Oracle® Hyperion Enterprise Performance Management Workspace
User's Guide

Release 11.2.5

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Oracle Hyperion Enterprise Performance Management Workspace User's Guide, Release 11.2.5

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Contents

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Overview of EPM Workspace

Related Topics

- About EPM Workspace
  Oracle Hyperion Enterprise Performance Management Workspace is the web user interface that is used to access all Oracle and non-Oracle content. Oracle content includes all of Oracle's financial applications.

- Logging on to EPM Workspace
  You can access Oracle Hyperion Enterprise Performance Management Workspace in one of two ways.

About EPM Workspace

Oracle Hyperion Enterprise Performance Management Workspace is the web user interface that is used to access all Oracle and non-Oracle content. Oracle content includes all of Oracle's financial applications.

EPM Workspace provides access to the following content:

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

- Financial Management and Planning—Consolidation and planning application tasks

- Profitability and Cost Management—Managing cost and revenue allocations that are necessary to compute profitability for a business segment

- Oracle Hyperion Financial Data Quality Management, Enterprise Edition—Module of Oracle Hyperion Financial Data Quality Management that enables you to integrate metadata and data from an Enterprise Resource Planning (ERP) source system into an Enterprise Performance Management (EPM) target application

- Oracle Hyperion Financial Close Management—Helps companies define, execute, and report on the interdependent activities of a financial close period

- Oracle Hyperion Calculation Manager—Create, validate, deploy, and launch calculations that solve business problems

- Oracle Hyperion Shared Services Console—Security components and migration of Oracle Enterprise Performance Management System products

> **✎ Note:**
>
> EPM Workspace refers to the user thin client (UTC) or common user interface of the product.

> **Note:**
>
> For information on system requirements, see the Oracle
> Enterprise Performance Management System Certification Matrix
> located at http://www.oracle.com/technetwork/middleware/ias/downloads/
> fusion-certification-100350.html

Logging on to EPM Workspace

You can access Oracle Hyperion Enterprise Performance Management Workspace in one of two ways.

- Through a URL provided by your administrator
- Through an Oracle application link

  Access through an Oracle application links requires that single sign-on be enabled.

Once logged in to EPM Workspace, you can access the help menu.

To start a EPM Workspace session:

1. In your web browser, go to EPM Workspace web page.

2. Enter you user name and password.

    To determine if the user name and password are case sensitive, refer to authentication sources documentation.

3. Click Log On.

    Your start or home page is displayed.

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Using the Explore Repository

Related Topics

- **About the Explore Repository**
  Use the Explore Repository to list and navigate repository contents, manage and control files and folders, and use elements that present the repository as a file management system.

- **Using a Single Instance of the Explore Repository**
  With the single instance feature, if you re-launch the Explore Repository, a new tab opens in the existing Explore Repository instance.

- **Setting General Preferences**
  As a designer, you can set defaults for the general appearance of the Explore Repository.

- **Setting Explore Preferences**
  Explore preferences define default folders and permissions for items that you create or import.

- **Changing the Native User Password**
  You can change the native user password.

- **Using the Home Page**
  Starting in Release 11.2.4, the Home page provides a starting point for users and a launching point for Oracle Hyperion Enterprise Performance Management Workspace functionality.

- **Personalizing the Explore Repository**
  When using the Explore Repository, you can customize the appearance of the user interface.

- **Managing Items**
  Manage documents, collections, supporting files, other standard files, and folders.

- **Managing Files and Folders**
  Use the Explore Repository to manage files and folders.

- **Using URLs in the Explore Repository**
  In the Explore Repository, you can open a URL, open a URL in a new window, and update a URL.

- **Searching for Items in the Repository**
  Search for and retrieve documents and reports.

- **Setting Permissions**
  Define permissions for files and folders and apply permissions to artifacts in a folder.

- **Working with Properties**
  Set general and advanced properties and change ownership of artifacts.

- **Using Smart View**
  Oracle Smart View for Office provides a common Microsoft Office interface for Oracle Hyperion Financial Reporting and Oracle Hyperion Planning components.

About the Explore Repository

Use the Explore Repository to list and navigate repository contents, manage and control files and folders, and use elements that present the repository as a file management system.

To access the Explore Repository, click the Explore tab in Oracle Hyperion Enterprise Performance Management Workspace.

Items opened in the Explore Repository display as tabs at the top of the Explore Repository. Access privileges or permissions determine which items you can view, modify, run, and delete in the repository.

Based on the following criteria, menus and the toolbar are updated as you use the system:

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

- The components used and the task performed.

From the Explore Repository, you can perform the following tasks:

- Preview Oracle Hyperion Financial Reporting documents, such as reports and books

- Organize, search for, and assign access permissions to files

- Schedule batches

- Create documents

- Set preferences

- Define favorites

- Install the following components:

  - Oracle Smart View for Office

  - Oracle Hyperion Strategic Finance Client

  - Predictive Planning

  - Oracle Hyperion Financial Management Client

  - Tax Provision Metadata Accelerator

  - Offline Planning

  - Planning Admin Extenstion

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

> **Note:**
>
> Because importing Financial Reporting objects with invalid characters in their names or path is allowed, you must rename the objects after they are imported into the Explore Repository. Scheduled batches containing object names with invalid characters fail when PDF and HTML are selected as output options.

Using a Single Instance of the Explore Repository

With the single instance feature, if you re-launch the Explore Repository, a new tab opens in the existing Explore Repository instance.

This includes launching repository items from external URLs such as emailed links, SmartCuts, Subscriptions, Related Content, links on other web sites, and browser bookmarks.

Setting General Preferences

As a designer, you can set defaults for the general appearance of the Explore Repository.

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

To set general preferences:

1. From the Explore Repository, select **File**, and then **Preferences**.

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

    * **Content**—Click the drop down to select which screen will initially display when you start Oracle Hyperion Enterprise Performance Management Workspace.

    * **Prompt to Save Unsaved Files**—Selected by default to prompt you to save unsaved files.

    * **Show Path For Documents**—Whether to show or hide document paths in the progress bar.

    * **Accessibility Mode**—Whether to enable screen reader support.

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

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

Setting Explore Preferences

Explore preferences define default folders and permissions for items that you create or import.

You can specify default permissions for specific users, groups, or roles. If you do not set these preferences, the Default folder is set to the top-most, or root folder and permissions for items are set to Empty.

To set or modify Explore preferences:

1. From the Explore Repository, select **File**, then **Preferences**, and then click the **Explore** icon.

2. Set preferences for the following:

   - **Default Folder**—The default folder is shown when you use Explore. Set it to the folder you access most frequently. To set the default folder, click **Select**. In the **Select** dialog box, select a folder, and then click **OK**.

   - **Default File Permissions**—Default file permissions are applied when you create a folder or import artifacts. These permissions determine the ability of a user, group, or role to access the item and whether to automatically push the item to the user, group, or role favorites. Default file permissions are automatically applied to all artifacts you create or import. You can override these defaults by manually changing the permissions when you create or import the artifact.
     To set default file permissions:

     – Click **Set Permissions** to access the **Permissions** dialog box where you can set the default permissions for users, groups, and roles.

     – Select which product to apply the default permissions to:

       * All Other Documents

       * Folders

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

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**.

Using the Home Page

Starting in Release 11.2.4, the Home page provides a starting point for users and a launching point for Oracle Hyperion Enterprise Performance Management Workspace functionality.

The Home page displays the following information:

- **Recents**: Recently-opened items for each user provisioned in EPM Workspace.

  – Items have an icon followed by the item name.

  – Clicking on an item opens it in the module content area.

  – The number of items displayed are limited by the administrator in the Workspace Server Settings. When the limit is reached, the oldest items are removed.

  – If documents currently displayed are deleted from repository or a user is deprovisioned from an application, items are removed.

  – Selecting the Open link displays the Open dialog box from which you can open a document.

- **Favorites**: Personal and pushed items. See Using Favorites for information on using and managing favorites.

- **Applications**: Applications that you have installed.

- **Announcements**: Messages from your Administrator. New announcements are displayed when you first open the Home page. You can also click on an announcement to read it. (Messages are set up by administrators in Workspace Server Settings - **Navigate,** then **Administer**, then **Workspace Settings**, and then **Server Settings**.)

To set the Home page as the page that initially displays when you open the Explore Repository:

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

2. In the **Preferences** dialog box, select **General**.

3. Under **Default Startup Options**, click the **Content** drop-down, and select **Home**.

Personalizing the Explore Repository

When using the Explore Repository, you can customize the appearance of the user interface.

Table 2-1   Customization Options for the Explore Repository

Customization Option	Menu Command
Show/hide the View pane	**View**, and then **View Pane**
Show/hide the Masthead	**View**, and then **View Masthead**
Resize the View pane and content area or the Masthead	See Resizing the View Pane and Resizing the Masthead.
Which file types are listed in the content area	**View**, and then **Display Items of Type**. See Displaying Specific File Types.
Sort items in the content area	**View**, and then **Sort By**. See Sorting Columns.
Which item properties are displayed in the content area	**View**, and then **Show Columns**. See Displaying Specific File Types.
Whether to show hidden files in the content area	**View**, and then **Show Hidden**

Table 2-1   (Cont.) Customization Options for the Explore Repository

Customization Option	Menu Command
Whether to show duplicate items in the content area	**View**, and then **Show Duplicates**

Resizing the Masthead

To resize the masthead:

1. In the Explore Repository, point to the area between the menu options and the content area.

   The Masthead Area Adjuster is displayed as a line.

2. When the pointer changes to a vertical double-headed arrow, resize the masthead by dragging the arrow up or down.

Resizing the View Pane

To resize the View pane:

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

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

2. When the pointer changes to a horizontal double-headed arrow, resize the View pane by dragging the arrow right or left.

Displaying Columns

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

To hide or display columns:

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

2. In the **Show Columns** dialog box, display or hide columns by selecting or clearing the corresponding check box.

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

4. Click **Save**.

Reordering Columns

To reorder columns, do one of the following:

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

Sorting Columns

To sort columns by name, type, owner, modified date, or desciption, select **View**, then **Sort By**, and then select a sort option.

To alphabetically sort the items in a column, click a column heading, and then click the up arrow or down arrow to change the sort. (Date columns are sorted chronologically.)

Displaying Specific File Types

From the Explore Repository, you can specify which file types to display in the content area. Your role and permissions determine if an item is displayed.

To display specific file types, select **View**, then **Display Items of Type**, and then select an option:

- **All Files**—Displays all files
- **All Financial Reporting Objects**—All Oracle Hyperion Financial Reporting reports, snapshot reports, books, snapshot books, and batches
- **All Images**—All image files with the following extensions:
    - `.gif`
    - `.jpg`
    - `.png`
    - `.bmp`
- **All Office Files**—Microsoft Word, Excel, Power Point, and Project files
- **All Reports**—All Financial Reporting reports and snapshot reports
- **External Links**—All items imported as a URL
- **All Job Output**
- **All Jobs**
- **All Jobs (and Output)**
- **Standard** —All standard files (HTML, MS Excel, MS PowerPoint, MS Project, MS Word, PDF, plain text, RTF, XML, and ZIP)
- **Other**—Select a file from the menu displayed.

Managing Items

Manage documents, collections, supporting files, other standard files, and folders.

Related Topics

- Supported Items in the Explore Repository
- Using Ambiguous Items
- Importing Items
- Exporting Items
- Creating Documents

- • [Creating Shortcuts](#)
- • [Creating Email Links to Repository Items](#)
- • [Selecting Recipients to Receive Emails](#)

Supported Items in the Explore Repository

Items are objects stored in the repository, including:

- • [Documents](#)
- • [Collections](#)
- • [Supporting Files](#)
- • [Other Standard Files](#)
- • [Folders](#)

All objects have properties that store information, such as attributes and permissions. Attributes include: name, a description of the object, UUID, and owner. Properties for file objects, URLs, and shortcuts include additional attributes.

Documents

Documents include Oracle Hyperion Financial Reporting reports and snapshots. Use the Explore Repository to list and view documents. The items that you open in the Explore Repository are displayed as tabs at the top of the Explore Repository.

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

Collections

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

Table 2-2   Collections in the Explore Repository

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

Supporting Files

The following table lists supporting files that are used when authoring or managing documents or collections.

Table 2-3   Supported File Types, Descriptions, Studio Created in, and File Extensions

Type	Description	Studio created in	File Extension
Folder	Containers that contains other folders and files	NA	none
Shortcut	Link to a repository item. Create shortcuts to easily access the item to which the shortcut links.	NA	none
URL	Link to websites or HTML pages	NA	none
Grid	Oracle Hyperion Financial Reporting Studio object that contains data from external sources. Grids contain rows, columns, and optionally, a page axis.	Reporting Studio	`.rog`
Chart	Reporting Studio object that contains charts	Reporting Studio	`.roc`
Image	Reporting Studio image object	Reporting Studio	`.roi`
Text	Reporting Studio text object	Reporting Studio	`.rot`
Row and Column Template	Templates used to author Oracle Hyperion Financial Reporting reports	Reporting Studio	`.ros`

Other Standard Files

Other standard files include:

- Text files
- Image files
- Microsoft Office files
- HTML files
- PDF files
- Zip files

Folders

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

Using Ambiguous Items

When multiple items have the same name and reside in the same folder they are referred to as ambiguous items. You can select an item from the list to view its properties, and you can open the item to view additional details.

Importing Items

Related Topics

- Importing Files
- Importing URLs
- Importing Financial Reporting Artifacts
- Importing Financial Reporting Documents

Importing Files

To import files:

1. From the Explore Repository, navigate to the folder where you want to import the file.

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

3. Browse to the file that you want to import.

4. Enter a description, and then click **Next**.

5. **Optional:** Enter advanced properties.

   See Advanced Properties,

6. **Optional:** Complete permissions.

   See Setting Permissions.

7. Click **Finish**.

Importing URLs

To import URLs:

1. From the Explore Repository, navigate to the folder where you want to place the URL.

2. Select **File**, then **Import**, and then **URL**.

3. Enter a name, the URL address, and optionally a description, and the click **Next**.

4. **Optional**: Enter Advanced properties.

   See Advanced Properties.

5. **Optional:** Complete permissions.

   See Setting Permissions.

6. Click **Finish**.

Importing Financial Reporting Artifacts

Importing documents into the repository makes them available to others. You can give some users the ability to modify one document, while limiting others. See Setting Permissions for detailed information on permissions.

You can import the following types of Oracle Hyperion Financial Reporting artifacts:

- Dynamic report (*.des)

- Snapshot reports (*.rpt)

- Books (*.kbk)

- Snapshot Books (*.kbt)

- Batch files (*.bch)

- Oracle Hyperion Financial Reporting Studio objects that contain data from external sources (*.rog)

- Reporting Studio text object (*.rot)

- Reporting Studio image object (*.roi)

- Reporting Studio objects that contain charts (*.roc)

- Templates used to author Financial Reporting reports (*.ros)

- Zip files (*.zip)

Importing Financial Reporting Documents

To import a Oracle Hyperion Financial Reporting document:

1. From the Explore Repository, select **File**, then **Import**, and then **Financial Reporting Documents**.

2. Browse to the desired document, and then click **Import**.

   If you import a document that uses a data source connection, you may be prompted to select the data source connection.

   > **Note:**
   >
   > If you try to import a document whose MIME type is not defined, an error message is displayed.

Exporting Items

Related Topics

- Exporting Use Cases

- Exporting Financial Reporting Artifacts

- Exporting Financial Reporting Reports and Snapshots to Microsoft Office

Exporting Use Cases

Export Oracle Hyperion Financial Reporting items for the following uses:

- For use in locations outside of the Explore Repository. You can later import the items into a Studio or back into the Explore Repository. Financial Reporting items can be exported from testing environments to production environments.

- For use in Smart View. See Exporting to Smart View.

Exporting Financial Reporting Artifacts

Oracle Hyperion Financial Reporting artifacts can be exported from the repository to reports, books, and Microsoft Office:

- Dynamic reports (*.des)

- Snapshot reports (*.rpt)

- Books (*.kbk)

- Snapshot books (*.kbt)

- Batch files (*.bch)

- Grids (*.rog)

- Charts (*.roc)

- Images (*.roi)

- Text (*.rot)

- Row and column templates (*.ros)

From the Explore Repository, only Financial Reporting artifacts can be exported. Users can export Financial Reporting document definitions to the local file system to import into the Explore Repository. For example, users can export Financial Reporting items from testing environments, and then import them into production environments.

To export artifacts:

1. From the Explore Repository, select the item to export.

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

3. Select the artifacts to export, and then click **OK**.

Exporting Financial Reporting Reports and Snapshots to Microsoft Office

HTML and PDF reports with or without a page dimension, when exported as an image to Microsoft Word or PowerPoint, exports only the first physical page.

A report with a page dimension behaves as follows:

- **Export to Microsoft Excel**: All pages are exported.

- **Export to Microsoft PowerPoint**: All pages are exported.

When exporting multiple pages to PowerPoint, all pages are placed in a single slide. To have them automatically placed in separate slides, use Oracle Smart View for Office in PowerPoint to import the reports.

to export a report or snapshot to Microsoft Excel, Word, or PowerPoint:

1. Open the report.

2. At the bottom right of the report, select **Export in Query-Ready Mode** to export a grid on the report as query ready.

   When you export in query-ready mode, an `.SVLNK` file is generated, and you can launch Oracle Smart View for Office (Windows) to open it. The file is deleted after you open it in Oracle Smart View for Office.

   You cannot use this option to export snapshots.

3. Select **File**, and then **Export** to use other export options,

4. Select a submenu command:

   • Select **Excel** to export the current financial report as formatted HTML.

   • Select **Word** to export the current page of the current financial report to Microsoft Word as a static image or Word document (.docx) depending on the Oracle Hyperion Financial Reporting preference set. (To set the preference, select **File**, then **Preferences**, then **Financial Reporting**, and then select an option for Word Export).

   • Select **PowerPoint** to export the current page of the current financial report to Microsoft PowerPoint as a static image.

     Snapshots are always exported as static images.

     The **File Download** dialog box displays profile information about exported content.

     Because of limited object positioning in HTML, exported objects may overlap and may need to be repositioned in Microsoft Excel.

5. The file is opened in the selected mode. To save the file to your machine, select **File**, and then **Save As**.

   When exporting Financial Reporting grid objects to Excel, the values are exported as displayed in the report. The desired number of decimal places for precision should be set in the report before you export.

Creating Documents

Creating documents involves creating a Financial Reporting book or batch.

To create a document:

1. Select **File**, and then **New**, and then **Document**.

2. Select one of the following options:

   • **Collect Reports into a Book**

   • **Batch Reports for Scheduling**

3. Enter the requested information into the wizard, and then click **Finish**.

Creating Shortcuts

To create a shortcut:

1. From the Explore Repository, right-click a file object, and then select **Create Shortcut**.

2. Enter **General Properties**:

   - **Name:** The name assigned to the shortcut.

   - **Description:** The description of the shortcut. Limit the length to 250 characters.

   - **Folder:** Path to the folder to which the shortcut is pointing

     Either type in a path, or click **Browse**, select a path in the **Select** dialog box, and click **OK**.

3. Enter **Advanced Properties**:

   - **Auto-delete item on this date**: Enable to automatically delete this artifact from the repository.

   - **Automatically generate keywords**: Generates search keywords based on words contained in the Name and Description. The search function uses these keywords to find an artifact.

   - **Keywords**: Keywords used to search for an artifact.

4. Click **OK** to save the shortcut.

Creating Email Links to Repository Items

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

- Recipients must be defined as a user with a user name and password to open the linked item in a web browser.

- Recipients need proper access privileges to view the item.

- Items in the link can be viewed in web browsers. A link to the item is sent; not the item. When you click the link, the Explore Repository is opened, and then item is displayed.

- You cannot send an email link to a folder.

- You must select and send email links individually.

- You can add text to the email message.

To create email links:

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

2. Right-click the item, then select **Email Link**, and then select the recipients.

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

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

3. Perform one of the following tasks:

   - Enter the recipient's email address.

   - Use the Email Recipient List

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

5. Click **Send**.

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

Selecting Recipients to Receive Emails

Use the **Select Recipients** dialog box to organize a list of recipients to whom you want to send email links. By entering addresses in this list you do not need to retype email address again.

To select recipients:

1. Move the desired recipients from **Available Recipients** to **Selected Recipients**.

2. **Optional.** To add a recipient, in **New Recipient**, type the email address, and then click **Add**.

3. Click **OK**.

Managing Files and Folders

Use the Explore Repository to manage files and folders.

Related Topics

- Accessing Files or Folders
- Opening Files or Folders
- Saving Financial Reporting Files
- Creating Folders
- Moving or Copying Files and Folders
- Renaming Files or Folders
- Deleting Files or Folders
- Using Favorites
- Using Subscriptions

Accessing Files or Folders

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

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

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

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

Opening Files or Folders

Related Topics

- Opening Files Using Menu Options
- Opening Financial Reporting Files in Another Format

Opening Files Using Menu Options

To open or select a file or folder:

1. In the Explore Repository, select **File**, then **Open**, and then **Document**.

2. Navigate to the file or folder, and then click **Open**.

3. **Optional:** To open a file with another application:

   - In the **Open** dialog box, click **Options**.

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

   Note that **Open As** works only with Oracle Hyperion Financial Reporting objects.

Opening Financial Reporting Files in Another Format

To open Oracle Hyperion Financial Reporting files in a format other than the default format, from the content area of the Explore Repository, right-click a file, then select **Open In**, and then select a format:

- HTML Preview

- PDF Preview

- Studio Preview

> **Note:**
>
> To view a report or book in a PDF format in a Chrome browser, the "Download PDF files instead of automatically opening them in Chrome" option must be disabled. This option is disabled by default. If you are getting an error when trying to process a Financial Reporting report or book in a PDF format, do the following:
>
> 1. Open Chrome and select ⋮ .
> 2. Select **Settings**, then **Privacy and Security**, and then **Site Settings**.
> 3. In **Site Settings**, scroll down and select **Additional Content Settings**.
> 4. Select **PDF Documents** and ensure that **Download PDF files instead of automatically opening them in Chrome** is disabled.

Saving Financial Reporting Files

You can save the following Oracle Hyperion Financial Reporting objects in the Explore Repository:

- Book
- Snapshot Book
- Batch

> **Note:**
>
> When using Chrome 88.0.4324.06 (Official Build) (64-bit), you cannot use the Download button to download and save Financial Reporting reports in a PDF format. The workaround is to use the Print button to print the reports in a PDF format.

Creating Folders

You create folders to organize files and documents.

To create a folder:

1. From the Explore Repository, select **File**, then **New**, and then **Folder**.
2. In the **Create New Folder** dialog box, enter a name for the folder, and then click **Save**.

Moving or Copying Files and Folders

You can move or copy a file or folder to another location.

- Copying of all document types in the Explore Repository is supported. Users must have a minimum of View access.

- The user who copies the repository object becomes the owner.

- You can select multiple documents to copy and paste.

- All metadata associated with a document is copied except for schedules.

- Folders and their contents can be copied except for objects within a folder that have No Access permission.

- Hidden files are copied if a user has View access.

- You cannot copy nested folders.

To move or copy files or folders:

1. From the Explore Repository, right-click a document or folder, and then select **Cut** or **Copy**.

2. Select a repository location, then select **Edit**, and then select **Paste**.

Renaming Files or Folders

To rename files:

1. From the Explore Repository, right-click a document or folder, and then select **Rename**.

2. Enter a name, and then click **Save**.

Deleting Files or Folders

To delete files or folders, from the Explore Repository, right-click a file or folder, and then select **Delete**.

Using Favorites

Related Topics

- About Using Favorites
- Adding Items to Your Favorites
- Managing Favorites

About Using Favorites

You can set up favorites and track items that you access frequently to view them in the future.

Administrators can push items to a user's Favorites. You need the proper role to push items to Favorites. If you do not have the proper role to access Explore, you can also see your favorites list by selecting options on the **Favorites** menu.

Adding Items to Your Favorites

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

To add items or folders to Favorites, do one of the following:

- From the Explore Repository, right-click an item or folder, and then select **Add to Favorites**.
- From the Explore Repository, select an item, then select **Favorites**, and then select **Add to Favorites**.

Managing Favorites

To manage items in Favorites, select **Favorites**, and then **Manage Favorites**.

The **Favorites Manager** dialog box displays the items that you have added to favorites (see Adding Items to Your Favorites). **Show** is automatically selected indicating that the items will show in your favorites list.

To hide an item so it is not displayed in your list of Favorites, clear **Show**. To remove an item from Favorites, select **Remove**.

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

Using Subscriptions

Related Topics

- Creating a Subscription
- Modifying or Removing Subscriptions
- Subscribing to Folders
- Receiving and Viewing Subscriptions

Creating a Subscription

With a subscription you receive email notifications and links to items every time an item is modified or anything in a folder changes. You can subscribe to any item in the repository, and send it to one or more email addresses.

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

To create subscriptions:

1. From the Explore Repository, right-click an item, and then select **Subscribe**.

2. On the Subscribe page, do the following:

   a. Select **Subscribe and send email notifications to**.

   b. In the text box, enter email addresses for the recipient of the notification.

   c. To send the item as an attachment, select **Attach file for "repot name" to email message (if possible)**.

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

Modifying or Removing Subscriptions

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

To modify or remove subscriptions:

1. From the Explore Repository, select **Favorites**, and then **Show Subscribed Items**.
2. Click a subscription, and then click **Open Subscriptions.**
3. To remove the subscription, clear **Subscribe and send email notifications to**.
4. To modify the subscription, use the steps described in Subscribing to Folders.
5. Click **OK**.

Subscribing to Folders

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

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

To subscribe to folders:

1. From the Explore Repository, right-click a folder, and then select **Subscribe**.
2. In the **Subscribe** dialog box, select **Subscribe and send email notifications to:** to receive notification for this folder and to change or enter your email address.
3. Enter an email address for recipients of the subscription.

    You must enter the email address; you cannot select from a list of recipients.

4. To receive notification when there are changes to the subfolders, select **Notify on changes to subfolders of "Users"**.

Receiving and Viewing Subscriptions

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

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

Using URLs in the Explore Repository

In the Explore Repository, you can open a URL, open a URL in a new window, and update a URL.

Related Topics

- Opening a URL
- Opening a URL in a New Window
- Updating a URL
- URLs Supported by EPM Workspace

Opening a URL

To open a URL:

1. From the Explore Repository, select **File**, then **Open**, and then **URL.**
2. Enter the URL, and then click **OK**.

Opening a URL in a New Window

To open a URL in a new window:

1. Open a URL.
2. Select **New Window**.
3. Enter the URL, and then click **OK**.

Updating a URL

To update the content of an existing URL displayed in the content area:

1. Open a URL.
2. Select **Update URL**.
3. Enter the URL, and then click **OK**.

URLs Supported by EPM Workspace

Related Topics

- Default URL to Launch EPM Workspace
- URLs to Externally Launch From Within EPM Workspace
- Launching Financial Management
- Launching Planning

Default URL to Launch EPM Workspace

The default URL to launch Oracle Hyperion Enterprise Performance Management Workspace is:

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

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

URLs to Externally Launch From Within EPM Workspace

Related Topics

- Selecting Multiple External URLs
- Launching Repository Content

Selecting Multiple External URLs

When you select multiple external URLs to launch Oracle Hyperion Enterprise Performance Management Workspace and to limit EPM Workspace proliferation, the following scenarios are possible:

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

The format of the URL is:

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

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

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

Launching Repository Content

To open an object in the repository, use:

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

For example, to open a folder with the name Sample Content:

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

Launching Financial Management

To launch Oracle Hyperion Financial Management, use:

```
http://<server>:<port>/workspace/?
module=hfmadf.application&sourceApp=<hfm_application_name>&cluster=<cluste
rname>
```

Additional parameters:

- Optional: `showViewPane=true/false`

  False hides the left pane when the module is loaded. The default value is *true*.

- Optional: `bpm.logoff=true/false`

  False prevents the system from logging off if using the same session. The default value is *true*.

Launching Planning

To launch Oracle Hyperion Planning, use:

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

Additional parameters:

- Optional: `showViewPane=true/false`

  False hides the left pane when the module is loaded. The default value is *true*.

- Optional: `bpm.logoff=true/false`

  False prevents the system from logging off if using the same session. The default value is *true*.

Searching for Items in the Repository

Search for and retrieve documents and reports.

Related Topics

- About Searching
- Searching for Documents and Reports
- Using Advanced Search
- Search Syntax
- Supported MIME Types
- Security
- Search Results

About Searching

You can search for and retrieve documents and reports from any repository in the Explore Repository. The search operation returns a list of results based on locating

keywords in document-specific metadata; for example, document name, date created, or author (for Oracle Hyperion Financial Reporting Word or PDF documents only), and extracting content-based information from documents.

You can perform the following searches:

- **General search**—Search keywords in any part of all supported content published in the Explore Repository.

- **Context-sensitive search**—Search keywords associated with aspects of some content in all supported content published in the Explore Repository.

- **Search within a hierarchy**—General or context-sensitive searches restricted to selected branches of the Explore Repository or to selected repositories.

- **Data or metadata search**—If content is static, then both metadata and data are indexed (for example, filter name and selected values for the filter). If content is dynamic, then only metadata is indexed (for example, column name only).

Search results are returned on another page as a list of document references and synopses, ranked in order of relevance. Search results are:

- Categorized based on content type, modified date, and file locations within the Explore Repository

- Sorted by relevance or by modified date

- Authorized; user credentials ensure that only user-authorized content authorized is returned

Searching for Documents and Reports

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

To search for a document or a report:

1. Enter a keyword in the Search text box.

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

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

   - File name (clicking on this launches the document)

   - Description

   - Document type

   - Last modified date

   - File path (double-clicking on this launches the folder)

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

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

   By default, search results are sorted by score. A document's score or relevance is determined by how many times the keyword appears in the document and how many other keywords are in the document. For example, a document where

the keyword appears three times but only has five words scores higher than a document where the keyword appears 10 times but with 1,000 other keywords.

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

Using Advanced Search

The Advanced Search feature provides a convenient way to generate advanced search queries.

To use advanced search:

1. Click the **Advanced** link next to the Search text box.

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

Advanced search options:

- **All words**—All documents in the search results contain all the keywords entered.

- **At least one word**—All documents in the search results contain at least one of the keywords entered.

- **Without the words**—All documents in the search results do not contain any of the keywords entered.

- **Created in the past**—Restricts results to documents created within a specified time frame.

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

  The **Custom date range** option activates calendar controls to search for documents created in a specified date range.

- **Modified in the past**—Restricts results to documents modified within a specified time frame.

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

  The **Custom date range** option activates calendar controls to search for documents last modified in a specified date range.

- **In folder**—Restricts results to a specified repository and folder name.

- **Only search (document type)**—Restricts results to documents of a specified MIME type.

  To allow for multiple document types, edit the search text field at the top of the Search Results page. For example, change `sales +MimeType:application/x-brioquery` to `sales +(MimeType:application/x-brioquery MimeType:application/pdf)`.

- **Hidden file options**—Defines whether to retrieve hidden files. The "hidden" attribute of a file is set within the context of its repository. For example, it can be viewed or altered by the Properties dialog box in the Explore Repository.

- **Order by**—Defines the sort sequence of the search results.

Table 2-4   Advanced Search Examples

Search Term	Request
"sales +LanguageCodes:de"	Documents that contain the term "sales" and the "German " language.
"sales +(LanguageCodes:de LanguageCodes:es)"	Documents that contain the term "sales" and the "German" language, or documents that contain the term "sales" and the "Spanish" language.

Search Syntax

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

Table 2-5   Search Syntax Operators

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

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

Examples

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

```
+sales –oracle
```

Search for documents containing the phrase *radio sales*:

```
"radio sales"
```

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

```
+sales –(oracle radio)
```

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

```
+sales +oracle
```

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

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

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

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

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

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

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

Search for documents modified in 2007

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

Search for documents modified in December 2007

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

Supported MIME Types

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

Financial Reporting MIME Types

- Oracle Hyperion Financial Reporting Batch
- Financial Reporting Book
- Financial Reporting Chart
- Financial Reporting Grid
- Financial Reporting Image
- Financial Reporting Report
- Financial Reporting Row and Column Template
- Financial Reporting Snapshot Book
- Financial Reporting Snapshot Report
- Financial Reporting Text

Image MIME Types

- BMP File
- GIF File

- JPEG Image File

- PNG Image

Microsoft Office MIME Types

- MS Excel File

- MS PowerPoint File

- MS Word File

Other MIME Types

- Comma Separated Value File

- HTML File

- PDF File

- Plain Text

- RTF File

- XML File

- ZIP File

Security

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

Search Results

The search operation returns a list of results based on locating the users keywords in document-specific metadata; for example, document name, date created or author (for Oracle Hyperion Financial Reporting Word or PDF documents only), and extracting content-based information from documents.

Results are returned as a list of document references and synopses, ranked in order of relevance. Search results are:

- Categorized based on content type, modified date, and file locations within the Explore Repository.

- Sorted by relevance or by modified date

- Authorized; user credentials ensure that only user-authorized content authorized is returned

Search results include:

- File name (clicking on this launches the document)

- Description

- Document type

- Last modified date

- File path (double-clicking on this launches the folder)

You can order search results according to **Score** or **Last modified Date**.

By default, search results are sorted by score. A document's score or relevance is determined by how many times the keyword appears in the document and how many other keywords are in the document. For example, a document where the keyword appears three times but only has five words scores higher than a document where the keyword appears 10 times but with 1000 other keywords.

You can also **filter** search results according to document type, modified date, or publish location.

Setting Permissions

Define permissions for files and folders and apply permissions to artifacts in a folder.

Related Topics

*   [About Setting Permissions](#)
*   [Defining Permissions for Files and Folders](#)
*   [Applying Permissions to Artifacts in a Folder](#)

About Setting Permissions

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

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

Set artifact permissions when you import or select an artifact.

Rules for setting permissions:

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

> **✐ Note:**
>
> In the Simplified User Interface, folders that have no Oracle Hyperion Financial Reporting reports accessible to the logged in user are not displayed in Reports even if the user has access to the folder in the Explore Repository.

Defining Permissions for Files and Folders

To define permissions for files and folders:

1. From the Explore Repository, right-click the file or folder, and then select **Edit Permissions**.

   You can select multiple items in Explore and apply permissions.

2. In the **Permissions** dialog box, select the users, groups, and roles to which you want to apply permissions

   Permissions can be applied only to items to which a user has Full Control permission.

   - To populate the list with all users, groups, or roles, select **Update List**.

   - To filter the list, select **begin with**, **contain**, or **are in group**, then enter the filter criteria, and then click **Update List**.

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

3. Move the desired users, groups, and roles to **Selected Users, Groups and Roles**.

4. From **Selected Users, Groups and Roles**, select a name in the **Name** column, and then click under the **Access** column to access a drop-down where you can select one of the following permissions:

   - Full Control

   - Modify

   - View

   - No Access

5. **Optional:** Depending on whether you are defining permissions for folders or files, select either **Make these the default permissions for all folders I create** or **Make these the default permissions for all files I import** to apply the permissions to other folders or imported content by default.

6. Click **OK** to apply the permissions.

Applying Permissions to Artifacts in a Folder

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

To apply permissions to artifacts in a folder:

1. From the Explore Repository, right-click a file or folder, and then select **Apply Permissions to Children**.

2. In the **Apply Permissions to Children of the Selected Folder** dialog box, select the users, groups, and roles to which you want to apply permissions.

   • To populate the list with all users, groups, or roles, select **Update List**.

   • To filter the list, select **begin with**, **contain**, or **are in group**, then enter the filter criteria, and then click **Update List**.

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

3. Move the desired users, groups, and roles to **Selected Users, Groups and Roles**.

4. From **Selected Users, Groups and Roles**, select a name from the **Name** column, and then click under the **Access to Folder** and **Access to File** columns to access a drop-down where you can select the following permissions:

   • Inherit

   • Full Control

   • Modify

   • View

   • No Access

5. From the **Favorite** drop down, select an option:

   • **Pushed**—Push the artifact to the users' Favorites.

   • **Not Pushed**—View only if this is the only permission set.

6. Select one of the following:

   • **Overwrite current permissions**—Remove existing permissions and set new permissions.

   • **Merge with the current permission**—Redefine some permissions and add new permissions to the existing ones. The changes are applied to folder child elements recursively

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

7. Click **OK**, and then **Yes** to change the permissions.

Working with Properties

Set general and advanced properties and change ownership of artifacts.

Related Topics

• Setting File Properties

• General Properties

• Advanced Properties

• Changing Ownership of Artifacts

Setting File Properties

To set file properties:

1. From the Explore Repository, right-click a document, and then select **Properties**.

2. Set the desired properties, and then click **OK**.

General Properties

Table 2-6   General Properties for Artifacts

General Properties	Definitions
Name	Name assigned to the file, folder, or URL.
Description	Description of the file, folder, or URL. Limit the length to 250 characters.
UUID	(Read only) Universal Unique Identifier: A 128-bit number used to uniquely identify repository objects.
Owner	User ID of the person who imported the artifact. To change owner of an artifact, see Changing Ownership of Artifacts.
Original File Name (File objects only)	(Read-only) Name of the file when it is imported or created
Size (File objects only)	(Read-only) File size
SmartCut (File objects only)	(Read-only) A URL pointing to a file
URL (URL objects only)	The URL starts with `http://` or `https://`.
Shortcut to (Shortcut objects only)	Path to a file to which the shortcut is pointing

Advanced Properties

Table 2-7   Advanced Properties for Artifacts

Advanced Properties	Definitions
MIME Type	(Read-only) Multipurpose Internet Mail Extensions.
Auto-delete item on this date	Enable to automatically delete this artifact from the repository.
Hidden Item	Hides files and folders in the Explore Repository. Example: Enable this option for image files needed by an HTML file, so the users select HTML files only.
Automatically generate keywords	Generates search keywords based on words contained in the Name and Description. The search function uses these keywords to find an artifact. **Note:** This property does not exist for folders.

Table 2-7   (Cont.) Advanced Properties for Artifacts

Advanced Properties	Definitions
Keywords	Keywords used to search for an artifact.
	Creating keywords for artifacts is highly recommended and used for searching repository artifacts.
	Note: This property does not exist for folders.

Changing Ownership of Artifacts

Users can change the ownership of repository artifacts, including folders, subfolders, events, and schedules.

In order to change ownership, you must have Full Control or Administrator role rights.

To change the owner of an artifact:

1. From the Explore Repository, select an artifact.

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

3. In **Properties**, select **Change Owner**.

4. In the **Change Owner** dialog box:

    a. Select **begin with**, **contain**, or **are in group**, and then enter the filter criteria.

    b. Select **Update List**, and then click **OK**.

    c. Select **OK**.

5. Click **OK** to exit from the Properties dialog box.

Using Smart View

Oracle Smart View for Office provides a common Microsoft Office interface for Oracle Hyperion Financial Reporting and Oracle Hyperion Planning components.

The centralized interface enables simultaneous use of these components and improves integration with Microsoft Office.

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

Installing Smart View From the Explore Repository

When you install Oracle Smart View for Office from the Explore Repository, the Office client component is displayed as a menu and toolbar within the Microsoft Office suite.

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

To install the Smart View client from the Explore Repository:

1. From the Explore Repository, select **Tools**, then **Install**, and then **Smart View**.

2. Under **Oracle Smart View for Office**, select **Download Latest Version**.

3. Accept the license agreement, and click **Download Now**.

4. Accept the default installation options.

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

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

6. Reopen the Microsoft Office application.

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

Exporting to Smart View

Oracle Smart View for Office enables the following export options:

- Export the current page of the current data object to Word, Power Point, or Excel as an image. After insertion, you can query the corresponding web application again to refresh the image.

- Export documents to Microsoft Excel as either query-ready HTML or formatted HTML.

  When you export content as query-ready HTML, the current page of the current data object is converted to HTML and Oracle-specific formatting is removed. All data rows and columns are included, including hidden rows and columns, to ensure a valid ad-hoc query format in Oracle Smart View for Office (Windows). In addition, Oracle Hyperion Financial Reporting formula and text rows and columns are not included. This enables Smart View to query the data source independent of the web application.

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

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

Table 2-8   Smart View Export Options

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

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

Using Smart View to Import Financial Reporting Content

Using Oracle Smart View for Office, you can import Oracle Hyperion Financial Reporting content from the Explore Repository. You can use smart tags to import report settings.

Based on the type of Financial Reporting report that you select to import, you may be asked to respond to prompts other than the default or log on to the data source. The report may contain default User POVs, Grid POVs or Page members that you can change or allow for expansion.

To use Smart View to import Financial Reporting documents:

1. When connected to the repository, right-click a Financial Reporting report, and then select **Open**.

2. On the Preview screen, select the desired options:

   • Select **All Pages** to import all pages for members listed in the **Page** drop-down; clear **All Pages** to import only the current page listed in the **Page** drop-down.

   • For Microsoft Excel only: Select **Split Pages across worksheets** to place each member page you selected in the **Page** drop-down on separate worksheet tabs; clear **Split Pages across worksheets** to place all member pages you selected in the **Page** drop-down on the same worksheet.

   • Option for Excel only: To revert to the Explore Repository Point of View, select **Refresh Using Workspace Point of View**.

   • In **Import Document As**, select one of the following:

     – **Fully-Formatted**—For Microsoft Excel only: Select to display a fully formatted report in HTML.

     – **Query Ready**—For Microsoft Excel only: Select to run an ad hoc analysis on a report using Oracle Hyperion Financial Management or Analytical Services data sources. All data rows and columns are included, including hidden rows and columns, to ensure a valid ad hoc query format in Oracle Smart View for Office (Windows). In addition, Financial Reporting formula and text rows and columns are not included. Query Ready is not supported for Snapshot reports.

     – **Image**—For Microsoft Word or PowerPoint only: Select to import the report as an image.

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