups or roles leave the text box blank, select **Update List**.

b. To populate the list with specified users, groups or roles:

i. To filter the list by name, select **begin with**, **contain**, or **are in group**, and then and enter letters.

ii. To filter the list by user type, select tabs for Users, Groups, or Roles, and then click **Update List**.

Available Users, Groups, and Roles display artifacts based on the selections that you made in the lists.

Note: If all of the artifacts are not listed, filter the list with criteria or contact your administrator. Your administrator determines the maximum number of artifacts to list. Wild cards are not supported and the filter is not case sensitive.

2 Select a user, group, or role from Users, Groups, or Roles tab, and then click 

3 From **Selected Users, Groups and Roles** select a name from the Name column. From **Access** or **Access to file** drop-down set permissions:

- **Inherit**—Not set; inherit defaults to No Access.
- **No Access**—Users cannot see the document.
- **View**—Users can view but cannot modify the document.
- **Modify**—Users can make changes but cannot delete the document.
- **Full control**—Users can display, change, and delete the document.

4 From the Favorite drop down, select **Pushed** to push the artifact to the users Favorites or Inherit (not pushed) to view only if this is the only permission set.

5 Repeat previous steps to set additional permissions for other users, groups, or roles.

Note: If all of the users/groups/roles in which you have access to are not listed, filter the list with different criteria or contact your administrator. Your administrator determines the maximum number of users/groups/roles to list.

6 Select one of the following:

a. To remove existing permissions and set new permissions, select **Overwrite current permissions**.

b. To redefine some permissions, and add new permissions to the existing ones, select **Merge with the current permission**. The changes are applied to folder child elements recursively.

Note: In a merge, if a user already exists in Apply Permissions to Children for some artifacts, and this user is granted new permissions, the new permissions are in force.

7 To apply these permissions for an artifact, click **OK**.

8 Do the following:

a. For files, if you want permissions to apply to other imported content by default, click **Make these the default permissions for all files I import.**

b. For folders, if you want permissions to apply to other imported content by default, click **Make these the default permissions for all folders I create.**

This automatically sets the same permissions for all files and folders you import. You can change permissions for each file or reset your default access permissions.

9 Click **OK.**

Note: To remove a role, group, or user from the selected list, click after highlighting the name to be removed.

Creating Shortcuts

➤ To create a shortcut to a file or document:

1 From **Explore,** navigate to an artifact.

2 Right-click the artifact, and then click **Create Shortcut.**

3 Enter the name and folder.

4 See "General Properties" on page 43 and "Advanced Properties" on page 44.

Working with Properties

Subtopics

- General Properties
- Changing Ownership of Artifacts
- Advanced Properties
- Setting Permissions
- HTML File Properties
- URL Properties

This section describes how to modify properties of repository artifacts. You specify properties when importing and modifying artifacts.

➤ To access properties:

1 From **Explore**, select an artifact.

2 Select **File**, and then **Properties.**

General Properties

Table 13 General Properties for Artificats

General Properties	Definitions
File	File name and path
Name	Name assigned to the file. For example, if the file is `c:\Jan03SR` set the name to `January 2003 Sales Report`. Use letters, numbers, a space, and an underscore (_).
Description	Description used to generate search keywords. Limit the length to 250 characters.
Owner	User Name of the person who imported the artifact. To change owner of an artifact, see "Changing Ownership of Artifacts" on page 43.
Original File Name	(Read-only) Name of the file when it is imported or created
Size	(Read-only) File size
SmartCut	(Read-only) AURL pointing to a file
Shortcut To Folder	Folder and subfolders for shortcuts
Also store file in compressed (.zip) format	Set this when you import to store the file in WinZip format. This saves disk space, but slows down viewing.

Changing Ownership of Artifacts

Users can change the ownership of repository artifacts, including folders, subfolders, events, and schedules. In order to change ownership, you must have Full Control or Service Administrator role rights.

➤ To change the owner of an artifact:

1. From **Explore**, select an artifact.
2. Select **File**, and then **Properties.**
3. In **Properties**, select **Change Owner.**
4. In **Change Owner:**
   a. Select how you want to sort the name list by, User ID, First name, or Last name from the first drop down menu.
   b. To filter by name, select **begin with**, **contain**, or **are in group**, and then enter letters.
   c. Select **Update List**.
   d. Select **OK**.
5. Select **OK.**

Advanced Properties

Table 14 Advanced Properties for Artifacts

Advanced Properties	Definitions
MIME Type	(Read-only) Multipurpose Internet Mail Extensions. Update this for documents only. MIME types are MS Word file, HTML file, and Personal Page.
Character Encoding	The character-encoding method, such as UTF-8. This encoding must be specified for HTML files so that Planning and Budgeting Cloud Service Workspace can display the file correctly. If the character encoding is not specified in this property or in the HTML file, Planning and Budgeting Cloud Service Workspace uses the default encoding of the Application Server's JVM.
Hidden File	Hides files in Explore. Example: Enable this option for image files needed by an HTML file, so the users select HTML files only.
Auto-delete file on this date or **Auto-delete shortcut on this date**	Enable to automatically delete this artifact . from the repository when these conditions are met: ● The expiration date passed. ● Auto-delete is selected. ● The system performs regular garbage collection (up to an hour after the expiration date). ● For folders, set auto-delete to occur after all contents have been deleted from the folder.
Automatically generate keywords	Generates search keywords based on words contained in the Name and Description. The search function uses these keywords to find an artifact.
Keywords	New keywords used to search for an artifact. Creating keywords for artifacts is highly recommended and used for searching repository artifacts.

Setting Permissions

Set rights for users to access files.

HTML File Properties

Table 15 HTML File Properties

HTML File Properties	Descriptions
Character encoding	The method of character encoding. Note: Use UTF–8 for non-Latin-1 languages or when using WebSphere or iPlanet native servlet engines.
Make displayable as a file content window	Contents of this artifact can be displayed on Personal Pages. (Default is enabled.)

URL Properties

Table 16 URL Properties

URL Properties	Descriptions
URL (in the General Properties group)	The URL starts with `http://` or `https://`.
Make displayable as a file content window	Contents of this artifact can be displayed on Personal Pages. (Default is enabled.)
Character encoding	The method of character encoding for the web page. Note: Use UTF–8 for non-Latin-1 languages or when using WebSphere or IPlanet native servlet engine.
Icon	The icon shown for the URL. To change the icon, click **Change Icon.**
Change Icon	Select to add a graphic file from your PC or from the repository. Set the width and height to smaller than 24 pixels.

Working with Versions

Subtopics

- Adding a Version
- Viewing or Modifying Properties of Versions
- Version Properties
- Listing Multiple Versions
- Deleting Versions

Repository artifacts have multiple versions, except for shortcuts and Financial Reporting artifacts.

Typical files are collections of versions, even if you have not imported multiple versions. After a file is imported, the resulting artifact is a collection containing a single version. You can later import additional versions.

Versions can be different files or revisions of the same file. If the file is considerably different from the original file, import a new file with a unique name.

Click an artifact's name for the latest version. When you move or delete an artifact, versions are included in the operation.

Versions have their own properties that are distinct from the properties of their collection artifact.

Adding a Version

Add another file as a version to an artifact in the repository.

Note: All artifacts in the repository can have multiple versions, except for shortcuts and Oracle Hyperion Financial Reporting artifacts.

➤ To add versions:

1. **From Explore select an artifact.**
2. **Select File, and then Properties.**
3. **In Properties, select Versions, and then click Add New Version.**
4. **Click Browse, and then select a file to add as a new version.**
5. **Optional: Complete one or more of these steps:**
   - Enter a description.
   - Enable **Flag as an exception**, and then enter a message.

     If an exception occurs, the message is displayed on the Exceptions dashboard.
   - Set the priority to **High** or **Normal**.
6. **Click OK.**

   The version is added to the repository as the latest version.

Viewing or Modifying Properties of Versions

Each version has its own properties.

➤ To view or modify properties of versions:

1. **From Explore, click the artifact whose version you want to edit.**
2. **Select File, and then Properties.**
3. **Select Versions.**
4. **Select Modify.**

   The changeable properties are Description, Flag as an Exception, and Message. See “Version Properties” on page 46.
5. **After modifying properties, click OK.**

Version Properties

Table 17 Version Properties

Version Properties	Descriptions
Description	A description that identifies the version. Maximum of 250 characters.
Creation date	(Read-only) Date the version was created.

Version Properties	Descriptions
Last modified	(Read-only) Date the version was changed. Changing versions includes replacing or modifying its properties.
Modified By	(Read-only) User who modified the version.
Priority	Users can sort on priority and search for high-priority artifacts. This property is available if your administrator activated the priority feature on your system.
Size	(Read-only) The file size; set automatically.
Flag as an exception	An exceptions indicates a condition or result, such as a threshold being reached. *Flag as an exception* can be set manually by a user.
Message	Text associated with an exception for this version. When an exception is flagged on the version, this message prints, or it may be visible from a users Exception Dashboard.

Listing Multiple Versions

From **Explore**, the latest artifact version is displayed in the content area.

➤ To see all versions:

1 **Select View, and then Show Columns.**

2 **Select Versions, and then Save.**

Deleting Versions

Delete one or more versions together.

➤ To delete versions:

1 **From Explore, navigate to the artifact whose version you want to delete.**

2 **Select File, and then Properties.**

3 **Select Versions, and then select a version.**

4 **Click Delete Selected, and then click OK.**

5 Viewing and Organizing Information

In This Chapter

Viewing

To view and modify content within documents, use Explore, Applications, and Open Items. These can all be accessed from the Navigate menu.

- **Explore**—Navigate through the repository to locate files and folders.
- **Applications**—Select Planning, and then select the Oracle Hyperion Planning application.
- **Open Items**—Use the View pane to interact and view a document. For example, use the View pane to navigate through information for the active document.

Using Different File Types

For information on how to view and use file types, see *Designing Documents with Financial Reporting for Oracle Planning and Budgeting Cloud Service*.

Creating a Book or Batch

For information on creating books and batches, see *Designing Documents with Financial Reporting for Oracle Planning and Budgeting Cloud Service*.

Using Favorites

Subtopics

- Adding Items to Your Favorites
- Pushing Items to Favorites
- Managing Favorites

You can set up Favorites and track items that you access frequently to view them in the future. Administrators and users can push items to a user's Favorites.

You need the proper role to push items to Favorites. If you do not have the proper role to access Explore, you can also see your Favorites list by selecting the Favorites menu.

Adding Items to Your Favorites

To add items to your Favorites or to push items to another user's Favorites, you need access permissions. You can add a folder, and then use Favorites to access the folder; you cannot access items within the folder directly.

➤ To add items to Favorites:

1 Select **Explore**, and then navigate to the item.

2 Right-click, and then select **Add to Favorites.**

➤ To add folders to Favorites:

1 Select **Explore**, and then navigate to the folder.

2 Right-click, and then select **Add to Favorites.**

Pushing Items to Favorites

➤ To push item to Favorites:

1 Select **Explore**, and then select an item.

2 Select **File**, and then **Properties.**

3 From **Properties**, select **Permissions** in the left pane.

Note: You can also use your mouse and select **Edit Permissions** by right-clicking the artifact.

4 Populate the **Users, Groups, and Roles** tab with the following:

a. To filter by name, select **begin with**, **contain**, or **are in group**, and then enter letters.

You cannot use the **are in group** filter for roles.

b. To filter by user type, select **roles, groups, or users**, click **Update List**.

Note: If all of the users/groups/roles are not listed, filter the list with different criteria or contact your administrator. Your administrator determines the maximum number of users/groups/roles to list. Wild cards are not supported, and the filter is not case-sensitive.

5 From the **Users, Groups and Roles** tab, select users.

6 From Selected Users, Groups and Roles, select **Pushed** from the Favorite menu to push the item to the users Favorites.

7 Select **Push this item to selected Users, Groups, and Roles.**

If the Access to File option is set to No Access and there are no higher access rights for this item to inherit, then the item is not pushed.

8 Repeat step 1 through step 7 to push other items to Favorites.

9 Click **OK.**

10 **Optional**: If you want permissions to apply to other content you import, make them your default permissions by selecting:

a. For files, **Make these the default permissions for all files I import**.

b. For folders, **Make these the default permissions for all folders I import**.

Selecting these permissions enables the system to automatically set the same permissions for files you import. You can change the permissions for each file or reset your default permissions at any time.

Managing Favorites

➤ To manage items in Favorites:

1 From Planning and Budgeting Cloud Service Workspace, select **Favorites**, and then **Manage Favorites.**

2 To remove an item from your Favorites, click **Remove** next to the item you want to remove.

3 To display an item on your list of Favorites, click **Show** next to the item you want to show.

Note: Pushed items can be hidden in Favorites but not removed by the recipient. Pushed items can only be completely removed by the user that performed the push.

Using Subscriptions

Subtopics

With a subscription you receive email notifications and links to items every time a particular item is modified, an exception is generated, or anything in a folder changes. Subscribe to any item in the repository, and send it to one or more email addresses. See "Creating a Subscription" on page 52.

If you subscribe to a folder, you are notified of any new items imported or created in that folder or any modifications to items within its subfolders. See "Subscribing to Folders" on page 53.

Note: You cannot subscribe to Personal Pages.

Creating a Subscription

Subscribe to an item to be notified when it changes. Receive email notifications that the item changed or with the changed item attached.

Subscribe to be notified when exceptions occur as opposed to receiving notification when an item changes. The item's owner must enable the item to generate exceptions for you to subscribe. Items generate exceptions when the following steps are setup:

Manually set exceptions on items by setting the version property **Flag as Exception**; indicating that the item generated an exception. See "Version Properties" on page 46. The latest version of the item is used to determine if an exception is set.

➤ To create subscriptions:

1. **Select Explore, and then navigate to the item you want to subscribe to.**
2. **Right-click the item, and then select Subscribe.**
3. **On the Subscribe page, do the following:**
   a. Select **Subscribe and send email notifications to**.
   b. In the text box, enter email addresses for the recipient of the notification.
   c. To send the item as an attachment, select **Attach file for "report name" to email message (if possible)**.

   Tip: Your Service Administrator determines the maximum size of attachments.

Modifying or Removing Subscriptions

You can modify or remove subscriptions by managing a list of subscribed items.

➤ To modify or remove subscriptions:

1. From Planning and Budgeting Cloud Service Workspace, select **Favorites**, and then **Show Subscribed Items.**
2. Click a subscription, and then click **Open Subscriptions.**
3. To remove the subscription, clear **Subscribe and send email notifications to.**
4. To modify the subscription, use the steps described in "Subscribing to Folders" on page 53.
5. Click **OK.**

Note: When you remove a subscription, it is also removed from all of your Personal Page Bookmark sections.

Subscribing to Folders

When you subscribe to folders, you are notified of items imported to that folder or updates to items in the folder or its subfolders.

If you are interested in the entire contents of a folder or subfolder, you can subscribe to the folder or subfolder.

➤ To subscribe to folders:

1. Select **Explore**, and then navigate to the folder to which you want to subscribe.
2. Right-click the item, and from the shortcut menu select **Subscribe.**
3. On Subscribe Settings, select **Subscribe and send email notifications to:** to receive notification for this folder and to change or enter your email address.
4. Enter an email address for recipients of the subscription.

   You must enter the email address; you cannot select from a list of recipients.
5. To receive notification when there are changes to the subfolders, select **Notify on changes to subfolders of "Users".**
6. To receive notification only when items in the folder generate exceptions, select **Exception Items.**
7. To receive notification only when items in the folder are high priority items, select **High Priority Items.**

   This option is available only if the administrator has enabled priority ratings.

Receiving and Viewing Subscriptions

Using a subscription email notification you can access items directly without browsing the repository. Email notification comes in two formats:

- **Email with a link to the item or folder**—Click the link; if you have access to that item, you can open the document.
- **Email with the item attached**—Follow the directions to either view the file where it is or download the attachment to a file.