

Oracle® Cloud

Accessing Content for Oracle Enterprise Performance Management Cloud

Oracle Cloud Accessing Content for Oracle Enterprise Performance Management Cloud

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Contents

Documentation Accessibility	5
Documentation Feedback	7
Chapter 1. Using Planning and Budgeting Cloud Workspace	9
About Planning and Budgeting Cloud Workspace	9
Preparing to Use Planning and Budgeting Cloud Workspace	10
Planning and Budgeting Cloud Workspace User Interface	10
Using the Navigate Menu	11
Starting Tasks	11
Creating Documents	11
Opening and Printing Documents and URLs	12
Setting File Properties and Moving Files	12
Renaming Files	13
Adding and Removing Documents from Favorites	13
Using Explore	13
Using Schedule	14
Using Open Items	14
Using URLs in Planning and Budgeting Cloud Workspace	14
Opening a URL	14
Opening a URL in a New Window	15
Updating a URL	15
Using Smart View	15
Using a Single Instance of Planning and Budgeting Cloud Workspace	16
URLs Supported by Planning and Budgeting Cloud Workspace	16
Default URL to Launch Planning and Budgeting Cloud Workspace	16
URLs to Externally Launch From Within Planning and Budgeting Cloud Workspace	17
Chapter 2. Setting General Preferences	19
Chapter 3. Launching Applications	21

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1

Using Planning and Budgeting Cloud Workspace

In This Chapter

About Planning and Budgeting Cloud Workspace	9
Preparing to Use Planning and Budgeting Cloud Workspace	10
Planning and Budgeting Cloud Workspace User Interface	10
Using the Navigate Menu	11
Starting Tasks	11
Creating Documents	11
Opening and Printing Documents and URLs	12
Setting File Properties and Moving Files	12
Renaming Files	13
Adding and Removing Documents from Favorites	13
Using Explore	13
Using Schedule	14
Using Open Items	14
Using URLs in Planning and Budgeting Cloud Workspace	14
Using Smart View	15
Using a Single Instance of Planning and Budgeting Cloud Workspace	16
URLs Supported by Planning and Budgeting Cloud Workspace	16

About Planning and Budgeting Cloud Workspace

Use Planning and Budgeting Cloud Workspace for these tasks:

- Access Oracle Hyperion Planning
- Organize, search for, and assign access permissions to files
- Perform administration tasks for Workspace Settings, Reporting Settings, Annotations, Planning Administration, Data Management, Calculation Manager, and Application Management
- Schedule batches
- Create documents
- Set preferences
- Define favorites
- Launch Financial Reporting Studio

- Install the following components:
 - Oracle Smart View for Office
 - Predictive Planning
 - Financial Reporting Studio
 - Planning Admin Extension
 - File Transfer Utility

From Planning and Budgeting Cloud Workspace, you use menus and a toolbar to perform tasks. Based on the following criteria, menus and the toolbar are updated as you use the system:

- The roles granted you by the administrator. Roles determine which modules are displayed in the View pane and toolbar.
- The components used and the task performed. For example, if you use an Administer menu item, the menus contain tasks associated with administration related tasks. If you use Explore, the menu contains file tasks.

Preparing to Use Planning and Budgeting Cloud Workspace

Before using Planning and Budgeting Cloud Workspace, review “Using Planning and Budgeting Cloud Service” in the Oracle Cloud help center.

Planning and Budgeting Cloud Workspace User Interface

The Planning and Budgeting Cloud Workspace user interface includes these areas:

1. **Menu Bar**—Commands that organize tasks and modules.
2. **View pane**—Enables movement between panels and displays lists of documents and modules. Hiding this pane provides a larger content frame in which to use Planning and Budgeting Cloud Workspace. Select **View**, and then **View Pane** to hide or display the view pane.
3. **Content Area**—Area in which you view active module documents, tasks, and files.
4. **View Pane or Content Area Adjuster**—Adjusts the size of the View pane and content area. (Not available for all components.)
5. **Document Tab Bar**—Information bar specific to the current module (If multiple documents are open, the current document tab is highlighted).
6. **Title Bar**—Displays the component name, the name of user logged in, help, and log off links.
7. **Masthead**—Area that provides the masthead and the menu bar. Select **View**, and then **View Masthead** to hide or display the masthead.
8. **Masthead Area Adjuster**—Select to show or hide the menu bar.

Using the Navigate Menu

From Planning and Budgeting Cloud Workspace, you can access the following from the Navigate menu:

- **Applications**—Accesses Planning components. Applications is displayed only when a user has rights and applications are available.
- **Explore**—Enables you to organize, search for, or assign access permissions to files. When you select Explore, the view pane shows folders, and the content pane shows files and folders.
- **Administer**—Enables you to manage Workspace Settings, Reporting Settings, Annotations, Planning Administration, Data Management, Calculation Manager, and Application Management.
- **Schedule**—Enables you to schedule batches.
- **Open Items**—Provides easy access to artifacts that you currently have open in Planning and Budgeting Cloud Workspace.

Starting Tasks

Most tasks in Planning and Budgeting Cloud Workspace start in the same way.

➤ To begin a task:

- 1 From the **Navigate** menu, select **Applications**, **Explore**, **Administer**, **Schedule**, or **Open Items**.
- 2 From any of the menus, select a task.

For example, from the **File** menu, select **New**, and then **Document**.

Note: You can also perform some tasks using shortcut menus.

Creating Documents

With Planning and Budgeting Cloud Workspace, you can create a Oracle Hyperion Financial Reporting book or batch.

➤ To create a Financial Reporting book or batch:

- 1 Select **File**, then **New**, and then **Document**.
- 2 Select an option:
 - Collect Reports into a Book
 - Batch Reports for Scheduling

For more information on collecting reports in a book and batch reports for scheduling, see *Working with Financial Reporting for Oracle Enterprise Performance Management Cloud*.

Opening and Printing Documents and URLs

➤ To open a document:

- 1 Select **File**, then **Open**, and then **Document**.
- 2 In the Open dialog box, select a document, and then click **Open**.

Note: Each open document is displayed as a tab at the top of Planning and Budgeting Cloud Workspace. You can also view a list of the open documents by selecting **Navigate**, and then **Open Items**. You can toggle between open documents.

➤ To open a URL:

- 1 Select **File**, then **Open**, and then **URL**.
- 2 Enter the URL and click **OK**.

➤ To print a document:

- 1 Select **File**, then **Open**, and then **Document**.
- 2 Open a Financial Reporting document.
You may need to open the document as HTML or PDF.
- 3 Select **File**, then **Print**, then **HTML** or **File**, then **Print**, and then **PDF**.

Note: This procedure applies only to Financial Reporting documents.

Setting File Properties and Moving Files

➤ To set file properties:

- 1 Select **Navigate**, and then **Explore**.
- 2 In **Explore**, select a document without opening it.
- 3 Select **File**, and then **Properties**.

The General properties option is selected by default. You can modify the file name, description, and change the owner of an object. To change ownership of an object, the user must have full control over that object.

➤ To move files or folders in Explore:

- 1 Select **Navigate**, and then **Explore**.
- 2 In **Explore**, select a document or folder.
- 3 Select **Edit**, and then **Cut** or **Copy**.
- 4 Select a repository location, then select **Edit**, and then select **Paste**.

Renaming Files

- To rename files:
 - 1 Select **Navigate**, and then **Explore**.
 - 2 From **Explore**, select a document or folder.
 - 3 Select **Edit**, and then **Rename**.
 - 4 Enter a name, and then click **Save**.

Adding and Removing Documents from Favorites

- To add a document or folder to favorites:
 - 1 Select **Navigate**, and then **Explore**.
 - 2 From **Explore**, select a document or folder.
 - 3 Select **Favorites**, and then **Add to Favorites**.
 - 4 Select **Favorites**.

The document or folder that you added is displayed as a menu option.

- To remove a document or folder from Favorites:
 - 1 Select **Favorites**, and then **Manage Favorites**.
 - 2 Clear **Show**, or select **Remove**, and then click **OK**.

- To create a shortcut:
 - 1 Select **Navigate**, and then **Explore**.
 - 2 From **Explore**, select the document.
 - 3 Right-click the document, and select **Create Shortcut**.
 - 4 Enter the desired **General Properties** and **Advanced Options**, and then select **OK**.

Note: You cannot create shortcuts for Oracle Hyperion Financial Reporting objects.

Using Explore

Explore is used to access the repository. It is used to store, access, and share documents and files. You can access items such as documents, files, and folders in various ways, including browsing or searching for documents, and subscribing to folders. You make documents, files, and folders available to others; for example, you can import documents to the repository. Documents show information and data in a predefined format. You can use batches to generate documents

automatically. You can run batches at any time or schedule them to run automatically. When you select Explore, the View pane shows folders, and the content pane shows files and folders

Note: Your file permissions determine which repository items you can view, modify, run, and delete.

To access Explore, select **Navigate**, and then **Explore**.

Explore features:

- **Folder tree**—Navigate through folders.
- **View File Properties**—View file information, such as type, owner, creation date, access permissions, modified date, and description.
- **Launch documents**—Open a document in a new tab or window.

Using Schedule

Use Schedule to manage and schedule batches.

To schedule a batch, select **Navigate**, and then **Schedule**, and then **Batch Scheduler**.

Using Open Items

The **Open Items** option on the **Navigate** menu displays a list of opened modules or documents, so you can quickly switch between them. Open documents are also displayed as tabs at the top of Planning and Budgeting Cloud Workspace.

Using URLs in Planning and Budgeting Cloud Workspace

Subtopics

- [Opening a URL](#)
- [Opening a URL in a New Window](#)
- [Updating a URL](#)

Opening a URL

► To open a URL:

- 1 Select **File**, then **Open**, and then **URL**.
- 2 Enter the URL, and then click **OK**.

Opening a URL in a New Window

- To open a URL in a new window:
 - 1 Complete the [Opening a URL](#) procedure.
 - 2 Select **New Window**.
 - 3 Enter the URL, and then click **OK**.

Updating a URL

- To update the content of an existing URL displayed in the content area:
 - 1 Complete the [Opening a URL](#) procedure.
 - 2 Select **Update URL**.
 - 3 Enter the URL, and then click **OK**.

Using Smart View

Smart View provides a common Microsoft Office interface for components in Planning and Budgeting Cloud Workspace. Using Smart View, you can:

- Export the current page of the current data object to Excel, Word, or PowerPoint
- Expose functions in Excel, Word, and PowerPoint content
- Receive notification when you can upgrade to new releases of Smart View

Smart View enables two export options:

- Export the current page of the current data object to Word, PowerPoint, or Excel as an image, and later, query the web application again to refresh the image.
- Export documents to Excel as query-ready or formatted HTML.

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

When you export content as formatted HTML, the current page of the current data object is converted to HTML, and Oracle formatting definitions and calculated members are retained. Thus, Smart View cannot directly query the data source, but Oracle content can be leveraged by Microsoft Office applications. Not all export options are supported by all data sources and web applications.

- To install Smart View:
 - 1 In **Planning and Budgeting Cloud Workspace**, select **Tools**, then **Install**, and then **Smart View**.
 - 2 Click **Save to save SmartView.exe locally**.

- 3 Run `SmartView.exe` and follow the prompts in the wizard.
- 4 When installation is complete, click **Finish**.
- 5 Oracle Smart View for Office is displayed the next time you open a Microsoft Office application.

Using a Single Instance of Planning and Budgeting Cloud Workspace

With the single instance feature, subsequent invocations of `/workspace` and `/workspace/index.jsp` opens items in Planning and Budgeting Cloud Workspace tabs in the existing Planning and Budgeting Cloud Workspace instance, even when launched from an external URL. Single instance also prevents extra Planning and Budgeting Cloud Workspace windows from closing existing sessions where multiple Planning and Budgeting Cloud Workspace windows were previously allowed.

Note: When using Google Chrome as the browser, Planning and Budgeting Cloud Workspace does not reuse the same browser window after opening a new tab.

URLs Supported by Planning and Budgeting Cloud Workspace

Subtopics

- [Default URL to Launch Planning and Budgeting Cloud Workspace](#)
- [URLs to Externally Launch From Within Planning and Budgeting Cloud Workspace](#)

Default URL to Launch Planning and Budgeting Cloud Workspace

The default URL to launch Planning and Budgeting Cloud Workspace is:

`http://<server>:<port>/workspace/`

Additional parameters:

- Optional: `sso_username=<username>`
Name of the user attempting to log in.
- Optional: `sso_password=<password>`
Password of the user attempting to log in.

Administrators may need to change the “Accept Credentials in an HTTP Request URL” setting in the “Workspace Server Settings” dialog box to support `sso_username` and `sso_password`.

- Optional: `fullscreen=true/false`

True launches the page in full screen. The default value is false.

Note: Included in the URL is the trailing slash and no `index.jsp`. Using `index.jsp` is not recommended since the web browser's Back button is enabled, and selecting it can cause issues. Using the trailing slash is encouraged. Without it, the web server does a redirect to the URL with the trailing slash.

URLs to Externally Launch From Within Planning and Budgeting Cloud Workspace

Subtopics

- [Selecting Multiple External URLs](#)
- [Launching Repository Content](#)
- [Launching Planning](#)

Selecting Multiple External URLs

When you select multiple external URLs to launch Planning and Budgeting Cloud Workspace and to limit Planning and Budgeting Cloud Workspace proliferation, the following scenarios are possible:

- A new Planning and Budgeting Cloud Workspace session opens if there are none on the desktop.
- If an existing Planning and Budgeting Cloud Workspace session is open, the newly-selected item is added as a tab in the existing Planning and Budgeting Cloud Workspace session.

The format of the URL is:

```
http://<host>:<port>/workspace/?<additional parameters>
```

You can specify a module to open and pass parameters to that module. For example, to open Oracle Hyperion Calculation Manager, use:

```
http://<host>:<port>/workspace/?module=calcmgr.filterview
```

Launching Repository Content

To open an object in the repository, use:

```
http://<server>:<port>/workspace/?  
module=wksp.relatedcontent&repository_path=<encoded path to repository  
object>
```

For example, to open the Sample Content folder:

```
http://<server>:<port>/workspace/?  
module=wksp.relatedcontent&repository_path=/Sample+Content
```

Launching Planning

To launch Planning, use:

```
http://<server>:<port>/workspace/?  
module=HyperionPlanning.planning&sourceApp=<appname>
```

Additional parameters:

- **Optional:** `showViewPane=true/false`
False hides the left pane when the module is loaded. The default value is true.
- **Optional:** `bpm.logoff=true/false`
False prevents the system from logging off if using the same session. The default value is true.

2

Setting General Preferences

As a designer, you can set defaults for the general appearance of Planning and Budgeting Cloud Workspace. All users have access to general preferences. General preferences include settings for displaying document paths, prompting to save files, setting accessibility mode, and displaying email addresses.

Changes made using Preferences take effect next time you log on.

► To set general preferences:

1 In Planning and Budgeting Cloud Workspace, select **File**, and then **Preferences**.

2 With **General** preferences selected, set preferences for the following:

- **Prompt to Save Unsaved Files**—Selected by default to prompt you to save unsaved files.
- **Show Path For Documents**—Clear this check box to hide document paths in the progress bar.
- **Accessibility Mode**—See the *Accessibility Guide for Planning and Budgeting Cloud Workspace*.

The Accessibility Mode option is not available in the Mozilla Firefox browser.

3 Click **OK** to save your changes.

Note: The email address displayed in the General preferences dialog box is the email address registered in your user security settings. You cannot update the email address displayed here. If your email address is not registered in security settings, “No email address found” is displayed.

3

Launching Applications

Applications launched in Planning and Budgeting Cloud Service include Oracle Hyperion Planning components that you can open.

► To launch an application from Planning and Budgeting Cloud Workspace:

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

The applications that you have rights to are displayed.

Note: If the current user is not provisioned for any application instances, the *Navigate*, then *Applications* menu displays a *No Applications disabled* menu item followed by a *Refresh* menu item. Except for *Refresh*, none of these items are displayed if the user is provisioned for any application instances. The same applies to the *File*, then *Open*, and then *Applications* menu.

2 Select the application to open.

The application launches as a tab at the top of Planning and Budgeting Cloud Workspace allowing easy switching between screens.

Note: You can set Preferences when viewing certain applications from Planning and Budgeting Cloud Workspace.

