Oracle® Hyperion Enterprise Performance Management Workspace
User's Guide

ORACLE®

Oracle Hyperion Enterprise Performance Management Workspace User's Guide, Release 11.1.2.4

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Using EPM Workspace

Related Topics

- **About EPM Workspace**
  Oracle Hyperion Enterprise Performance Management Workspace is the web user interface used to access Oracle Hyperion Financial Reporting, Oracle Hyperion Calculation Manager, and Oracle BI Presentation Catalog,

- **Preparing to Use EPM Workspace**
  Prior to using Oracle Hyperion Enterprise Performance Management Workspace, familiarize yourself with your documentation set.

- **Accessing EPM Workspace**
  You access Oracle Hyperion Enterprise Performance Management Workspace from the Home page.

- **Accessing Modules From the Navigate Menu in EPM Workspace**
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- **Launching Applications From EPM Workspace**
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- **Accessing Oracle BI EE From EPM Workspace**
  Oracle Business Intelligence Enterprise Edition content can be created and accessed within Oracle Hyperion Enterprise Performance Management Workspace.

- **Installing Products From EPM Workspace**
  You can install products from Oracle Hyperion Enterprise Performance Management Workspace.

About EPM Workspace

Oracle Hyperion Enterprise Performance Management Workspace is the web user interface used to access Oracle Hyperion Financial Reporting, Oracle Hyperion Calculation Manager, and Oracle BI Presentation Catalog,

- Financial Reporting—Scheduled or on-demand highly formatted financial and operational reporting from almost any data source, including Oracle Hyperion Planning and Oracle Hyperion Financial Management

- Calculation Manager—Create, validate, deploy, and administer sophisticated calculations that solve Planning, Financial Management, and Oracle Essbase business problems.

- Oracle BI Presentation Catalog—See the Oracle Business Intelligence Enterprise Edition product guides for more information on using the catalog.

Preparing to Use EPM Workspace

Prior to using Oracle Hyperion Enterprise Performance Management Workspace, familiarize yourself with your documentation set.

In addition, review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information on system requirements.

Additional information that you need:

- Browser information—See the *Oracle Enterprise Performance Management System Security Configuration Guide.*

- EPM Workspace URL and domain

- User account—User name and password assigned to you. See your system administrator.

- Access permissions

- Preferences

- Database information

For Oracle Hyperion Financial Reporting, Adobe Acrobat Reader must be installed on your computer. Before you can view reports in PDF, a PDF writer (Adobe Acrobat Distiller, GNU Ghostscript or AFPL Ghostscript) must be installed with your print server. If a PDF viewer is not available, only report names are listed.

To enable Microsoft Internet Explorer (IE) to view PDF reports in EPM Workspace

1. Open Internet Explorer.

2. Select **Tools**, and then **Internet Options**.

3. In **Internet Options**, select the **General** tab, and then in **Browsing History**, select **Settings**.

4. In **Settings**, in **Check for newer versions of stored page**, select **Every visit to the page**.

> **Note:**
>
> Oracle recommends that you add EPM Workspace to the exceptions for your web pop-up blocker. When you perform some EPM Workspace tasks on the web such as loading data, a status window shows the task status. If you have a pop-up blocker enabled on your computer, the status window is not displayed.

> **Note:**
>
> The first time you access a database connection, you may be prompted to log on. This occurs if the user name and password you use to log on to the web application differs from the user name and password for the database connection. Your administrator can provide you with the required database connection logon information.

Accessing EPM Workspace

You access Oracle Hyperion Enterprise Performance Management Workspace from the Home page.

To access EPM Workspace:

1. From the Home page, select **Financial Reporting Center**.

2. In **Financial Reporting Center**, click the Tasks button ⊟, and then select **Open Workspace for Financial Reports**.

> **Note:**
>
> Since EPM Workspace is accessed through an Oracle Fusion General Ledger session from which you have already been authenticated, the EPM Workspace login in screen is bypassed.

Accessing Modules From the Navigate Menu in EPM Workspace

In Oracle Hyperion Enterprise Performance Management Workspace, you can access several modules from the Navigate menu.

- **Applications**—Access Oracle Business Intelligence applications and the catalog. Applications is only displayed when a user has rights and applications are available.

- **Administer**—Manage Workspace Server Settings, Annotations, BI Presentation Services, and Oracle Hyperion Calculation Manager.

- **Schedule**—Schedule batches and events for Oracle Hyperion Financial Reporting artifacts and automated processing.

- **Open Items**—Dasy access to artifacts that you currently have open in EPM Workspace.

Menus and toolbar buttons are updated based on the following criteria:

- The roles granted you by the administrator. Permissions determine which modules are displayed in the View pane and toolbar.

- The products being used and the task being performed. For example, if you use an Administer menu item, the menus and toolbar icons contain tasks associated with the catalog related tasks.

Launching Applications From EPM Workspace

Applications are launched in a new tab, passing the single sign on token so you are not prompted again for credentials.

An application is displayed if both of the following are true:

- A user has rights

- Applications have been installed and are available

The list of available applications are filtered by the user's provisioned status.

To launch an application:

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

   A list of available applications for the products installed and for those you have rights to are displayed.

   If instanced products are installed but 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 display 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.

   The application launches as a tab at the top of Oracle Hyperion Enterprise Performance Management Workspace allowing you to easily switch between screens.

Accessing Oracle BI EE From EPM Workspace

Oracle Business Intelligence Enterprise Edition content can be created and accessed within Oracle Hyperion Enterprise Performance Management Workspace.

The Oracle BI Presentation Catalog, Oracle BI EE Home Page, BI Interactive Dashboards, Oracle Business Intelligence Publisher (in integrated mode only), and BI Delivers are the only Oracle BI EE modules available from EPM Workspace. The Oracle Business Intelligence Answers module is launched when specific objects are open.

To access Oracle BI EE from EPM Workspace:

1. In EPM Workspace, select **Navigate**, and then **Applications**.

2. Select an Oracle BI EE option:

   - **BI Catalog**—Provides access to all areas of the file system to which users have privileges

   - **BI Home**—Provides access to Oracle BI EEfunctionality

   - **BI Interactive Dashboards**—Provides access to Oracle BI EE dashboard creation, editing, viewing and interaction

Installing Products From EPM Workspace

You can install products from Oracle Hyperion Enterprise Performance Management Workspace.

1. Select **Tools**, then **Install**, and then select one of the following products:

    • **Smart View**

    • **Financial Reporting Studio**

    • **Oracle BI for Microsoft Office**

2. Follow the prompts in the wizard for the selected product.

3. When installation is complete, click **Finish**.

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Setting Preferences

Related Topics

- Setting General Preferences
  General preferences set defaults for the Content area's default start page, and for displaying document paths, and setting a default email address.

- Setting Financial Reporting Preferences
  Set general Financial Reporting preferences in EPM Workspace and set preferences for Financial Reporting Web Studio.

Setting General Preferences

General preferences set defaults for the Content area's default start page, and for displaying document paths, and setting a default email address.

All users have access to general preferences. Changes made to general preferences go into effect next time you log on.

To set general preferences:

1. From Oracle Hyperion Enterprise Performance Management Workspace, select **File**, and then **Preferences**.

2. In **Default Startup Options**, select an option to display by default whenever you log in to EPM Workspace.
   Click **Use Current Page** to use the current active page as the default startup option.

3. Select or clear **Show Path For Documents** to specify whether to show or hide document file paths in the progress bar.

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

> ✏ **Note:**
>
> The email address displayed is the email address registered in your user security settings. You cannot update it. If your email address is not registered in security settings, **No email address found** is displayed.

Setting Financial Reporting Preferences

Set general Financial Reporting preferences in EPM Workspace and set preferences for Financial Reporting Web Studio.

Related Topics

- Setting General Financial Reporting Preferences in EPM Workspace

- Setting Preferences for Reporting Studio

Setting General Financial Reporting Preferences in EPM Workspace

To set general Oracle Hyperion Financial Reporting preferences for Oracle Hyperion Enterprise Performance Management Workspace:

1. From EPM Workspace, select **File**, and then **Preferences**.

2. Click **Financial Reporting**.

3. In the **General** tab, enter the following preferences:

Preference	Description
Default Preview Mode	How to preview documents (HTML or PDF)
User Point of View	Whether to display the user point of view prior to running a report Click **Setup Members** to select the members you want to be available when using the User Point of View. See Setting Up the User Point of View for Financial Reporting Documents for more information.

Query-Ready Export	How to export a Financial Reporting report
	• **Export Mode**
	  – **Smart View** exports the report as an Oracle Smart View for Office file.
	  – **Simple Excel** opens the exported file in Microsoft Excel.
	  – **Disabled** hides the query-ready link when the report is displayed using HTML Preview.
	• **Export To**
	  – **New Worksheet** opens the exported report as a new sheet in an existing Excel workbook.
	  – **New Workbook** opens the exported report as sheet 1 in a new Excel workbook.
	Note: Export To options apply only when Export Mode is set to Smart View. These options are not available when Export Mode is set to Simple Excel.

Merge Equivalent Prompts	Whether to respond only once or consecutively to prompts and variables that are repeated **Note:** If Merge Equivalent Prompts is not selected, the default setting in the `JConsole.exe` file is used. For information on JConsole, see Appendix A"Property Information" in the *Oracle Hyperion Financial Reporting Administrator's Guide*.
Annotation Print Details	How to print annotations • **Use Footnote Details**—Create a system-defined footnote. Generic formatting is applied and system-defined sizes and fonts are used. To enable this option, select **Details** in the **Annotation Printing Preferences** drop down. • **Use Footnote Text Object**—Use the footnote function in the report's text object to print annotations. Footnote functions are created by the report designer. This option provides more flexibility for formatting and printing annotations. For example, the footnote function may specify to print only grid annotations with different size, font, and color to be applied to the heading and content. To enable this option, select **Text Object** in the **Annotation Printing Preferences** drop down.
Thousands Separator	Comma, Period, Underscore, or Space

Preference	Description
Decimal Separator	Comma, Period, Underscore, or Space
Date Value Format	How Oracle Essbase date values are rendered in a Financial Reporting report A cell within a grid can return a date value, which is stored as a numeric value in Essbase. When the cell returns the date value, it is displayed in Financial Reporting in "mm/dd/yyyy" format.

4. Click **OK**.

Setting Preferences for Reporting Studio

To set preferences for Oracle Hyperion Financial Reporting Studio:

1. From Oracle Hyperion Enterprise Performance Management Workspace, select **File**, and then **Preferences**.

2. Click **Financial Reporting**.

3. In the **Reporting Studio** tab, enter the following preferences:

Preference	Description
Units	Unit setting in the Report Designer
Guide Lines	Background settings in the Report Designer

4. Click **OK**.

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Managing Database Connections

Related Topics

- **Database Connection Manager**
  Use the Database Connection Manager to manage reports, books, saved reports objects (row/column templates, grids), batches, and scheduled batches.

- **Adding Database Connections**
  When you create a database connection, it is appended to the list in the Database Connection Manager dialog box.

- **Editing Database Connections**
  Edit database connections in the Database Connection Manager.

- **Changing Database Connections**
  Change database connections for reports and books in the Oracle Hyperion Enterprise Performance Management Workspace repository.

- **Deleting Database Connections**
  Delete database connections in the Database Connection Manager.

- **Accessing an Essbase Server**
  Access and Oracle Essbase serer from within the Database Connection Manager.

Database Connection Manager

Use the Database Connection Manager to manage reports, books, saved reports objects (row/column templates, grids), batches, and scheduled batches.

Reports and report objects can be moved from a development environment to a production environment, or between production servers.

The Database Connection Manager provides the following information about each database connection:

- **Name**—Database connection name
- **Type**—Data source type
- **Value**—Connection path

> ✎ **Note:**
>
> Oracle General Ledger only uses Oracle Essbase as a database.

Designers can use Oracle Hyperion Enterprise Performance Management Workspace to create, maintain, and assign names to database connections.

Users can select an existing database connection when prompted in Oracle Hyperion Financial Reporting Studio; for example, while adding a grid to a report. A database

connection consists of a database name, ID, password, and several values that are different for each data source.

> **Note:**
>
> This release of Oracle Hyperion Financial Reporting does not support SAP BW and MS OLAP as data sources.

Adding Database Connections

When you create a database connection, it is appended to the list in the Database Connection Manager dialog box.

To add a database connection:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Tools**, and then **Database Connection Manager**.

2. Click **New**.

3. In **Database Connection Properties**, enter the requested values:

   - **Database Connection Name**—Name to identify the database connection

   - **Type**—Data source type

   - **Server**—Data source server name. For Fusion Apps, enter **Essbase_FA_Cluster**.

   - **User ID**—User ID for the data source

   - **Password**—Password to access the data source

   - **Application/Database**— Click

     to add application and database names.
     The applications and corresponding databases are displayed in a tree view; the applications are listed as parents and the databases are listed as children. You can search on an application or database.

     For a data source associated with a database, select the database, and then click **OK**.

     For data sources that are *not* associated with a database, only applications are listed. For a data source that is not associated with a database, select the *application*, and then click **OK**

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

Editing Database Connections

Edit database connections in the Database Connection Manager.

To edit a database connection:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Tools**, and then **Database Connection Manager**.

2. In **Database Connection Manager**, select the database connection to edit, then click **Edit**.

3. Make your changes, and then click **OK**.

Changing Database Connections

Change database connections for reports and books in the Oracle Hyperion Enterprise Performance Management Workspace repository.

Related Topics

• About Changing Database Connections

• Changing a Database Connection

• Changing the Database Connection From Analytic Services to Planning Details

• Changing the Database Connection From Planning Details to Analytic Services

About Changing Database Connections

You can change the database connection for reports and books in the Oracle Hyperion Enterprise Performance Management Workspace repository. You can change the database connection when moving from a development environment server to a production environment server.

When the dimensions in the changed database connections do not match the previous dimensions, an error message similar to the following is displayed:

```
1012:Report contains an invalid grid. The following dimensions could not
be found: <Dimension>
```

The following actions occur when you open and save a report that has mismatched dimensions:

• Dimensions that existed in the old database connection but not in the new database connection are removed. The dimensions and its members that existed in the rows and or columns are removed from the grid. If, as a result of the removal, no dimension exists in the row or column, you must add a valid dimension to the cleared row or column in order for the report to run.

• Dimensions that exist in the new database connection but not in the old one are added to the POV.

If the report contains at least one dimension in both the row and column, it can be run and opened when the error message is received. The report can also be exported from the repository.

If you do not like the modifications that are automatically made for mismatched dimensions, you can close the report and revert to the original database connection.

When you change the database connection for reports or books, you can also validate that the databases have the same dimension. When this option is selected for a report, and dimensions do not match, you are shown that the action failed. Likewise, if dimensions do not match for a specific report in a book, you are shown that the action for the entire book failed. If you do not choose to validate, the database connection for the reports and books are changed, and you are not shown mismatched dimensions. However, errors may occur when you open or run the reports or books.

Changing a Database Connection

To change a database connection:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Tools**, and then **Change Database Connections**.

2. Select a report type, then an item, and then click **OK**.

3. In **Change Database Connection**, select the item, and then click **OK**.

4. In **Find all references to the Database Connection,** select the database connection to change.

5. In **Replace With**, select a database connection.

   To create a new database connection, click **New Database Connection**.

6. If you select multiple items, make changes to all the items that you selected.

7. Click **OK**.

Changing the Database Connection From Analytic Services to Planning Details

The following is a list of considerations when changing the database connection from Analytic Services to Planning Details for a report:

- The data source reference is the only change and there is no conversion.

- The dimensions and functions defined in reports and books must exist in the target data source. The following limitations apply:

  – Attribute dimensions are only supported for Essbase.

  – Hsp_Rates is not available as a dimension.

  – The cell text function cannot be used, because Linked Reporting Objects (LROs) are not supported.

  – Only the member selection using a level 0 is supported.

- Validate that dimensions exist prior to opening the report. If a dimension defined on a grid is not available in the Planning Details data source, no change is made. If an invalid function is used, an error is returned. The report designer has to remove the invalid function or dimension.

Changing the Database Connection From Planning Details to Analytic Services

The following is a list of considerations when changing the database connection from Planning Details to Analytic Services for a report:

- The data source reference is the only change and there is no conversion.

- There are several features that may be defined in a Planning Details report that are irrelevant for Analytic Services report, including Planning Annotations and Supporting Detail. If Supporting Detail is defined in the report, the details are

ignored. If Planning Annotations are used, they return an error. The report designer must remove the Planning Annotation function for the report to run.

Deleting Database Connections

Delete database connections in the Database Connection Manager.

To delete a database connection:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Tools**, and then **Database Connection Manager**.

2. In **Database Connection Manager**, select the database connection to remove, and then click **Delete**.

3. A confirmation message is displayed. Click **Yes** to confirm deletion.

Accessing an Essbase Server

Access and Oracle Essbase serer from within the Database Connection Manager.

To access an Essbase server:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Tools**, and then **Database Connection Manager**.

2. Select an Essbase database connection, and then click **New** or **Edit** to access the **Database Connection Propertie**s dialog box.

In the **Database Connection Properties** dialog box, the **Server** field allows various ways to access the Essbase server. Access can be in one of two modes: embedded mode or 3 Tier APS mode. For the 3 Tier APS mode, Oracle Hyperion Financial Reporting defines the APS server machine name in the JConsole using the EssbaseJAPIServer property. All API calls are sent through that server.

*   In both modes, you specify the Essbase server directly - Host[:port]. For example, `EssServer1:1423`.

*   With an Essbase cluster name, for both modes, you can either:

    –   Specify the Essbase cluster name directly. For example, `EssCluster1`. Financial Reporting internally resolves the cluster name to the server name at runtime.

    –   Enter the APS URL with an Essbase cluster name. For example: `http://host:port/aps/Essbase?ClusterName=EssCluster1`. where `host:port` is the APS server to resolve the Essbase cluster name. Failover is supported across the Essbase servers in the Essbase cluster.

*   In 3 Tier mode only, you can enter the APS cluster name. For example, `APSCluster1`.

    The APS cluster name and members are defined in the Essbase Admin Utility. This method supports failover and load balancing across the Essbase servers in the APS cluster.

4

Designing Documents for Financial Reporting Books

Related Topics

- About Files, Folders, and Documents in EPM Workspace
  Use Oracle Hyperion Enterprise Performance Management Workspace to access files, folders, and documents.

- About Books
  Books are created, edited, and saved in Oracle Hyperion Enterprise Performance Management Workspace. You must have Report Designer or Global Administrator roles to create a book.

- Creating Books
  Create a book by setting book properties, adding documents, adding or changing members, and adding a table of contents and cover page.

- Adding Reports and Documents to Books
  Use the Explore Repository to add reports and documents to books.

- Working With Members
  When working with books in the Book Editor, you can modify and select members for the book point of view.

- Opening, Renaming, and Saving Books
  Open, rename, and save books and snapshot books in the Explore Repository.

- Printing Reports, Books, and Snapshot Books
  You can print an entire book or snapshot book or print individual reports in a book or a snapshot book.

- Adding URLs in Book Editor
  URLs can be added to a book from Oracle Universal Content Management or other general servers.

About Files, Folders, and Documents in EPM Workspace

Use Oracle Hyperion Enterprise Performance Management Workspace to access files, folders, and documents.

- Documents, files, and folders can be opened in the following formats:

  - PDF

  - Text files

- Oracle Hyperion Financial Reporting users can subscribe to documents. Users are informed when documents are updated.

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

About Books

Books are created, edited, and saved in Oracle Hyperion Enterprise Performance Management Workspace. You must have Report Designer or Global Administrator roles to create a book.

A book can include:

- Oracle Hyperion Financial Reporting documents
- Dynamic reports
- Snapshot reports
- Heading text
- URL links

  URLs can be copied from a browser, orOracle Business Intelligence Enterprise Edition and Oracle Universal Content Management servers.

- Third-party documents
  - Microsoft Word, including:
    * Embedded Financial Reporting reports using the `FRExecute` function. See Using FRExecute to Embed Financial Reporting Reports into Microsoft Word and HTML DocumentsAdd cross-reference to Using FRExecute to Embed Financial Reporting Reports into Microsoft Word and HTML Documents.
    * Smart View queries
  - Microsoft Excel
  - Microsoft PowerPoint
  - PDF files
  - HTML files
  - Text (.txt) documents

  Third-party documents are listed in the table of contents and are launched like Financial Reporting documents. They are also included in PDF files when opening a book with "Complete Book in PDF."

Types of Books

Two types of books can be defined and saved to the repository:

- **Books**—Comprised of reports and snapshot reports and other artifacts such as text and PDF files and Microsoft PowerPoint, Excel, and Word files. When you run a book, the report data is dynamically retrieved from the database; the snapshot data remains static.

- **Snapshot Books**—A book saved as a snapshot book. The data contained in the reports, as well as a table of contents, is created when you save a book. Whenever a snapshot book is viewed, data-level security does not apply; data-level security is applied when the snapshot book is created and is based upon the data-level security that is set for the user who saved the snapshot book.

Reports or snapshot reports created in Oracle Hyperion Financial Reporting Studio and other artifacts located in the repository such as text, HTML, PDF files and Microsoft PowerPoint, Excel, and Word files, as well as URLs, can be assembled into a book, enabling you to generate their output in one session.

You can configure books to generate several versions of a report and different member selections. When a book containing these reports runs, all included reports are run at once. You can print or view the reports contained in the book individually or as a book.

The following table lists the features available for reports, snapshots, books, and snapshot books.

Table 4-1   Features Available for Reports, Snapshots, Books, and Snapshot Books

Feature	Reports	Snapshots	Books	Snapshot Books
Prompt	Yes	No	Yes	No
User POV	Yes	No	No	No
XML, HTML, and PDF	Yes	Yes	Yes	Yes
Page Axis	Yes	Yes	Yes	Yes
Expansions	Yes	No	No	No
Related Content	Yes	Yes	Yes	Yes
Grid POV	Yes	No	No	No
Data Security [1]	Yes	No	Yes	No
Email Links	Yes	Yes	Yes	Yes

[1] Data source security is applied.

Book Point of View

A book contains a book POV, which is a combination of all dimensions in the user POVs for each report in the book. Dimensions that are not defined in a report default to the user POV member, and the dimensions are displayed in the book POV of the Book Editor. You can also select the user POV as a member on the book POV, allowing you to modify the parameters, because they are no longer stored in the book definition.

The member selected for a dimension in the book POV is used in each report referencing the book POV for that dimension. The data sources in the POV match the data sources used by the reports in the book.

When a book is scheduled as part of a batch, the dimensions referring to the user POV are controlled by the scheduled batch POV.

> ✏️ **Note:**
>
> DTS functions in the book POV are not supported.

Book Output

Book output has the following features for PDF and HTML:

- You can define a book with sections and subsections with a table of contents.

- You can use templates for layout and page customization (HTML only).

- You can add third-party documents to books through Oracle Universal Content Managaement and Oracle Business Intelligence Enterprise Edition.

Creating Books

Create a book by setting book properties, adding documents, adding or changing members, and adding a table of contents and cover page.

Related Topics

- Considerations When Creating Books

- Creating a Book

- Setting Book Properties

- Adding a Table of Contents

- Adding a Cover Page

Considerations When Creating Books

When creating a book, keep in mind the following points:

- HTML documents inserted into a book are not supported in PDF output due to limitations in rendering charts, images, and `FRExecute` results. Use Word documents instead of HTML in this case.

- Book search works for special characters except in text surrounded by angle brackets, such as "<123>." You can search separately for character "<", ">", or "123".

- When you save a book as a snapshot book, expansions are removed.

- Related content in Oracle Hyperion Financial Reporting reports can be included in book output and are available in HTML books. See Behavior of Related Content in Books.

- With the exception of URLs, files must reside in the repository to select them for a book.

Creating a Book

To create a book:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **File**, then **New**, and then **Book**.

2. On the **New Book** tab, under **Add Document**, select reports and other artifacts to include in the book, and then click **Add**.

3. **Optional:** To add or change members selections for the book point of view, click a POV at the top of the **New Book** tab to open the Preview dialog box for that point of view.

   In the following example, you could edit the members for the "AccountingPeriod" and "Currency" Points of View:
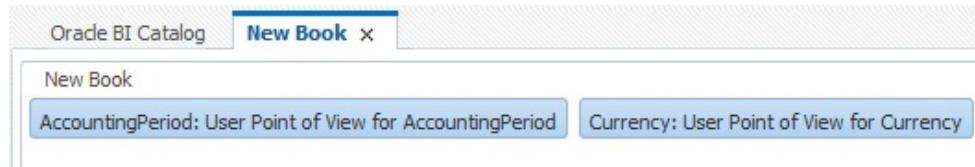
4. Under **Heading Text**, enter the heading text that will be displayed at the top of the book next to the Table of Contents, and then click **Add**.

5. Under **URL**, enter any desired URLs, and then click **Add**.

   See Adding URLs in Book Editor

6. Click the drop-down next to **Add Document**, and then select **Book Setup**.

7. Under **General**, enter information about general book properties.

   See Setting General Book Properties

8. Under **Table of Contents**, enter information about the book's table of contents.

   See Adding a Table of Contents.

9. Select **File**, and then **Save** to save the book with a name, description, and Mime Type of "Financial Reporting Book".

Setting Book Properties

Related Topics

• Setting General Book Properties

• Behavior of Related Content in Books

• Processing Behavior of Hyperlinks and FRExecute

Setting General Book Properties

To make changes to a book's General properties:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a book, and the select **Open In Editor**.

2. From the drop-down at the top right of the Book Editor next to Add Document, select **Book Setup**.

3. Under the **General** heading, edit any of the following properties:

   • **Paper Size**

   • **Consecutive Page Numbering**—You must specify page numbering in the header or footer of each report in the book before you can print the page number.

   • **Include Table of Contents in Page Numbering**

   • **Include Cover Page in Page Numbering**

- **Collate Reports By**

- **Include Related Content in Batch Output**—When a book is set to **Include Related Content in Batch Output**, and a complete book is generated in a PDF format, all related content links in the resulting PDF are included.

  The Related Content link objects are shown following the report from which they were linked. The Related Content link objects are always included in the book table of contents. They are shown as children of the report from which they were linked.

  If the same object is linked multiple times or from different reports, the object is only included once and will only appear in the book table of contents once. See Behavior of Related Content in Books.

- **Starting Page Number**

- **Enable Embedded Content Processing**—Select Yes to turn on the processing of Word, HTML and URL objects for `FRExecute` functions and hyperlinks. Select No to turn off the processing of Word, HTML and URL objects for `FRExecute` functions and hyperlinks. Select No for books with Microsoft Word objects that do not have any `FRExecute` functions or hyperlinks. For embedded content processing behavior information, see Processing Behavior of Hyperlinks and FRExecute.

Behavior of Related Content in Books

Additional information about related content when **Include Related Content in Static Book HTML and PDF** in the Book Editor is selected:

- If this property is set to "true", when the Static Book HTML output is generated, any related content links found in the reports in the book is followed.

  When a Related Content link is followed, the URL in the link is examined.

  – If the URL refers to a Report or Snapshot Report that resides in the current repository, that Report is executed, and the results are included in the Static Book HTML output. If the Report is a Snapshot Report, it is loaded from the repository and included. When the Report is executed, the POV of the cell that contained the Related Content link is used, as if you clicked the link.

  – If the URL refers to a repository "smart-cut"' to a Report or Snapshot Report in the repository, this is treated in the same way as if the URL linked to a repository object chosen through the **Related Content** dialog box.

  – If the URL refers to a repository "smart-cut" to a repository object that is not a Report or Snapshot Report (for example a Word Document, HTML file, or PDF file), the object is retrieved from the repository and included in the Static Book HTML output.

  – If the URL refers to an Oracle Universal Content Management document, the document is retrieved and included in the Static Book HTML output.

  – If the URL refers to an Oracle Business Intelligence Enterprise Edition document, the Oracle BI EE document is retrieved and included in the Static Book HTML output.

  – If the URL refers to a URL that is on the list of to-be-followed URLs, the HTML returned from executing the URL is retrieved and included in the Static Book HTML output.

- Cells that have Cell Documents are processed.
  - If the Cell Document is a physical file, it is included in the Static Book HTML output.
  - If the Cell Document is a URL, the URL is processed in the same way as if the URL was specified as a Related Content link.

> **Note:**
>
> If a cell contains multiple Related Content links on the cell, all Related Content links are processed in the same way. When a cell has multiple links, a standard hyperlink in the HTML document is shown. However, when the user clicks on the hyperlink, a list of available links is displayed.

Processing Behavior of Hyperlinks and FRExecute

Microsoft Word links behave similarly to those in related content. In the Book Editor, you can use the option **Include Related Content in HTML Table of Contents** at the chapter level to control how hyperlinks are processed in `.doc` or `.html` type chapters.

When using **Enable FRExecute Processing** some dependency exists with **Include Related Content in HTML Table of Contents** if the `FRExecute` report contains related content. The following tables describes the expected behavior with hyperlinks and `FRExecute` with related content:

> **Note:**
>
> If a `.doc` or `.html` document does not contain `FRExecute` and hyperlinks, the settings are for Enable `FRExecute` Processing and Include in Related Content in HTML table of contents are unnecessary.

Case 1: The `.doc` or `.html` document contains `FRExecute` with related content and also hyperlinks

Table 4-2   The `.doc` and `.html` document contains `FRExecute` with related content and also hyperlinks

If:	Enable Embedded Content Processing = Yes	Enable Embedded Content Processing = No	Include Related Content in HTML Table of Contents - Yes	Include Related Content in HTML Table of Contents - No	Then the Following are Processed:
	X		X		• `FRExecute` and its related content • Hyperlinks

Table 4-2   (Cont.) The `.doc` and `.html` document contains `FRExecute` with related content and also hyperlinks

If:	Enable Embedded Content Processing = Yes	Enable Embedded Content Processing = No	Include Related Content in HTML Table of Contents - Yes	Include Related Content in HTML Table of Contents - No	Then the Following are Processed:
	X			X	• `FRExecute` • Hyperlinks
		X	X		Hyperlinks
		X		X	(No processing occurs)

Table 4-3   The `.doc` and `.html` document contains `FRExecute` with Related Content and no hyperlink

If:	Enable Embedded Content Processing = Yes	Enable Embedded Content Processing = No	Include Related Content in HTML Table of Contents - Yes	Include Related Content in HTML Table of Contents - No	Then the Following are Processed:
	X		X		`FRExecute` and its related content
	X			X	`FRExecute` but not its related content
		X	X		(No processing occurs)
		X		X	(No processing occurs)

Table 4-4   The `.doc` and `.html` document contains hyperlinks only

If:	Enable Embedded Content Processing = Yes	Enable Embedded Content Processing = No	Include Related Content in HTML Table of Contents - Yes	Include Related Content in HTML Table of Contents - No	Then the Following are Processed:
	X		X		Hyperlink
	X			X	(No processing occurs)
		X	X		Hyperlink
		X		X	(No processing occurs)

And if:

• Enable FRExecute Processing = Yes

• Include Related Content in HTML Table of Contents = Yes

Then FRExecute's related content is processed, and hyperlinks are processed.

And if:

- Enable FRExecute Processing = Yes

- Include Related Content in HTML Table of Contents = Yes

Then FRExecute's related content is processed and hyperlinks are processed.

And if:

- Enable FRExecute Processing = Yes

- Include Related Content in HTML Table of Contents = Yes

Then FRExecute's related content is processed and hyperlinks are processed.

And if:

- Enable FRExecute Processing = Yes

- Include Related Content in HTML Table of Contents = Yes

Then FRExecute's related content and hyperlinks are processed.

Adding a Table of Contents

Related Topics

- Setting Table of Contents Text
- Customizing the Table of Contents

Setting Table of Contents Text

In the Book Editor, the information in the **Display Text** field shows the text for each artifact entry in the table of contents. The default text in the table of contents is the artifact name or, in the case of a member, the member name. For example, if the artifact in the book is a report, the report name is shown. If the artifact in the book is an external file (for example, a Microsoft Word document), the file name from the repository is shown.

A panel at the bottom of the Book Editor displays the default properties of the book and enables you to change an artifact's textual and processing settings for the table of contents. For example, you can change the selected artifact name to the artifact's to customized text, or you can choose to not display any text for the selected artifact. Other properties are read-only.

To set the table of contents text for an artifact:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a book, and then select **Open In Editor**.

2. In the Book Editor, highlight an artifact and scroll to the bottom panel. You can edit the following:

   - **Display**—For *members*, the value is always **Display**. For *reports*, the following options are available:

     – **Name**—Artifact name

     – **Description**—Description as it exists in the repository

- **Custom Text**—Custom text that you enter

- **Do Not Display**—Do not display the text in the table of contents

If you select **Custom Text**, the **Display Text** field is enabled so you can enter text.

You can include a `Value` function in the Custom Text to insert a member label of a dimension as follows:

`<<value(`*`dimension-name`*`)>>`

For example: `<<Value(Product)>>` or `<<Value(Year)>>`

Using the `Value` function, you can create a cleaner, more streamlined table of contents. For example, the book can contain two reports that are run for the children of Qtr1. In Custom Text, you can include a `<<Value(Year)>>` function, and then hide the member selections.

In the following example, "Period" and "Year" are added to the Profit & Loss and Balance Sheet reports:

`Profit and Loss for <<Value(Period)>> <<Value(Year)>> and `` Balance Sheet for <<Value(Period)>> <<Value(Year)>>`

This changes the appearance of the table of contents from this:

Profit & Loss Statement
    Jan, 2008 1
Balance Sheet
    Jan, 2008 2

to this:

Profit and Loss Statement for Jan 2008 1
Balance Sheet for Jan 2008 2

- **Display Text**—If you selected **Name** or **Description** in the **Display** field, the report name or report description is used for the display text. If you selected **Custom Text** in the **Display** field, then type the custom text.

- **Include Related Content in HTML Table of Contents**—Available when you select a *report* in the Book Editor.

- For processing behavior with `FRExecute` and hyperlinks, see Processing Behavior of Hyperlinks and FRExecute.

- **Member Selection**—Available when you select a *member* in the Book Editor. To change the member for the Point of View, click the entry field to display the **Preview User Point of View** dialog box, select a member, and then click **OK**.

Customizing the Table of Contents

A table of contents, with headings and subheadings as in a tree structure, is created for the documents compiled in the book. You can add content within this hierarchy, move or delete content, and format the layout. You can change the heading structure by increasing or decreasing the indent. You can copy member selections to other reports in the book.

A table of contents is created for the book. You can collate the reports within the printed table of contents by report or by member selection. For example, you can create the following two books:

Book 1 Balance Sheet (New York, Boston), (Q1, Q2) Cash Flows (New York, Boston), (Q1, Q2)

Book 2 Balance Sheet (Actual, Budget), (Q1, Q2) Cash Flows (New York, Boston), (Q1, Q2)

If you collate reports in printed books by report, the first report for each set of member selections is run, and then the second report for each set of member selections is run. The following book is generated:

```
Book1 Table of Contents

Balance Sheet

 New York, Q1

 New York, Q2

 Boston, Q1

 Boston, Q2

 Cash Flows

 New York, Q1

 New York, Q2

 Boston, Q1

 Boston, Q2
```

If you collate reports in printed books by member selections, each report for the member selection is run. The following book is created:

```
Book1 Table of Contents

Balance Sheet

 New York, Q1

 Cash Flows

 New York, Q1

 Balance Sheet

 New York, Q2

 Cash Flows

 New York, Q2

 Balance Sheet

 Boston, Q1

 Cash Flows

 Boston, Q1
```

```
Balance Sheet

Boston, Q2

Cash Flows

Boston, Q2
```

Adding a Cover Page

You can add a cover page to any book. The cover page is displayed before the table of contents when you view the book output as complete book in PDF. The cover page can be one of these file types:

- PDF file
- Microsoft Word

> ✎ **Note:**
>
> The cover page is not displayed when HTML Preview, PDF Preview or static HTML Web Site is selected as the book output.

To select an artifact as the cover page:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a book, and then select **Open In Editor**.

2. In the Book Editor, select a PDF file or a Microsoft Word file for the cover page from the list of book artifacts, and then navigate to the lower pane containing the object settings.

3. In the **Value** column, click the arrow in the row for **Cover Page**, and then select **Yes**.

   The selected artifact is moved to the top of the book artifacts list and is marked with a star to indicate that it is the cover page.

Adding Reports and Documents to Books

Use the Explore Repository to add reports and documents to books.

Related Topics

- Adding a Report to a Book
- Adding a Document to a Book
- Using Microsoft Word Documents in Books
- Setting Up the User Point of View for Financial Reporting Documents

Adding a Report to a Book

When adding a report to a book, the report may contain prompts for member selection. Prompts are defined when the book is run. Also, when adding a report to a book,

dimensions from the book POV can be set to multiple members. When the book is run, the report iterates over each member. For example, if North, South, East, West, Actual, and Budget are selected, the book contains eight versions of this report (Actual for N, S, E, W, Budget for N, S, E, W).

You can collate the printed output by member selection if the same member selections are used for all reports in the book. Doing so enables, for example, all the reports for East or Budget to be grouped. Collating by member selection is not available if:

- Chapters are indented
- The book contains external content that has book member selections that do not match the member selections of other chapters

You can copy member selections between reports if they use the same data source. This eliminates selecting shared members multiple times.

To add a report to a book, following the steps under Adding a Document to a Book.

Adding a Document to a Book

To add document to a book:

1. In the Book Editor, highlight a document.

2. With **Add Document** selected in the drop-down at the right of the Editor, select a document, and then click **Add**.

   The document is displayed beneath the artifact you highlighted, but it can be moved to another location.

   > **Note:**
   >
   > This option is disabled when a member is selected.

Using Microsoft Word Documents in Books

Related Topics

- About Using Microsoft Word Documents in Books
- Creating Hyperlinks in Microsoft Word Documents
- Using FRExecute to Embed Financial Reporting Reports into Microsoft Word and HTML Documents
- Printing Text Files
- Microsoft Word Template

About Using Microsoft Word Documents in Books

When you use Microsoft Word documents in books:

- You can insert links to report or any files located in the repository and third-party documents through Oracle Universal Content Management using Microsoft Word's Hyperlink option. See Creating Hyperlinks in Microsoft Word Documents.

- You can insert Oracle Hyperion Financial Reporting reports using the `FRExecute` function. See Using FRExecute to Embed Financial Reporting Reports into Microsoft Word and HTML Documents.

- You can use all the formatting features included in the Word product.

Creating Hyperlinks in Microsoft Word Documents

In a Microsoft Word document, you can insert hyperlinks by copying and pasting the document's URL from:

- Oracle Hyperion Financial Reporting reports or any files located in Oracle Hyperion Enterprise Performance Management Workspace

- Any file from Oracle Universal Content Management

When creating a book, all POVs from all reports (reports specified in `FRExecute` and hyperlinks) are included in the appropriate chapters.

> **Note:**
>
> When selecting a `doc` or `html` document containing hyperlinks in Book HTML Preview or PDF Preview, the contents of the hyperlink are not displayed, even if "Include Related Content in HTML Table of Content" is set.

To create hyperlinks in a Microsoft Word document:

1. From EPM Workspace with the BI Catalog open, right-click a Financial Reporting report or file, and then select **Properties**.

2. In **Properties**, to the right of the **SmartCut** label, copy the document's URL, and then exit from EPM Workspace.

3. Open your Microsoft Word document. To paste the URL, right-click inside the Microsoft Word document where you want the link to display, and then select **Hyperlink**.

4. In **Text to display**, enter the description that you want associated with the link.

5. In **Address**, paste the URL that you previously copied in EPM Workspace, and then click **OK**.

6. Save the Microsoft Word document as a `.doc` or `.html` file.

   Saving the document as an `.html` file provides better performance.

> **Note:**
>
> For processing behavior using links, see Processing Behavior of Hyperlinks and FRExecute.

Using FRExecute to Embed Financial Reporting Reports into Microsoft Word and HTML Documents

Related Topics

- About FRExecute
- FRExecute Syntax
- Considerations When Using FRExecute
- FRExecute Examples

About FRExecute

The `FRExecute` function embeds a Oracle Hyperion Financial Reporting report or report section into Microsoft Word and HTML documents. You can include a report, a report type (dynamic or snapshot), or specify selected areas in the report such as a grid, chart, page, text box, text area, or cell.

FRExecute Syntax

```
FRExecute(ReportPath[Type={1,2};ComponentType={1,2};ComponentName={Grid1,G
rid2,Chart1,Chart2,Chart3};Page={1,2,..;.}Cell=FRFormula}
```

where:

`ReportPath` is the full path to the report, including the report name.

`Type1` is a dynamic report and `Type2` is a Snapshot report.

`ComponentType1` (optional) is a grid and `ComponentType2` (optional) is a chart.

`ComponenentName` (optional) is the grid or chart name.

`Page` (optional) is the page number.

`Cell` (optional) is the date cell formula.

The cell syntax is `cell=cell[row,col]`, or `cell=[row,col]`

where

`row` is a number >=1 referring to the row in Oracle Hyperion Financial Reporting Studio report designer.

`col` is a letter >= A referring to the column in Financial Reporting Studio report designer. If a report has more then 26 columns, two letters are used for those columns (for example, AA, AB, AZ, AAA, AAB, and so on).

> **Note:**
>
> You can specify a "sub-tuple" if the design time row evaluates to more then one tuple. For example, if you reference row 2, which has a member selection "Children of Market" resulting in four children (East, West, South, Central), the sum of all four tuples are returned. You can also refer to individual tuples like this: Cell[2(1),A] referring to East/ColA; Cell[2(3),A] referring to South/ColA.

> **Note:**
>
> To limit the size of the report, place the FRExecute function inside a Microsoft Word text box.

Considerations When Using FRExecute

- In HTML documents, FRExecute is supported for web page creation. For PDF printing, you can insert FRExecute in a Microsoft Word document to be included in the PDF output.

- You cannot use these characters in the FRExecute function: ; ( ) & < > " '.

- If FRExecute is in a text box, the result is limited to the designated size of the text box. Scroll bars are displayed if the content is greater than the text box. If FRExecute is added to a Microsoft Word page (not in a text box), the entire result is output, regardless of size.

- If you use the Enter key in FRExecute, the text wraps around at that point.

- Keep FRExecute the same font, size, and color.

- You can insert FRExecute in any text line position.

- When using an FRExecute function in a text box, do not combine it with other text or FRExecute functions.

- Using Microsoft Word: When formatting a text box, HTML output supports only left or right alignment.

- When using FRExecute is inserted in other than a Word component (for example, table, image, and so on), the Horizontal Alignment option must be set to Left or Right.

- You can save your document as *.docx, *.htm, or *.html. If your Microsoft Word document contains only text and FRExecute, you can save it as *html for increased performance.

- You can add FRExecute to any generic .html file (a file that can be used with any file type).

FRExecute Examples

Example 4-1   Return the entire report with dynamic values

```
FRExecute(ReportName;Type=1)
```

Example 4-2   Return page 2 of a dynamic report

```
FRExecute(ReportName;Type=1ComponentType=1'ComponentName=Grid2;Page=2)
```

Example 4-3   Return a dynamic report with all pages

```
FRExecute(ReportName;Type=1;ComponentName=Grid2)
```

Example 4-4   Return a data cell on page 2. If you do not select the page, then return the first page's data cell.

```
FRExecute(reportFullName; Type=1;
ComponentType=1;ComponentName=Grid2;Page=2; Cell=Cell[2,B])
```

```
FRExecute(reportFullName; Type=1;
ComponentType=1;ComponentName=Grid2;Page=2; Cell=[2,B])
```

Example 4-5   Return a chart on page 2. If you do not select the page, then return chart 1 on all the pages.

```
FRExecute(reportFullName; Type=1;
ComponentType=2;ComponentName=Chart1;Page=2)
```

Considerations

In an HTML document or Word document, "FRExecute" (including lowercase, uppercase or mixed-case letters) is the keyword of the `FRExecute` function. "FRExecute" cannot be used in file content or as part of the file name.

When applying a layout to a Microsoft Word text box containing `FRExecute`, select "Square" for Wrapping Style, and select "Left" or "Right" for Horizontal alignment.

Printing Text Files

Microsoft Word can print text (`.txt`) files, which must include the `.txt` extension to print. This is a design consideration when appending text files to for cell documents, books, and external content.

Microsoft Word Template

A Microsoft Word template document, `FR_TextTemplate.doc`, is installed on the Oracle Hyperion Financial Reporting print server in the `${home.reports}/bin/` folder. When the template is found by the Financial Reporting print server, the contents of the text file is inserted into the Word template, after which the existing routine that prints Word

documents is used to print text files. When the print job has finished, the file is closed without saving, preserving the template for the next text file.

Default Word template settings

- The `<<FR_content>>` string is the only body content.

- Text formatted to Courier New, 10pt font

- Portrait setting with one-inch margins.

- Footer set to print date and time and current page number. These settings are updated for all text files printed through the Financial Reporting print server.

Customizing the template

Always back up the template before customizing it. You can open the template through Microsoft Word. Changes to the template are applied the next time a text file is printed. You need not restart the Financial Reporting print server.

In the `<<FR_content>>` string, you can specify the font and paragraph settings for the inserted text file content and should be included in the `FR_TextTemplate.doc` template.

When printing a text file, the Financial Reporting print server opens `FR_TextTemplate.doc` and looks for the `<<FR_content>>` string. If found, the contents of the text file replaces the string. If the string is not found, the contents of the text file is inserted at the end of the Word document and any preexisting content in the template is shown before the data in the text file.

Benefits of implementing the Microsoft Word template

- Default formatting of the template can be customized.

- Page setup of the template, such as print mode and page size, can be controlled.

- Footers of the template, such as page numbers, can be customized.

- Content of the template, such as inserting a standard confidentiality clause, can be added.

- Images or backgrounds of the template, such as a company logo, can be added.

Setting Up the User Point of View for Financial Reporting Documents

To set up user POVs for Oracle Hyperion Financial Reporting documents:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **File**, then **Preferences**, and then click **Financial Reporting**.

2. In the General tab under **User Point of View**, select **Setup Members**.

3. In **Database Connection**, select a data source, and then click **Refresh** to update the list of database connections.

4. If prompted, enter logon credentials, and then select **OK**.

   Use the Planning Details data source only if your grid contains Supporting Detail or Planning Unit Annotations. In all other cases, use Oracle Essbase as the data source.

5. In **Setup User POV**, do the following:

    a. Select the members you want to be available when using the User Point of View.

      i. Click next to a dimension.

      ii. In **Preview User Point of View**, expand the dimensions to view the available members, then click to add members to the Selected column, and then click **OK**.

    b. In **Display Member Label as**, select how to display the member in the User POV in Financial Reporting documents.

    Members are displayed by member name, by alias/description, or both member name and alias/description. The options available are based on the data source.

    c. In **Dimension Labels are**, select whether to include dimension labels.

6. Click **Apply** to save your selections and set up User POVs for another data source, or click **OK** to accept all changes and return to the **Preferences** dialog box.

Working With Members

When working with books in the Book Editor, you can modify and select members for the book point of view.

Related Topics

- Selecting Members for a Document in a Book
- Limiting the Members That Can Be Selected
- Selecting the User Point of View as a Member in the Book Point of View
- Assigning Members Using Functions
- Selecting Multiple Members Based on Criteria
- Searching for Members
- Changing Page Members
- Changing Members for Grid POVs
- Copying Members from One Report to Another
- Previewing Selected Members

Selecting Members for a Document in a Book

When working with books in the Book Editor, you can modify and select members for the book point of view. You can select members, create and save member lists, and select functions that dynamically retrieve members from the database connection.

> **Note:**
>
> The following steps work only for books that contain reports with dimensions on the POV in the report.

To select members for a document in a book:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, then select **Open In Editor**.

2. In the Book Editor, right-click a document in the book, and then select **Member Selection**.

3. In the **Preview User Point of View** dialog box, enter information in the following tabs:

   - **Members**—The Members tab shows members that are associated with the selected dimension. By default, the members for a dimension are shown in tree view, which is a hierarchal view of the dimension's members. You can also show the members in a flat list. By default, the tree view shows only the top-level member. You can expand the top-level member to see its descendents.

   - **Lists**—The Lists tab shows member lists used to perform a query or to select members for your report. The type of lists are based on the database connection. Member lists can be predefined in the database when you create user lists. You can include members, member lists, and functions.

     System lists are available when using Oracle Essbase, Oracle Hyperion Planning, or Oracle Hyperion Financial Management as database connections.

     User List—Lists that are created by you. When you select print preview or web preview, the members in the user-defined list are displayed in the order that you specified during list creation. User lists can be created when using Essbase as a database connection.

     See the *Oracle Hyperion Financial Reporting Studio User's Guide*.

     Dynamic Lists—Predefined lists that are used with the `DynamicMemberList` function. Dynamic lists are available only when using Financial Management as a database connection. See the *Oracle Hyperion Financial Reporting Studio User's Guide*.

   - **Functions**—The Functions tab defines which functions to use when selecting members for your report or adding members to member lists. Functions retrieve members and related members from a database connection. You can specify one or more functions and edit the function parameters. (See *Oracle Hyperion Financial Reporting Studio User's Guide*.)

Limiting the Members That Can Be Selected

You can limit the members that can be selected for a book. You can also specify an alternate member label, descriptions (for a Oracle Fusion Forecast Management database connection), or aliases (for Analytic Services or Oracle Hyperion Planning database connections), or both member names and descriptions or aliases. For

example, to provide only lines of products, In Member Selection, select Prompt for Product as a member of Product, then in Prompt Details,

> **Note:**
>
> The following steps work only for books that contain reports with dimensions on the POV in the report

To set up a report prompt to select members:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, and the select **Open in Editor**.

2. In the Book Editor, right-click a document in the book, and then select **Member Selection**.

3. In the **Preview User Point of View** dialog box in the **Members** tab, select **Prompt for** <*member*>, and then click **OK**.

4. **Optional:** To limit the prompt selection to specific default members, a list of members, or both, do the following:

    • If the member name is known, enter the member name in **Default Member** or click **Default Member**. If multiple members are provided for the prompt, members must be separated by commas.
    If you leave **Default Member** blank, the **Respond to Prompts** dialog box does not display a default member when a user runs the report. The user must specify a member rather than accept a default.

    • If the members are known, click **Choices List** to select a list of members. If multiple member lists are provided for the prompt, member lists must be separated by commas.

5. From **Member Labels in Prompt Selection**, select the kinds of labels to be displayed in the **Respond to Prompts** dialog box when you run the report:

6. Click **OK.**

Selecting the User Point of View as a Member in the Book Point of View

When a report is added to a book, the dimensions that are on the user POV in the report definitions are applied to the book POV. Members on the book POV default to the user POV in the Book Editor.

> **Note:**
>
> The following steps work only for books that contain reports with dimensions on the POV in the report

To select the user POV as a member in the book POV:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, and then select **Open In Editor**.

2. In the Book Editor, click the tab the corresponds to the dimension for which you want to set up a User POV.

   For example, if you had a "Market" dimension, the tab would say "Market: User Point of View for Market".

3. In the **Preview User Point of View**, dialog box, select **User Point of View for** *<dimension name>*, and then click **OK**.

Assigning Members Using Functions

You can use functions and edit their parameters to select members dynamically.

> **Note:**
>
> The following steps work only for books that contain reports with dimensions on the POV in the report

To assign a member using functions:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, then select **Open In Editor**.

2. In the Book Editor, right-click a document in the book, and then select **Member Selection**.

3. In the **Preview User Point of View** dialog box, click the **Functions** tab, define the function, and then click **OK**.

For information on using and editing function parameters, see the *Oracle Hyperion Financial Reporting Studio User's Guide*.

Selecting Multiple Members Based on Criteria

You can select members based on criteria. You define criteria by creating expressions of members, Boolean operations, and commands.

Boolean operators enable you to specify precise member combinations for the report. This is useful with large volumes of data. Use the AND, OR, UNION, and NOT Boolean operators, combined with expression commands, to refine your member selections.

To select multiple members based on criteria:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, and then select **Open In Editor**.

2. In the Book Editor, right-click a document in the book, and then select **Member Selection**.

3. In the **Preview User Point of View** dialog box, in the **Selected** area on the right of the dialog box, click **Show Advanced Options** button .

At least two members must be displayed in the **Selected** area before you can create criteria.

4. Build expressions by using one or more of the following operators and symbols:

- Select the NOT Boolean operator to build the expression. NOT is the inverse of the selected condition.

- Enter a left parenthesis, "(", to add an opening character to the expression.

- Enter a right parenthesis,")", to add a closing character to the expression.

- Click in the **Operator** column, and then select:

  – AND—When all conditions must be met

  – OR—When one condition of several must be met

  – UNION—To combine the data

  You must use double parentheses if you are using three members. For example, if you selected descendants of Market, and you want to exclude East, West, and South, your advanced member selection query should be:
  ```
  Descendants of Market AND NOT(East AND NOT(West AND NOT SOUTH ))
  ```

5. Click **OK**.

Searching for Members

You can search for members to edit using a text string or property. Use a blank space as a separator to perform simultaneous searches. To search a string for an exact match, including blank spaces, enclose the string in quotation marks.

> **Note:**
>
> For Oracle Hyperion Financial Management, when you search for an entity, you must search on parent entity (for example. D62VIELO.D62475LO). When you search just the entity, you need to precede the entity with a wildcard, (for example, *D62475LO).

To search for members:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, then select **Open In**, and then **Editor**.

2. In the Book Editor, right-click a document in the book, and then select **Member Selection**.

3. In any tab in the **Preview User Point of View** dialog box, select an option next to **Find**, and then enter the search criteria.

4. If you are searching in the **Members** tab, click **Find** . If you are searching in the **Lists** or **Functions** tab, click **Find Next** or **Find Previous** .

5. Click **OK**.

6. If matches are found, in the **Search Result** dialog box, select the items to add to your member selection, and then click **OK**.

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. In HTML reports, you change a page member to see different report views. 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 gird.

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

   The report is run, and data is displayed for the selected member. In PDF files, the data for page members is displayed on different pages.

> **Note:**
>
> For PDF, data for page members is displayed on different pages.

Changing Members for Grid POVs

Grids on reports can have dimensions on the grid POV. You can use the default member for each dimension, or you can select a new member to run for a report.

To change a member on the grid POV:

1. Open an HTML report that displays a grid POV.

2. Click a dimension or member link.

3. Select a member, and then click **OK**.

   The report runs for the selected member.

Copying Members from One Report to Another

To copy members from one report to another:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, then select **Open In Editor**.

2. In the Book Editor, right-click a document in the book, then select **Copy Member Selection to**, and then select a report.

Previewing Selected Members

You can preview the selected members. Members can include a list or function result from evaluated member lists or functions, if applicable.

To preview members:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a Oracle Hyperion Financial Reporting book, then select **Open In Editor**.

2. In the Book Editor, right-click a document in the book, then select **Member Selection**.

   This is only for books that contain reports with dimensions on the POV in the report

3. On the right side of the **Preview User Point of View** dialog box, click **Preview Selection** .

Opening, Renaming, and Saving Books

Open, rename, and save books and snapshot books in the Explore Repository.

Related Topics

- Opening Books and Snapshot Books
- Renaming Books and Snapshot Books
- Saving Books

Opening Books and Snapshot Books

After you save a book, you can open it to maintain, print, or preview the book in HTML or PDF format. When you preview a book, a table of contents is displayed with a list of reports in the book. When you preview a snapshot book, the table of contents is displayed as a PDF or HTML file, depending on you preference setting. Snapshot books cannot be changed, but they can be previewed, printed, and viewed.

To open a book or snapshot book:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a book or snapshot book, and then select **Open**, then **Open in PDF** , and then **Open in Editor**, or **Open Complete Book in PDF**.

2. In the book table of contents, select a report or snapshot, and then click **Show Report**.
   The report or snapshot is displayed in the Content area in HTML or PDF format, with the Report Name and POV in the tab description.

3. Select **File**, then **Close**, and then **Current**.

Renaming Books and Snapshot Books

To rename a book or snapshot book:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right–click the book, and then select **Rename**.

2. Enter a new name for the book..

3. Select whether to preserve references to the old name.

4. Click **OK**.

Saving Books

You can save books to the repository as a compilation of reports, Microsoft Word documents, snapshot reports, or reports and snapshot reports. You can replicate an existing book by saving it with the Save As command.

To save a book:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a book, and then select **Open In Editor**.

2. Select **File**, and then **Save** or **Save As**.

3. Enter a name and description, select a folder, and then click **Save**.

   The report's data will be dynamic when the book is run.

4. Navigate to the repository to establish file permissions for the book or snapshot book.

> **Note:**
>
> You cannot save a book as a snapshot book from within the Book Editor. Instead, to save a snapshot book, perform an HTML or PDF preview of the book, and then, while in the **Book Table of Contents** page, select **Files**, and then **Save As**.

Printing Reports, Books, and Snapshot Books

You can print an entire book or snapshot book or print individual reports in a book or a snapshot book.

When you print a book, the data is retrieved for the reports in the book and the book is printed. When you print a snapshot book, the data has already been saved in the reports when you save the book as a snapshot book.

You can print any type of report or book. For dynamic reports and books, data is refreshed. For snapshot reports and snapshot books, data is not refreshed.

Features of a PDF File Generated From a Book

- PDF and plain text files are supported. When referring to "external content" within books, you can include Excel, Word, PowerPoint, PDF, and plain text files within books.

- Cell document attachments (for example, Cell Text) that are extracted from a Oracle Hyperion Financial Reporting report (Microsoft Office, PDF, and text files) are included in the PDF output.

- Any cell documents associated with a Financial Reporting report are displayed as "sub-items" in the book's table of contents.

- PDF bookmarks are displayed on the left in Adobe Reader. Use bookmarks to any of the book's chapters.

- The table of contents includes linked items. When you click an item in the table of contents, the first page of that item is displayed.

- Financial Reporting reports, snapshots, Excel, Word, PowerPoint, and plain text files show consecutive page numbers. You must select Consecutive Page Numbers in the book properties. If you do not select consecutive page numbers, then the page numbering resets for each document in the book. You cannot implement consecutive page numbers for embedded PDF files.

- Financial Reporting reports, snapshots, Excel, Word, PowerPoint, and plain text files show a total page count. For example, assume a report has three pages but the book's contents make 10 pages. If the `<<PageCount()>>` text function is used in the report, it shows 10 instead of three.

- You can customize how plain text files are printed by modifying `FR_TextTemplate.doc`.

Adding URLs in Book Editor

URLs can be added to a book from Oracle Universal Content Management or other general servers.

Each method requires a properties file setup to add a URL to a book:

- **For Oracle Universal Content Management Server using the http:// protocol**—The syntax is: `UCMServer=http://<hostname><port><ID>`. For example: `UCMServer=http://localhost:19000`

  Note: When using Oracle Universal Content Management, only the http:// protocol requires a property setup. The idc:// protocol does not require a property setup.

- **Syntax For general servers**:

  - `HTTPProxyHost=<hostname>`. For example: `HTTPProxyHost=www-proxy.us.oracle.com`

  - `HTTPProxyPort=<port>`. For example: HTTPProxyPort=80

> ✎ **Note:**
>
> The user name and password for all data sources must be the same to add URLs to the Book Editor.

Adding URLs from the Oracle BI EE Server

After you have defined the OBIEEServer property setting, you can add the URL to the Book Editor.

To add a URL:

1. In Oracle Business Intelligence Enterprise Edition, copy the URL that you want to add.

2. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a book, and then select **Open In Editor**.

3. In the Book Editor, highlight an artifact.

4. On the right-side panel, under **URL**, enter the URL, and then click **Add**.

5. Click **Add**.

   The URL is displayed below the selected artifact. You can move the URL by right-clicking and selecting Move Up or Move Down.

Adding General URLs

Once you have defined the `HTTPProxyHost` and `HTTPProxyPort` property settings, you can add the URL to the Book Editor.

To add a URL:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a book, then select **Open In Editor**.

2. In the Book Editor, highlight an artifact.

3. On the right-side panel, under **URL**, enter the URL, and then click **Add**.

4. Click **Add**.

   The URL is displayed below the selected artifact. You can move the URL by right-clicking and selecting Move Up or Move Down.

Adding Oracle Universal Content Management URLs

You can add URLs with two types of Oracle Universal Content Management protocols: `http://` or `idc://`. The protocol that you select determines how the URLs are added:

> **Note:**
>
> The protocol `http://` requires that you define the properties `HTTPProxyHost` and `HTTPProxyPort` in JConsole. The protocol `idc://` does not require properties setup.

- `http://`—URLs can be pasted into the Document URL field. The **Logon** dialog box is displayed where you enter the Oracle Universal Content Management User ID and Password.

- `idc://`—The Oracle Universal Content Management host name, idc port number, and document ID are typed into the Document URL field. The syntax: `idc://<hostname>:<port number>.<document ID>`. For example: `idc://vacorda08.us.oracle.com:4444.DM0000213`

  > **Note:**
  >
  > For information locating the host name, port number, and document ID, see Locating Property Values in Oracle Universal Content Management.

Locating Property Values in Oracle Universal Content Management

Before creating a URL in Book Editor by using the `idc://` protocol in Oracle Universal Content Management, you must know the host name, port number, and document ID.

To locate the host name:

1. In the Oracle Universal Content Management navigation pane, select **Administration**, and then **Configuration for idc** to display **Configuration Information for idc**.

2. Under HTTP Server Address, note of host name ending in `.com`. For example: `www.oracle.com`.

To locate the idc port number:

1. In the Oracle Universal Content Management navigation pane, select **Administration**, and then **Admin Server**.

2. Click **idc**.

3. From the navigation pane, select **General Configuration**.

4. In Additional Configuration Variables, note the **IntradocServerPort** value. For example: `IntradocServerPort=`**4444**

To locate the document ID:

1. The Oracle Universal Content Management server generates an ID for documents uploaded to Oracle Universal Content Management. In the navigation pane, select **Search**.

2. You can search by the title of the original name, the generated ID, Author, or release date.

3. The Search Results displays the matching values.

4. Note the ID. For example: `DM000213`.

After gathering your values, you can add them in the Book Editor for a Oracle Universal Content Management URL. For example: `vacorda.us.oracle.com:4444/DM000213.`

5
Designing Batches

Related Topics

- About Batches
  Use batches to simultaneously process sets of reports and books.

- Designing a Batch
  Design a batch from with Oracle Hyperion Enterprise Performance Management Workspace.

- Defining Prompts for a Batch
  Define prompts to request members in a report or book.

About Batches

Use batches to simultaneously process sets of reports and books.

Batches include reports, books, snapshots, snapshot books, and prompts. Prompt information is for the current batch that you are running.

Saved batches can be modified, removed, or rescheduled. You can duplicate a batch to use some or all of the properties as the original batch.

By default, only the scheduling user is assigned access rights to snapshots and snapshot books in the repository. If you have file permissions to a batch, you can run every report in the batch when it is scheduled. The scheduling user can assign file permissions to other users and groups at the time of scheduling.

Scheduled batches have a scheduled batch POV (Point of View) that you can modify while scheduling. You can also specify prompt information for the batch. The POV and prompt information provides values for the POV and prompts specified for each book and report contained in the batch. You can schedule batches to be processed immediately or in the future.

Designing a Batch

Design a batch from with Oracle Hyperion Enterprise Performance Management Workspace.

To design a batch:

1. In EPM Workspace with the BI Catalog open, select **File**, then **New**, and then **Batch**.

2. In the **New Batch** tab, right-click, and then select **Add Items**.

3. In the **Select** dialog box, under **Available Items**, select a Oracle Hyperion Financial Reporting report, book, snapshot report, or snapshot book, and then

   click [>] to move it under **Selected Items**.

If you move, delete, or rename a report in the repository, the report is removed from the book the next time the book is opened.

If you select a report type multiple times, you are prompted to enter a new name for the duplicate report type. The renamed report type is listed in the Batch Editor with its original name followed by the new name in parentheses. To discard the duplicate report, click **Cancel**.

4. Click **OK**, and respond to any prompts that are displayed.

   See Defining Prompts for a Batch.

5. Select **File**, and then **Save** to save the batch.

Defining Prompts for a Batch

Define prompts to request members in a report or book.

Related Topics

- About Prompts
- Defining Prompts
- Responding to Prompts

About Prompts

Prompts are requests for members in a report or book. If reports or books in a batch have prompts, you can select the members in the Batch Editor.

When you save the batch, the Respond to Prompts dialog box displays the prompts and variables contained in the artifacts within the batch.

Defining Prompts

To define prompts in the Batch Editor:

1. From the Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a batch that contains a report with prompts, and then select **Respond to Prompts**.

2. In **Respond to Prompts**, click **Go to Member Selection**.

3. In **Member Selection**, select the member to use in the report when the batch runs.

4. Click **OK**, and then schedule the batch if desired.

5. Save and close the file.

Responding to Prompts

When a variable exists and the data source has multiple references, or when the same prompt exists in multiple grids, the Respond to Prompts dialog box displays a list where you can choose whether to respond to prompts at the Grid, Report/Book or Batch level. The options depend on whether the Respond to Prompts dialog box is displayed while running a Report, or Book, or from within the Batch Editor. If a report, book, or batch contains only a single prompt, or the prompts are different (different

dimensions, default members, or choices list), the options on how to respond to the prompts are not displayed.

Prompt Options When Running a Report

- Respond to Prompts at the Report Level (default)
- Respond to Prompts at the Grid Level

Prompt Options When Running a Book

- Respond to Prompts at the Book Level (default)
- Respond to prompts at the Report Level
- Respond to prompts at the Grid Level

Prompt Options When Editing a Batch

- Respond to Prompts a the Batch Level (default)
- Respond to Prompts at the Report/Book Level
- Respond to Prompts at the Grid Level

You can respond to a prompt once and have the same value used for each prompt, or you can select **Respond to Prompt at Grid Level**, then click **Apply**, and then enter different values for each prompt.

The Source column shows what artifact the prompt is on. When identical prompts are found and only one prompt response is displayed, the Source column shows an asterisk (*) to indicate that the prompt response applies to all prompts of that type.

> **Note:**
>
> The ability to select the level at which to respond to prompts is available only in Oracle Hyperion Enterprise Performance Management Workspace. In Oracle Hyperion Financial Reporting Studio, the Respond to Prompts dialog box always shows all member selection prompts and one reference to each variable.

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Scheduling Batches

Related Topics

- **About Scheduling Batches**
  Batches are used to group and process sets of documents such as reports, documents, or books.

- **Scheduling a Batch to Run**
  Schedule a batch to run from within Oracle Hyperion Enterprise Performance Management Workspace.

- **Scheduling Batch Bursting**
  With each scheduled batch, you can use job bursting to run a report for more than one member in a dimension.

- **Batch Scheduler Operations**
  Delete batches, retrieve exported output, view batch details, launch an HTML book, and copy batch properties to new batches.

About Scheduling Batches

Batches are used to group and process sets of documents such as reports, documents, or books.

Batches are created, edited, and saved in Oracle Hyperion Enterprise Performance Management Workspace using the Batch Editor.

You must have a Global Administrator, Report Designer, Scheduler, or Content Publisher role in order to create a batch. For role information, see the appendix in the *Oracle Enterprise Performance Management System Security Configuration Guide*.

You can export batches as HTML or PDF files to a Oracle Hyperion Planning Inbox/Scheduler Output folder. You can email users the exported output as a PDF.

You can schedule batches to run immediately or at a later date. During batch scheduling, you select the batch POV, set up email notifications, and select the destinations of the generated output when the batch is run. Destination types can include saving a Snapshot to a designated repository folder, exporting a PDF file to a Planning Inbox/Scheduler Output folder or attached to an email, and exporting an HTML file to a designated Planning Inbox/Scheduler Output folder. (Batch Bursting does not support HTML.) After selecting scheduled batch options, the batch is added to the batch queue from the Batch Scheduler after a successful run.

The scheduler's batch bursting feature can run a batch for more than one member of a single dimension in the batch POV for one data source, email the PDFs generated to a recipient list, and save the output to the file system or to the repository. For example, a batch scheduled to run for New York and Houston can send the output for New York to `jones@cd.com` and the output for Houston to `smith@cd.com`. With batch bursting, you can use predefined text functions for report labels and folder labels. You can create a Bursting Destination file (see Specifying the Batch Destination) to override default settings assigned to the batch.

Scheduling a Batch to Run

Schedule a batch to run from within Oracle Hyperion Enterprise Performance Management Workspace.

1. From EPM Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. On the **Batch Scheduler** tab, select **File**, and then **New Scheduled Batch**.

3. In the **Schedule Batch** wizard, under **Batch Job Details**, enter a name and description for the batch.

    The **Batch Job Name** must start with a Java start identifier, and other characters should be Java identifier parts or a hyphen character.

4. Under **Folders**, navigate to the desired batch, then select the batch, and then click **Next**.

5. If the **Login Credentials** dialog box is displayed, enter a user name and password, and then click **OK**. See Providing Logon Credentials.

6. In **Start Time**, define how routinely you want the batch to run.

7. In **Scheduled Batch Point of View**, if any reports and books in the batch have dimensions in the user POV, set the member for those dimensions.

8. In **Bursting Options**, set options to use job bursting to run a batch for more than one member in a dimension on the Batch POV. See Scheduling Batch Bursting.

9. In **Destinations**, define destination information about the batch file you are running. See Specifying the Batch Destination.

10. In **Bursted Output Labels**, define object label and subfolder label information. See Specifying Burst Output Labels.

11. In **Scheduled Batch Details**, specify whether to send an email to recipients if the batch ran successfully or unsuccessfully along with a brief message. See Selecting Email Addresses for Batch Scheduling.

12. Click **Finish** to save the batch job in the Batch Scheduler.

Providing Logon Credentials

You must provide logon credentials to run a scheduled batch at a future date. You enter logon credentials when you schedule a batch in the Batch Scheduler.

To enter logon credentials:

1. Enter a user name and password for the Oracle Hyperion Financial Reporting server.

2. Enter a user name and password for the Database Connection Name.

3. Click **OK**.

> **Note:**
>
> See Changing Logon Credentials for Scheduled Batches for information on how to change your password.

Changing the Native User Password

You can change the native user password.

To change your native user password:

1. Enter your current password.

2. Enter your new password.

3. Enter your new password again to confirm it.

4. Click **Save**.

Selecting a Member for the Batch Point of View

Each scheduled batch has a POV based on all relevant dimensions for the reports in the batch. If no reports or books have a member in the user POV, then there is no batch POV. When the batch is added to the schedule, the user POV is specified as the default batch POV. You can override the user POV settings by specifying a member for each dimension on the batch POV. You must verify that the members selected in the batch POV are appropriate.

To select a member for the batch POV:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. In the Schedule Batch wizard, navigate to the **Scheduled Batch Point of View** area, and then click the dimension for which you want to select a member.

3. Select the member that you want to use for the POV, and then click **OK**.

Specifying the Batch Destination

The **Destinations** area in the Batch Scheduler defines the type and location of the output for the scheduled batch. The following options are available:

- **Save As Snapshot in Repository**—Enables the following options:

  - **In Same Folder as Original Object**—Save snapshots and snapshot books in the same folder as the original report or book in the repository.

  - **In Another Folder**—Save the output to another location in the repository. Click **Folder** to select a destination folder in the repository.

  - **Email HTML Link**—Email the snapshot as an HTML link.

  - **Email PDF Link**—Email the snapshot as a PDF link.

> **Note:**
>
> Selecting **Save As Snapshot in Repository** also enables **File Permissions**, where you can assign access to users and groups for snapshot output.

> **Note:**
>
> To specify a maximum attachment size for email output, use the property, `MaxEmailAttachmentSize` in the `JConsole.exe` file. This value, entered in kilobytes, is used to split reports into multiple emails to conform to the maximum size attachments allowed per email. The default is set to unlimited (`0` (zero) or `-ve`). When sending an oversized attachment containing a single PDF file or numerous files, the email fails to deliver and the sender is notified. For a single oversized file attachment, the sender can manually deliver the attachment by copying it from the scheduler server or external directories. For numerous files attachments, the sender can rerun the batch from the Batch Scheduler and select the option of sending individual emails for each file. This property applies to bursting and non-bursting output.

- **Export as PDF**—Export the batch as a PDF file on the Oracle Hyperion Financial Reporting server.

    – **Export to an External Directory**—Export to the Oracle Hyperion Planning Inbox/Scheduler Output folder, where the file can be accessed in the Inbox/Outbox Explorer.

    – **Email as PDF Attachments**—Email the reports as PDF attachments. To zip the email attachments, select **Zip PDF(s)**.

    – **Print Annotations**—Print annotations with the report. Click **Details** to specify how to print the annotations. Note that annotation printing preferences are one-time setups for a specific batch; they are not saved as global preferences.

- **Export as HTML (Web Page)**—Export the batch as an HTML file on the Financial Reporting server.

    Select **Export to an external directory** to export to the Planning Inbox/Scheduler Output folder, where the file can be accessed in the Inbox/Outbox Explorer.

> **Note:**
>
> Export as HTML (Web Page) is not supported for burst batches.

The output of a generated batch will differ from HTML output:

    – The `template.css` file is ignored. Thus, any formatting defined in the template is not applied.

    – If the batch includes Microsoft Word documents with the `FRExecute` function, the resulting output depends on the design of the Microsoft Word document:

    *   If `FRExecute` was entered in a text box , the resulting output is sized to fit the parameters of the text box. The designer should size the text box according to the scope of the `FRExecute` content.

    *   If `FRExecute` was entered on the top of the Microsoft page (not in a text box), the resulting output is displayed as specified in the Financial Reporting designer.

- **Export as Single File Web Page (MHTML)**—Export the batch as a single file on the Financial Reporting server.

  Select **Export to an external directory** to export to the Planning Inbox/Scheduler Output folder, where the file can be accessed in the Inbox/Outbox Explorer.

  Export as Single File Web Page (MHTML) is not supported for burst batches.

Selecting Email Addresses for Batch Scheduling

You can set up the Batch Scheduler to send an email when a scheduled batch is completed successfully or unsuccessfully. The email includes status details of the batch and, optionally, the PDF output of the batch. You can select, add, or delete email addresses.

For batches that are not burst, the email contains the notification and PDF attachments. For burst batches, the email contains only the notification.

To select recipient emails:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. On the **Scheduled Batch Details** screen, select the desired options:

   - **If Successful, Email Details to:**—Select email addresses to send a notification to when the batch runs successfully.

   - **If Unsuccessful, Email Details:**—Select email addresses to send a notification to when the batch runs unsuccessfully.

3. Enter a message subject.

4. **Optional:** Click **Preview Bursting List** to view and export the Bursting Destination file for job bursting batches.

   This file contains default settings selected for the members in the burst batch. See About the Bursting Destination File.

Scheduling Batch Bursting

With each scheduled batch, you can use job bursting to run a report for more than one member in a dimension.

When you select only a dimension for job bursting, the setting for that dimension on the batch POV is disabled. The batch POV members not selected remain active and are included with the batch. If no reports or books have a member in the user POV, then there is no batch POV or job bursting.

To schedule batch bursting:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. On the **Batch Scheduler** tab, select **File**, and then select **New Scheduled Batch**.

3. Navigate through the **Schedule Batch** wizard. When you get to the **Bursting Options** area, select **Run Batch for multiple members in the dimension**, and then select the dimension for job bursting.

4. Click , and then select the members for job bursting.

5. In **Bursting File**, if you have created a CSV Bursting Recipients list for this batch and imported it into the repository, click to select the file.

6. Click **Copy Members** to add the members defined in the **CSV Bursting Recipients** list to the **Select Members** list.

   Only members that are valid for the selected dimension are added.

7. Click **Preview Bursting List** to display the default settings for the current batch.

8. Continue navigating through the wizard, and then click **Finish**.

About the Bursting Destination File

The Bursting Destination File contains the default settings for the scheduled batch. You can periodically view the default settings as you navigate through the Batch Scheduler. You can export the Bursting File as a CSV file to specify output and permission exceptions for a scheduled batch, thus overriding the default settings defined in the Batch Scheduler. The member settings in the CSV Bursting Destination file can be appended to the member selections in the Batch Scheduler. For example, you can specify a different subfolder for some reports, based on selected members, or make some reports read-only. Only members that are valid for the selected dimension are appended to the bursted file.

To edit the Bursting Destination File for a current batch, the administrator or designer exports the file to a text editor or Excel, enters the members, if not already displayed, and edits any values in the table. The values for each member in the dimension are: Subfolder Name, Financial Reporting Object Name, Email Address, Group Name, Role Names, User Names, External Root Folder for PDF.

When complete, you must import the file into the repository (select **File**, then **Import**, and then **File**) where it can be applied to a batch in the Batch Scheduler.

When you create a CSV Bursting File and import it into the repository, you can select it for your scheduled batch.

> **Note:**
>
> Member names in the CSV file are case-sensitive and must match the member names in the data source. If the member name case in the file differs from that in the data source, the burst generates no email output.

Selecting the Bursting File

To select a bursting file:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, navigate to the folder containing the bursting file.

2. Select the bursting file, and then click **OK**.

> **Note:**
>
> The batch will run only for members selected in Member Selection in the Batch Scheduler. The CSV file is used only to output options for individual members in a dimension.

Previewing the Bursting List

The bursting list displays the default setting for the current scheduled batch. You can periodically view the default settings as you navigate through the Batch Scheduler and export the bursting list as a CSV file to specify output and permissions exceptions for a scheduled batch, thus overriding the default settings defined for the scheduled batch. For example, you can specify a different subfolder for some reports based on selected dimensions, or make some reports read-only.

To edit the bursting destination file for a current batch, the administrator or designer exports the file to a text editor or Excel, enters the members if not already displayed, and edits values in the table. When comple, the file must be imported into the repository **(File** , then **Import**, then **File**) where it can be applied to a scheduled batch.See the Bursting Destination File located in the `/sample` folder for a sample list.

To preview the bursting list:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. On the **Batch Scheduler** tab, select **File**, and then select **New Scheduled Batch**.

3. Navigate through the **Schedule Batch** wizard. When you get to the **Bursting Options** area, select **Preview Bursting List**.

Specifying Burst Output Labels

To identify burst output report names and subfolder names:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. On the **Batch Scheduler** tab, select **File**, and then select **New Scheduled Batch**.

3. Navigate through the **Schedule Batch** wizard. When you get to the **Bursting Output Labels** area, define an **Object Label** and a **SubFolder Label**.

   The **Object Label** and **SubFolder Label** fields display two default text functions that enable you to identify the report and subfolder names. Click f_x to select additional text functions. Click the checkmark to test the functions.

Example 6-1   Available Functions for Bursted Reports

- `<<MemberName()>>`—Returns the name of the member being burst. This function takes no parameters.

- `<<MemberAlias()>>`—Returns the alias of the member being burst. This function takes no parameters.

- `<<MemberDescription()>>`—Returns the description of the member being burst. This function takes no parameters.

- `<<BatchPovMember("`*DataSrcName*`","`*DimName*`")>>`—Returns the name of the POV member being burst, where *DataSrcName* is the name of a data source of the desired POV (a batch can point to two or more POVs), and *DimName* is the name of the dimension under the given POV whose member name is to be extracted.

- `<<BatchPovAlias("`*DataSrcName*`","`*DimName*`")>>`—Returns the alias of the POV member of the report being burst, where *DataSrcName* is the name of a data source of the desired POV (a batch can point to two or more POVs), and *DimName* is the name of the dimension under the given POV whose member alias is to be de extracted.

- `<<BatchPovDescription ("`*DataSrcName*`", "`*DimName*`")>>`—Returns the description of the POV member of the report being burst, where *DataSrcName* is the name of a data source for the desired POV (a batch can point to two or more POVs), and *DimName* is the name of the dimension under the given POV whose member description is to be extracted.

- `<<FinancialReportingObjectName()>>`—Returns the name of the Oracle Hyperion Financial Reporting object being burst. This is typically the report name. This function takes no parameters.

- `<<Financial ReportingObjectDescription()>>`—Returns the description of the Financial Reporting object being burst. This is typically the report description. This function takes no parameters.

- `<<Date("`*format*`")>>`—Returns the date and time that an online report is populated with data, or the date and time a snapshot report is saved, where *format* is a list of characters enclosed in quotation marks that define the format of the date and time.

  See the *Oracle Hyperion Financial Reporting Studio User's Guide*, Using Functions chapter for a list of all the *format* date and time characters.

> **Note:**
>
> When POV-related functions (`BatchPovMember`, `BatchPovAlias`, and `BatchPovDescription`) are added, the parameter values must be surrounded by double quotation marks. For example: `<<BatchPovDescription("Essbase sample basic on ProdServer1","Product">>`. where "`Essbase sample basic on ProdServer1`" is the data source name and "`Product`" is the dimension name.

Batch Scheduler Operations

Delete batches, retrieve exported output, view batch details, launch an HTML book, and copy batch properties to new batches.

Related Topics

Deleting Batches

Based on your role assignment, during batch scheduling, you can delete scheduled batches from the Batch Scheduler if the batches complete successfully. If you do not delete scheduled batches, the successful batches are saved in the Batch Scheduler. Batches with an "error" status are always saved in the Batch Scheduler.

To manually delete scheduled batches from the Batch Scheduler:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, then **Batch Scheduler**.

2. In **Batch Scheduler**, select the batches to delete.

3. Select **Edit**, and then **Delete**.

4. When prompted, click **Yes**.

Retrieving the Exported Output

After a scheduled batch is run, you can retrieve a zipped HTML or PDF output file using the Retrieve Output option, and then rename and relocate the zipped file to your local drive from the scheduler server. You must have access to the batch to retrieve the exported output.

> **Note:**
>
> If you delete a batch after scheduling it, you cannot retrieve the output. Retrieval is only valid for non-bursted batch files.

To retrieve output:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, then **Batch Scheduler**.

2. In **Batch Scheduler**, select a completed scheduled batch that produced exported output.

3. Select **Action**, and then **Retrieve Output**.

   The file is displayed as a zip file.

4. Select the files to export, and then click **Extract** to export the files to a directory on your machine or web server.

Viewing Details of a Scheduled Batch

To view the details of a scheduled batch:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. In **Batch Scheduler**, select a batch.

3. Select **Action**, and then **Show Details**.

4. Click **Close**.

> **Note:**
>
> To copy the details to the clipboard, in **Show Details**, right-click and click **Select All**, and then right-click and select **Copy**.

Changing Logon Credentials for Scheduled Batches

If you have changed your Oracle Hyperion Financial Reporting server or database, you can specify new logon credentials to be used for all the scheduled batches when the scheduled batches run.

To change logon credentials:

1. In the Explore Repository, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. Select **Action**, and then **Change Password**.

3. Select the logon credentials to change, **Financial Reporting Server** or **Database**, then enter a User ID, an Old Password, and a New Password, and then click **OK**.

Launching an HTML Book for Web Viewing

After a scheduled batch is generated as HTML output, you can retrieve the zipped HTML output file for web viewing by using the **Retrieve Output** option. The zipped file contains everything for you to deploy to your web server. You can rename and relocate the zipped file to your machine or web server.

To launch a book for Web viewing:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then **Batch Scheduler**.

2. In Batch Scheduler, select a completed scheduled batch that produced exported output.

3. Select **Action**, and then **Retrieve Output**.

The file is displayed as a ZIP file.

4. Select the files to export and click **Extract To** to export the files to a directory on your machine or web server.

> **Note:**
>
> If you delete a batch after scheduling one, you cannot retrieve the output. Retrieval is valid only for non-bursted batch files.

> **Note:**
>
> The output of a generated batch is static.

Viewing an Example of HTML Web Output

The following image presents a book generated as a static HTML and launched in a browser. The output shows a customized layout, user defined content, and navigational features. Due to inherent limitations of an image, not all features can be shown. However an HTML book can contain:

- Customized page layout of header and footer. Page layout is defined in the template.css file.

- Table of contents navigation with nested sections and section headings. Table of contents properties is defined in the Book Editor.

- Navigation Trail that keeps track of your location within the book.

- Oracle Hyperion Financial Reporting reports. Reports can have additional navigation links in the report rows and other areas of the report that link to other reports, URL, and external websites.

- Word document with textual content and the `FRExecute` function. See About FRExecute.

- Microsoft Excel and PDF documents.

- Search on the entire site, table of contents, or content only.

- Text headings in Table of Content.

Copying Batch Properties to New Batches

You can copy batch properties from an existing batch to a new batch. In addition, you can modify the properties of the copied batch, tailoring them to the new batch.

To duplicate and edit batch properties based on a scheduled batch:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **Navigate**, then **Schedule**, and then select **Batch Scheduler**.

2. In **Batch Scheduler**, select a scheduled batch, then select **Edit**, and then **Duplicate and Edit Properties**.

3. Edit the batch properties for the new batch, and the click **Finish**.

7

Using Annotations

Related Topics

- **About Annotations**
  Annotations, used with Oracle Hyperion Financial Reporting reports, capture collective information that can be shared on documents and data.

- **Annotation Elements**
  Annotations include a header and body text.

- **Considerations When Using Annotations**
  There are several considerations to keep in mind when creating annotations.

- **Creating Annotations**
  Annotations can be attached to a report object, grid object (including formula cells), text object, chart object, and image object, and they can reference a full or partial POV.

- **Showing and Hiding Annotations**
  Show or hide annotations from within Oracle Hyperion Enterprise Performance Management Workspace.

- **Behavior of Annotations in Formula Cells**
  Right-click a formula cell in the report viewer to create an annotation.

- **Viewing Annotation Summaries**
  To view initial summary annotation text, right-click the annotation icon.

- **Viewing Annotation Details**
  View annotations details, which may include responses and attachments, in the Annotation List panel.

- **Editing Annotations**
  Selecting **Enable Editing** when an annotation is created to specify that users with Modify or Full-Control permission can edit the annotation.

- **Editing Annotation Context**
  Select **Enable Context Changes** when an annotation is created to specify that users with Modify or Full-Control permission can edit the annotation context.

- **Setting Annotation Permissions**
  Annotation creators can apply access control and permission options to selected users, groups, or roles.

- **Setting Annotation Printing Preferences**
  Annotation printing preferences define how to print annotations.

About Annotations

Annotations, used with Oracle Hyperion Financial Reporting reports, capture collective information that can be shared on documents and data.

Annotations provide a range of flexibility from simple notations to full-fledged threaded discussions, laying the foundation for collaboration, compliance reporting, and

business process analysis. Authorized users can create, edit, remove, and respond to annotations. Annotations can be attached to a report object (grid object, text object, chart object, and image object), and can reference a full or partial POV. Annotations included in reports can be viewed when selected for books and snapshot books.

Annotation Elements

Annotations include a header and body text.

- **Annotation Header—**A high level description of the commentary; includes Subject, Creation Date, Author, and Category. There is one summary heading for each annotation.

- **Body Text**—Text can be formatted to include, bold, italics, underline, color, left, right, center and justify alignment, indent, and bullet lists with hanging indent.

Considerations When Using Annotations

There are several considerations to keep in mind when creating annotations.

- The annotation creator can apply access control and permission options to groups or users.

- Annotations can be added to a single value, a row or column, or a range of rows and columns.

- Annotations cannot be applied to objects in the report's header or footer.

- Annotations in Snapshot reports, represented with an eye icon, and snapshot books and batches are limited to read-only permissions.

- Multiple attachments per annotation are supported as well as URL references. Hovering the mouse over the icon displays attachments.

- A warning icon is displayed when a report containing an annotation is deleted.

- A designer can add text cells or text objects to a report and apply an Annotation function that will reference specific annotations or annotation elements in a grid. This is done through Oracle Hyperion Financial Reporting Studio. See the *Oracle Hyperion Financial Reporting Studio User's Guide*

- In Annotation Manager, administrators can search and access annotations across the environment, modify context associated with a context, modify properties, including metadata, and remove annotations from the system.

Creating Annotations

Annotations can be attached to a report object, grid object (including formula cells), text object, chart object, and image object, and they can reference a full or partial POV.

To create an annotation:

1. From Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, right-click a report, and then select **Open.**

2. With the report preview displayed, select **View**, and then **Show Annotations**.

3. Click **New Annotation**.

4. In the **New Annotation** dialog box, enter information about the annotation in the following tabs:

- **Annotation**

  a. Enter a **Title** and a **Description** for the annotation.

     You can format the description text by specifying bullets, numbering, indentation, color, justification, undo, and redo.

  b. Select an option to define the **Category**.

  c. Select **Enable Editing** to allow users with the correct permissions to edit the annotation.

     If **Enable Editing** is selected when it is created, users cannot reply to that annotation. See Editing Annotations.

  d. Select **Enable Context Changes** to allow users with the correct permissions to change annotation context.

- **Context**

  Select an object, and then select the dimensions that you want to include in the annotation. To select members for a dimension, click the dimension name.

  Object information can be a data source or any object on the report. For example:

  – Data Source—The annotation is attached to any Financial Reporting report using the specified data source.

  – Grid, Data source—The annotation is attached to the specified grid and data source.

  – Text, Chart, or Grid—The annotation is attached the specified object with no dimensions on the object.

- **Attachments**

  Link attachments to an annotation. Click the File icon to attach a document that is located on your computer, click the Report icon to attach a document from the repository, or click the URL icon to select a link to a website.

5. Click **OK**.

   An Annotation icon is displayed in the report.

Showing and Hiding Annotations

Show or hide annotations from within Oracle Hyperion Enterprise Performance Management Workspace.

To show or hide annotation options:

1. From EPM Workspace with the BI Catalog open, right-click a report, and then select **Open**.

2. With the report preview displayed, select **View**, and then either **Show Annotations** or **Hide Annotations**.

Behavior of Annotations in Formula Cells

Right-click a formula cell in the report viewer to create an annotation.

The context of the annotation includes all dimensions except those that occur on the formula row and column. The content includes "Row X' and/or Column Y" instead of the dimensions that occur on the formula row and column ("Row 3", "Row 14", "Column C", "Column "AF"). For example:

Measures

		Year Product	Year 100-10	[A] + [B]
Market	Scenario	45.00	35.50	80.50
East	Scenario	200.25	12.00	212.25
[1] + [2]	Scenario	245.25	47.50	292.25

- If you annotate a cell with a value of 80.50, the context is: Measures/Market/Scenario/Column C.

- If you annotate a cell with a value of 47.50, the context is: Measures/Year/100-10/Row 3.

- If you annotate a cell with a value of 292.25, the context is: Measures/Row 3/Column C.

When displayed in the Annotation Panel, formula row and column headings are shown as the "display value" for the context rather than showing "Row X" or "Column Y". For

Measures

		Year Product	Year 100-10	Total Column
Market	Scenario	45.00	35.50	80.50
East	Scenario	200.25	12.00	212.25
Total Row	Scenario	245.25	47.50	292.25

example:

- If you annotate a cell with a value of 80.50, the context is: Measures, Market, Scenario, Total Column.

- If you annotate a cell with a value of 47.50, the context is: Measures, Year, 100-10, Total Row

- If you annotate a cell with a value of 292.25, the context is: Measures, Total Row, Total Column

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> **✎ Note:**
>
> The context of the annotation still uses "Row X" and "Column Y." It is just the annotation display value that shows the heading values. This is consistent with what happens with member names when the grid is displaying member aliases (the member alias is shown in the display value of the context).

Considerations:

- You can include a formula row or column only in the context of an annotation by right-clicking on the cell.
- You cannot navigate to a formula row or column through member selection from within the New Annotation dialog box.
- The text "Row" and "Column" are in English and act like keywords. They are not localized.

Viewing Annotation Summaries

To view initial summary annotation text, right-click the annotation icon.

Within the bubble, you can click icons to view attachments, reply to annotations, or view annotation details, if applicable.

Viewing Annotation Details

View annotations details, which may include responses and attachments, in the Annotation List panel.

The following information is displayed for each annotation:

- **Status**—An eye icon indicates viewing rights, an exclamation icon indicates that the annotation is not longer associated with an object in the repository, or "blank" indicates that you can view and respond to the annotation.
- **Title**—Annotation title
- **Author**—Creator of the annotation
- **Description**—Annotation description
- **Posted**—Date the annotation was created
- **Source**—Database used in the report
- **Context**—Object associated with the annotation. If the object is a Grid, the dimension and members are displayed. If the object is an image, text, or chart, the path of the report and object ID are displayed.
- **Category**—Predefined categories describing that nature of the annotation.

To view annotation details, do one of the following:

- Click an annotation icon, and then click **Show Detail**.
- In the Annotation List Panel at the bottom of the screen, click **Show Panel**.

Editing Annotations

Selecting **Enable Editing** when an annotation is created to specify that users with Modify or Full-Control permission can edit the annotation.

If this option is not selected, the annotation cannot be edited. Once an annotation is created, this setting cannot be changed.

> **Note:**
>
> If "Enable Editing" is chosen for an annotation, users cannot reply to that annotation.

If users can edit an annotation, they can change:

- Title
- Description
- Category
- Attachments

To edit an annotation:

1. With an annotation displayed in the **Annotation List Panel** and the bottom of the HTML Preview screen, do one of the following:

   - Double-click the annotation.
   - Right-click the annotation, and then select **Edit**.
   - Select the annotation, and then click the **Edit** icon in the Annotation toolbar.
   - Select the annotation from the object annotation bubble, and then select **Edit**.

2. In the **Annotation** dialog box, modify the Title, Description, Category or Attachments associated with the annotation.

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

Editing Annotation Context

Select **Enable Context Changes** when an annotation is created to specify that users with Modify or Full-Control permission can edit the annotation context.

If this option is not selected, the annotation context cannot be edited. Once an annotation is saved, this setting cannot be changed.

> **Note:**
>
> The editing option is available only when viewing a report. This feature is not available in the **Explore Annotations** tab accessed by selecting **Navigate**, then **Administer**, and then **Annotations**. When working with annotations on the **Explore Annotations** tab, you can modify context using the **Change Source** option.

To edit annotation context:

1. Double-click an annotation, and then select **Edit**.

2. In the **Context** tab, do one or both of the following:

    • Select or clear dimensions.

    • Change the member selections for one or more dimensions.

3. Click **OK**.

Setting Annotation Permissions

Annotation creators can apply access control and permission options to selected users, groups, or roles.

Access control applies to the top level annotation (the root) and all subsequent replies. Permission options define what kind of access a user has to the annotation. You can organize and control the view of annotations to which you have access.

Permissions options are:

• **No Access**—Users cannot view annotations.

• **View**—Users can view all annotations but cannot create or respond to annotations.

• **Modify**—Users can create and respond to annotations, but not delete.

• **Full Control**—Users can create, respond to, and perform administrative functions associated with the repository object.

To set annotation permissions:

1. Click the annotation, and then click **Show Details** to view the annotation in the Annotation List Panel.

2. In the **Annotation List Panel**, highlight the annotation to which you want to set permissions and click **Permissions**.

3. In the **Permissions** dialog box highlight the users, groups, or roles to which you want to apply permissions, then click on the right-facing arrow to move them to the Selected Users, Groups and Roles panel.

4. From the **Access list**, select the permissions, and then click **OK**.

Setting Annotation Printing Preferences

Annotation printing preferences define how to print annotations.

To define how to print annotations in a report:

1. In Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **File**, then **Preferences**, and then click **Financial Reporting**.

2. In the **General** tab, click **Annotation Print Details**.

3. In the **Annotation Printing Preferences** dialog box, do one of the following:

   - Select **Details**, and then select the options under **Use Footnote Details** to create a system-defined footnote. Generic formatting is applied and system-defined sizes and fonts are used

   - Select **Text Object**, and then click **Select** under **Use Footnote Text Object** to use the footnote function in the report's text object to print annotations. Footnote functions are created by the report designer. This option provides more flexibility for formatting and printing annotations. For example, the footnote function may specify to print only grid annotations with different size, font, and color to be applied to the heading and content

   - Select **None** to specify that annotations will not be printed in the PDF as footnotes.

4. Click **OK**.

A

Accessing Financial Reporting From a Mobile Device

Related Topics

- Overview of Accessing Financial Reporting From a Mobile Device
  You can view, launch, and interact with Oracle Hyperion Financial Reporting reports from mobile devices.

- Viewing Reports and Books
  View the entire book or individual reports in the book.

- Working With Reports and Books
  Change the user POV, respond to prompts, and use expansions and related content.

Overview of Accessing Financial Reporting From a Mobile Device

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

For a list of supported mobile platforms, refer to the *Oracle Enterprise Performance Management System Certification Matrix*.

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 a user name and password when prompted.

4. Press **OK** to access the Financial Reporting repository.

After you access the repository, you can:

- Select and display reports, snapshot reports, books, and snapshot books. See Viewing Reports and Books.

- Work with reports and books, including responding to prompts and using expansions. See 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 are 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 Explore Repository user preferences.

- Exporting a report to Microsoft Office is not supported on mobile devices.

- Annotations are not supported on mobile devices.

Viewing Reports and Books

View the entire book or individual reports in the book.

Related Topics

- Viewing Reports
- Viewing Books

Viewing Reports

If reports contain dimensions on the user POV, the dimensions 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. From the Oracle Hyperion Enterprise Performance Management Workspace with the BI Catalog open, select **File**, then **Open**, then **Document**, and then select a report.

2. **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 Oracle Hyperion Financial Reporting.

3. 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.

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

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

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

   The report is refreshed.

Viewing Books

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 add reports to books and modify members.

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**, and then **Book**.

2. Right-click the book, then 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 does not include HTML content.

3. **Optional:**If the Current User POV Settings page is displayed, change the settings, and then click **OK**.

   If the page is displayed, User Point of View is selected in the Preferences dialog box for Oracle Hyperion Financial Reporting.

4. **Optional:**From the Book Table of Contents page, modify the User POV, and then view the report for the new POV.

5. To view a specific document, highlight the document, and then click **Show Report**.

Working With Reports and Books

Change the user POV, respond to prompts, and use expansions and related content.

Related Topics

• Changing the User POV

• Using Expansions

• Responding to Prompts

• Using Related Content

Changing the User POV

The 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 the 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 you do not have access to parent members, the parent and child hierarchy cannot be rendered in a tree; instead, the hierarchy is presented as a large flat list.

> ✏ **Note:**
>
> Financial Management dimensions often have more than one top-level node.

> ✏ **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 ?.

Using Expansions

Expansions enable report viewers to see children of members and their corresponding data. Expansions are available only when viewing HTML reports. 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.

> **Note:**
>
> If you have a background color that is the same color as the triangle used for the expansion, you will not be able to see the expansion arrow.

Responding to Prompts

When a variable exists and the data source has multiple references, or when the same prompt exists in multiple grids, the Respond to Prompts dialog box displays a list where you can choose whether to respond to prompts at the Grid, Report/Book or Batch level. The options depend on whether the Respond to Prompts dialog box is displayed while running a Report, or Book, or from within the Batch Editor. If a report, book, or batch contains only a single prompt, or the prompts are different (different dimensions, default members, or choices list), the options on how to respond to the prompts are not displayed.

Prompt Options When Running a Report

- Respond to Prompts at the Report Level (default)

- Respond to Prompts at the Grid Level

Prompt Options When Running a Book

- Respond to Prompts at the Book Level (default)

- Respond to prompts at the Report Level

- Respond to prompts at the Grid Level

Prompt Options When Editing a Batch

- Respond to Prompts a the Batch Level (default)
- Respond to Prompts at the Report/Book Level
- Respond to Prompts at the Grid Level

You can respond to a prompt once and have the same value used for each prompt, or you can select **Respond to Prompt at Grid Level**, then click **Apply**, and then enter different values for each prompt.

The Source column shows what artifact the prompt is on. When identical prompts are found and only one prompt response is displayed, the Source column shows an asterisk (*) to indicate that the prompt response applies to all prompts of that type.

> **Note:**
>
> The ability to select the level at which to respond to prompts is available only in Oracle Hyperion Enterprise Performance Management Workspace. In Oracle Hyperion Financial Reporting Studio, the Respond to Prompts dialog box always shows all member selection prompts and one reference to each variable.

Using Related Content

Related Content links to other Oracle Hyperion Financial Reporting documents and to documents on other Oracle servers. Related Content is set up by report designers, and is available only in HTML. 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 are 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, Financial Reporting sets the user POV for the Account dimension to Margin, sets the user POV for the Entity dimension to Boston, and then displays the Related Content report. See the *Oracle Hyperion Financial Reporting Studio User's Guide*.

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 the **Related Content** dialog box is displayed, click a link.

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