

Oracle® Cloud

Designing with Management Reporting for Oracle Enterprise Performance Management Cloud



E99155-03



Oracle Cloud Designing with Management Reporting for Oracle Enterprise Performance Management Cloud,
E99155-03

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Primary Author: EPM Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Documentation Accessibility

Documentation Feedback

1 Creating a Report

Access the Report Designer, Add a Grid, and Select a Data Source	1-1
Modify the Report Layout	1-3
Add Members to the Report	1-4
Add Some Operating Expenses	1-10
Select POVs	1-14
Preview the Grid	1-18
Add Report Formatting	1-19
Add a Chart	1-26
Add a Text Object	1-30
Preview the Finished Report	1-35
Import a Report	1-39

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Documentation Feedback

To provide feedback on this documentation, send email to epmdoc_ww@oracle.com, or, in an Oracle Help Center topic, click the Feedback button located beneath the Table of Contents (you may need to scroll down to see the button).

Follow EPM Information Development on these social media sites:

LinkedIn - http://www.linkedin.com/groups?gid=3127051&goback=.gmp_3127051

Twitter - <http://twitter.com/hyperionepminfo>

Facebook - <http://www.facebook.com/pages/Hyperion-EPM-Info/102682103112642>

Google+ - <https://plus.google.com/106915048672979407731/#106915048672979407731/posts>

YouTube - <https://www.youtube.com/oracleepminthecloud>

1

Creating a Report

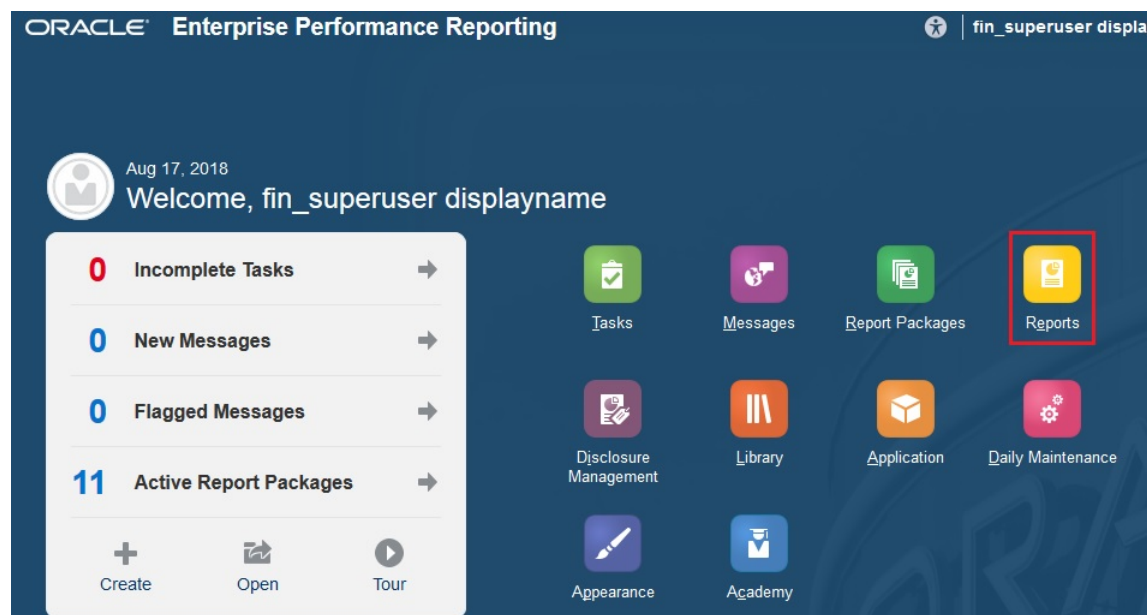
Related Topics



- [Access the Report Designer, Add a Grid, and Select a Data Source](#)
- [Modify the Report Layout](#)
- [Add Members to the Report](#)
- [Add Some Operating Expenses](#)
- [Select POVs](#)
- [Preview the Grid](#)
- [Add Report Formatting](#)
- [Add a Chart](#)
- [Add a Text Object](#)
- [Preview the Finished Report](#)
- [Import a Report](#)

Access the Report Designer, Add a Grid, and Select a Data Source

Begin by accessing the Report Designer and adding a grid.

1. From the Enterprise Performance Reporting Home page, click **Reports**.

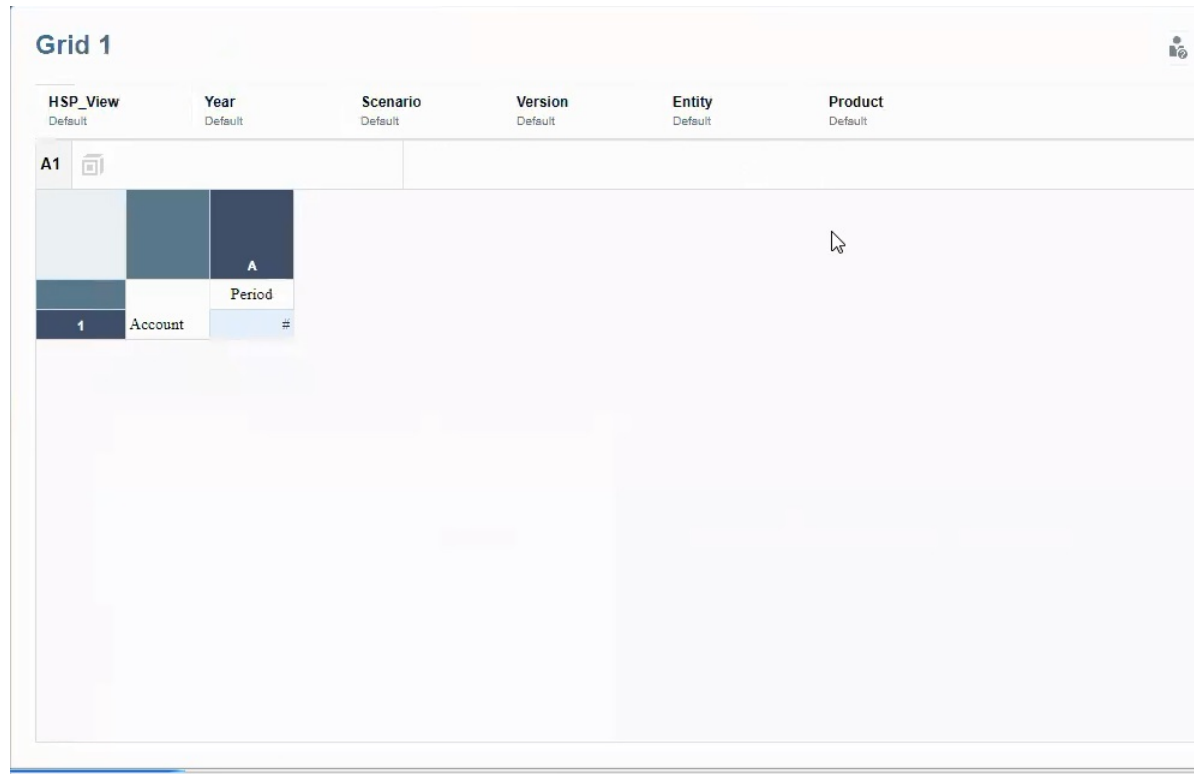


2. Click **Create Report** .
3. Click **Setup Grid** .
4. When you add a grid, you are prompted to select a data source. For this report, we will select the **PBCS Vision** data source.



If you do not currently have a data source set up, see [Creating and Editing Data Source Connections](#) for information on setting up a data source.

The grid is inserted with the **Period** dimension as a column and the **Account** dimension as a row. Note that the POV dimensions are displayed along the top, and the grid properties are displayed on the right.



Review these topics for more information:


[Working With the Report Designer](#)

[Adding a Grid](#)

[About Data Sources](#)

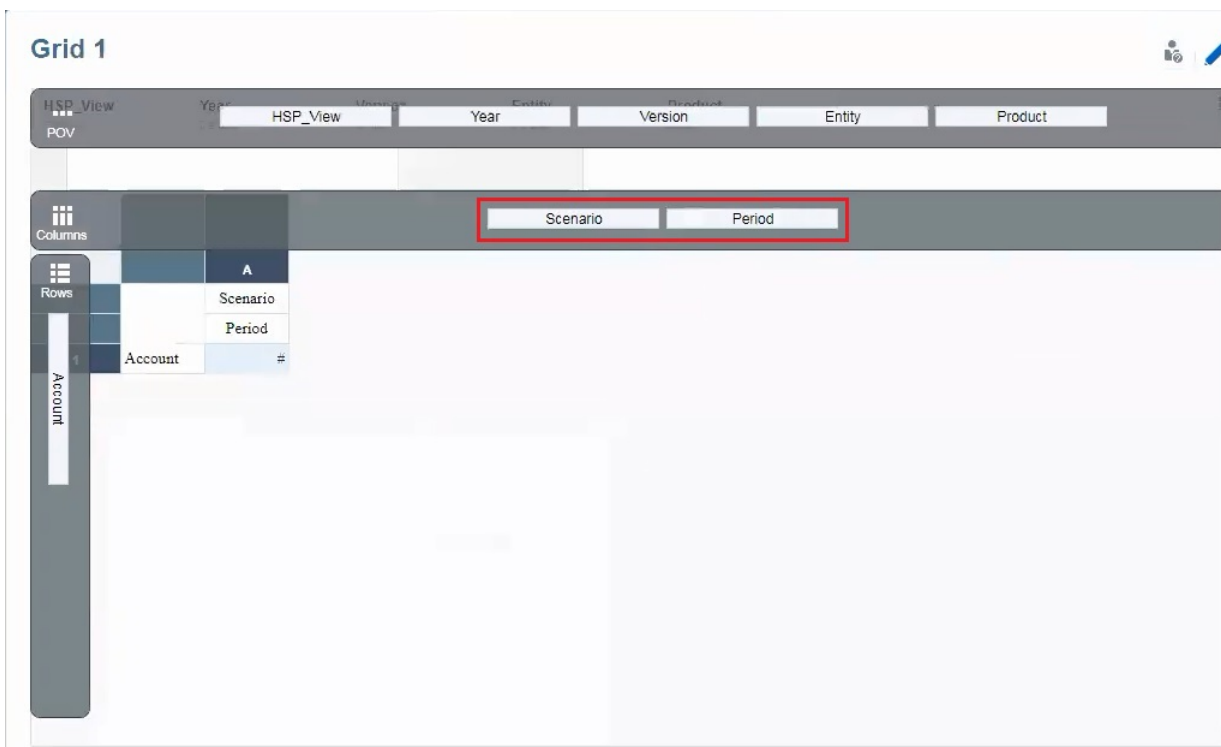
Modify the Report Layout

First, let's modify the layout of the report to add a Scenario POV to the grid.

1. Click **Show Dimension Layout**  to display the dimension layout.
2. Drag the **Scenario** POV so that it is placed to the left of the **Period** POV.

To do this, drag **Scenario** directly over **Period** until you see a white vertical cursor to the left of the dimension, and then let go of the mouse.






3. Click **Hide Dimension Layout**  to remove the dimension overlay.

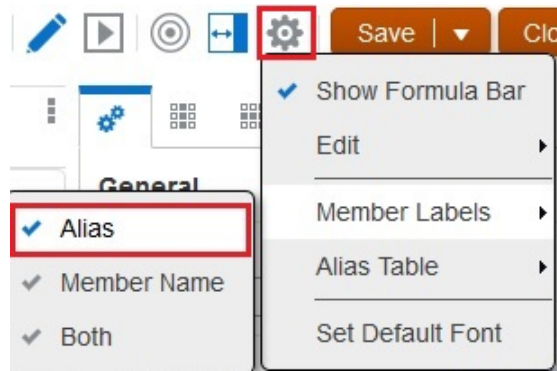
Add Members to the Report

The next step is to add members to the report. In our sample report, we will add *actual* and *plan* members for the Scenario dimension, and add members for *quarters 1-4* for the Period dimension.

Note:

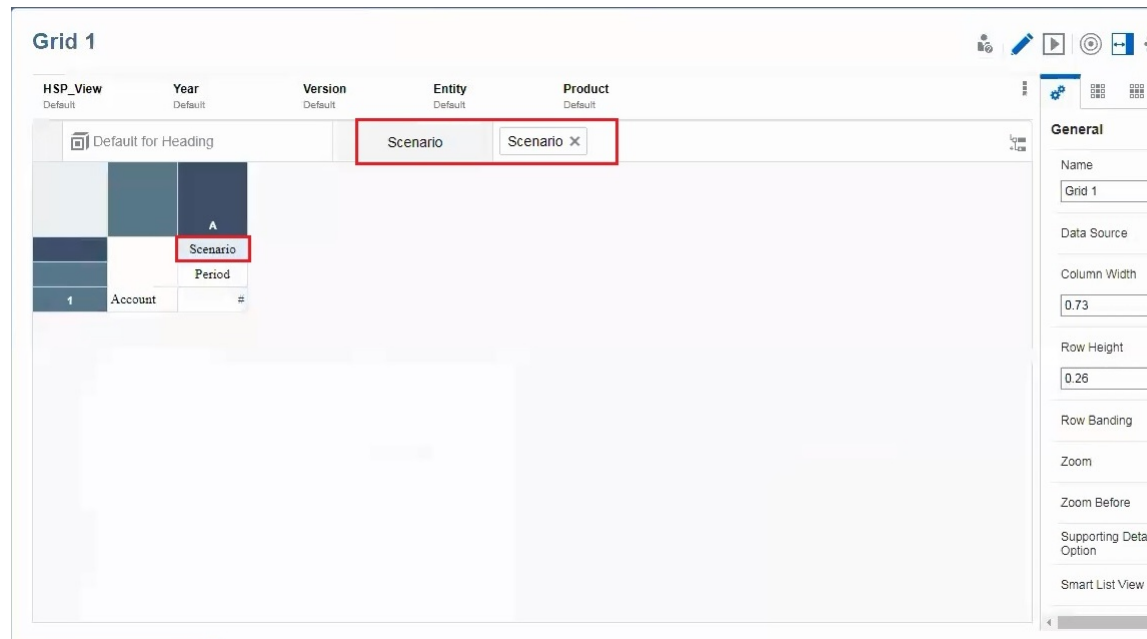
The following steps show you how to add members to the sample report in this Learning Path. Review [Assigning Members to Data Rows or Columns](#) for general information on adding members.

Before we add members to our report, we need to ensure that member selection uses member aliases. To do this, click **Report Actions** , and make sure **Member Labels** is set to **Alias**.

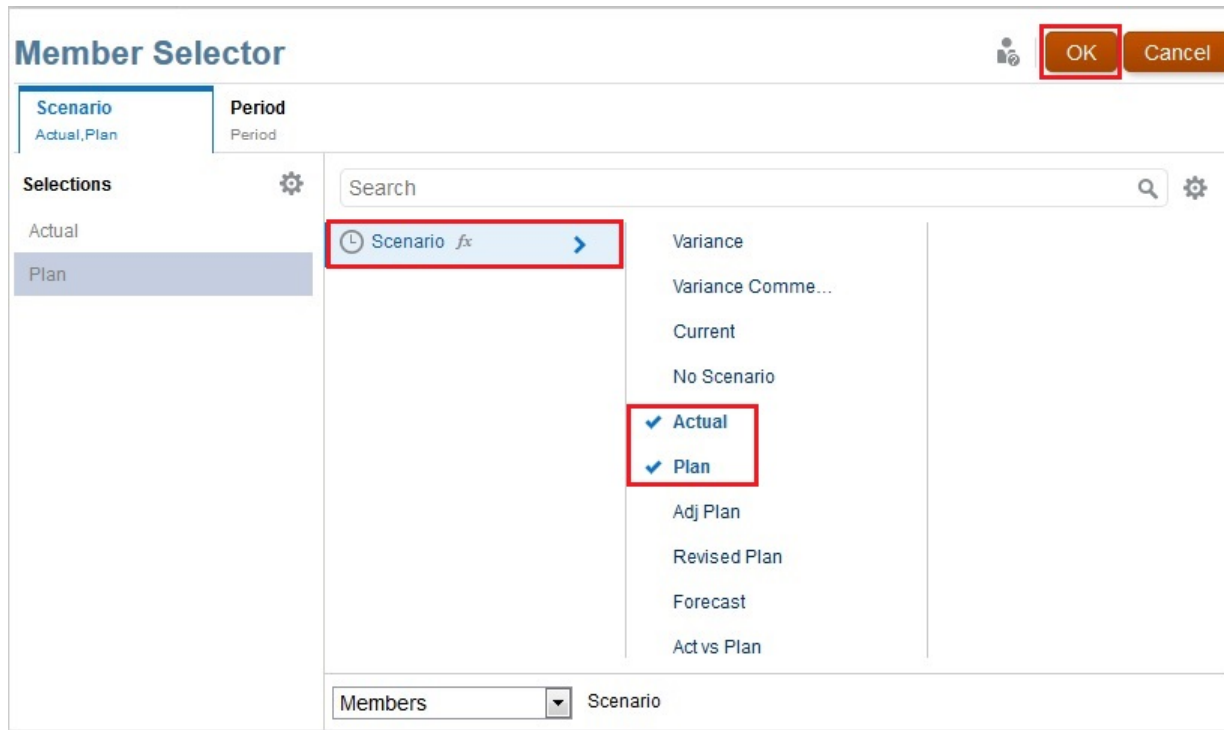


To add members to our sample report:

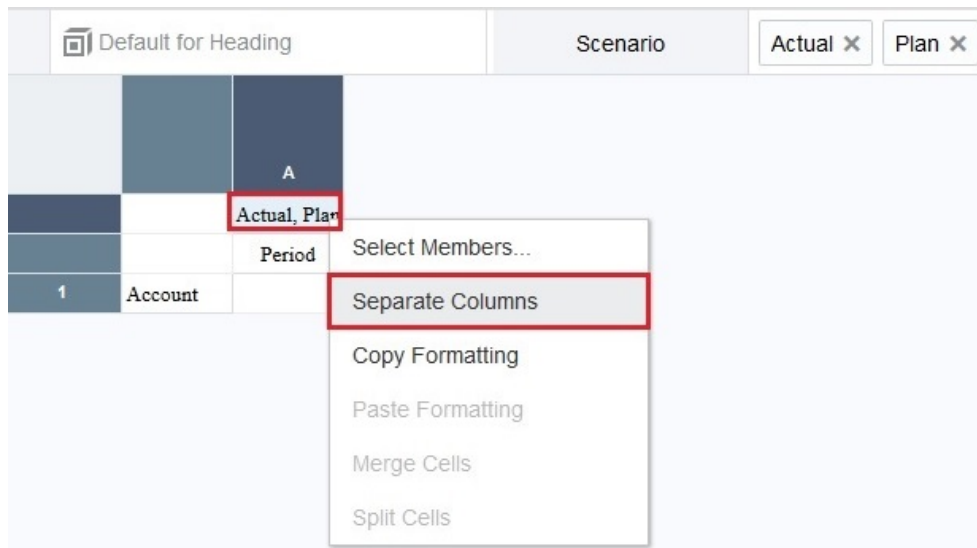
1. Click the **Scenario** cell to display **Scenario** in the member selector on the top of the Report Designer.



2. Right-click **Scenario**, and choose **Select Members** to display the **Member Selector**.
3. In the **Member Selector**, click the check mark next to **Scenario** to deselect it. (We want to select the members of Scenario - not Scenario itself.)
4. Expand **Scenario**, select **Actual** and **Plan**, and click **OK**.



5. Back in the grid, right-click **Actual,Plan**, and select **Separate Columns**.



Actual and **Plan** are now in their own columns.

Default for Heading		Scenario	Actual X
		A	B
		Actual	Plan
		Period	Period
1	Account	#	#

We separated the columns so that we can select different **Period** dimension members for the **Actual** and **Plan** dimensions. In the following steps, we will select **Q1** and **Q2** for the first period, and **Q3** and **Q4** for the second period.

- In column A, right-click **Period**, and choose **Select Members**.

Default for Heading		Period	Period X
		A	B
		Actual	Plan
		Period	Period
1	Account		

Select Members...

Separate Columns

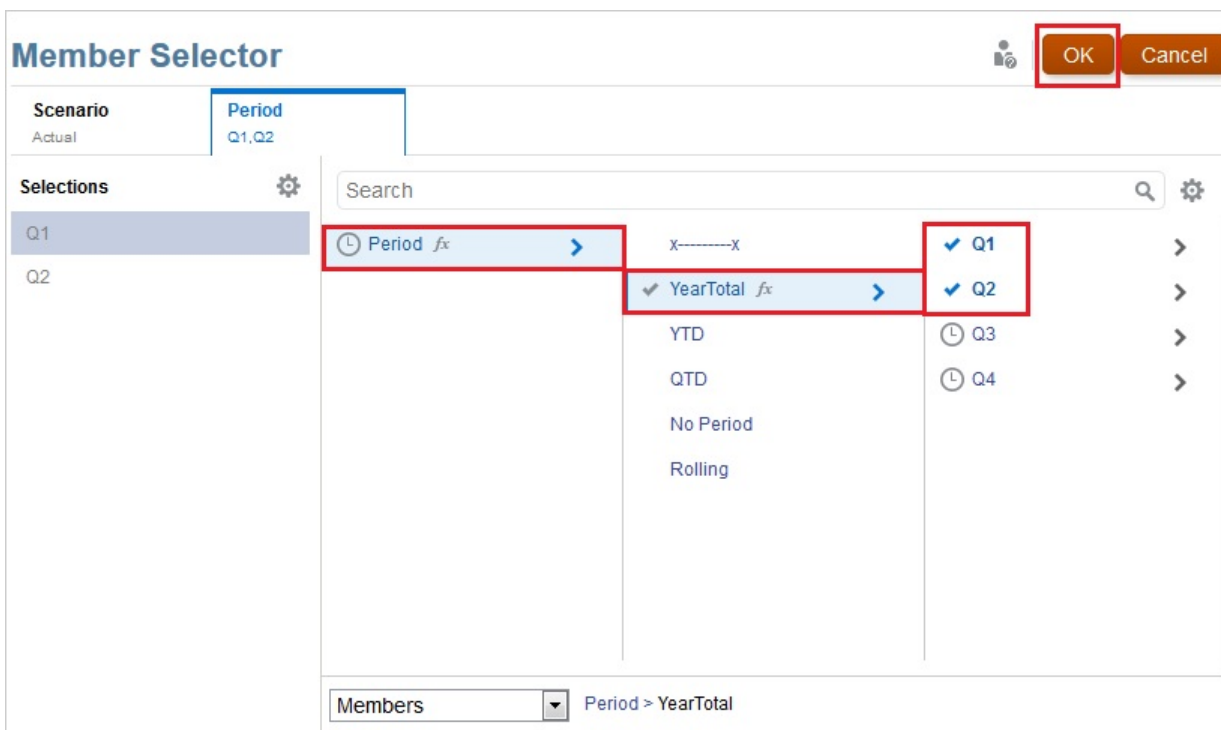
Copy Formatting

Paste Formatting

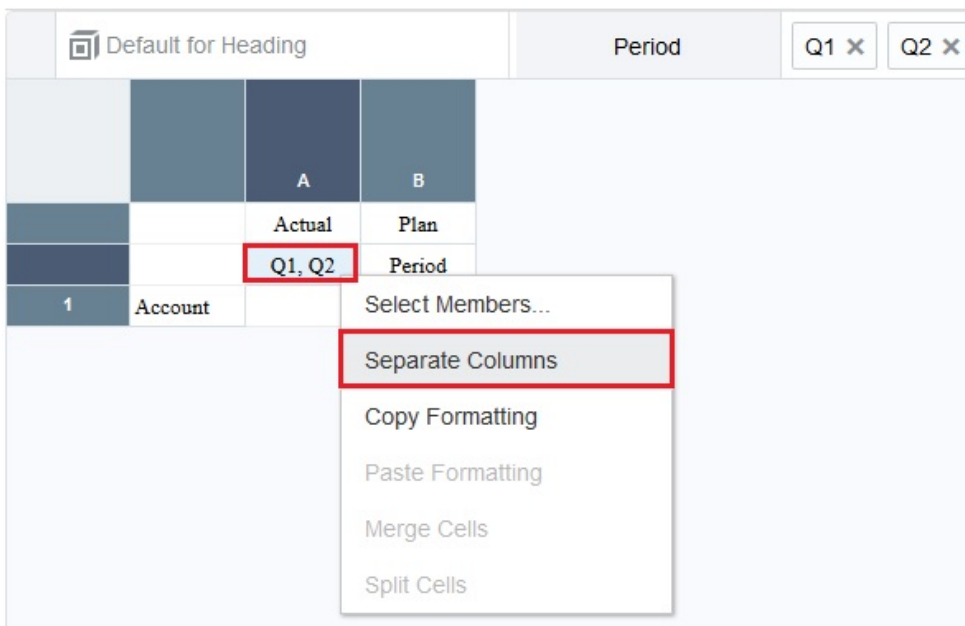
Merge Cells

Split Cells

- In the **Member Selector**, deselect **Period** and then expand it. (We want to select the members of Period - not Period itself.)
- Expand **YearTotal**, then select **Q1** and **Q2**, and then click **OK**.



- In the grid, right-click **Q1, Q2**, and select **Separate Columns**.



We are separating the columns to center the **Scenario** member names across the respective **Period** selections in a later step.

- In column C, right-click **Period**, and then choose **Select Members**.

Default for Heading		Period		
		A	B	C
		Actual	Actual	Plan
		Q1	Q2	Period
1	Account	#	#	

Select Members...
 Separate Columns
 Copy Formatting
 Paste Formatting
 Merge Cells
 Split Cells

11. In the **Member Selector**, deselect **Period** and then expand it.
12. Expand **YearTotal**, then select **Q3** and **Q4**, and then click **OK**.

Member Selector

Scenario
Plan
Period
Q3, Q4
OK

Selections ⚙

Q3

Q4

Search

⌚ Period fx > x-----x

✓ YearTotal fx >

YTD

QTD

No Period

Rolling

⌚ Q1

⌚ Q2

✓ Q3

✓ Q4

Members ▼ Period > YearTotal

13. In the grid, right-click **Q3**, **Q4**, and select **Separate Columns**.

Default for Heading		Period		
		A	B	C
		Actual	Actual	Plan
		Q1	Q2	Q3, Q4
1	Account	#	#	

Select Members...
Separate Columns
 Copy Formatting
 Paste Formatting
 Merge Cells
 Split Cells

Add Some Operating Expenses

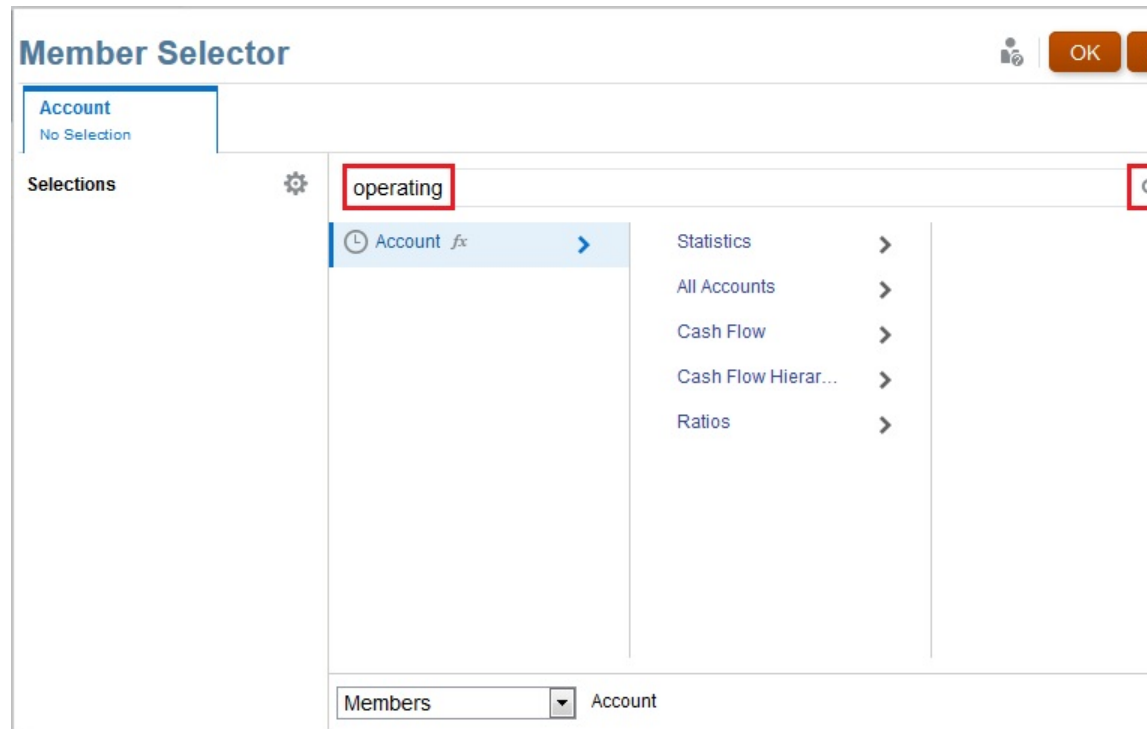
Now we are going to add some operating expenses to the report. To do this, we will open the Member Selector for the Account cell, and search for "operating." We will then drill into the operating expenses hierarchy, and add a function to select the children of the operating expenses before they are allocated. Finally, we will select the total operating expenses.


1. Begin by right-clicking **Account**, and choosing **Select Members**.

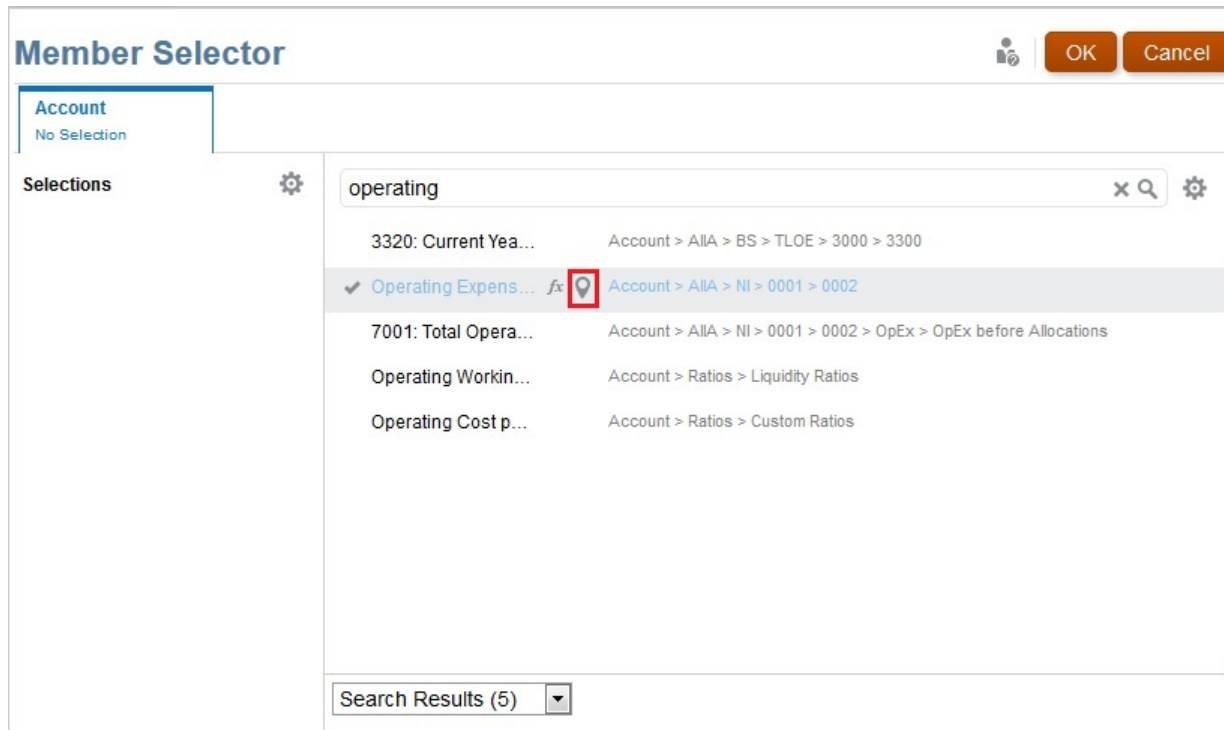
Default for Heading		Account			
		A	B	C	D
		Actual	Actual	Plan	Plan
		Q1	Q2	Q3	Q4
1	Account	#	#	#	#

Select Members...
 Separate Rows
 Copy Formatting
 Paste Formatting
 Merge Cells
 Split Cells

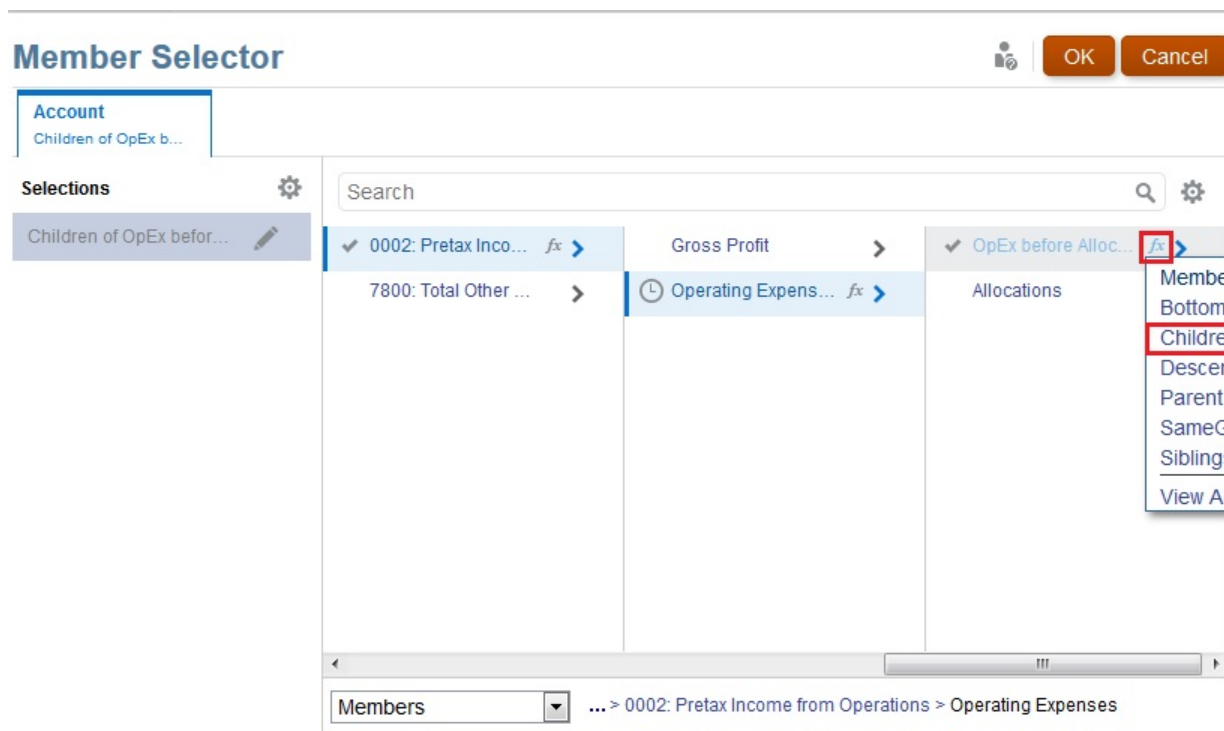
2. In the **Member Selector**, deselect **Account**, and then expand it. (We want to select the members of Account - not Account itself.)
3. Search on "operating".



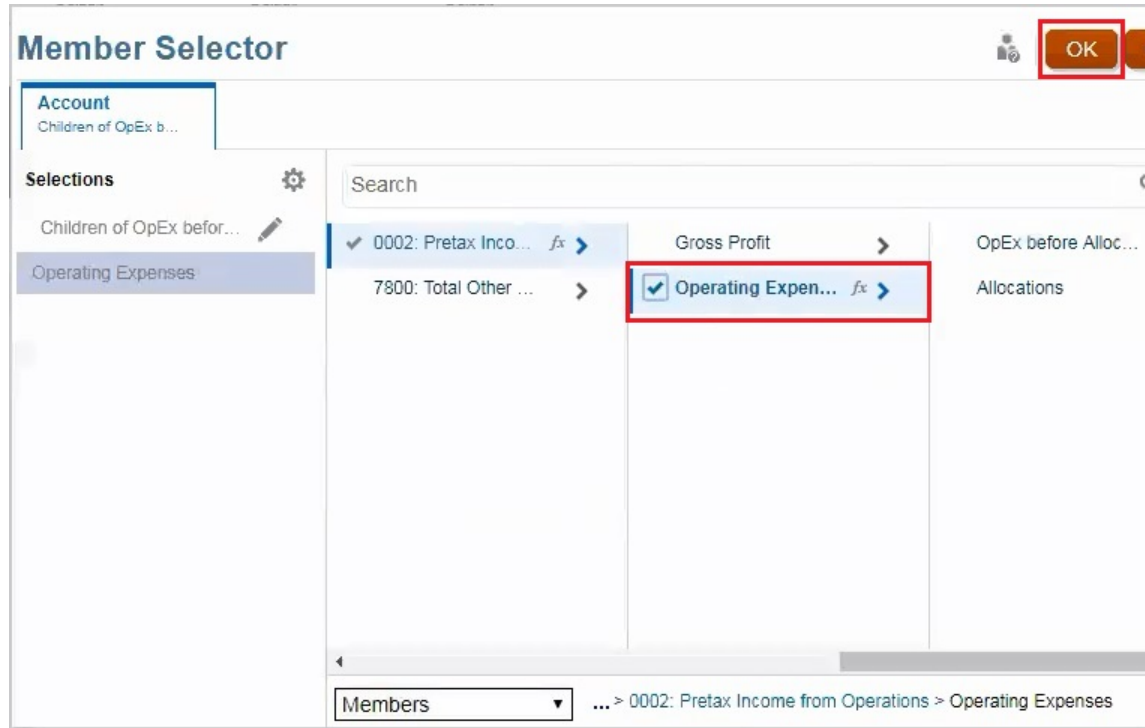
4. The members that meet the "operating" search criteria are displayed. Highlight **Operating Expenses**, and click **Show in Hierarchy**  .



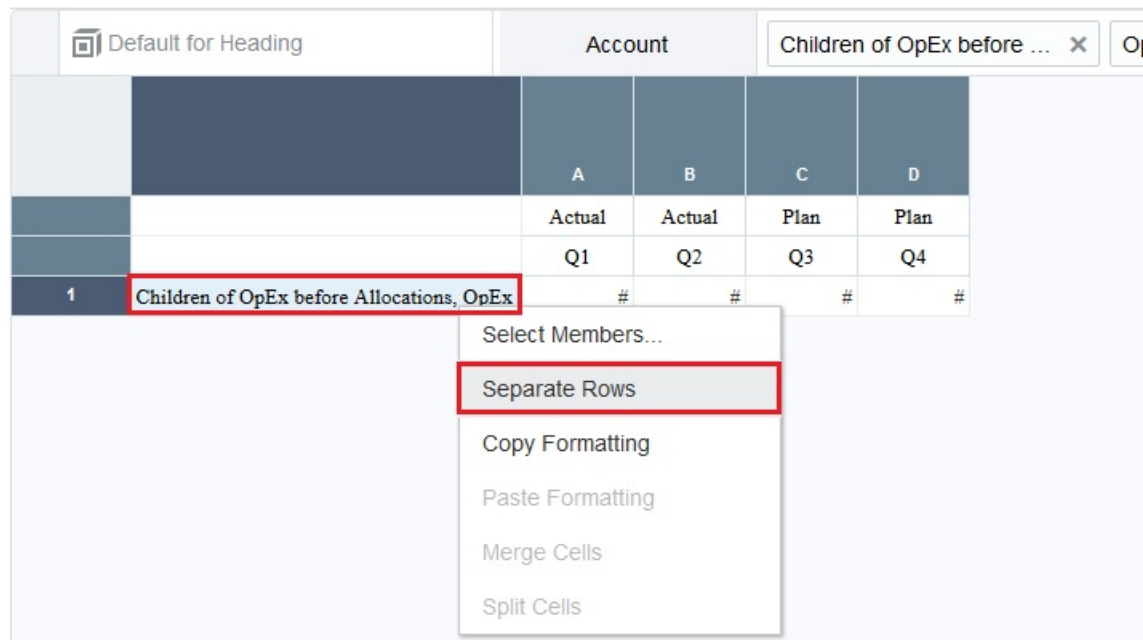
5. Highlight **OpEx before Alloc**, click **Functions** *fx*, and select **Children**.



6. Select **Operating Expenses** under **Gross Profit**, and then click **OK** to close the **Member Selector**.



- In the grid, expand the cell that has **Children of OpEx before Allocation** and **OpEx**. We want to separate these members into their own rows. To do this, right-click the cell, and select **Separate Rows**.



Children of OpEx before Allocations and **OpEx** are now in their own rows.

Grid 1

HSP_View	Year	Version	Entity	Product	
Default	Default	Default	Default	Default	
Default for Heading		Account		Children of OpEx before ...	
		A	B	C	D
		Actual	Actual	Plan	Plan
		Q1	Q2	Q3	Q4
1	Children of OpEx before Allocations	#	#	#	#
2	OpEx	#	#	#	#

We separated the rows so that we can format them differently and add a separator between them. We will do this later on when we format the report.

Select POVs

After you have defined the members for a report, next step is to set up the POVs. In our sample report, we are going to select members for the HSP_View, Year, Version, Entity, and Product POVs. We are also going to select an option that will enable us to print all the selections for the Entity POV. and we are going to hide the dimensions for the HSP_View Version, and Product POVs.

 **Note:**

The following steps show you how to add POVs to the sample report in this Learning Path. Review [Learning About the Point of View](#) for more information on POVs.

To set up the POVs for our sample report:

1. Select the **HSP_View** POV, expand **HSP_View**, and select **BaseData**.

Grid 1

The screenshot shows the 'Grid 1' interface with the following structure:

- HSP_View** (BaseData)
 - Year** (Default)
 - Version** (Default)
 - Entity** (Default)
 - Product** (Default)

The 'Year' dimension is expanded, showing a list of selections: BaseData, FY14, and FY15. The 'BaseData' selection is highlighted. The expanded view shows 'HSP_View' with a checkmark and 'fx' icon, and 'BaseData' with a checkmark and 'fx' icon, highlighted with a red box. Other options include 'ConsolidatedData' and 'SandboxData'. The 'Members' dropdown is set to 'HSP_View'.

2. Select the **Year** POV, expand **Year**, and select **FY14** and **FY15**.

Grid 1

The screenshot shows the 'Grid 1' interface with the following structure:

- HSP_View** (BaseData)
 - Year** (FY14, FY15)
 - Version** (Default)
 - Entity** (Default)
 - Product** (Default)

The 'Year' dimension is expanded, showing a list of selections: FY14 and FY15. The 'FY14' and 'FY15' selections are highlighted. The expanded view shows 'Year' with a checkmark and 'fx' icon, and 'FY14' and 'FY15' with checkmarks and 'fx' icons, highlighted with a red box. Other options include 'FY10', 'FY11', 'FY12', 'FY13', 'FY16', 'FY17', 'FY18', and 'FY19'. The 'Members' dropdown is set to 'Year'.

3. Select the **Version** POV, expand **Version**, and select **Working**.

Grid 1

The screenshot shows the Oracle BI interface with the following settings:

- HSP_View:** BaseData
- Year:** FY14,FY15
- Version:** Working
- Entity:** Default
- Product:** Default

The 'Product' dimension is expanded, and the 'Working' version is selected in the 'Members' list. The 'Children of OpEx before Allocations' and 'OpEx' are visible in the grid.

4. Select the **Product** POV, expand **Product**, and select **TotalProduct**.

Grid 1

The screenshot shows the Oracle BI interface with the following settings:

- HSP_View:** BaseData
- Year:** FY14,FY15
- Version:** Working
- Entity:** Default
- Product:** Total Product

The 'Entity' dimension is expanded, and 'Total Product' is selected in the 'Members' list. The 'Actual' and 'Q1' members are visible in the grid.

5. For the **Entity** POV, we are going to make multiple selections. To do this:

- a. Select the **Entity** POV, and expand **Entity** and **Total Entity**.
- b. Select **Total Department**, then expand it, and then select **Resources, Other Corporate, Sales, Manufacturing, Other Departments, Finance and Acc,** and **HR and Administration**.

Grid 1

HSP_View	Year	Version	Entity	Product
BaseData	FY14,FY15	Working	Total Department,...	Total Product
1			Children of OpEx before Allocations	
2			OpEx	

Selections

- Total Department
- Resources
- Other Corporate
- Sales
- Manufacturing
- Finance and Accounting
- HR and Administration

Search

- Total Entity fx
- Unspecified Entity
- No Entity
- Management Roll

Members

- c. You can render each member of a dimension with multiple members on a separate page when printing to PDF. To do this for the members we selected for Total Department, click **POV Dimension Actions** next to the **Entity** POV, and select **Print All Selections**.

Grid 1

HSP_View	Year	Version	Entity	Product
BaseData	FY14,FY15	Wd		Total Prodi
				Children of OpE
				D
				Plan
				Q4
1			Children of OpEx before Allocations	# # # #
2			OpEx	# # # #

Reset to Default

Hide Dimension

Global Dimension

Display Suggestions Only

Print All Selections

- Click **POV Dimension Actions** next to the **Product** POV, and select **Hide Dimension**. (This hides the dimension in Preview mode.)

Grid 1

HSP_View	Year	Version	Entity	Product
BaseData	FY14,FY15	Working	Res	Total Product
Default for Heading		Account		
		A		
		Actual		
		Q1		
1	Children of OpEx before Allocations		#	#
2	OpEx		#	#

POV Dimension Actions menu for Product:

- Reset to Default
- Hide Dimension
- Global Dimension
- Display Suggestions Only
- Print All Selections

- Hide the dimensions for the **Version** and **HSP_View** POVs.

Note that when you hide a dimension, it is displayed in a lighter font in the POV area at the top of the grid.

HSP_View (BaseData), Year (FY14,FY15), Version (Working), Entity (Total Department,...), Product (Total Product)






Preview the Grid

As you are designing a report, you can preview the grid without having to run the entire report.


To preview the grid for our sample report:

- Click **Preview** .

In this grid, notice that the **Year** and **Entity** are the only POVs that are displayed. (We hid the **HSP_View**, **Version**, and **Product** POVs).

Grid 1      Save | Close

Year	Entity				
FY14	Total Department				
		Actual	Actual	Plan	Plan
		Q1	Q2	Q3	Q4
6000: Total Employee Expenses		623,125	618,452	625,729	642,542
7001: Total Operating Expenses		9,475,716	9,368,732	7,247,970	7,477,778
7300: Total Depreciation & Amortization		1,837,392	1,891,918	1,903,046	1,843,344
Operating Expenses		11,936,233	11,879,103	9,968,842	10,155,761



2. Try clicking the **Year** and **Entity** POVs at the top of the grid and selecting different members to see how the data in the grid changes. For the final display, make sure that **FY14** is selected for **Year** and **Total Department** is selected for **Entity**.
3. When you are finished previewing the grid, click **Edit**  to return to edit mode.

Add Report Formatting

You can add formatting to make your report more interesting. In our sample report, we are going to bold some of the headings, add a separator to add some space between the rows, add a formula to sum all the results in the report, add a custom heading, merge the cells that contain duplicate data, and add some borders and shading.

Note:

The following steps show you how to add formatting to the sample report in this Learning Path. Review [Formatting Grid Cells](#) for more information on formatting cells.

1. Let's begin by adding bold formatting to the heading cells. To do this, select the **Actual**, **Plan**, **Q1**, **Q2**, **Q3**, and **Q4** cells, click **Cell** , and then click **Bold** .

Grid 1

HSP_View Year Version Entity Product
BaseData FY14,FY15 Working Resources,Other C... Total Product

Multiple

		A	B	C	D
		Actual	Actual	Plan	Plan
		Q1	Q2	Q3	Q4
1	Children of OpEx before Allocations	#	#	#	#
2	OpEx	#	#	#	#

Cell

Font and Alignment

Font Default - "Liber...

Size

B I S U [Color]

Vertical Alignment

Horizontal Alignment

Reverse for right to left languages

Indent

Zoom Grid

Border and Shading

Border

Shading

Replace Text



Reset

2. Insert a separator to add a blank row above the **OpEx** row. To do this, select the **OpEx** row, click the drop-down arrow by the row number, and select **Insert Before**, and then **Separator**.

Grid 1

HSP_View	Year	Version	Entity		Product	
BaseData	FY14,FY15	Working	Resources,Other C...		Total Product	
			A	B	C	D
			Actual	Actual	Plan	Plan
			Q1	Q2	Q3	Q4
1	Children of OpEx before Allocations		#	#	#	#
2	OpEx		#	#	#	#

A context menu is open over the 'OpEx' row (row 2). The menu items are: Copy, Move, Copy Formatting, Delete, Insert Before, Insert After, and Select Members... The 'Insert Before' option is highlighted with a red box, and its sub-menu is also open, showing 'Separator' as the selected option.

3. Bold the **OpEx** row. To do this, click the header cell for the row (the cell with number 3) to select the entire row, then click **Cell** , and then click **Bold** .

Grid 1

HSP_View	Year	Version	Entity		Product	
BaseData	FY14,FY15	Working	Total Department,...		Total Product	
			A	B	C	D
			Actual	Actual	Plan	Plan
			Q1	Q2	Q3	Q4
1	Children of OpEx before Allocations		#	#	#	#
2						
3	OpEx		#	#	#	#

The 'OpEx' row (row 3) is highlighted with a red box, indicating it is selected.

4. Add a formula to sum all the results in the report. To do this, click the drop-down arrow for column D, and select **Insert After**, and then **Formula**.

Grid 1

HSP_View	Year	Version	Entity	Product			
BaseData	FY14,FY15	Working	Resources,Other C...	Total Product			
			A	B	C	D	
			Actual	Actual	Plan	Plan	
			Q1	Q2	Q3	Q4	
1	Children of OpEx before Allocations		#	#	#		
2							
3	OpEx		#	#	#		

Context menu for column D:

- Copy
- Move
- Copy Formatting
- Delete
- Insert Before
- Insert After**
- Select Members...


Sub-menu for 'Insert After':

- Data
- Formula**
- Text
- Separator

5. In the newly-created column E, click in the top heading cell; then, in the formula bar, click **Formula Functions** Σ , and select **SUM()**.

Grid 1




HSP_View		Year	Version	Entity	Product
BaseData		FY14,FY15	Working	Resources,Other C...	Total Product
+ Formula for Heading		Enter a Formula			
		A	B	C	D
		Actual	Actual	Plan	Plan
		Q1	Q2	Q3	Q4
1	Children of OpEx before Allocations	#	#	#	#
2					
3	OpEx	#	#	#	#

6. Enter the sum as **SUM([a:d])**, and then click **Accept** .

+ Formula for Heading		SUM([a:d])			
-----------------------	--	------------	--	--	--

The formula is now displayed in the grid.

+ Formula for Heading		SUM([a:d])			
		A	B	C	D
		Actual	Actual	Plan	Plan
		Q1	Q2	Q3	Q4
1	Children of OpEx before Allocations	#	#	#	#
2					
3	OpEx	#	#	#	#

7. Click **Formula for Heading** , and select **Custom Heading** to make the cell heading blank.
8. Place your cursor in column E on the **Q1, Q2, Q3, Q4** row, and next to the  button type in the custom heading "Total Year", and click **Accept** .

		Total Year					
		A	B	C	D	E	
		Actual	Actual	Plan	Plan		
		Q1	Q2	Q3	Q4		
1	Children of OpEx before Allocations	#	#	#	#		=#
2							
3	OpEx	#	#	#	#		=#

Total Year is now displayed as a heading in the grid.

		Total Year					
		A	B	C	D	E	
		Actual	Actual	Plan	Plan		
		Q1	Q2	Q3	Q4	Total Year	
1	Children of OpEx before Allocations	#	#	#	#		=#
2							
3	OpEx	#	#	#	#		=#

9. Merge the repeating "Actual" and "Plan" Scenario labels.
To do this, select the two **Actual** cells, then right-click the cells, and select **Merge Cells**.




		A	B	C	D	E
		Actual	Actual	Plan	Plan	
		Q1	Q2			
1	Children of OpEx before Allocations	#				=#
2						
3	OpEx	#				=#

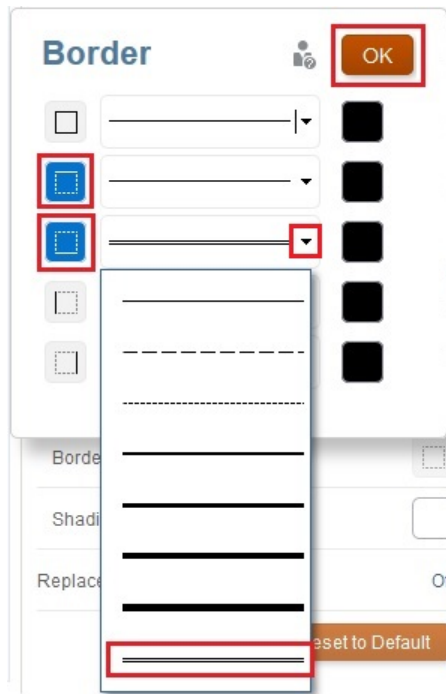
Do the same for the two **Plan** cells.


		A	B	C	D	E
		Actual		Plan	Pl	
		Q1	Q2	Q3	Q4	
1	Children of OpEx before Allocations	#	#	#	#	=#
2						
3	OpEx	#	#	#	#	=#

10. On row 3, select the # cells.

		A	B	C	D	E
		Actual		Plan		
		Q1	Q2	Q3	Q4	Total Year
1	Children of OpEx before Allocations	#	#	#	#	=#
2						
3	OpEx	#	#	#	#	=#

11. In the **Cell** properties on the right, under **Border and Shading**, click **Border** , and select the **Top**  and **Bottom**  options. In the **Bottom** option, select a double underline, and then click **OK**.



- Click **Preview**  to preview the grid. You can see that it looks better with the formatting we have done.

Grid 1

Year	Entity	Actual		Plan		Total Year
FY14	Total Department	Q1	Q2	Q3	Q4	
6000:	Total Employee Expenses	623,125	618,452	625,729	642,542	2,509,848
7001:	Total Operating Expenses	9,475,716	9,368,732	7,247,970	7,477,778	33,570,196
7300:	Total Depreciation & Amortization	1,837,392	1,891,918	1,903,046	1,843,344	7,475,700
Operating Expenses		11,936,233	11,879,103	9,968,842	10,155,761	43,939,938

- Click **Save** to save the report, enter a name for the report, and then click **Close** to return to the Report Designer.

Add a Chart

Let's add a chart to show the operating expenses for Quarter 1.

 **Note:**

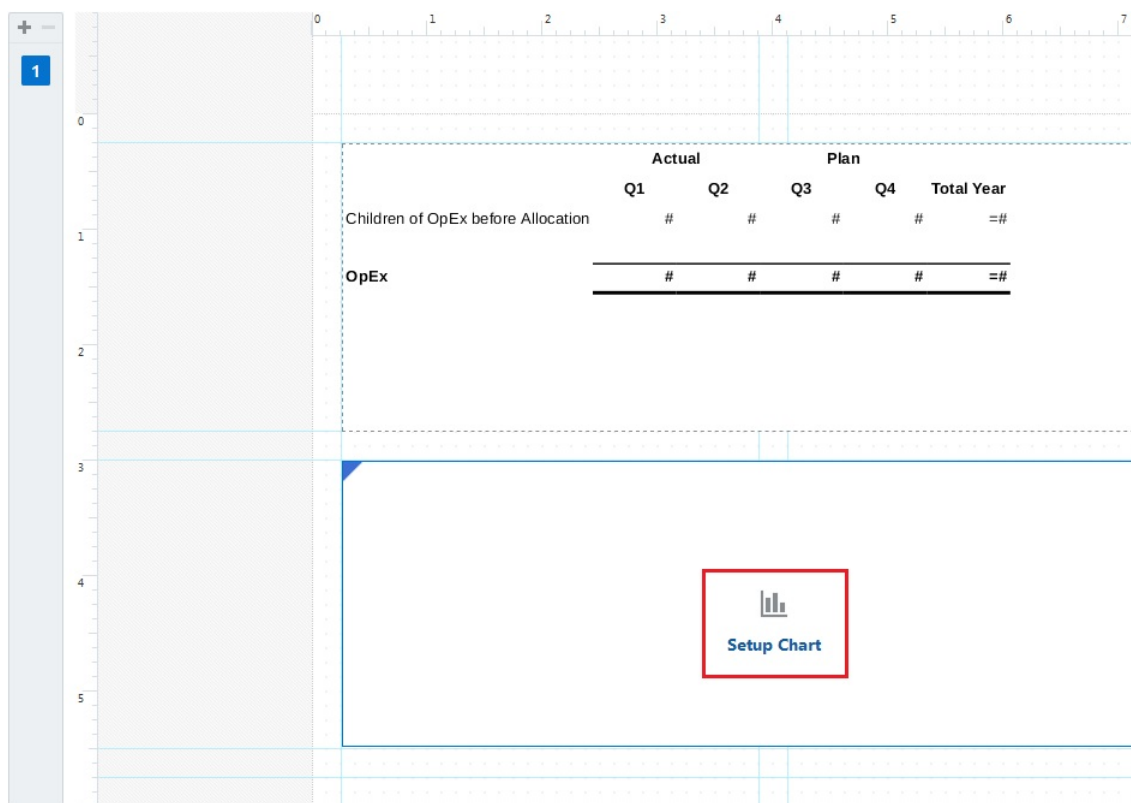
The following steps show you how to add a chart to the sample report in this Learning Path. Review these topics for more information on charts:

[Creating Charts in Oracle Enterprise Performance Reporting Cloud](#) (video)

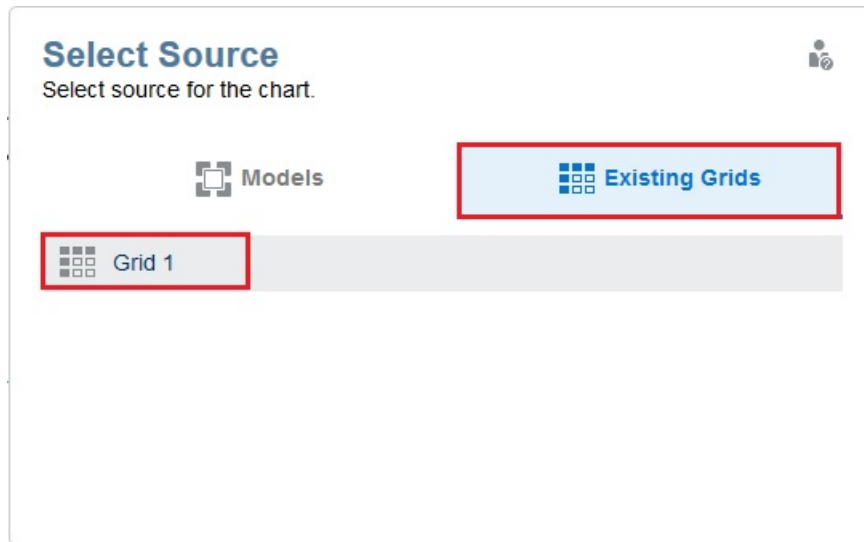
[Working With Charts](#) (doc)


To add a chart to our sample report:

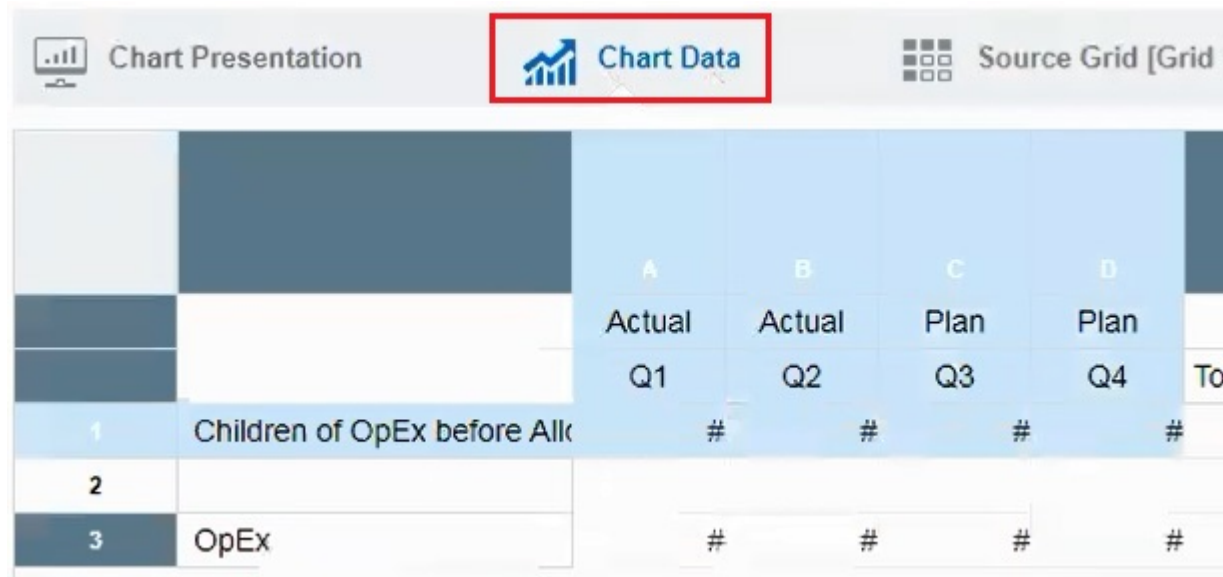
1. Scroll down to the area below the grid you created, right-click and select **Add Report Content**, and then select **Chart**.
2. Expand the chart area, and click **Setup Chart**.







3. One of the benefits of Management Reporting is that when you are creating charts, you can either select an existing grid or you can choose a model or cube and create a grid. In this example, select **Existing Grids**, and then select **Grid 1**.




4. The Chart Editor shows a simple bar chart based on the data in the grid. In the chart **General** properties on the right, click  to view the different types of charts you can create.
5. Click **Chart Data**, and select these rows and columns:



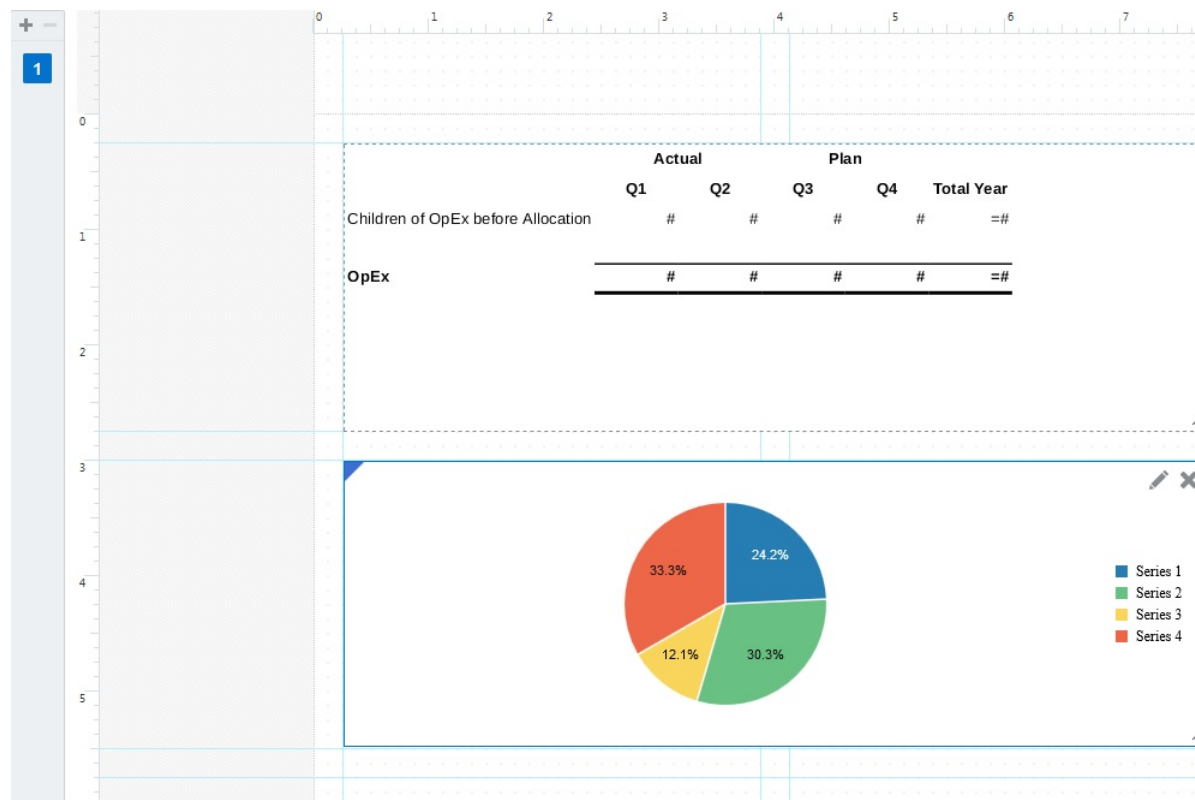
6. Click **Preview**  to preview the chart.
7. Let's change the chart type. To do this, click **Edit**  to return to the **Chart Data** view. In the chart **General** properties on the right, click , and then select **Pie**

 . Since pie charts typically display just one column of data for the point of view, change selected columns to Q1 in column A.

		A	B	C	D
		Actual	Actual	Plan	Plan
		Q1	Q2	Q3	Q4
1	Children of OpEx before Allocation	#	#	#	
2					
3	OpEx	#	#	#	

8. Click **Preview**  to preview the chart.
9. Click **Close** to return to the Report Designer.

The chart is displayed in the Report Designer as follows:



Add a Text Object

Text objects are Management Reporting report objects that can contain text and text functions. In our sample report, we will add a text object for Vision Operations that displays the report description and Entity and POV selections. To create this text object, we will type in text and also enter text functions that retrieve the report description and the year. Finally, we will move and resize the area containing the text.

 **Note:**

The following steps show you how to add a text box to the sample report in this Learning Path. Review these topics for more information on working with text boxes:

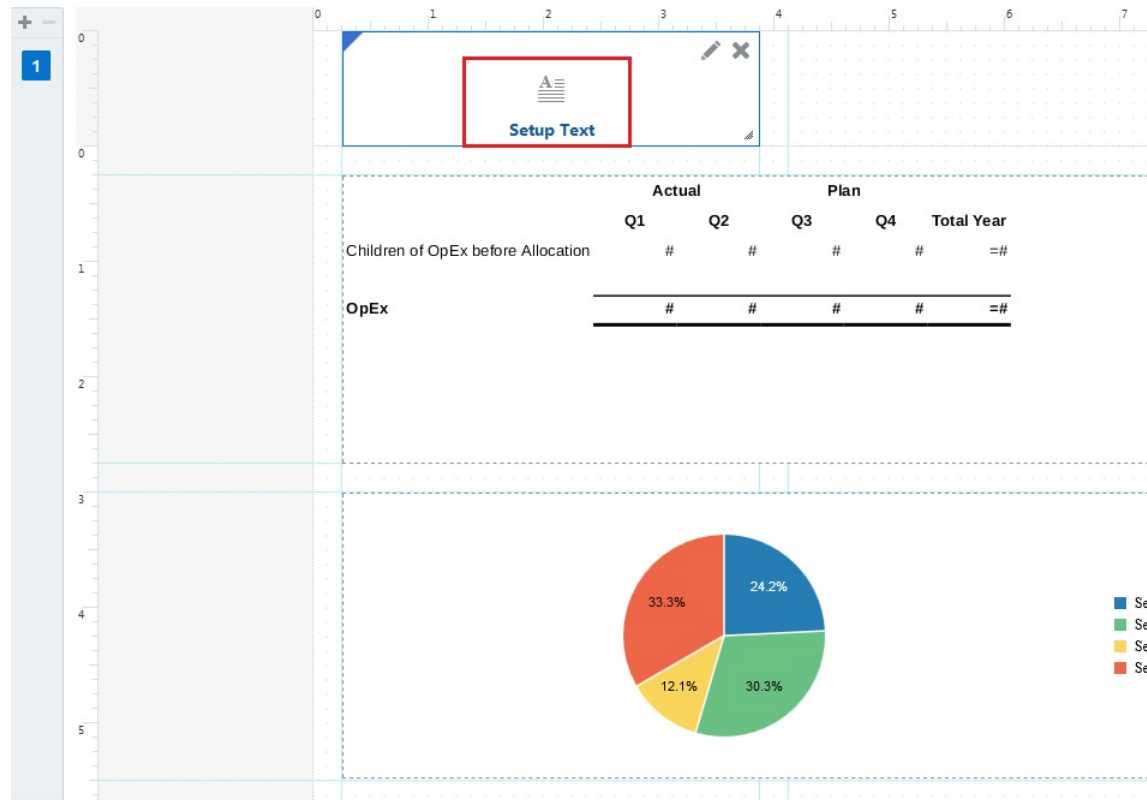
[Adding Objects to Management Reports in Oracle Enterprise Performance Reporting Cloud \(video\)](#)

[Adding a Text Box \(doc\)](#)

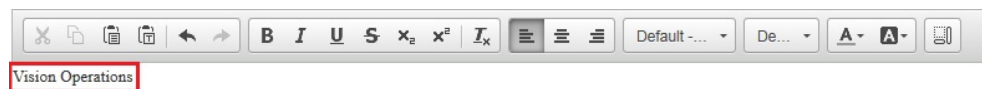
[Formatting Text Boxes \(doc\)](#)

To add a text object to our report:

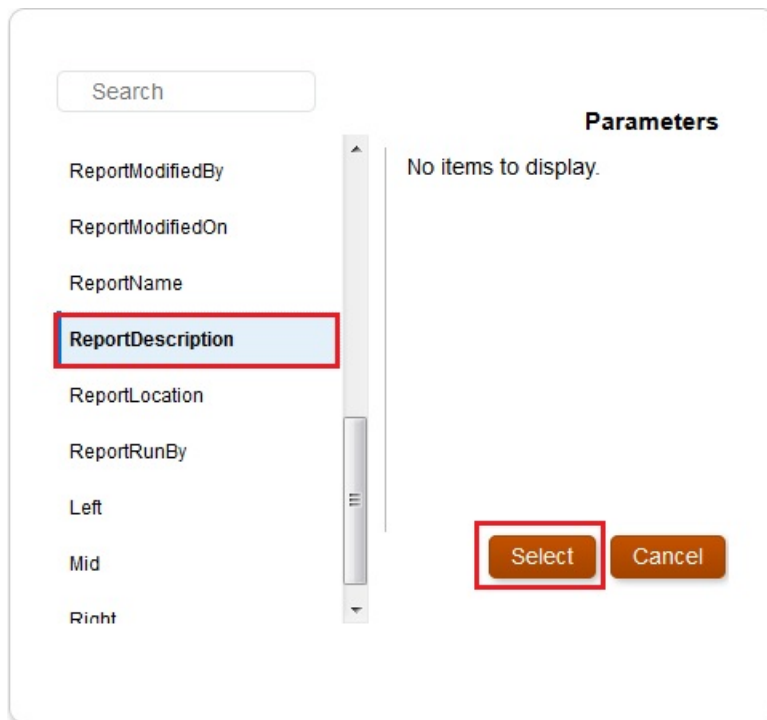
1. Scroll above the grid in the Report Designer, right-click and select **Add Report Content**, and then select **Text**.
2. Expand the text area, and click **Setup Text**.



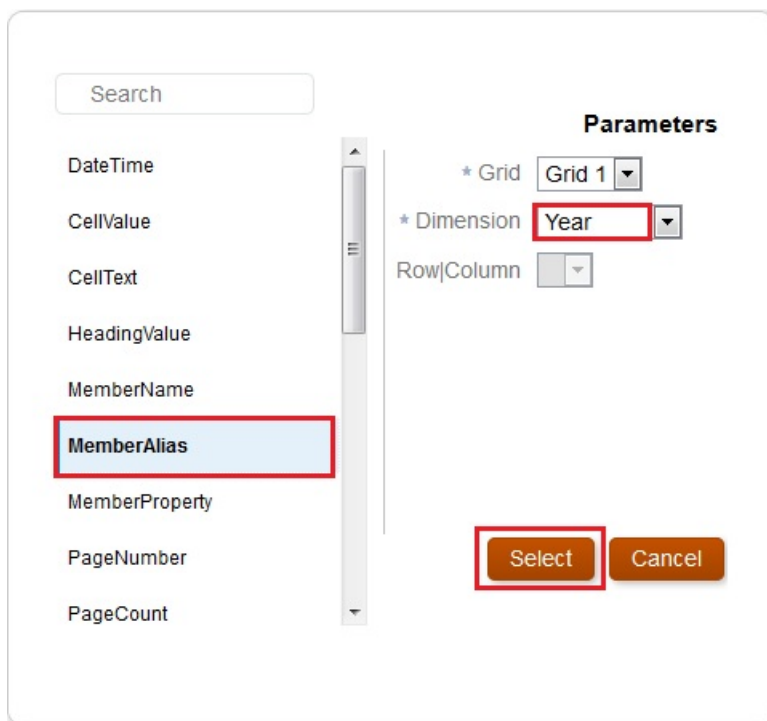
3. In the text editor, type in **Vision Operations** and press Enter.



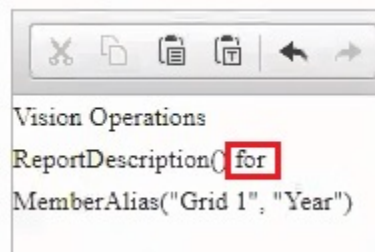
4. Make sure that your cursor is on the line below "Vision Operations", click **Text Functions** *fx*, and select the **ReportDescription** function. Click **Select** to insert the function into the text box.



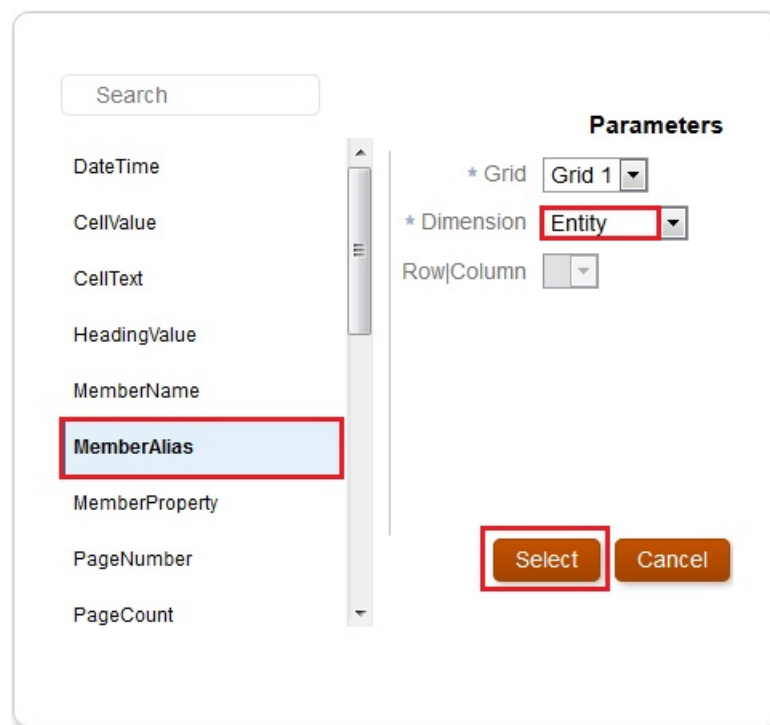
5. On the next line, click **Text Functions** ^{*fx*} again, select the **MemberAlias** function, and select **Year** to display the current year. Click **Select** to insert the function into the text box.



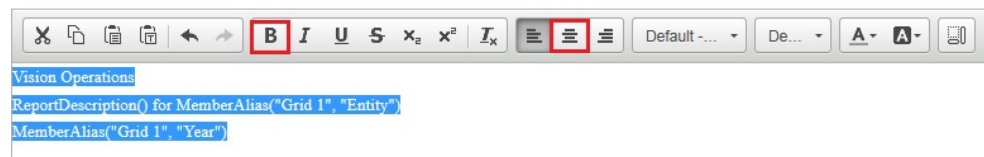
6. Put your cursor next to **ReportDescription()** and type in **for**.



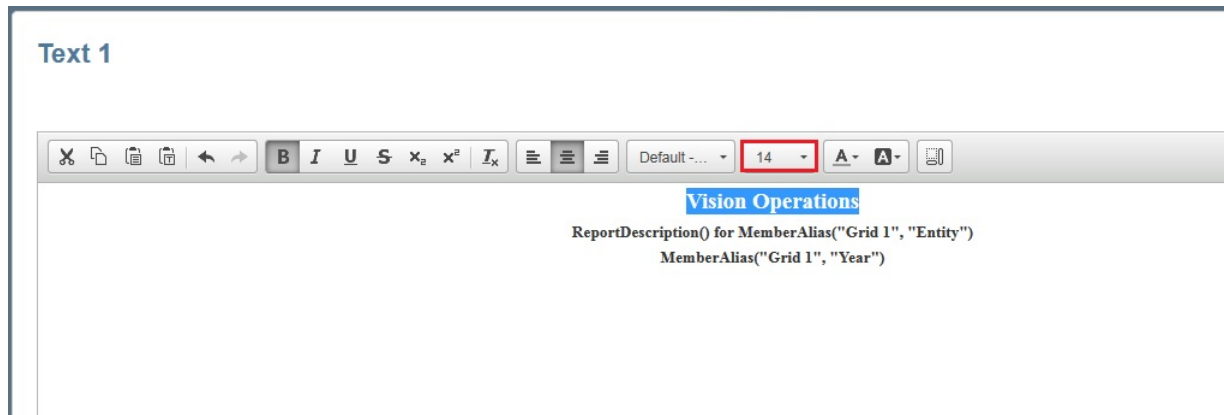
7. After **for**, click **Text Functions** ^{*fx*}, select the **MemberAlias** function, and select **Entity**. Click **Select** to insert the function into the text box.



8. Select the text in the designer, make it bold, and center it.

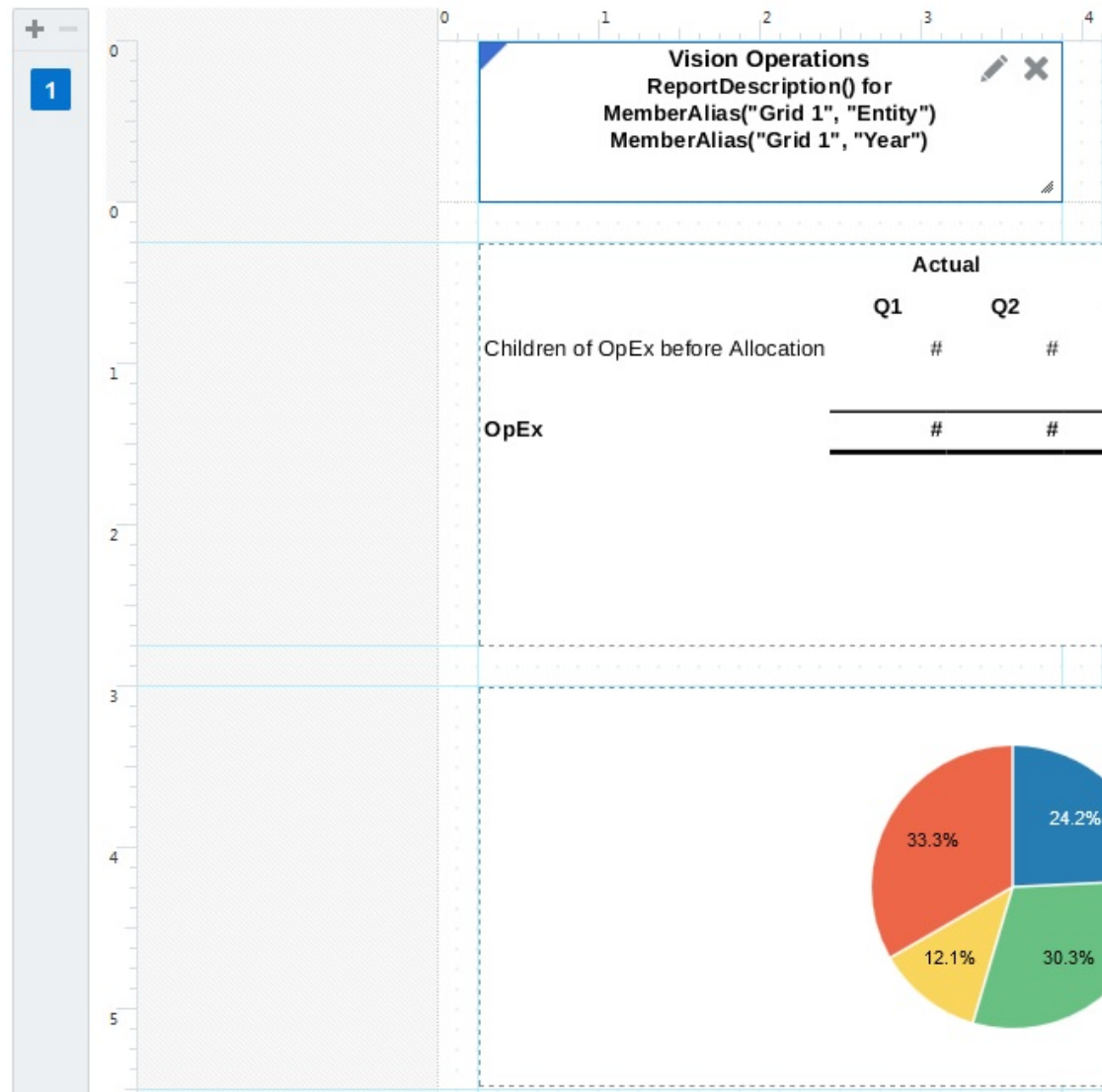


9. Change the font size for "Vision Operations" to be **14**, and click **Close** to close the text designer.




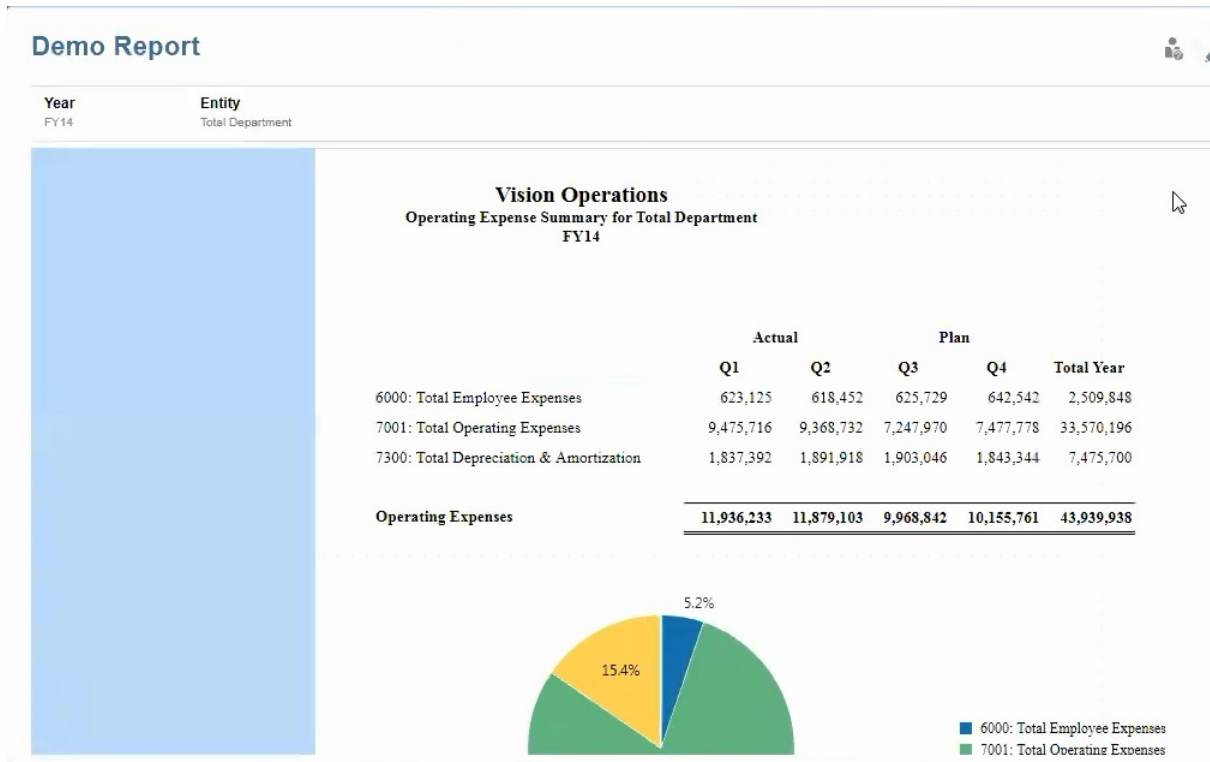
10. Back in the Report Designer, add "Operating Expense Summary" as a description in the **General** properties on the right of the Designer, and then click **Save** to save the report.


Demo Report

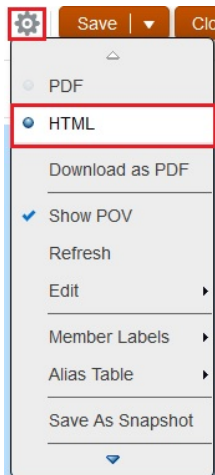


Preview the Finished Report

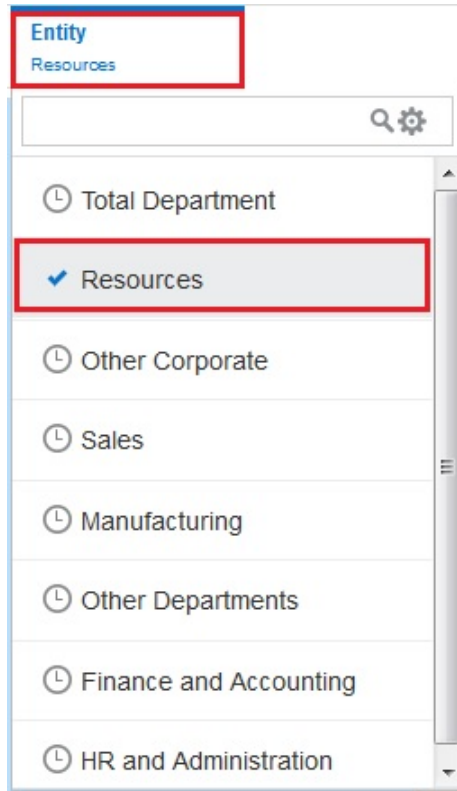
1. Click **Preview**  to preview the finished report. Notice the report shows the Operating Expenses Summary for the Total Department.



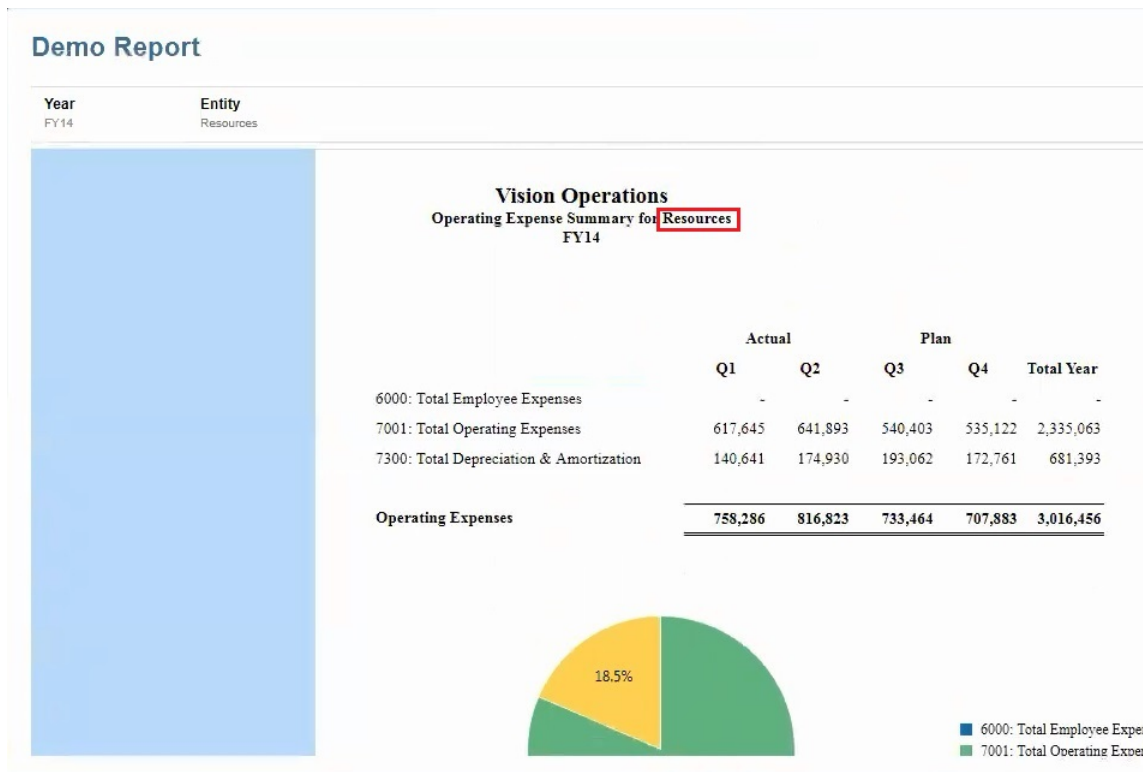
2. Click **Report Actions** , and make sure **HTML** is selected.



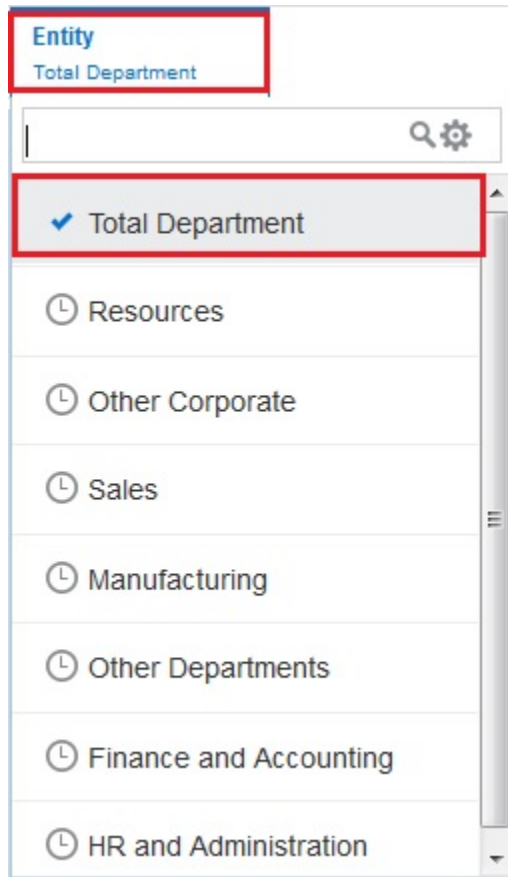
3. Click the **Entity** POV, and select **Resources** to change the report view.




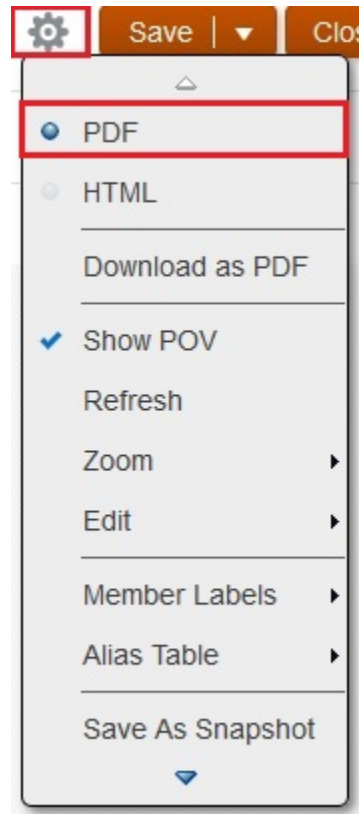
4. Notice that the report now shows the Operating Expenses Summary for **Resources**.



5. Click the **Entity** POV, and change the report view back to **Total Department**.



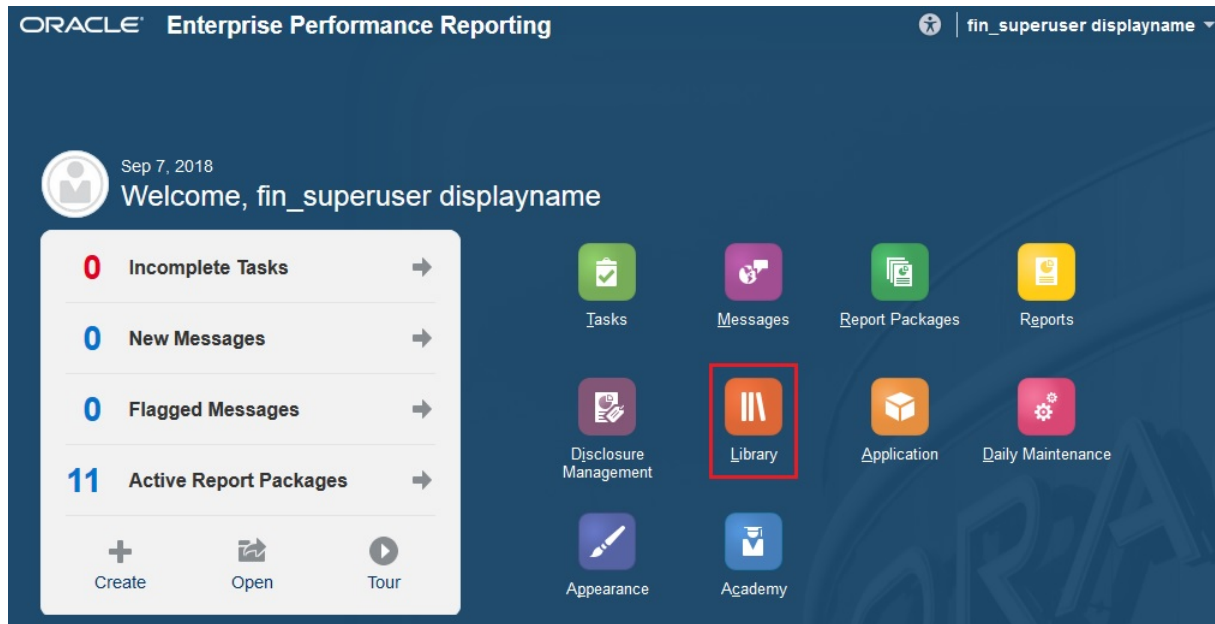
6. Click **Report Actions** , select PDF, and scroll through the pages of the report.




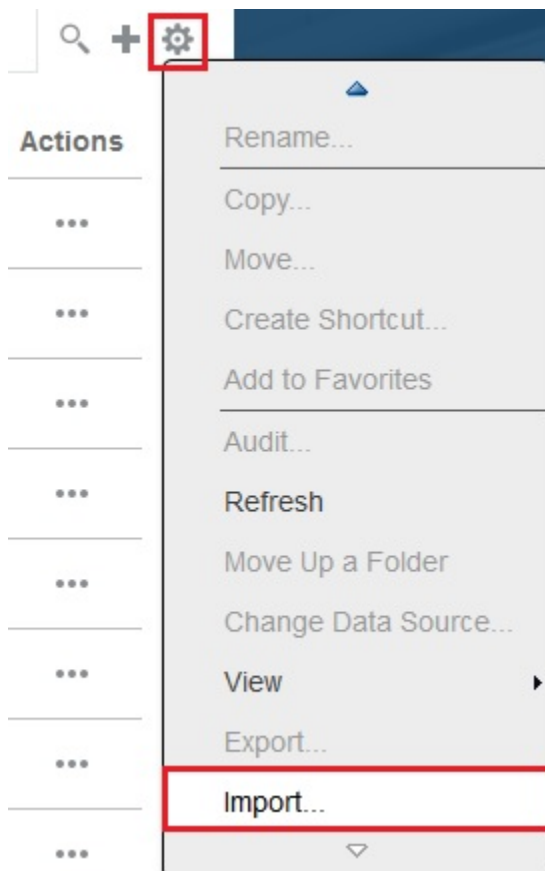
Import a Report

To import a sample report similar to the one that was created using the steps in this Learning Path:

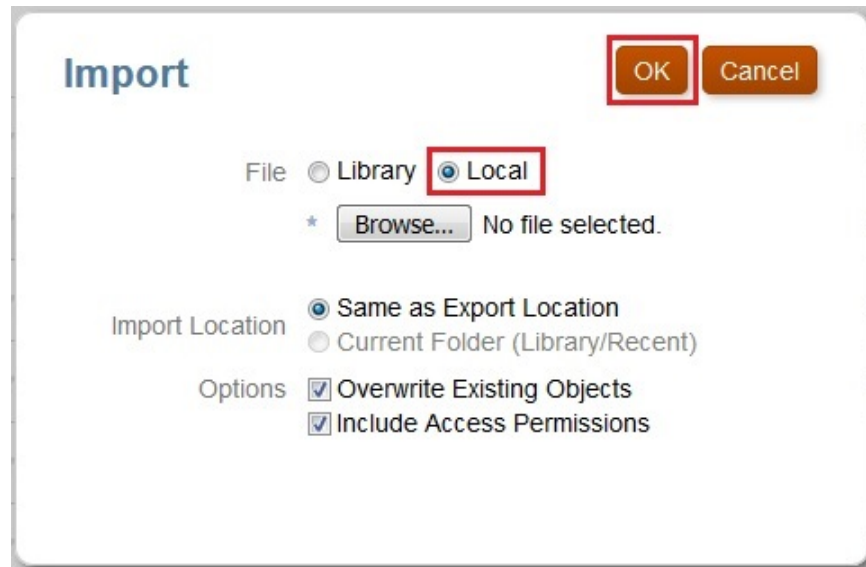
1. Download the **PBCS Operating Expenses Summary.zip** file from the Learning Path to your local drive.
2. From the Enterprise Performance Reporting Home page, click **Library**.



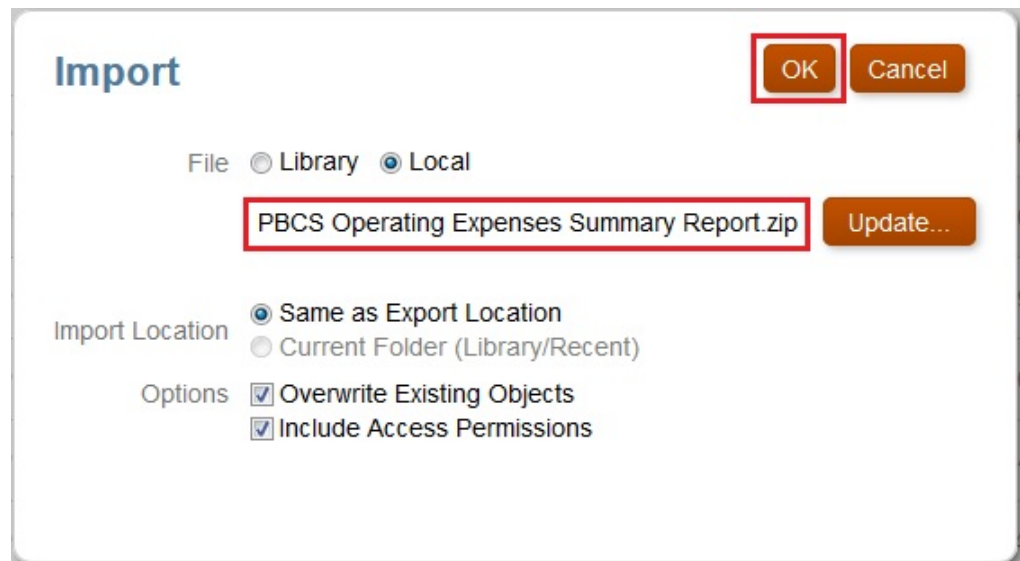
3. Click **Actions** , and then select **Import**.



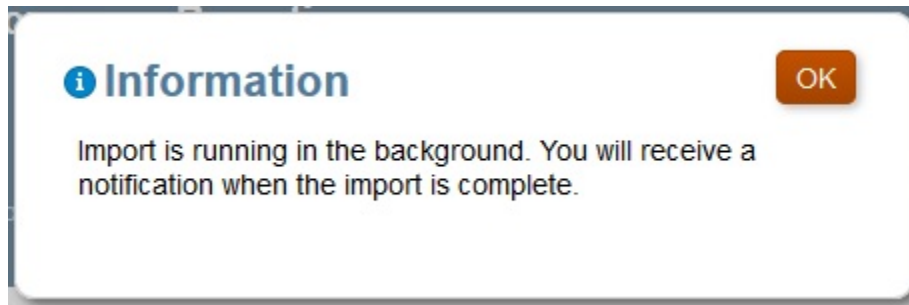
4. In the **Import** dialog box, select **Local**, and click **Browse**.



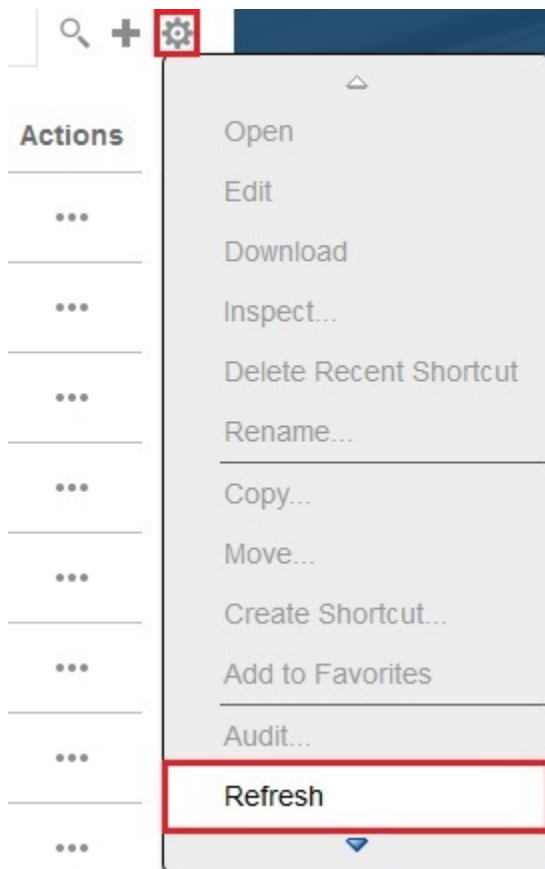
5. Select the **PBCS Operating Expenses Summary Report.zip** file that you have saved to your local drive, and click **Open**.
6. Click **OK** to begin the import process.



7. Click **OK** in the **Information** dialog box.



8. Click **Actions** , and then select **Refresh**.



The **PBCS Operating Expense Summary Report.zip** is displayed in the library.

The screenshot displays the Oracle Reports Library interface. On the left, a sidebar contains a 'Library' section with various categories like 'Recent', 'Favorites', 'My Library', 'Audit Logs', 'Report Packages', 'Application', 'Fonts', 'Data Sources', 'Reports', 'Disclosure Management', '10Q 10K', and '302 and 404 Reporting'. Below this is a 'User Libraries' section with a 'Select User' option. The main area is titled 'Recent' and shows a table of reports. The report 'PBCS Operating Expense Summary' is highlighted with a red border.

Name	Type	Last
★ Import Process Status - 09-10-20	File	Sep 1
★ PBCS Operating Expense Summary	Report	Sep 1
★ Income Statement - Act vs Plan	Report	Aug 6
★ Sample Application	Application	Aug 2
★ Sample Management Reports.zip	File	Jul 23
★ Vision Quarterly Business Review	Report Package	Jun 5
★ KScope18 WFP Salary Detail	Report	Jun 4
★ Monthly Mgmt Review	Report Package	May 2
★ 302 and 404 Reporting	Report Package	May 2