Oracle® Cloud
Working with Oracle Smart View for Office (Mac and Browser)
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Introduction to Smart View (Mac and Browser)

Related Topics

- **Overview of Smart View (Mac and Browser)**
  Oracle Smart View for Office provides a common Microsoft Office interface designed specifically for Oracle's Enterprise Performance Management (EPM) and Business Intelligence (BI) solutions.

- **Supported Data Sources**
  Smart View (Mac and Browser) currently supports four Oracle Enterprise Performance Management Cloud data sources.

- **Smart View (Mac and Browser) Components**
  The basic components of Oracle Smart View for Office (Mac and Browser), from which you connect to your data source and access Smart View functionality, are the Smart View ribbon and the Smart View Home panel.

- **Deploying Smart View**
  Smart View (Mac and Browser) is hosted in the Oracle Enterprise Performance Management Cloud environment and administrators deploy it to their Office 365 users.

Overview of Smart View (Mac and Browser)

Oracle Smart View for Office provides a common Microsoft Office interface designed specifically for Oracle’s Enterprise Performance Management (EPM) and Business Intelligence (BI) solutions.

Using Smart View, you can view, import, manipulate, distribute and share data in Microsoft Excel, Word and PowerPoint interfaces. It is a comprehensive tool for accessing and integrating EPM and BI content from Microsoft Office products.

Microsoft Office 365 refers to subscription plans that include access to Office applications plus other productivity services that are enabled over the Internet (cloud services) in addition to access to desktop versions.

Smart View (Mac and Browser) provides an interface between Oracle’s EPM Cloud solutions and Microsoft Office 365 deployed in a web browser on either Windows or Mac systems. Specifically the Chrome browser on Windows/Mac and Safari on the Mac are supported. Other platforms and devices are planned for a future release.

Smart View (Mac and Browser) was developed because the existing Smart View add-in infrastructure supports only Windows desktop deployments and the Smart View (Mac and Browser) deployment aligns more closely with Microsoft Office 365. Other benefits include:

- Multi-platform support
- Ease of deployment and maintenance
• Frequent cloud updates
• Zero client footprint; no maintenance for end users
• Highly customizable user interface and deployment

Smart View (Mac and Browser) supports most of the features in Excel *ad hoc analysis* and *forms*. The following high-level features are included:

• Ad hoc analysis operations such as: Zoom, Pivot, Keep/Remove only, as well as Submit, Range Operations, Analyze/Free Form and Formula Preservation
• Form operations such as: Form Open and Refresh, Submit from Forms, Expand/Collapse, Supporting Details, Mass Allocate, Job Console, Copy Version, Business Rules, and Analyze
• Options and Styles
• Member Selection and POV
• Drill Through
• Saving ad hoc grids as forms, including saving formatting
• Saving ad hoc grids as Smart Forms, including saving formatting
• Spreading, Grid Spread, Cell Locking, and Mass Allocation

Watch this overview video to learn about using basic features in Smart View (Mac and Browser).

![Overview video](image)

Some Smart View features are currently not available in Smart View (Mac and Browser), such as:

• Functions
• Copy and paste data points
• Task lists
• Application building and maintenance
• Double-click on member or data cells is not supported. Instead, use ribbon commands to accomplish tasks, such as zoom-in.
• Word and PowerPoint functionality

### Supported Data Sources

Smart View (Mac and Browser) currently supports four Oracle Enterprise Performance Management Cloud data sources:

• Planning
• Financial Consolidation and Close
• Tax Reporting
• Planning Modules
Smart View (Mac and Browser) Components

The basic components of Oracle Smart View for Office (Mac and Browser), from which you connect to your data source and access Smart View functionality, are the Smart View ribbon and the Smart View Home panel.

Smart View Ribbon

The Smart View ribbon contains commands for common Smart View operations and is always present.

Administrators: The commands that display on the ribbon depend on selections you make when creating the manifest file. See Deploying and Administering Oracle Smart View for Office (Mac and Browser) for information on creating, customizing, and deploying the manifest file.

Smart View Home Panel

The Smart View Home panel is displayed on the right side of the Microsoft Office application.

You click the **Home** button on the Smart View ribbon to open the Smart View Home panel.

From the Smart View Home panel, you can:

- Manage data source connections (see Connecting to Smart View (Mac and Browser))
- Open forms (see Opening Forms in Excel)
- Create ad hoc grids (see Starting Ad Hoc Analysis)
- View and define Smart View options (see Setting Smart View Options)
- Set the Point of View (see Selecting Members From a Point of View Dimension)
- Cascade reports (see Cascading Reports)

A separate tab in the **Smart View** panel is opened for each task. You can switch between the tabs as you require.

Right-Click Context Menus

You access context menus when you right-click an item in a form or an ad hoc grid.

Administrators: The commands that display on the right-click context menu depend on selections you make when creating the manifest file. See Deploying and Administering Oracle Smart View for Office (Mac and Browser) for information on creating, customizing, and deploying the manifest file.

Deploying Smart View

Smart View (Mac and Browser) is hosted in the Oracle Enterprise Performance Management Cloud environment and administrators deploy it to their Office 365 users.

See Deploying and Administering Oracle Smart View for Office (Mac and Browser) for more information.
Connecting to Smart View (Mac and Browser)

Related Topics
- Connecting to Smart View on the Mac
- Connecting to Smart View in Chrome

Connecting to Smart View on the Mac

To log in to your environment:

1. On a Mac, start Excel 365 and log in to your Office 365 account.
   A Smart View ribbon is displayed along with the other Excel 365 ribbons.
2. Select the Smart View ribbon, and then click Home.
   In the Smart View panel, to the right of the Excel sheet, the Oracle Cloud login information is displayed.
3. Enter your user name and password, and then click Go.
   You are now connected to the environment and should see the library folders and cubes in the Smart View panel.

Connecting to Smart View in Chrome

Complete the following procedure to log in to Office 365, your EPM Cloud service, and Oracle Smart View for Office (Mac and Browser).

1. In Chrome, log in to the EPM Cloud web application, and then log in to Office 365 and Smart View.
   For example, launch Planning and log in.
   You must have the service running in the browser before logging in to Smart View.
2. Open another tab in the browser and log in to portal.office.com using your Office 365 credentials.
3. Select Excel.
4. On the Welcome to Excel page, click New blank workbook, or open an existing workbook.
5. Select the Smart View ribbon.
6. Click Home to launch the Smart View panel, where the library folder and cubes are displayed.
7. Continue with Allowing Pop-ups from Office Online in Chrome
Allowing Pop-ups from Office Online in Chrome

While you’re using Oracle Smart View for Office (Mac and Browser) in an Office Online environment in Chrome, you will encounter pop-ups, which Chrome will block. The first time a pop-up is blocked, you can specify that Chrome allows these pop-ups.

For example, the first time that you click a button in the ribbon, such as the Change Alias button, a pop-up blocker may display. When you encounter a pop-up blocker in Chrome, the address bar briefly displays the words "Pop-up blocked" along with the pop-up blocker button,  

![Pop-up blocked](image)

After a few seconds, only the pop-up blocker button,  
, is displayed in the address bar. The text that displays when you hover over the button indicates that pop-ups have been blocked on this page:

![Pop-ups were blocked on this page.](image)

To allow pop-ups from Office Online as you work:

1. At the first encounter with a pop-up blocker, leave the dialog that triggered the pop-up blocker open, do not close it, and do not make any selections in it.

2. In the Chrome address bar, click the pop-up blocker button,  

   The Pop-ups blocked dialog is displayed.
3. Select the **Always** option, and then click **Done**.
   Your Office Online URL is now added to the list of allowed pop-ups in Chrome.

4. If still open, close the dialog you were working in.

5. Restart your browser and reconnect to your web application, Office 365, and Smart View, and then repeat the task you were previously working on.

---

**Note:**

You should only have to perform this procedure once for all subsequent Smart View operations and sessions.
Dimensions and Members

Related Topics

• About Dimensions and Members
  *Dimensions* are data categories used to organize business data for retrieval and preservation of values.

• Selecting Members
  In Oracle Smart View for Office (Mac and Browser), you select members to use in ad hoc grids and Oracle Enterprise Performance Management Cloud forms.

• Displaying Point of View Dimensions
  If you choose to display POV dimensions, you can select members from a POV dimension and move them to and from the grid.

• Aliases and Alias Tables
  Aliases are alternate names for database members.

About Dimensions and Members

*Dimensions* are data categories used to organize business data for retrieval and preservation of values.

Dimensions usually contain hierarchies of related *members* grouped within them. For example, a Year dimension often includes members for each time period, such as quarters and months.

Selecting Members

In Oracle Smart View for Office (Mac and Browser), you select members to use in ad hoc grids and Oracle Enterprise Performance Management Cloud forms.

Related Topics

• Selecting Members From the Smart View Member Selector
• Selecting Members From a Point of View Dimension
• Entering Members in Free-Form Mode

Selecting Members From the Smart View Member Selector

To select members:

1. Display the *Smart View Member Selector* by doing one of the following:
   • Select a dimension or member in an ad hoc grid, and then from the *Smart View* ribbon, select *Member Selection*.
• In an ad hoc grid, select **POV**

  to display the POV dimensions in the **Smart View** panel. Then, click
  
  next to a POV dimension, and select **Member Selection**.

2. **In the Member Selector** dialog, click the Dimension Selector drop-down (the first drop-down at the top left of the dialog box), and select a dimension (for example, [Year] [Dropdown]).

   If you accessed Member Selection from a POV dimension in the **Smart View** panel, then the dimension next to which you clicked
  
  is automatically displayed in the drop-down, and you are not able to select another dimension (for example, [Scenario]).

3. **Optional.** To filter the members displayed, click the Filter drop-down (the second drop-down in the dialog box), and select one of these filters (filter options may vary by data source type):

   • **Hierarchy** to select all the members in the hierarchy
   • **Descendants** to select all descendants of the selected member
   • **Descendants Inclusive** to include the selected member and all descendants of the selected member
   • **Children** to select only the children of the selected member
   • **Children Inclusive** to include the selected member and only the children of the selected member
   • **Siblings** to select all siblings of the selected member
   • **Siblings Inclusive** to include the selected member and all siblings of the selected member
   • **LSiblings** to include only the members that appear before the selected member with the same parent
   • **LSiblings Inclusive** to include the selected member and its left siblings
   • **RSiblings** to include only the members that appear after the selected member with the same parent
   • **RSiblings Inclusive** to include the selected member and its right siblings
   • **Parent** to select only the parent of the selected member
   • **Parent Inclusive** to include the selected member and only the parent of the selected member
   • **Ancestors** to select all the ancestors of the selected member
   • **Ancestors Inclusive** to include the selected member and all the ancestors of the selected member
3. **Optional.** To search for a specific member, enter a member name in the search field, and then click ✱ Search. Asterisks (*) and question marks (?) can be used as wild cards. The asterisk can be substituted for a group of characters; the question mark can be substituted for only one character. For example, if you are searching for all member names that start with the word total, Total, To* and To?al are valid search strings; however, To? is not. The search string cannot begin with an asterisk. For example, *Total and *otal are not supported search strings.

4. **Optional.** Select to sort the members that are displayed, to select all the members, or to clear the selected members.

5. **Optional.** Select to move the selected members to the Selection column.

6. If this is the first member selection that you make in a blank worksheet, toggle the arrows next to Selection to select how to insert the members in the grid:

   ![Horizontal Column](image)
   ![Vertical Row](image)

   displays the selected members horizontally in a column

   displays the selected members vertically in a row

7. **Optional.** Click Select Dimension to add the dimension you selected in the Dimension Selector drop-down (the first drop-down in the dialog box) to the list of selected members.

8. Click Apply to close the dialog box and add the selected members to the grid, or click Cancel to close the dialog box without saving any changes.

9. From the Smart View ribbon, click Refresh to update the data to correspond to the selected members.
Selecting Members From a Point of View Dimension

The Point of View (POV) is the default starting point for dimensions in a data source connection. You can select members and filters for the dimensions that you want to include in the grid and move members to and from the grid.

Each connection is associated with only one POV; however, the same connection to different worksheets within a workbook may have different POVs.

To select a member from the POV:

1. In an ad hoc grid, from the Smart View ribbon, select POV to display the POV dimensions in the Smart View panel.
2. From the Smart View panel, click the ellipsis button next to a POV dimension, and select Member Selection.
3. Select the members in the Smart View Member Selector (see Selecting Members From the Smart View Member Selector).

To place a member or dimension from the POV onto the grid:

1. Click the ellipsis button next to a member or dimension in the POV.
2. Select Pivot to Column or Pivot to Row. (See Pivoting Dimensions Between the Grid and the POV).

Entering Members in Free-Form Mode

If you are familiar with the dimensions and members of your database, you can enter their names directly into cells using free-form mode.

You can use aliases from the alias table associated with the current grid in free-form mode. In ad-hoc, if you enter an alias from a different alias table, it will revert to the alias from the current alias table.

After connecting to a data source, you can enter member names as follows:

- By entering a member name in a blank cell
- By replacing a member name in a cell with a different member from the same dimension

You can still use the POV, member selection, and other ad hoc operations in free-form grids.

Displaying Point of View Dimensions

If you choose to display POV dimensions, you can select members from a POV dimension and move them to and from the grid.
To display point of view dimensions:

1. Display a grid in ad hoc mode.
2. From the Smart View ribbon, click **POV**

   ![Smart View ribbon with POV button]

   The POV dimensions are displayed in the **Smart View 365** panel to the right of the grid.

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**Note:**

See [Pivoting Dimensions Between the Grid and the POV](#) for information on how to move dimensions back and forth between the grid and the POV.

---

### Aliases and Alias Tables

Aliases are alternate names for database members.

#### Related Topics

- About Aliases
- Selecting Alias Tables

### About Aliases

Database member names are often stock numbers or product codes; their aliases can be more descriptive.

For example, in the PBCS Vision Plan1 cube, the alias name for the "P_TP1" member in the "Product" dimension is "Computer Equipment". Aliases are stored in alias tables as part of a database. Dimensions can be associated with multiple alias tables.

### Selecting Alias Tables

If an administrator has created alias tables in the database, you can select an alias table for the current worksheet. The alias table selected applies only to the current worksheet and not to future connections.

To select an alias table for the current worksheet:

1. Select a member in an ad hoc grid.
2. From the Smart View ribbon, select **Change Alias** to display the list of available alias tables.
3. In the dialog box that is displayed, select an alias table, and then click **OK**.
**Note:**

If you enter a name from an alias table that is not associated with the current grid, its corresponding alias from the alias table that is associated with the current grid is displayed after you refresh. For example, if you enter `QTR1` into a grid that is associated with the Long Names alias, the after you refresh, `Quarter1` is displayed.
Data and Data Cells

Related Topics

- **Refreshing Data**
  In Excel, you can retrieve and refresh data for the current worksheet or for all worksheets in the workbook using the **Refresh** button on the **Smart View** ribbon.

- **Submitting Data**
  You can update any type of data in the data source by submitting changed data from forms and ad hoc grids. If you make changes while disconnected, you can submit the changes after you reconnect.

- **Calculating Data**
  After you submit new or changed data, you need to calculate the data in the database to reflect your changes.

- **Adjusting Values in Data Cells**
  You can adjust the value of one or more data cells by a specified number or percentage if the cells contain numerical data.

- **Spreading Data**
  You can spread data for time periods, spread data with cell locking, spread values using grid spread, and spread values using mass allocation.

- **Drill-Through Reports**
  If the Oracle Enterprise Performance Management Cloud source used Oracle Enterprise Data Management Cloud to load data for drill-through reports, you can drill to source data in Excel or a web page.

- **Cell Actions**
  Expand and collapse cells, view underlying member formulas, view detailed member information, and review comments, attachments, and cell history.

**Refreshing Data**

In Excel, you can retrieve and refresh data for the current worksheet or for all worksheets in the workbook using the **Refresh** button on the **Smart View** ribbon.

Refreshing applies to entire sheets, documents, and slides, and includes data in all ad hoc grids and reporting objects, such as function grids, tables, or charts.

**Figure 4-1  Refresh Icon**

![Refresh Icon]

**Notes About Refreshing**

- On ad hoc sheets, Excel filters are retained after refreshing.
- Selected POV members are reverted to dimension members after deleting some columns and refreshing a spreadsheet. To avoid this, click the POV button to hide...
the POVs dimensions, and ensure that you do not delete the column that contains the Page members.

Submitting Data

You can update any type of data in the data source by submitting changed data from forms and ad hoc grids. If you make changes while disconnected, you can submit the changes after you reconnect.

Related Topics
- Guidelines for Submitting Data
- Steps to Submit Data
- Submitting Data Ranges

Guidelines for Submitting Data

- You can use Submit Data Range to submit cell data from cells that were modified by a user who does not have Oracle Smart View for Office (Mac and Browser) installed.
- In worksheets that support multiple grids, you can perform the Submit Data commands for only one grid at a time.
  
  If you try to submit data for more than one grid at a time; that is, if you selected cell ranges in more than one grid, the first range returned by Excel is used to determine the selected grid and the submit is performed only on that grid.
- If you are submitting data from forms:
  - In Oracle Enterprise Performance Management Cloud forms, you can lock any cell or range of cells to protect the data until the data is refreshed or submitted.
  - Some cells may no longer exist in the form definition. This behavior may happen if the form definition or access privileges have changed, or if rows or columns are suppressed. In these cases, only writable cells that exist in the new form definition are saved. This behavior applies to both cells and supporting detail changes, and also applies when working with forms while connected to or disconnected from the data provider.
  - When you are working in a form and you click Submit Data, you are actually writing data back to the latest POV. Oracle recommends performing a refresh whenever you make changes to the POV. The refresh updates the data on the sheet to reflect the latest POV change.
  - On forms opened in Smart View, some calculated and read-only cells can be edited without an error message being displayed, although the changed data cannot be submitted.

Steps to Submit Data

To submit data:

1. Connect to the data source and display a plan or a form in the grid.
2. Modify the data as needed.
3. Ensure that your cursor is somewhere in the grid; then, from the Smart View ribbon, select Submit

![image]

Note:
When you submit data, all dirty cells on the worksheet are also submitted.

Submitting Data Ranges

To submit a data range:
1. Connect to the data source and display a plan or a form in the grid.
2. Modify the data as needed.
3. Select the data ranges to submit.
   You can submit contiguous and non-contiguous single cells or cell ranges.
4. Ensure that your cursor is somewhere in the grid; then, from the Smart View ribbon, select Submit Range

![image]

Only cell data from selected cells is submitted. If there are dirty cells on the sheet outside the range of selected cells, the modified value is not submitted and those cells will revert back to the value that was last stored with the provider.

Calculating Data

After you submit new or changed data, you need to calculate the data in the database to reflect your changes.

To calculate data, you must have security access rights to the data.

There are two methods that you can use to calculate data on Oracle Enterprise Performance Management Cloud forms in Excel:

- **Business Rules** allows you to select a business rule to apply to the form.
  - See Applying a Business Rule to an EPM Cloud Form.
- **Rules on Form** is created for each form to calculate subtotals.
  - See Calculating Subtotals on an EPM Cloud Form.

You can also run business rules on forms designed to calculate rules after submitting data. See Applying a Business Rule On Forms Defined to Run Rules When Submitting Data.
Note:

In Chrome on a Mac or on Windows, when launching the rules panel, the buttons at the bottom of the panel, such as Plan Type, Apply, Back, Next, Launch, and Cancel, may not be visible, even if the window is maximized. To view the buttons, at the top right of the window, click the Maximize/Restore Down button (Maximize/Restore Down) until the rules buttons are visible. Click Maximize/Restore Down again to restore the window to the size you require (maximized or resized window).

Applying a Business Rule to an EPM Cloud Form

To apply a business rule to a form:

1. Open a form in Excel.
2. From the Smart View ribbon, select Calculate, and then select Business Rules. The business rules associated with the form are displayed in the Smart View panel.
3. Select a business rule to launch it.
4. Enter any applicable runtime prompts, and then click Run.
5. A dialog box is displayed to let you know whether the business rule completed successfully. Click Close to close the dialog box. If the calculation is successful, the values in the database reflect the results of the calculation.

Calculating Subtotals on an EPM Cloud Form

To calculate the subtotals on a form:

1. Open a form in Excel.
2. From the Smart View ribbon, select Calculate, and then select Rules on Form.
3. In the Smart View panel, select the rule to calculate the subtotals. Any data that is not saved on the spreadsheet is lost when you launch the business rule.
4. A dialog box is displayed to let you know whether the business rule completed successfully. Click Close to close the dialog box.
5. If the calculation is successful, the values in the database reflect the results of the calculation.

Applying a Business Rule On Forms Defined to Run Rules When Submitting Data

Some forms are designed to run business rules when you submit data. In the web application, this is referred to as "Run After Save." Use the Submit and Calc button in the Smart View ribbon to run business rules on this type of form.
Note:
In forms designed to run business rules when you submit data, if you click the Submit button on the Smart View ribbon in error, a message is displayed instructing you to use the Submit and Calc button.

To run business rules on a form designed to run rules when you submit data (also referred to as Run After Save):

1. Open a form in Excel.
2. Make the changes you require in the form.
3. From the Smart View ribbon, select Submit and Calc.
   The business rules associated with the form are displayed in the Smart View panel.
4. Select a business rule to launch it.
5. Enter any applicable runtime prompts, and then click Run.
6. If a dialog box is displayed to let you know whether the business rule completed successfully, click Close to close the dialog box.
   If the calculation is successful, the values in the database reflect the results of the calculation.

Adjusting Values in Data Cells

You can adjust the value of one or more data cells by a specified number or percentage if the cells contain numerical data.

Note:
If you adjust the value of a cell that contains an Excel formula, the adjusted value overwrites the formula.

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

To adjust data values:

1. Click the data cell that contains the value to adjust.
2. From the Smart View ribbon, select Adjust.
3. From Adjust Data, select an option then enter the number or percentage by which you want to adjust the value of the cell.
   Available options are:
   • Add fixed value to selected cell(s)
   • Subtract fixed value from selected cell(s)
   • Multiply selected cell(s) by a fixed value
Divide selected cell(s) by a fixed value
Increase selected cell(s) by a fixed percentage
Decrease selected cell(s) by a fixed percentage

4. Click Adjust Data.

Spreading Data

You can spread data for time periods, spread data with cell locking, spread values using grid spread, and spread values using mass allocation.

Related Topics
- About Spreading Data
- Spreading Data for Time Periods
- Spreading Data with Cell Locking
- Spreading Values Using Grid Spread
- Spreading Values Using Mass Allocation

About Spreading Data

You can adjust data values with spreading using the following methods:
- For time periods
- With cell locking
- Using grid spread
- Using mass allocation

Spreading Data for Time Periods

Data source types: Planning, Financial Consolidation and Close, Tax Reporting

While working in forms, you can spread, or distribute, values.

In a form, the spreading rules for time periods are set in the web application as part of the dimension property settings. When you work with a form in Excel, and depending on how the form was set up by the administrator, data values can be spread, or distributed, in several ways:

- Spread the value of a summary time period to its base time periods or to the first parent or first child of the parent time period
- Spread values among children and parents proportionally, based on existing distribution
- Spread values based on the weekly distribution of a quarter, which could be 4-4-5, 5-4-4, 4-5-4, or None (as set up by the budget administrator)
- Temporarily lock the values of certain cells while spreading data over time periods (see Spreading Data with Cell Locking)
- Spread values for different time periods using a different spreading rule for each separate time period on the same row or column dimension. For example, FY2018 can have formula fill, and FY2019 can have flow.
Notes

• You cannot spread data in a summary time period that includes members with mixed currency types.

• Excel formulas in child cells are ignored during spreading.

To spread data for time periods:

1. Open a form.
2. In the Smart View ribbon, select Options.
3. In the Options panel, select the Data tab, then select the Spreading Enabled check box, and then close the panel.

Note:

• You must complete this step to select the Spreading Enabled check box for each form you launch.

• In Chrome on a Mac or on Windows, when launching the Options panel, Data tab, the Spreading Enabled check box is not visible, even if the window is maximized. To view the button, at the top right of the window, click the Maximize/Restore Down button (Max) until the Spreading Enabled button is visible. Click Max or Min again to restore the window to the size you require (maximized or resized window).

4. In the open form, select a data cell and enter a new value.

   The value is distributed according to the rules described in Adjusting and Spreading Data in Working with Planning.

5. To save the data, click Submit.

Spreading Data with Cell Locking

Data source types: Planning, Financial Consolidation and Close

When spreading data over time periods, you can temporarily lock the values of one or more cells to preserve their values when other values are recalculated. You can spread data across time periods based on various calculations and visually review the changes before committing them to the database. For examples of spreading with cell locking, see Examples of Spreading Data with Cell Locking in Working with Planning.

To temporarily lock values:

1. Open a form.
2. In the Smart View ribbon, select Options.
3. In the Options panel, select the Data tab, then select the Spreading Enabled check box, and then close the panel.
4. In the form, select the cell or group of cells that you want to lock.

5. From the Smart View ribbon, select **Adjust**, and then **Lock**.

   A color change indicates that a cell is locked. You can now spread or manipulate data in the other cells however you want, without affecting the locked cells.

6. To unlock a cell, refresh the grid.

### Spreading Values Using Grid Spread

**Data source types:** Planning, Financial Consolidation and Close

If your administrator has enabled Grid Spread, you can specify an amount or percentage to increase or decrease values across multiple dimensions on the grid, based on the existing values in the target cells. When calculating the spread data, read-only and locked cells and cells having supporting detail are ignored. Data integrity is ensured because values can be spread only to cells to which you have access.

To spread values using Grid Spread:

1. Open a form.

2. In the Smart View ribbon, select **Options**.

3. In the **Options** panel, select the **Data** tab, then select the **Spreading Enabled** check box, and then close the panel.

---

**Note:**

- You must complete this step to select the **Spreading Enabled** check box for each form you launch.

- In Chrome on a Mac or on Windows, when launching the **Options** panel, **Data** tab, the **Spreading Enabled** check box is not visible, even if the window is maximized. To view the button, at the top right of the window, click the **Maximize/Restore Down** button (☐/☐) until the **Spreading Enabled** button is visible. Click ☐ or ☐ again to restore the window to the size you require (maximized or resized window).
4. Put the cursor in the Subtotal or Total source cell whose value you want to spread to target cells.

5. From the Smart View ribbon, select Adjust, and then Grid Spread.

6. From the drop-down menu, select one of these options:
   - Value to increase or decrease values by a specified amount
   - Percentage to increase or decrease values by a percentage

7. Select Increase By or Decrease By and enter a value or percentage.

8. In Spread Value, enter the actual spread value that you want.
   
   For example, if the Current Value is 100 and you want the spread value to be 125, enter 125 directly in Spread Value and do nothing with the Increase By/Decrease By options or text box in the previous step.

   Alternatively, you can enter 25 in Increase By, and 125 will be displayed in Spread Value.

   **Note:**
   Entering a value in Spread Value has no effect on the Increase By/Decrease By text box. But when you enter a value in Increase By/Decrease By, the spread value is reflected in the Spread Value text box.

9. Select a spreading pattern:
   - Proportional Spread to spread the value proportionally, based on the existing values in the target cells (the default)
   - Evenly Split to spread the value evenly among the target cells
   - Fill to replace the value in all target cells
   
   Your administrator can add other spreading patterns.

10. Click Spread. The specified value or percentage is spread across the target cells, replacing former values with new ones.

11. To save the new values, click Submit.

### Spreading Values Using Mass Allocation

**Data source types:** Planning, Financial Consolidation and Close, Tax Reporting

Using mass allocation, you can spread data to all descendants of a source cell and across all dimensions.

Spreading by mass allocation spreads data to cells not displayed on the grid and does not require that you have access to the target cells.

When using mass allocation, keep in mind the following points:

- Mass allocation is available only for forms, which must be enabled for mass allocation by the administrator.
- You must be provisioned with the Mass Allocate role to use mass allocation.
To spread values by mass allocation:

1. Open a form.
2. In the Options panel, select the Data tab, then select the Spreading Enabled check box, and then close the panel.

   **Note:**
   - You must complete this step to select the Spreading Enabled check box for each form you launch.
   - In Chrome on a Mac or on Windows, when launching the Options panel, Data tab, the Spreading Enabled check box is not visible, even if the window is maximized. To view the button, at the top right of the window, click the Maximize/Restore Down button ( maximize/restore down) until the Spreading Enabled button is visible. Click or again to restore the window to the size you require (maximized or resized window).

3. Position the cursor in the Total or Subtotal cell whose value you want to spread.
4. From the Smart View ribbon, in the Data section, select Mass Allocate.
5. Enter a new value in Spread Value to replace the current value, or from the dropdown menu, select one of the following options:
   - **Value** to increase or decrease values by a specified amount
   - **Percentage** to increase or decrease values by a percentage
6. Select Increase By or Decrease By and enter a value or percentage.
7. In Spread Value, enter the actual spread value that you want.

   For example, if the Current Value is 100 and you want the spread value to be 125, enter 125 directly in Spread Value and do nothing with the Increase By and Decrease By options.

   Alternatively, you can enter 25 in Increase By, and 125 will be displayed in Spread Value.

   Entering a value in Spread Value has no effect on the Increase By and Decrease By text box. But when you enter a value in Increase By and Decrease By, the spread value is reflected in the Spread Value text box.

8. Select the Spread Type for allocating the specified value or percentage across the target cells:
   - **Proportional Spread** to spread the value proportionally, based on the existing values in the target cells (the default)
   - **Evenly Split** to spread the value evenly among the target cells
   - **Fill** to replace the value in all target cells
• **Relational Spread** to spread into the selected cells based on values that exist in a different source location. Selecting this option displays the currently selected member for each dimension in both the **Current Relation** and **Choose Relation** columns. Double-clicking on any row opens **Member-Selection**. You can now select any one member for that dimension, which appears afterwards in the **Choose Relation** column.

Your administrator can add other spreading patterns.

9. Click **Spread**.

The new values are automatically saved.

## Drill-Through Reports

If the Oracle Enterprise Performance Management Cloud source used Oracle Enterprise Data Management Cloud to load data for drill-through reports, you can drill to source data in Excel or a web page.

**Data source types:** Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Consider these guidelines when working with drill-through reports:

- Cells that contain drill-through reports can be indicated on the grid by a cell style.
- The data displayed in a drill-through report is dynamic.
- You cannot use alias names for drill-through; you must use member names.

### Note:

In order to use the drill-through feature in Chrome, you must follow these steps to enable pop-ups:

1. Click the Chrome menu (the three dots icon ) on the browser toolbar, and select **Settings**.
2. Scroll down the page and click the arrow next to **Advanced** to see more settings.
3. In the **Privacy and Security** section, select **Content Settings**.
4. Select **Pop-ups and Redirects**.
5. In **Allow**, click **Add**.
6. In the **Add Site** dialog box, enter the URL for your environment, up to the port number; for example:
   
   `https://<serviceURL>.oraclecloud.com`

7. Click **Add**.

The URL should appear in the list under **Allow**.

To access a drill-through report:

1. Select a data cell associated with a drill-through report.
2. From the Smart View ribbon, select **Drill-through**.

3. If there are multiple drill-through reports associated with the cell, select a report from the list and click **Launch**.

   If only one drill-through report is associated with the cell, the drill-through report launches directly.

**Note:**

If Internet Explorer is your default browser, then the first time that you click a drill-through cell and the browser launches, you will be asked to log in to your cloud service. After login, you may see an HTTP 403 or 500 error. Return to the sheet in Oracle Smart View for Office (Mac and Browser), and click the drill-through cell again to launch the drill-through report.

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**Cell Actions**

Expand and collapse cells, view underlying member formulas, view detailed member information, and review comments, attachments, and cell history.

**Related Topics**

- Expanding and Collapsing Cells
- Viewing Member Formulas
- Viewing Member Information
- Adding Cell Comments
- Adding Attachments
- Viewing Cell History

**Expanding and Collapsing Cells**

As you are working in *forms*, you can expand and collapse parent cells on the grid.

To expand or collapse a parent cell in a form:

1. Select a cell in a form.
2. From the Smart View ribbon, select **Expand/Collapse**.

**Viewing Member Formulas**

You can view the underlying formula in dimension member cells that contain a formula.

To view a member formula:
1. Open a form.

2. From the Smart View ribbon, in Cell Actions, select Member Formula.

Details of the formula are displayed.

### Viewing Member Information

You can view detailed information about any member on the grid. The information displayed depends on the data source type to which you are connected.

To view member information:

1. Select a member in the grid.
2. From the Smart View ribbon, in Cell Actions, select Member Information.

Information is displayed on the following tabs. Only the tabs that are applicable to the member and connection are displayed.

- **Information**: A list of general information about the member such as dimension, level, generation, and so forth
- **Aliases**: A list of alias tables and corresponding aliases associated with the member
- **Attributes**: A table of the dimensions, members, and types of attributes associated with the member
- **Formula**: The formula associated with the member
- **Comments**: A list of comments associated with the member
- **User Defined Attributes**: A list of user defined attributes (attributes of the member defined by the administrator)

3. Click OK to return to the grid.

### Adding Cell Comments

You can add one or more comments per data cell. Each data cell can contain comments from multiple users. Cells that contain comments can be associated with a cell style.

Oracle Smart View for Office (Mac and Browser) conforms to the character limit set in Oracle Enterprise Performance Management Cloud.

Depending on the permission level assigned to you by the administrator, you may be able to do any of the following in a data cell:

- Add comments
- View the comments that you and other users have added
- Delete comments that you have entered.
To add comments to a data cell:

1. In an ad hoc grid or a form, select a data cell.
2. From the Smart View ribbon, in Cell Actions, select Cell Actions.
3. In the Cell Actions dialog box under Comments, enter the comment and click Post.
4. Click Close to close the dialog box.

Adding Attachments

Documents can be attached to individual data cells by way of URLs or files. Each data cell can contain multiple documents attached by one or more users. Depending on the permission level assigned to you by the administrator, you may be able to do any of the following in a data cell:

- Attach documents.
- View the documents that you and other users have attached.
- Edit and delete documents that you have attached. You cannot edit or delete documents attached by other users.
- Attach URLs.

Cells that contain attachments can be associated with a cell style.

To attach documents to a data cell:

1. In an ad hoc grid or a form, select a data cell or a range of data cells.
2. From the Smart View ribbon, in Cell Actions, select Cell Actions.
3. In the Cell Actions dialog box, select Attachments.
4. Enter the title and URL for the document that you want to attach.
5. Click Post to save your attachment selections.
6. Click Close to close the dialog box.
Viewing Cell History

You can view the history of changes made to a data cell.

To display cell history:

1. In an ad hoc grid or a form, select a data cell.
2. From the Smart View ribbon, in Cell Actions, select Cell Actions.
3. In the Cell Actions dialog box, select History.

For each change listed, the following information is displayed:

- User who made the change
- Date the change was made
- Old value
- New value
5

Ad Hoc Analysis

Related Topics

• **About Ad Hoc Analysis**
  In ad hoc analysis, you use Oracle Smart View for Office (Mac and Browser) functionality with Excel spreadsheets to retrieve and analyze data.

• **Starting Ad Hoc Analysis**
  You can start ad hoc analysis from a cube and from an Oracle Enterprise Performance Management Cloud form.

• **Formatting Ad Hoc Grids**
  You can use either Smart View or Excel to control grid formatting.

• **Zooming In and Out**
  Zoom in on members in the grid to display data for their children and descendants.

• **Pivoting**
  Pivoting changes the orientation of the data on the worksheet. You can move dimensions between rows and columns and between the grid and the POV.

• **Selecting Members to Keep and Remove**
  You can keep or remove members and their associated data from the grid.

• **Inserting Attribute Dimensions**
  When performing ad hoc analysis, you can insert attribute dimensions or members into a worksheet.

• **Preserving Excel Formulas in Ad Hoc Operations**
  You can associate Excel formulas with members and data cells in ad hoc grids and set cell styles to identify such cells. By default, formulas are preserved when you perform ad-hoc operations with the exception of Pivot.

• **Cascading Reports**
  You can create separate reports for any or all of the members of one or more dimensions in a report based on an ad hoc grid.

• **Cross Joins**
  Cross joins display all member combinations across dimensions.

• **Saving Ad Hoc Grids as Forms**
  You can save ad hoc grids as forms.

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**About Ad Hoc Analysis**

In ad hoc analysis, you use Oracle Smart View for Office (Mac and Browser) functionality with Excel spreadsheets to retrieve and analyze data.

You do this by selecting members, using functions, and performing a variety of operations, including formatting, to design your reports.
Starting Ad Hoc Analysis

You can start ad hoc analysis from a cube and from an Oracle Enterprise Performance Management Cloud form.

Starting Ad Hoc Analysis from a Cube

To start ad hoc analysis from a cube, select a cube from the Smart View panel.

In the following example, there are five cubes from which you can select (Plan1, Plan2, Plan3, VisASO, and Vis1ASO).

When you select a cube, the data is placed on the grid in ad hoc mode, and you can immediately start ad hoc analysis.

Starting Ad Hoc Analysis from an EPM Cloud Form

If you have been assigned the ad hoc user role by an administrator, you can perform ad hoc analysis on EPM Cloud forms that have been enabled for ad hoc by the administrator.

To start ad hoc analysis for an EPM Cloud form:

1. From the Smart View panel, select an EPM Cloud form.
   For example, in the following Smart View panel:
   a. Select Library.
b. Select **Plan** to display all the EPM Cloud forms saved under the **Plan** folder.

c. Select an EPM Cloud form; for example, you could select the **Actual vs Plan** EPM Cloud form.
When you select an EPM Cloud form, the data for that form is placed on the grid; however, it is not initially in ad hoc mode.

2. On the Smart View ribbon, in the Ad Hoc section, click Analyze to open a second sheet that contains the ad hoc grid created from the form.

**Formatting Ad Hoc Grids**

You can use either Smart View or Excel to control grid formatting.

**Related Topics**
- Using Smart View Formatting
- Using Excel Formatting

**Using Smart View Formatting**

Oracle Smart View for Office (Mac and Browser) formatting consists of formatting selections made in the Formatting tab in the Smart View 365 panel. If you do not set specific Smart View options, then Excel formatting is used (see Using Excel Formatting).

To set Smart View formatting options:

1. From the Smart View ribbon, click Options.
2. In the Smart View panel, select the Formatting tab.
3. In the Formatting tab, select Use Cell Styles.
4. Set the desired cell styles (see Formatting Options).

Using Excel Formatting

When you use Excel formatting, your formatting selections, including conditional formatting, are applied and retained on the grid when you refresh or perform ad hoc operations.

When you use Excel formatting, Oracle Smart View for Office (Mac and Browser) does not reformat cells based on your grid operations, and it does not mark cells as dirty when you change data values. Smart View does preserve the formatting on the worksheet between operations.

Using Excel formatting is generally preferable for highly formatted reports, and you must use Excel formatting for data sources whose application-specific colors are not supported by the Excel color palate.

Excel formatting is used by default, unless you select the Use Cell Styles option on the Formatting tab in the Smart View 365 panel. See Using Smart View Formatting for more information.

Zooming In and Out

Zoom in on members in the grid to display data for their children and descendants.

Related Topics
- Zooming In
- Zooming Out
- Selecting Members to Display When Zooming

Zooming In

You can zoom in on members in the grid to display data for their children and descendants.

To zoom in on a member:

1. Select a member in the grid.

2. From the Smart View ribbon, click the down arrow next to Zoom In, and then select an option:
   - Next Level to retrieve data for the children of the selected members
   - All Levels to retrieve data for all descendants of the selected members
   - Bottom Level to retrieve data for the lowest level of members in a dimension

Note:

When you zoom in on a page dimension, the page dimension is pivoted to a row dimension.
Note:
You cannot zoom in on member formula cells when connected to an aggregate storage database.

Zooming Out

To zoom out:

1. Select a member in the grid.
2. From the Smart View ribbon, click the down arrow next to **Zoom out**, and then select an option:
   - **Next Level** to zoom out to the next level of data
   - **Top Levels** to zoom out to the top level of data

Selecting Members to Display When Zooming

You can set options to specify which members are retained and displayed as you zoom in and out.

To set member display options for zooming:

1. From the Smart View ribbon, select **Options**, and then select **Members**.
2. Under **Member Retention**, select:
   - **Include Selection** to display both the selected member and the members retrieved as a result of zooming.
     For example, zooming in on the selected member **Qtr1** retrieves data for **Jan**, **Feb**, **Mar**, and **Qtr1**. If not selected, only the members retrieved as a result of the zoom are displayed; in this example, **Jan**, **Feb**, and **Mar**.
   - **Within Selected Group** to zoom in only on the selected group of cells, leaving the unselected cells as is.
     This setting is meaningful only when there are two or more dimensions down the grid as rows or across the grid as columns. (This setting also applies to **Keep Only** and **Remove Only**.)

Pivoting

Pivoting changes the orientation of the data on the worksheet. You can move dimensions between rows and columns and between the grid and the POV.

Related Topics

- Pivoting Dimensions Between Rows and Columns
- Pivoting Dimensions Between the Grid and the POV
- Rearranging Dimensions on the Grid
Pivoting Dimensions Between Rows and Columns

You can pivot a dimension or members between rows and columns. There must be two or more dimensions, or members from two or more dimensions in the row or column that contains the dimension that you want to pivot. That is, you cannot pivot the last row dimension or the last column dimension on a grid.

When you pivot a member, the other members in its dimension are also pivoted.

When you pivot between rows and columns, Oracle Smart View for Office (Mac and Browser) moves the selected dimension to the outermost row or column on the opposite axis. For example, when you select to pivot a dimension to a row, the system moves the dimension to the top of the grid.

To pivot a dimension or member from a row to a column or from a column to a row:

1. Select a dimension or member in the grid.
2. From the Smart View ribbon, in the Analysis section, click the arrow next to Pivot, and then select Pivot.
   - Row dimensions are pivoted to the top most column dimension.
   - Column dimensions are pivoted to the left most row dimension.

**Note:**

When you use Excel formatting, member and numeric formats may unexpectedly change after pivot operations. For example, member names may be centered and numeric values may be left-justified. You can reset the grid to the proper format using the Excel formatting options. See Formatting Ad Hoc Grids.

Pivoting Dimensions Between the Grid and the POV

You can select to pivot a dimension out of the ad hoc grid to the Point of View (POV), or out of the POV to the grid. You can also pivot a member. If you do so, the other members in its dimension are also pivoted.

**Pivoting a Dimension from the Grid to the POV**

To pivot a dimension from the grid to the POV:

1. Select the dimension in the grid.
2. From the Smart View ribbon, in the Analysis section, click the arrow next to Pivot, and then select Pivot to POV.
3. From the Smart View ribbon, in the Ad hoc section, click POV.
   - The dimension is displayed in the Smart View panel to the right of the grid.

**Pivoting a Dimension from the POV to the Grid**

- To pivot a dimension from the POV to a column in the grid: from the Smart View 365 panel, click the ellipsis button
to the right of the dimension, and then select **Pivot to Column**.

- To pivot a dimension from the POV to a row in the grid: from the **Smart View 365** panel, click the ellipsis button to the right of the dimension, and then select **Pivot to Row**.

**Pivoting Notes**

- You can leave any number of dimensions in the POV.
- After pivoting the last dimension from the POV to the grid, the POV is hidden. You can always re-display it by clicking the **POV** button in the **Ad hoc** section of the **Smart View** ribbon.
- The grid must always contain at least two dimensions: one row dimension, and one column dimension. When there is only one row dimension and one column dimension on a grid, you must first pivot the replacement dimension on to the grid before you can pivot a dimension out of the grid.
  
  For example, if you want to pivot the row dimension off of the grid, then you must first pivot the replacement row dimension on to the grid, and then pivot the unwanted row dimension off of the grid.

- When you pivot a member from the grid to the POV, the member selected on the grid becomes the POV for that dimension. For example, if you pivot Qtr2 of the Year dimension from the grid to the POV, then Qtr2 becomes the POV for the Year dimension.

- You can manually type a dimension or member name to replace a dimension or member name in the grid or the POV.
  
  Similarly, you can delete a dimension or member from the grid, refresh the grid, and the deleted dimension or member is moved from the grid and will display on the POV.

- You can pivot members by selecting them from the POV, as described in **Selecting Members From a Point of View Dimension**.

**Rearranging Dimensions on the Grid**

To rearrange the dimensions on an ad hoc grid:

1. Select a dimension or member on the grid.

2. From the **Smart View** ribbon, in the **Analysis** section, click the arrow next to **Pivot**, and select one of the following options:

   - **Move Up**
   - **Move Down**
   - **Move Left**
   - **Move Right**
Selecting Members to Keep and Remove

You can keep or remove members and their associated data from the grid.

Selecting Members to Keep

To select members on the grid to keep:

1. On an ad hoc grid, select the members cells you want to keep.
2. From the Smart View ribbon, in the Analysis section, select Keep Only.

Selecting Members to Remove

To select members on the grid to remove:

1. On an ad hoc grid, select the members cells you want to remove.
2. From the Smart View ribbon, in the Analysis section, select Remove Only.

Keep and Remove Examples

The results of Keep Only and Remove Only depend on how the selected group is evaluated within the grid. A group consists of two or more dimensions down the grid as rows or across the grid as columns.

To use the Keep Only or Remove Only command, the selected member must have a group of members associated with it. Members do not have to be from the same dimension to be considered a group. The selected member shouldn’t be the lowest or last member of the group.

For example, you could think of New York, Florida, Connecticut, and New Hampshire as individual groups that all contain the January member. We want to keep the data for January for those four states. Yet, when we select Jan, and then click Keep Only, the grid doesn’t change. This is because Jan is not its own group; it’s actually a member of a group originating with the Market dimension, and also belongs to the New York, Florida, Connecticut, and New Hampshire groups.

Figure 5-1    Grid with Market Members in Column A, Year Members in Column B

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>New York</td>
<td>Jan</td>
<td>8722</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Florida</td>
<td>Jan</td>
<td>336</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Connecticut</td>
<td>Jan</td>
<td>321</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>New Hampshire</td>
<td>Jan</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>West</td>
<td>Feb</td>
<td>2394</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>South</td>
<td>Year</td>
<td>13238</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Central</td>
<td>Year</td>
<td>38262</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Market</td>
<td>Year</td>
<td>213522</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Move Jan to reposition it so that Jan is now a group, and the members New York, Florida, Connecticut, and New Hampshire belong to the Jan group.

**Figure 5-2  Grid with Year Members in Column A, Market Members in Column B**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Product</td>
<td>Scenario</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Measures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td><strong>Jan</strong></td>
<td>New York</td>
<td>8722</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Jan</td>
<td>Florida</td>
<td>336</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Jan</td>
<td>Connecticut</td>
<td>321</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Jan</td>
<td>New Hampshire</td>
<td>44</td>
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<td>7</td>
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<td>9</td>
<td>Jan</td>
<td>Central</td>
<td>2956</td>
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<tr>
<td>10</td>
<td>Jan</td>
<td>Market</td>
<td>16234</td>
<td></td>
</tr>
<tr>
<td>11</td>
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<td>99955</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Feb</td>
<td>Florida</td>
<td>361</td>
<td></td>
</tr>
<tr>
<td>13</td>
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<td></td>
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<td>16</td>
<td>Feb</td>
<td>South</td>
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</tr>
<tr>
<td>17</td>
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<td>116202</td>
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</tr>
<tr>
<td>20</td>
<td>Year</td>
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<td>5029</td>
<td></td>
</tr>
<tr>
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<td>New Hampshire</td>
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<td></td>
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<td>Year</td>
<td>West</td>
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<td></td>
</tr>
<tr>
<td>24</td>
<td>Year</td>
<td>South</td>
<td>13238</td>
<td></td>
</tr>
<tr>
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<td>Year</td>
<td>Central</td>
<td>38262</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Year</td>
<td>Market</td>
<td>213522</td>
<td></td>
</tr>
</tbody>
</table>

Now select a Jan cell and click **Keep Only**. The resulting layout shows only the Market dimension members grouped under Jan.
Figure 5-3  Grid with Only Jan Group Members

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Product</td>
<td>Scenario</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Measures</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Jan</td>
<td>New York</td>
<td>8722</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Jan</td>
<td>Florida</td>
<td>336</td>
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<td>5</td>
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<tr>
<td>9</td>
<td>Jan</td>
<td>Central</td>
<td>2956</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Jan</td>
<td>Market</td>
<td>16234</td>
<td></td>
</tr>
</tbody>
</table>

You can further refine the report to show only the New York, Florida, Connecticut, and New Hampshire members. Select those members in the grid.

Figure 5-4  Members Selected for Keep Only

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Product</td>
<td>Scenario</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Measures</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Jan</td>
<td>New York</td>
<td>8722</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Jan</td>
<td>Florida</td>
<td>336</td>
<td></td>
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<tr>
<td>5</td>
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<td>Connecticut</td>
<td>321</td>
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<tr>
<td>6</td>
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<td>9</td>
<td>Jan</td>
<td>Central</td>
<td>2956</td>
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<tr>
<td>10</td>
<td>Jan</td>
<td>Market</td>
<td>16234</td>
<td></td>
</tr>
</tbody>
</table>

And then click Keep Only.

Figure 5-5  Grid with Only Jan Group Members New York, Florida, Connecticut, and New Hampshire

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Product</td>
<td>Scenario</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Measures</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Jan</td>
<td>New York</td>
<td>8722</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Jan</td>
<td>Florida</td>
<td>336</td>
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<tr>
<td>5</td>
<td>Jan</td>
<td>Connecticut</td>
<td>321</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Jan</td>
<td>New Hampshire</td>
<td>44</td>
<td></td>
</tr>
</tbody>
</table>
You can achieve the result in another way. Select the West, South and Central members, and the Market dimension.

**Figure 5-6 Members Selected for Remove Only**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Product</td>
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<td></td>
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<tr>
<td>2</td>
<td></td>
<td>Measures</td>
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<tr>
<td>3</td>
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<td>New York</td>
<td>8722</td>
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<tr>
<td>4</td>
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<td>Florida</td>
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<td>5</td>
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<td>6</td>
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<tr>
<td>9</td>
<td>Jan</td>
<td>Central</td>
<td>2956</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Jan</td>
<td>Market</td>
<td>16234</td>
<td></td>
</tr>
</tbody>
</table>

And then click **Remove Only**.

**Figure 5-7 Grid with Only Jan Group Members New York, Florida, Connecticut, and New Hampshire**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Measures</td>
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<td></td>
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<tr>
<td>3</td>
<td>Jan</td>
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<td>8722</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Jan</td>
<td>Florida</td>
<td>336</td>
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<tr>
<td>5</td>
<td>Jan</td>
<td>Connecticut</td>
<td>321</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Jan</td>
<td>New Hampshire</td>
<td>44</td>
<td></td>
</tr>
</tbody>
</table>

Remember that the **Keep Only** and **Remove Only** commands are always performed on the selected groups, evaluated within the grid.

**Inserting Attribute Dimensions**

When performing ad hoc analysis, you can insert attribute dimensions or members into a worksheet.

**Related Topics**

- Considerations When Inserting Attribute Dimensions
- Inserting Attribute Dimensions
Considerations When Inserting Attribute Dimensions

When inserting attributes, keep in mind the following guidelines:

- If an attribute is already present on the grid, then it will not be available for selection in the **Insert Attributes** dialog box.
- The grid must be in a refreshed state. If the grid is in free-form state prior to refresh, then Oracle Smart View for Office (Mac and Browser) prompts you to manually refresh.
- When the attributes are inserted on the grid, the grid is automatically refreshed.
- In the **Insert Attributes** dialog box:
  - You can select to insert the entire attribute dimension, or one attribute member from a dimension.
  - If a member name is left blank in the attribute text box, then that dimension is in a deselected state and will not be inserted.
- If you have inserted a single attribute member using the **Insert Attributes** command and dialog box, you can use **Member Selection** to add other members from the same attribute dimension to the grid.
- **Insert Attributes** is not supported for Query Designer design sheets.
- **Insert Attributes** is not supported for multiple grid sheets.
- When filtering on attributes at the Generation 3 level in an attribute dimension, Smart View only displays members up to the Generation 2 level.

**Note:**

An attribute dimension must be in the grid before it can be deleted. See Pivoting Dimensions Between the Grid and the POV.

Inserting Attribute Dimensions

To insert attribute dimensions or members on a worksheet:

1. In an ad hoc grid, from the **Smart View** ribbon, in the **Analysis** section, click **Insert Attribute**.
2. In the **Insert Attribute** dialog box, select the attribute dimensions to add to the sheet.
3. **Optional:** To further define the attribute, click next to the attribute.

For example, clicking next to market size:
allows you to select Large Market, Medium Market, or Small Market.

4. Select **Insert** to add the selected attribute dimensions to the grid.

---

### Preserving Excel Formulas in Ad Hoc Operations

You can associate Excel formulas with members and data cells in ad hoc grids and set cell styles to identify such cells. By default, formulas are preserved when you perform ad-hoc operations with the exception of Pivot.

To specify whether to preserve formulas in ad hoc operations:

1. From the **Smart View** ribbon, in the **General** section, click **Options**.
2. Select **Data**, then scroll down to **Mode**, and then do one of the following:
   - To preserve formulas in ad hoc grids, select **Preserve Formulas on Ad Hoc Operations**.
   - To disable preservation of formulas, clear **Preserve Formulas on Ad Hoc Operations**. Do this only if you do not need to preserve formulas and you want faster execution of queries.

   The selection you make applies to formulas in both member and data cells.

---

### Cascading Reports

You can create separate reports for any or all of the members of one or more dimensions in a report based on an ad hoc grid.

You can then cascade these reports separately across the worksheets of an Excel workbook.

To cascade a report from an ad hoc grid:

1. Open an ad hoc grid on the worksheet.
2. From the Smart View ribbon, select Cascade

3. In the Smart View panel to the right of the worksheet, click next to each dimension to launch the Smart View Member Selector dialog box.

4. Select the members for the dimension for which you want to create reports, and then click Apply.

One report will be generated for each member you select.

5. Click OK to begin cascading.

The resulting reports are created on separate worksheets in the current workbook. Each worksheet tab is named for the dimensions and members of the report it contains. Click a worksheet tab to view a report.

**Note:**

The names on the worksheets created as a result of cascading have a 30 character limit. Any characters over 30 are truncated.

---

**Cross Joins**

Cross joins display all member combinations across dimensions.

**Related Topics**

- About Cross Joins
- Cross Joining Dimensions and Members

**About Cross Joins**

For ad hoc queries with multiple dimensions in the rows or columns, where different member combinations are selected across dimensions for each row or column, you can perform a cross join to display all member combinations across the dimensions.

Asymmetric queries, with multiple dimensions in the rows or columns with different member combinations, are relatively common from a reporting standpoint. An example scenario is:

- Scenario and Time in the columns, where you want to see Actual data for certain time periods and Budget data from the remaining time periods.
- Market and Measures in the rows, where you might report on specific accounts for each Market and specific Measures.

In the scenario described above, you might start with an asymmetric grid such as this one, where you type dimensions and members free-form on the sheet:
You can optionally click **Refresh** to see the data points for this grid before performing the cross join.

After clicking **Cross Join**, the result is a grid consisting of combinations of all existing row and column members on the sheet.

---

### Cross Joining Dimensions and Members

To cross join dimensions and members in a sheet:

1. Open a previously-saved workbook containing the report you want to work with or use either ad hoc or free-form to create a new report.
2. **Optional:** Refresh the sheet.

3. From the **Smart View** ribbon, in the **Query** section, select **Cross Join**.

---

**Saving Ad Hoc Grids as Forms**

You can save ad hoc grids as forms.

**Data source types:** Planning, Financial Consolidation and Close, Tax Reporting

To save an ad hoc grid as a form:

1. With the ad hoc grid active, from the Smart View ribbon, click **Save Ad Hoc Grid**.
   
   Saving ad hoc grids as forms is not supported for grids containing attributes.

2. In **Save Grid As**, enter a name and description for the form, and then browse to the location where you want to save the grid.

3. Click **OK**.

   The saved grid is displayed in the Smart View Home panel tree list in the location that you selected in **step 2**.
Data Forms

Related Topics

- Working With Forms in Excel
  Forms are grid displays in which you can enter data into the database from Excel and view and analyze data or related text. Certain dimension member values are fixed, giving you a specific view into the data.

- Opening Forms in Excel
  You can open Oracle Enterprise Performance Management Cloud forms in Excel.

- Excel Formulas in Forms
  You can create Excel formulas in form cells inside or outside the grid if the cells are not read-only or locked.

- Working With Dynamic User Variables
  When a Oracle Smart View for Office (Mac and Browser) form contains user variables, you can modify them in Smart View.

- Copying Versions
  You can copy data from one bottom-up or target version of a selected scenario to another bottom-up or target version within the same scenario.

- Monitoring Job Status
  Use the Job Console to view the execution status of Oracle Enterprise Performance Management Cloud jobs and delete them if needed.

- Entering Supporting Details
  You can enter supporting details for ad hoc grids and for writable cells in forms.

- Working with Smart Forms
  Create and manage Smart Forms in Oracle Smart View for Office (Mac and Browser).

Working With Forms in Excel

Forms are grid displays in which you can enter data into the database from Excel and view and analyze data or related text. Certain dimension member values are fixed, giving you a specific view into the data.

Using Oracle Smart View for Office (Mac and Browser), you can work with Oracle Enterprise Performance Management Cloud forms in Excel.

Considerations for Forms Opened in Smart View

In forms opened in Smart View:

- You can modify data values but not the form structure in forms.
- Values submitted to the database from Excel must be non-formatted data.
- If a form is currently loaded in Excel and the administrator changes the form definition on the server, you should close the form and reload it. This action ensures that the newest form definitions are displayed.
• Customizations made to forms are preserved when you save or refresh only if they are made outside the grid or if they are made to thousands and decimal separators.
• If you collapse a form on the web, and then open the form in Smart View, the form will be displayed as fully expanded.

Guidelines for Smart Forms
You can open an existing Smart Form in Smart View; however, note the following:
• You cannot change the view type. Currently, whatever is set through the web is used for display.
• User-defined functions (UDFs) are not supported.
• You cannot create a new Smart Form.

Opening Forms in Excel
You can open Oracle Enterprise Performance Management Cloud forms in Excel.

To open a form:
1. Connect to a data source.
2. In the Smart View panel, expand the tree list and select a form.
3. Optional. View instructions associated with the form by clicking Instructions in the Workflow section in the Smart View ribbon.

Excel Formulas in Forms
You can create Excel formulas in form cells inside or outside the grid if the cells are not read-only or locked.

Cells that contain cell text can contain Excel formulas, but cells containing supporting detail (such as Oracle Enterprise Performance Management Cloud cells) cannot.

Formulas are preserved in forms when you refresh the form even without saving the data.

If you move a referential formula, its cell references are updated to reflect the new location.

In forms, you are prompted to save the workbook as an Excel file if you do any of the following (but you temporarily lose access to the form):
• Change the current page
• Select a different form
• Connect to a different data source
Working With Dynamic User Variables

When a Oracle Smart View for Office (Mac and Browser) form contains user variables, you can modify them in Smart View.

When you click

next to a user variable displayed in the Smart View panel, the Smart View Member Selector dialog box is displayed. You then select members applicable for the user variable. Any filters that apply to the selected user variable are loaded and are viewable from the filter drop-down list. Once selections are made, you can easily change one or more of the user variable buttons, thus changing the POV of a form in Smart View.

To modify with user variables in forms:

1. In the Smart View panel, connect to a data source and open a form.
2. From the Smart View ribbon, click POV.

Any user variables are displayed with the user variable name, followed by the column, followed by the value.

3. Click

next to a user variable to access the Smart View Member Selector, where you can assign other members to the user variable.

4. Click Apply to apply your changes and exit from the Smart View Member Selector.

5. From the Smart View ribbon, click Refresh.

Copying Versions

You can copy data from one bottom-up or target version of a selected scenario to another bottom-up or target version within the same scenario.

For example, you can create a Best Case version and copy some or all the data in that version to a Worst Case version to quickly create a starting point for the new version.

You can copy between bottom-up and target versions.

- When you copy to a bottom-up version, only the selected level 0 members are copied.
- When you copy to a target version, all selected members are copied.
- To protect data in approved planning units, copying a version does not copy to approved planning units.
To successfully copy data, when specifying the copy data criteria, you must select at least one member for the Scenario, Account, Entity, Period, and Version dimensions.

To copy a version:

1. From the Smart View ribbon, in the Workflow section, select Copy Version.
2. In Scenario, select the scenario to copy.
3. In Copy From, select the source version.
4. In Copy To, select the destination version.
5. Click Go to display the available entities (planning units) for the selected source version.
6. Use the arrow keys to move entities from Available Entities to Selected Entities. You can copy entities with a process status of not started or first pass.
7. Optional: To copy associated information, select these options:
   - Copy Account Annotations
     Only annotations for selected entities are copied. If you are copying to a bottom-up version, only level 0 entities (and their annotations) are copied.
   - Copy Cell Comments and Annotations
   - Copy Supporting Details
8. Click Copy Data.

Wait for the message indicating that the copy data operations was successful before loading another Web page.

Monitoring Job Status

Use the Job Console to view the execution status of Oracle Enterprise Performance Management Cloud jobs and delete them if needed.

To check the execution status of jobs:

1. From the Smart View ribbon, in the Workflow section, select Job Console.
   By default, all jobs are displayed. You can filter the list of jobs using any of the following job criteria:
   - Type
   - Status
   - Job Name
• **User Name**
• **Start Date**
• **End Date**

If you enter criteria to filter the jobs, click **Go** to display the jobs matching your selections.

2. **Optional:** To view the application name and the plan type of a job, select the job and click **Show Details**.

3. When you are finished viewing jobs, click **OK** to close the Job Console.

## Entering Supporting Details

You can enter supporting details for ad hoc grids and for writable cells in forms.

To enter supporting details:

1. Open a form and select a cell.
2. From the **Data** section in the Smart View ribbon, select **Supporting Details**.
3. In the **Supporting Details** dialog box, enter the desired information, and then click **Submit**.

### Note:

- To define a background color for cells that have supporting details, click **Options** on the **Smart View** ribbon, then click the **Formatting** tab, and then scroll down to **Supporting Details** where you can set the color.
- Supporting details cannot be added to non-level zero time periods.

## Working with Smart Forms

Create and manage Smart Forms in Oracle Smart View for Office (Mac and Browser).

### Related Topics

- **About Smart Forms**
- **Creating Smart Forms**
tbd
- **Excel Functions Supported in Smart Forms**

### About Smart Forms

**Data source types:** Planning, Financial Consolidation and Close, Tax Reporting

Create and manage Smart Forms in Oracle Smart View for Office (Mac and Browser).
Starting with an ad hoc analysis grid, you can customize the grid by adding business calculations to it, in the form of Excel functions and formulas. These calculations don't affect metadata in the rest of the source application. The business calculations that you create and save in the Smart Form can then be executed in both Smart View and the provider web interface; for example, in Planning. In Smart View, the formulas are evaluated by Excel; in the web interface, the formulas are evaluated by the provider.

For example, say you're analyzing Planning data in Smart View. You want to calculate the average profit margin for four products. You can add a row to the grid, with the grid label of "Average Profit Margin." In the new row, add an Excel function for average profit margin, selecting the profit margin data cells for each of the four products. If the profit margin for each product appears in column D of the grid, then your function may be =AVERAGE(D5:D8). In Smart Forms, the Excel formulas and functions you add are referred to as business calculations. After you add the business calculation, the average profit margin is instantly displayed in the new row, but the new row will be saved only in the Smart Forms, not the rest of the application.

To make this ad hoc grid with its grid labels and calculations available as a form in Planning, you select the Save As Smart Form option in the Smart View ribbon in Smart View. Thereafter, in Planning or Smart View, you can open and use this Smart Form as a form, including any rows, columns, and business calculations you added. In Smart View, you can perform ad hoc against this Smart Form. You can even create a sandbox from a Smart Form.

The sections that follow provide descriptions and guidelines for working with Smart Forms.

**Smart Forms**

Smart Forms are a type of data form, created in Smart View and based on ad hoc grids, that have functionality not supported by regular data forms. Smart Forms support grid labels, along with business calculations in the form of Excel formulas and functions. In Smart View, you can save these ad hoc grids to the applicable provider, such as Planning, as Smart Forms. The business calculations and grid labels, along with any empty rows and columns, are saved as a part the Smart Form definition. Additionally:

- Beside calculated cells and empty rows and columns functionality, Smart Forms support extended Excel formatting features including cell merging.
- Smart Forms can be used by end users in the same way as regular forms in the applicable web interface or in Smart View.
- Smart Form design, as with form design in the application web interface, is not available for end users. You must have the Admin or Interactive User role to save ad hoc grids as Smart Forms.
  
  As with regular forms, the administrator must assign read/write access to Smart Forms for end users.
- In Smart View, you design Smart Forms in Excel worksheets, meaning you can clearly see the Smart Form layout, even an asymmetric layout. In the provider web interface, you would need to create separate rows and columns to achieve this.
- When connected using a shared connection, the following Smart View functions are supported in Smart Forms: HsGetValue, HsSetValue, and HsActive.
  
  When connected using a private connection, Smart View functions are not supported.
Note: When you open an a Smart Form containing a Smart View function, click Refresh to update the function cells with their correct values.

- In the provider web interface, while in design mode:
  - You can assign business rules to Smart Forms.
  - You cannot modify the Smart Form grid layout, Excel formatting, or business calculations.

- Smart Form functionality is available for ad hoc grids created with Planning, Financial Consolidation and Close, and Tax Reporting. Check with your service administrator about the availability of Smart Forms in your service.

Business Calculations

In Smart Forms, the Excel functions and formulas that you add to an ad hoc grid are referred to as business calculations. When a grid is saved as a Smart Form, end users can execute the business calculations from the Smart View client, without adding members to the application metadata.

Business calculations are executed in Smart View utilizing Excel's calculation engine, and do not require queries to the provider. These runtime business calculations are supported in both Smart View and the data provider. Also note the following:

- Many Excel functions are supported in Smart Forms. If an Excel function is not supported, a message will notify you when you attempt to save the Smart Form.
- You can apply Excel formatting to the business calculation cells so that the figures display according to your preferences; for example, with dollar signs or decimal points.
- In the grid label row or column, you cannot enter only constants for the business calculation cells; for example, 1000 or 0.10 are not supported. If you want to use a constant in a calculated cell, be sure to prefix it with an equal sign (=); for example, =1000 or =0.10.

Grid Labels

Grid labels are used to provide placeholders in a grid for entering business calculations for corresponding data cell intersections. They are required in order to save an ad hoc grid with business calculations. Additionally:

- You enter grid labels manually in Excel in place of actual members in an ad hoc grid.
- Grid label names cannot match any actual member name in the data source application, or any member alias from any alias table. In case of a match, the actual member name or alias name will take precedence over the grid label name.
- Grid labels cannot consist of only blank spaces.
- Grid labels do not have any dimension properties.
- Grid labels are not visible in the Planning Dimension Editor and they are not sent to Essbase.
- Data cells created by the intersection of actual members with grid labels are referred to as calculated cells.
Creating Smart Forms

tbd

In Oracle Smart View for Office (Mac and Browser), you create Smart Forms by saving ad hoc grids that contain grid labels and business calculations. Smart Forms are saved to Planning, Financial Consolidation and Close, or Tax Reporting accordingly.

To create a Smart Form:

1. Follow the steps in Starting Ad Hoc Analysis to create an ad hoc grid. Alternatively, open a form and, from the Smart View ribbon, click Analyze to convert the form to an ad hoc grid.
2. Add grid labels and business calculations (in the form of Excel formulas and functions), to the ad hoc grid.
3. After you have added grid labels and business calculations to an ad hoc grid, in the provider ad hoc ribbon, click Save As Smart Form.
4. In the Save Grid As Smart Form dialog box:
   • In Grid Name, provide a name for the Smart Form.
   • In Grid Path, browse to the location where you want to store the Smart Form. You can also type a new folder name. The folder appears under the application in the Smart View Home panel.
   • Optional: Select Submit Formatting to save any custom Excel formatting changes that have been applied to the grid.
   • Optional: Enter your comments in Description.

In the Smart View Home panel, Smart Forms are designated with the icon.

Excel Functions Supported in Smart Forms

Several Excel functions are supported in Smart Forms.

Subtopics:
• Excel Functions Supported in Smart Forms in Alphabetic Order
• Excel Functions Supported in Smart Forms by Category

Excel Functions Supported in Smart Forms in Alphabetic Order

Table 6-1  Alphabetical List of Excel Functions Supported in Smart Forms

<table>
<thead>
<tr>
<th>Function</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABS</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>ACCRINT</td>
<td>Financial</td>
</tr>
<tr>
<td>ACCRINTM</td>
<td>Financial</td>
</tr>
<tr>
<td>ACOS</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>ACOSH</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>Function</td>
<td>Category</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>AMORDEGRC</td>
<td>Financial</td>
</tr>
<tr>
<td>AMORLINC</td>
<td>Financial</td>
</tr>
<tr>
<td>AND</td>
<td>Logical</td>
</tr>
<tr>
<td>ASIN</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>ASINH</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>ATAN</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>ATAN2</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>ATANH</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>AVERAGE</td>
<td>Statistical</td>
</tr>
<tr>
<td>AVERAGEA</td>
<td>Statistical</td>
</tr>
<tr>
<td>CEILING</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>COMBIN</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>COS</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>COSH</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>COUNT</td>
<td>Statistical</td>
</tr>
<tr>
<td>COUNTA</td>
<td>Statistical</td>
</tr>
<tr>
<td>COUPDAYBS</td>
<td>Financial</td>
</tr>
<tr>
<td>COUPDAYS</td>
<td>Financial</td>
</tr>
<tr>
<td>COUPDAYSNC</td>
<td>Financial</td>
</tr>
<tr>
<td>COUPNCD</td>
<td>Financial</td>
</tr>
<tr>
<td>COUPNUM</td>
<td>Financial</td>
</tr>
<tr>
<td>COUPPCD</td>
<td>Financial</td>
</tr>
<tr>
<td>CUMIPMT</td>
<td>Financial</td>
</tr>
<tr>
<td>CUMPRINC</td>
<td>Financial</td>
</tr>
<tr>
<td>DATE</td>
<td>Date and time</td>
</tr>
<tr>
<td>DAY</td>
<td>Date and time</td>
</tr>
<tr>
<td>DAYS360</td>
<td>Date and time</td>
</tr>
<tr>
<td>DB</td>
<td>Financial</td>
</tr>
<tr>
<td>DDB</td>
<td>Financial</td>
</tr>
<tr>
<td>DEGREES</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>DISC</td>
<td>Financial</td>
</tr>
<tr>
<td>DOLLARDE</td>
<td>Financial</td>
</tr>
<tr>
<td>DOLLARFR</td>
<td>Financial</td>
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<td>Financial</td>
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<tr>
<td>EDATE</td>
<td>Date and time</td>
</tr>
<tr>
<td>EFFECT</td>
<td>Financial</td>
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<td>EOMONTH</td>
<td>Date and time</td>
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<tr>
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<td>FACTDOUBLE</td>
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<td>FV</td>
<td>Financial</td>
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Table 6-1  (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

<table>
<thead>
<tr>
<th>Function</th>
<th>Category</th>
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<tbody>
<tr>
<td>FVSCHEDULE</td>
<td>Financial</td>
</tr>
<tr>
<td>GCD</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>HOUR</td>
<td>Date and time</td>
</tr>
<tr>
<td>IF</td>
<td>Logical</td>
</tr>
<tr>
<td>IFERROR</td>
<td>Logical</td>
</tr>
<tr>
<td>- TRUE</td>
<td>Logical</td>
</tr>
<tr>
<td>- FALSE</td>
<td>Logical</td>
</tr>
<tr>
<td>INT</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>INTRATE</td>
<td>Financial</td>
</tr>
<tr>
<td>IPMT</td>
<td>Financial</td>
</tr>
<tr>
<td>IRR</td>
<td>Financial</td>
</tr>
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<td>ISERR</td>
<td>Information</td>
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<tr>
<td>ISERROR</td>
<td>Information</td>
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<tr>
<td>ISPMT</td>
<td>Financial</td>
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<tr>
<td>LCM</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>LEFT</td>
<td>Text</td>
</tr>
<tr>
<td>LN</td>
<td>Math and trigonometry</td>
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<tr>
<td>LOG</td>
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<tr>
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<td>Statistical</td>
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<tr>
<td>MDURATION</td>
<td>Financial</td>
</tr>
<tr>
<td>MID</td>
<td>Text</td>
</tr>
<tr>
<td>MIN</td>
<td>Statistical</td>
</tr>
<tr>
<td>MINUTE</td>
<td>Date and time</td>
</tr>
<tr>
<td>MIRR</td>
<td>Financial</td>
</tr>
<tr>
<td>MOD</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>MONTH</td>
<td>Date and time</td>
</tr>
<tr>
<td>MROUND</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>MULTINOMIAL</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>NETWORKDAYS</td>
<td>Date and time</td>
</tr>
<tr>
<td>NOMINAL</td>
<td>Financial</td>
</tr>
<tr>
<td>NOT</td>
<td>Logical</td>
</tr>
<tr>
<td>NOW</td>
<td>Date and time</td>
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<tr>
<td>NPER</td>
<td>Financial</td>
</tr>
<tr>
<td>NPV</td>
<td>Financial</td>
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<td>ODD</td>
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<tr>
<td>OR</td>
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</tr>
<tr>
<td>PI</td>
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<td>PMT</td>
<td>Financial</td>
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<tr>
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<tr>
<td>PPMT</td>
<td>Financial</td>
</tr>
<tr>
<td>PRICE</td>
<td>Financial</td>
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</table>
### Table 6-1  (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

<table>
<thead>
<tr>
<th>Function</th>
<th>Category</th>
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</thead>
<tbody>
<tr>
<td>PRICEMAT</td>
<td>Financial</td>
</tr>
<tr>
<td>PRODUCT</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>PV</td>
<td>Financial</td>
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<tr>
<td>QUOTIENT</td>
<td>Math and trigonometry</td>
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<tr>
<td>RADIANS</td>
<td>Math and trigonometry</td>
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<tr>
<td>RAND</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>RANDBETWEEN</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>RATE</td>
<td>Financial</td>
</tr>
<tr>
<td>RECEIVED</td>
<td>Financial</td>
</tr>
<tr>
<td>RIGHT</td>
<td>Text</td>
</tr>
<tr>
<td>ROUND</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>ROUNDDOWN</td>
<td>Math and trigonometry</td>
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<tr>
<td>ROUNDUP</td>
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<tr>
<td>SECOND</td>
<td>Date and time</td>
</tr>
<tr>
<td>SIGN</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>SIN</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>SINH</td>
<td>Math and trigonometry</td>
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<td>SLN</td>
<td>Financial</td>
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<tr>
<td>SUM</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>SUMSQ</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>SYD</td>
<td>Financial</td>
</tr>
<tr>
<td>TAN</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>TANH</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>TBILLEQ</td>
<td>Financial</td>
</tr>
<tr>
<td>TBILLPRICE</td>
<td>Financial</td>
</tr>
<tr>
<td>TBILLYIELD</td>
<td>Financial</td>
</tr>
<tr>
<td>TIME</td>
<td>Date and time</td>
</tr>
<tr>
<td>TODAY</td>
<td>Date and time</td>
</tr>
<tr>
<td>TRUNC</td>
<td>Math and trigonometry</td>
</tr>
<tr>
<td>WEEKDAY</td>
<td>Date and time</td>
</tr>
<tr>
<td>WEEKNUM</td>
<td>Date and time</td>
</tr>
<tr>
<td>WORKDAY</td>
<td>Date and time</td>
</tr>
<tr>
<td>XIRR</td>
<td>Financial</td>
</tr>
<tr>
<td>XNPV</td>
<td>Financial</td>
</tr>
<tr>
<td>YEAR</td>
<td>Date and time</td>
</tr>
<tr>
<td>YEARFRAC</td>
<td>Date and time</td>
</tr>
<tr>
<td>YIELD</td>
<td>Financial</td>
</tr>
<tr>
<td>YIELDDISC</td>
<td>Financial</td>
</tr>
<tr>
<td>YIELDMAT</td>
<td>Financial</td>
</tr>
</tbody>
</table>
When using the \texttt{FVSCHEDULE} function in Smart Forms, use cell references to existing data, rather than arrays of data. For example, use \texttt{=FVSCHEDULE(C10,B15:B17)}. Do not use \texttt{=FVSCHEDULE(C10,\{0.09,0.11,0.1\})}.

Excel Functions Supported in Smart Forms by Category

**Financial Functions**

\texttt{ACCRINT}
\texttt{ACCRINTM}
\texttt{AMORDEGRC}
\texttt{AMORLINC}
\texttt{COUPDAYBS}
\texttt{COUPDAYS}
\texttt{COUPDAYSNC}
\texttt{COUPNCD}
\texttt{COUPNUM}
\texttt{COUPPCD}
\texttt{CUMIPMT}
\texttt{CUMPRINC}
\texttt{DB}
\texttt{DDB}
\texttt{DISC}
\texttt{DOLLARDE}
\texttt{DOLLARFR}
\texttt{DURATION}
\texttt{EFFECT}
\texttt{FV}
\texttt{FVSCHEDULE} ***
\texttt{INTRATE}
\texttt{IPMT}
\texttt{IRR}
\texttt{ISPMT}
\texttt{MDURATION}
\texttt{MIRR}
\texttt{NOMINAL}
\texttt{NPER}
When using the **FVSCHEDULE** function in Smart Forms, use cell references to existing data, rather than arrays of data. For example, use `=FVSCHEDULE(C10,B15:B17)`. Do not use `=FVSCHEDULE(C10,{0.09,0.11,0.1})`.

**Information Functions**

ISERR

ISERROR

**Logical Functions**

AND

IF

NOT

OR

IFERROR

• TRUE

• FALSE

**Statistical Functions**
AVERAGE
AVERAGEA
COUNT
COUNTA
MAX
MIN
Text Functions
LEFT
RIGHT
MID
Date and Time Functions
DATE
DAY
DAYS360
EDATE
EOMONTH
HOUR
MINUTE
MONTH
NETWORKDAYS
NOW
SECOND
TIME
TODAY
WEEKDAY
WEEKNUM
WORKDAY
YEAR
YEARFRAC
Math and Trigonometry Functions
ABS
ACOS
ACOSH
ASIN
ASINH
ATAN
ATAN2
ATANH
CEILING
COMBIN
COS
COSH
DEGREES
EVEN
EXP
FACT
FACTDOUBLE
FLOOR
GCD
INT
LCM
LN
LOG
LOG10
MOD
MROUND
MULTINOMIAL
ODD
PI
POWER
PRODUCT
QUOTIENT
RADIANS
RAND
RANDBETWEEN
ROUND
ROUNDDOWN
ROUNDUP
SIGN
SIN
SINH
SQRT
SQRTPI
SUM
TAN
TANH
TRUNC
7

General Operations

Related Topics

- **Using Undo and Redo**
  When connected to a data source provider, the Undo option in the Smart View ribbon undoes the last user action in a cell.

- **Sheet Information**
  You can view connection and other details for the current worksheet.

- **Importing Metadata**
  You can import metadata into copied worksheets. Metadata consists of Oracle Smart View for Office (Mac and Browser) artifacts such as the POV, alias tables, and connection information.

Using Undo and Redo

When connected to a data source provider, the Undo option in the Smart View ribbon undoes the last user action in a cell.

**Related Topics**

- **About Using Undo and Redo**
- **Specifying the Number of Undo and Redo Actions**
- **Undo Support in EPM Cloud**

About Using Undo and Redo

When using Undo and Redo, keep in mind the following:

- In ad hoc analysis, Undo undoes Zoom In, Zoom Out, Keep Only, Remove Only, or Refresh and restores the previous database view to the grid. Performing an Undo after modifying member data returns the sheet to its state before the last refresh, not to its state before the data modification.
- In ad hoc grids, Excel formatting is not retained when performing an Undo.
- In forms, Undo undoes the last user action in a cell.
- You can only undo operations that are performed in Oracle Smart View for Office (Mac and Browser). You cannot undo operations that are performed on the provider server, such as calculation status.

Specifying the Number of Undo and Redo Actions

To specify the number of permitted undo and redo actions:

1. From the Smart View ribbon, select Options.
2. In Settings, in Number of Undo Actions, specify the number of permissible Undo operations, 0 through 100.
The setting takes effect after you refresh or perform a drill operation.

## Undo Support in EPM Cloud

### Table 7-1  Undo Operations Supported by EPM Cloud - Ad Hoc Options

<table>
<thead>
<tr>
<th>Operations</th>
<th>Form</th>
<th>Ad Hoc</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoom In</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Zoom Out</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Keep Only</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Remove Only</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
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<tr>
<td>Pivot</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Refresh</td>
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<td>Supported</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### Table 7-2  Undo Operations Supported by EPM Cloud - Member Options

<table>
<thead>
<tr>
<th>Operations</th>
<th>Form</th>
<th>Ad Hoc</th>
<th>Functions</th>
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</thead>
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<tr>
<td>General</td>
<td>General</td>
<td>General</td>
<td>General</td>
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<tr>
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<tr>
<td>Member Name Display</td>
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<td>N/A</td>
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<tr>
<td>Indentation</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Ancestor Position</td>
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<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Member Retention</strong></td>
<td><strong>Member Retention</strong></td>
<td><strong>Member Retention</strong></td>
<td><strong>Member Retention</strong></td>
</tr>
<tr>
<td>Include Selection</td>
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<td>Supported</td>
<td>N/A</td>
</tr>
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<td>Within Selected Group</td>
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<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Remove Unselected Groups</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Comments and Formulas</strong></td>
<td><strong>Comments and Formulas</strong></td>
<td><strong>Comments and Formulas</strong></td>
<td><strong>Comments and Formulas</strong></td>
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<td>Supported</td>
<td>N/A</td>
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<td>Enable Enhanced Comment Handling</td>
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<td>Supported</td>
<td>N/A</td>
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<tr>
<td>Preserve Formula on POV Change</td>
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### Table 7-3  Undo Operations Supported by EPM Cloud - Data Options

<table>
<thead>
<tr>
<th>Operations</th>
<th>Form</th>
<th>Ad Hoc</th>
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</thead>
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<td><strong>Data Options</strong></td>
<td><strong>Data Options</strong></td>
<td><strong>Data Options</strong></td>
<td><strong>Data Options</strong></td>
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<td><strong>Rows</strong></td>
<td><strong>Rows</strong></td>
<td><strong>Rows</strong></td>
<td><strong>Rows</strong></td>
</tr>
<tr>
<td>Suppress No Data/Missing</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Zero</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>No Access</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Invalid</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Underscore Characters</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Repeated Members</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Table 7-3  (Cont.) Undo Operations Supported by EPM Cloud - Data Options

<table>
<thead>
<tr>
<th>Operations</th>
<th>Form</th>
<th>Ad Hoc</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columns</td>
<td>Columns</td>
<td>Columns</td>
<td>Columns</td>
</tr>
<tr>
<td>Suppress No Data/Missing</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Zero</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>No Access</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Mode</td>
<td>Mode</td>
<td>Mode</td>
<td>Mode</td>
</tr>
<tr>
<td>Suppress Missing Blocks</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Table 7-4  Undo Operations Supported by EPM Cloud - Other Actions

<table>
<thead>
<tr>
<th>Operations</th>
<th>Form</th>
<th>Ad Hoc</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modify Open Saved</td>
<td>N/A</td>
<td>Not Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Alias Table</td>
<td>N/A</td>
<td>Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Metadata (member data)</td>
<td>N/A</td>
<td>Not Supported</td>
<td>N/A</td>
</tr>
<tr>
<td>Cell Style</td>
<td>N/A</td>
<td>Not Supported</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Sheet Information

You can view connection and other details for the current worksheet.

Related Topics

- Sheet Information Notes
- Viewing Sheet Information
- Sheet Information Support in EPM Cloud

Sheet Information Notes

- When using Sheet Information with multiple grid worksheets:
  - To display information on all grids on a multiple grid worksheet, click anywhere outside of the grid boundaries, or select only one cell within a grid.
  - To display information for only one of the grids on a multiple grid worksheet, select the entire grid, and do not select any cells outside of the grid boundaries.
- When connected to Oracle Enterprise Performance Management Cloud, it is not necessary to use the Set as Default Connection option to associate the sheet with an active connective. The association is made automatically immediately after connecting.
- When you associate a connection to an ad hoc worksheet using Set Active Connection, members may disappear from the worksheet when you refresh. Instead of associating a connection, perform direct ad hoc analysis on the worksheet.
Viewing Sheet Information

To view sheet information:

1. From the **Smart View** ribbon, select **Sheet Info**.
   
   If you see a notification indicating that Oracle Smart View for Office (Mac and Browser) wants to display a new window, click **Allow**.

   Depending on the data on the sheet, the following information is displayed:

   - **Connection**
     - **Server**: Name of the server to which the sheet is connected
     - **Application**: Application to which the sheet is connected
     - **Cube**: Cube, model, or database to which the sheet is connected
     - **URL**: URL string of the data source provider to which the sheet is connected
     - **Provider**: Data source type to which the sheet is connected.
     - **Alias Table**: Current alias table
     - **Form Name**: Name of the form to which the sheet is connected. This property applies when connected to forms in Oracle Enterprise Performance Management Cloud applications.

   - **General**
     - **Sheet Type**: Ad hoc or form
     - **Connected**: Connection status; Yes if connected, No if not connected
     - **Last Retrieved**: Date and time that the last refresh was performed on the sheet

2. Select the following options as needed:

   - **Delete**: Provides these options for deleting Smart View metadata:
     - **Delete worksheet metadata** deletes all Smart View metadata in the active worksheet.
     - **Delete workbook metadata** deletes all Smart View metadata in the active workbook.

   - **Save**: Saves the sheet information content to an html file.

3. Click **Close** to close the Sheet Information dialog box.

Sheet Information Support in EPM Cloud

**Table 7-5  Sheet Information Supported by in EPM Cloud**

<table>
<thead>
<tr>
<th>Connection Status</th>
<th>Form</th>
<th>Ad Hoc</th>
<th>Smart Form</th>
<th>Rules</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Connection, open new blank worksheet</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
Table 7-5  (Cont.) Sheet Information Supported by in EPM Cloud

<table>
<thead>
<tr>
<th>Connection Status</th>
<th>Form</th>
<th>Ad Hoc</th>
<th>Smart Form</th>
<th>Rules</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>No connection, open a saved worksheet</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Set Active Connection for this Worksheet</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Set as Default Connection, before associate with active connection</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Set as Default Connection, after associating with active connection</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Last Retrieved</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Importing Metadata**

You can import metadata into copied worksheets. Metadata consists of Oracle Smart View for Office (Mac and Browser) artifacts such as the POV, alias tables, and connection information.

**Related Topics**
- About Importing Metadata in Smart View
- Importing Metadata into Copied Worksheets

**About Importing Metadata in Smart View**

**Related Topics:** Planning, Financial Consolidation and Close, Tax Reporting

In a new Excel sheet, you may want to make use of Oracle Smart View for Office (Mac and Browser) content in an existing sheet that contains not only the formatting and layout that you need, but data points as well. Instead of recreating the Smart View content from scratch, you can reuse the work that is already available.

When you use the Microsoft Excel copy and paste commands to copy Smart View content within or between Excel sheets, the static data and formatting is copied; but the Smart View metadata is not copied.

By using the Import Metadata command, after the data is copied, you can import the metadata from the original Excel sheet into the new sheet.

To use the Import Metadata feature, metadata is required in at least one sheet in the current workbook. You can import metadata from sheets containing forms or ad hoc grids.
Importing Metadata into Copied Worksheets

**Data source types:** Planning, Financial Consolidation and Close, Tax Reporting

Before you begin, be sure to review the content in *About Importing Metadata in Smart View.*

**Note:**

This operation cannot be undone.

To import metadata to a copied worksheet:

1. Back up your work.
2. Use Excel to copy a worksheet.
   
   This operation copies the visible contents of the source worksheet but not the metadata (connection information, POV selections, alias tables, and such items) to the destination worksheet.

3. With the destination worksheet active, from the Smart View ribbon, select **Import Metadata** to display a list of all open workbooks and their corresponding open worksheets.

4. From the list, select the worksheet that contains the metadata that you want to import to the destination worksheet.

5. Click **OK.** You will be asked to confirm your selection.

6. Refresh.
Working with the Query Designer

Related Topics

• About the Query Designer
  The Query Designer is an Oracle Smart View for Office (Mac and Browser) tool from which you can design the layout of a report by selecting dimensions, members, and attributes for rows, columns, and the POV from one interface.

• Designing and Running a Query
  Use the Oracle Smart View for Office (Mac and Browser) Query Designer to design the layout of a report.

About the Query Designer

The Query Designer is an Oracle Smart View for Office (Mac and Browser) tool from which you can design the layout of a report by selecting dimensions, members, and attributes for rows, columns, and the POV from one interface.

You can use the Query Designer to:

• Create a query from a blank connected worksheet, which uses the default report as a starting point
• Extract a query from a saved report

The Query Designer is available only for ad hoc worksheets.

Designing and Running a Query

Use the Oracle Smart View for Office (Mac and Browser) Query Designer to design the layout of a report.

Note:
The Query Designer will launch only if an ad hoc grid is already present on the worksheet or opened in a saved workbook.

To design and run a query:

1. Open a worksheet or an existing report.
2. Ensure that an ad hoc grid exists on the worksheet.
3. From the Smart View ribbon, in the Query section, select Query Designer.


4. In the **Smart View Member Selector** dialog box, click the check box next to the members you want to select, and then click

![>]

to move the selected members to the **Selection** column.

5. Click **Apply** to close the dialog box.

6. From the **Smart View** ribbon, in the **Query** section, select **Run Query**
Smart View Options

Related Topics

• Setting Smart View Options
  Smart View 365 provides two types of options, global options and sheet options.

• Smart View Settings
  The settings defined on the Settings tab are global options that apply to the entire current workbook, including new worksheets added to the current workbook, and to any new workbooks and worksheets that are created.

• Data Options
  Data options control the display of data cells. Data options are sheet level options, which are specific to the worksheet for which they are set.

• Member Settings
  Member settings define information about how members are displayed in forms and ad hoc grids.

• Formatting Options
  Formatting options control the textual display of members and data. Formatting options are sheet-level options that are specific to the worksheet for which they are set.

Setting Smart View Options

Smart View 365 provides two types of options, global options and sheet options.

To set Oracle Smart View for Office (Mac and Browser) options, click Options on the Smart View ribbon:

Global Options

Global options apply to the entire current workbook, including any new worksheets added to the current workbook, and to workbooks that are created later.

Changes to global options also affect existing worksheets and workbooks, and other Office documents.

The following are global options:

• Advanced Options
• Cell Styles
Sheet Options

Sheet options are specific to the worksheet for which they are set. Sheet options are applicable only in Excel.

Three options are available for saving sheet level options:

- **OK**: The sheet level option changes apply only to the current sheet in the current workbook. The changes do not apply to existing sheets or to new sheets in the current workbook. They do not affect any existing workbooks or new workbooks.

- **Save as Default Options**: The sheet level options changes are also the default option settings for new worksheets in the current workbook and for any new workbooks, and any other new Office documents. Changes to sheet level option settings do not affect existing worksheets or workbooks.

  For example, in Excel, assume you made changes to member options and selected **Save as Default Options**. You must access each existing worksheet individually, and make those same changes, if you want the changes to be propagated to existing worksheets in the workbook. This allows for different sheet level options on different worksheets. However, the changes are automatically propagated to any new worksheets you create within the current workbook and to any new workbooks.

- **Apply to All Worksheets**: The sheet level options changes apply to all existing worksheets with Smart View content within the current workbook. They do not apply to any new worksheets within the current workbook, to other existing workbooks, or to new workbooks.

  For example, assume you made changes to member options and selected **Apply To All Sheets**. The changes are propagated to all existing worksheets with Smart View content within the current workbook. This allows for quick updating of sheet level options in the current workbook. However, these changes are not propagated to any new worksheets in the current workbook, to existing workbooks, or to new workbooks.

The following are sheet level options:

- Member Options
- Data Options
- Formatting Options

Smart View Settings

The settings defined on the Settings tab are global options that apply to the entire current workbook, including new worksheets added to the current workbook, and to any new workbooks and worksheets that are created.

Changes to global option settings become the default for all existing and new Microsoft Office documents.

To set the option on the **Settings** tab in the **Smart View** panel:

1. From the Smart View ribbon, click **Options**: 
2. In the Smart View panel, click the Settings tab.

Table 9-1  Settings

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider URL</td>
<td>The provider to which the sheet is connected</td>
</tr>
<tr>
<td>Show loading time dialog</td>
<td>Whether to display the loading time dialog box</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Do not select this option if you are using Oracle Smart View for Office (Mac and Browser) on a browser. The browser treats the dialog box as a pop-up window, and the dialog box does not close properly.</td>
</tr>
<tr>
<td>Enable client logging</td>
<td>Whether to enable client logging</td>
</tr>
<tr>
<td>Show Log</td>
<td>Click to display the Smart View log</td>
</tr>
<tr>
<td>Enable diagnostics</td>
<td>Whether to enable diagnostics</td>
</tr>
<tr>
<td>Number of undo actions</td>
<td>The number of undo and redo actions permitted on an operation (0 through 100)</td>
</tr>
<tr>
<td></td>
<td>See Using Undo and Redo.</td>
</tr>
<tr>
<td>Clear Storage</td>
<td>Whether to clear the storage cache</td>
</tr>
</tbody>
</table>

Data Options

Data options control the display of data cells. Data options are sheet level options, which are specific to the worksheet for which they are set.

To set data options:

1. From the Smart View ribbon, click **Options**:

2. In the Smart View panel, click the **Data** tab.

**Note:**

In Chrome on a Mac or on Windows, when launching the **Options** panel, **Data** tab, the **Spreading Enabled** check box is not visible, even if the window is maximized. To view the button, at the top right of the window, click the **Maximize/Restore Down** button () until the **Spreading Enabled** button is visible. Click  or  again to restore the window to the size you require (maximized or resized window).
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Row Suppression</strong></td>
<td><strong>To streamline the grid, you can suppress rows that contain types of data that you do not need to view.</strong> <strong>Note:</strong> In suppressed rows, cell references to Excel formulas are not updated.</td>
</tr>
<tr>
<td><strong>Zero</strong></td>
<td>Suppress rows that contain only zeroes.</td>
</tr>
<tr>
<td><strong>Invalid</strong></td>
<td>Suppress rows that contain only invalid values.</td>
</tr>
<tr>
<td><strong>Missing</strong></td>
<td>Suppress rows that contain only cells for which no data exists in the database. No data is not the same as zero. Zero is a data value.</td>
</tr>
<tr>
<td><strong>No Access</strong></td>
<td>Suppress rows that contain data that you do not have the security access to view.</td>
</tr>
<tr>
<td><strong>Underscore</strong></td>
<td>Suppress rows that contain underscore characters in member names.</td>
</tr>
<tr>
<td><strong>Column Suppression</strong></td>
<td><strong>To streamline the grid, you can suppress columns that contain types of data that you do not need to view.</strong> <strong>Note:</strong> In suppressed columns, cell references to Excel formulas are not updated.</td>
</tr>
<tr>
<td><strong>Zero</strong></td>
<td>Suppress columns that contain only zeroes.</td>
</tr>
<tr>
<td><strong>Invalid</strong></td>
<td>Display actual data even if it is invalid, rather than #Invalid/meaningless or other replacement text. If no data exists, the cell is left blank.</td>
</tr>
<tr>
<td><strong>Missing</strong></td>
<td>Suppress columns that contain cells for which no data exists in the database. No data is not the same as zero. Zero is a data value. If you later clear No Data/Missing, suppressed values are returned only from that point on. You must zoom out and then zoom in on a member to retrieve values that were suppressed while this option was selected.</td>
</tr>
<tr>
<td><strong>No Access</strong></td>
<td>Suppress columns that contain data that you do not have the security access to view.</td>
</tr>
<tr>
<td><strong>Underscore</strong></td>
<td>Suppress columns that contain underscore characters in member names.</td>
</tr>
<tr>
<td><strong>Block Suppression</strong></td>
<td><strong>Suppress Missing Blocks</strong> Suppress blocks of cells for which no data exists in the database.</td>
</tr>
<tr>
<td><strong>Replacement</strong></td>
<td>Replacement</td>
</tr>
</tbody>
</table>
Table 9-2  (Cont.) Data Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Missing/No Data Label and NoAccess Label | Data cells may contain missing or invalid data, or data that you do not have permission to view. In such cells, by default, Oracle Smart View for Office (Mac and Browser) displays #Missing, #Invalid, or #No Access, respectively, but you can change these labels. To do so, in any of these fields, enter one of the following:  
  • Text of your choice (or leave the default). Text labels have the advantage of being descriptive, but they cause Excel functions to fail.  
  • #NumericZero to specify numeric zero (0) replacement labels. With #NumericZero, you can use functions, but you cannot submit zeroes to the database (even if the zeroes are actual zeroes and not replacement labels) unless you select the Submit Zero option below. Calculations that are dependent on a cell with a numeric zero label compute correctly and take the value of the cell as zero.  
  Note: When you enter #NumericZero, ensure that the Submit Zero option is selected to ensure that the parent data is deleted when spreading data for time periods.  
  The #Missing replacement label allows you to clear data values from cell intersections. For example, to clear the sales data for New York, manually type #Missing in the cell where Sales and New York intersect, and click Submit. This clears the data value from the database. Subsequent queries on that database will show #Missing at the intersection of Sales and New York.  
  Submit Zero | If you chose #NumericZero for the #Missing label above, select this option if you want to be able to submit zeroes to the database.  
| Ad Hoc Mode                                      | Speeds up operations such as Pivot, Zoom, Keep Only, and Remove Only by preventing the calculation of source data while you are navigating. When you are ready to retrieve data, clear Navigate Without Data.  
| Navigate Without Data                         | Preserves formulas in ad hoc grids.  
| Preserve Formulas                             | Note: Only Refresh operations are supported when Preserve Formulas is selected. Other ad hoc operations, such as Zoom In or Keep Only, are not supported.  
| Preserve Formulas and Comments                | Preserves formulas and comments in ad hoc grids.  
| Spreading Enabled                             | Note: Only Refresh operations are supported when Preserve Formulas and Comments is selected. Other ad hoc operations, such as Zoom In or Keep Only, are not supported.  
| Select to enable spreading for time periods in the current form.  
| This check box must be selected on each sheet for each form that you open.  
| The setting is preserved when you reopen the saved workbook.  
| The setting is not preserved if you open the same form in a new or different workbook.  

**Member Settings**

Member settings define information about how members are displayed in forms and ad hoc grids.

To define member settings:
1. From the **Smart View** ribbon, click **Options**:

![Options](image)

2. In the **Smart View** panel, click the **Members** tab.

<table>
<thead>
<tr>
<th>Table 9-3</th>
<th>Members Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>Ancestor Placement</td>
<td>Top or Bottom</td>
</tr>
<tr>
<td>Indentation</td>
<td>None or Subitem</td>
</tr>
<tr>
<td>Member Name Display</td>
<td>Member Name or Alias, or Distinct Member Name Only</td>
</tr>
<tr>
<td>Page Members Indentation (for Forms)</td>
<td>Zero Level, Hierarchy, or None</td>
</tr>
<tr>
<td>Format Members as Text</td>
<td>Single Quote or None</td>
</tr>
</tbody>
</table>

## Formatting Options

Formatting options control the textual display of members and data. Formatting options are sheet-level options that are specific to the worksheet for which they are set.

### Note:

- Most formatting options apply to both forms and ad hoc grids. Exceptions are noted in **Table 1**.
- Formatting options are saved when a workbook is saved. You will see the saved formatting options when you reopen the workbook.

To set formatting options:

1. From the **Smart View** ribbon, click **Options**:

![Options](image)

2. In the **Smart View** panel, click the **Formatting** tab.
Table 9-4  Formatting Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimension Headers</td>
<td>Ad hoc grids only.</td>
</tr>
<tr>
<td></td>
<td>Print headers above row dimensions in the grid.</td>
</tr>
<tr>
<td></td>
<td>For example, with Dimensions Headers not selected:</td>
</tr>
<tr>
<td></td>
<td><img src="image1" alt="Grid without Headers" /></td>
</tr>
<tr>
<td></td>
<td>With Dimension Headers selected:</td>
</tr>
<tr>
<td></td>
<td><img src="image2" alt="Grid with Headers" /></td>
</tr>
<tr>
<td>Repeat Member</td>
<td>Forms only.</td>
</tr>
<tr>
<td>Labels</td>
<td>Facilitates the readability of forms by allowing member names to appear on each row of data.</td>
</tr>
<tr>
<td></td>
<td>In forms where repeated members are merged into one cell, member names may be out of the screen view, necessitating much back and forth</td>
</tr>
<tr>
<td></td>
<td>scrolling between the member names and the row data. Selecting <strong>Repeat Member Labels</strong> helps make forms easier to read and use.</td>
</tr>
<tr>
<td>Adjust Column Width</td>
<td>Adjusts the column width to fit cell contents automatically.</td>
</tr>
<tr>
<td>Use Cell Styles</td>
<td>Ad hoc grids only.</td>
</tr>
<tr>
<td></td>
<td>Use background color formatting that you define for member styles, data styles, and miscellaneous styles (where applicable). Overrides any user or Excel formatting.</td>
</tr>
<tr>
<td></td>
<td>You can set different cell styles for forms and ad hoc grids. For example, in forms, you can set the member background color to green, and in ad hoc grids, you can set the member background color to blue.</td>
</tr>
</tbody>
</table>
Table 9-4  (Cont.) Formatting Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply Styles</strong></td>
<td>Forms only.</td>
</tr>
<tr>
<td></td>
<td>Once a form is rendered within Oracle Smart View for Office (Mac and Browser), select an option to view the formatting on the sheet:</td>
</tr>
<tr>
<td></td>
<td>• <strong>None</strong>—Applies no styles (Excel formatting or Smart View cell styles) to the sheet. Though cell styles or custom styles may exist on the sheet, neither are shown when selecting this option. They are preserved, however, if you want to display them later using the <strong>Cell styles</strong>, <strong>Custom styles</strong>, or <strong>Custom and cell styles</strong> options.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Cell styles</strong>—Applies only Smart View cell styles to the sheet, as described in this table.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Custom styles</strong>—Applies only custom user-defined native Excel formatting to the sheet.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Custom and cell styles</strong>—Applies both Excel formatting and Smart View cell styles to the sheet.</td>
</tr>
<tr>
<td></td>
<td>Note that when you select <strong>Custom and cell styles</strong>, cell styles take precedent over custom Excel formatting.</td>
</tr>
<tr>
<td></td>
<td>After making a selection, refresh the sheet.</td>
</tr>
<tr>
<td><strong>Member Styles</strong></td>
<td>Set the background color for the following member styles:</td>
</tr>
<tr>
<td></td>
<td>• Member</td>
</tr>
<tr>
<td></td>
<td>• Formula (forms only)</td>
</tr>
<tr>
<td><strong>Data Styles</strong></td>
<td>Set the background color for the following data styles:</td>
</tr>
<tr>
<td></td>
<td>• Dirty</td>
</tr>
<tr>
<td></td>
<td>• Locked (forms only)</td>
</tr>
<tr>
<td></td>
<td>• Cell Note (these are cell comments in Oracle Enterprise Performance Management Cloud)</td>
</tr>
<tr>
<td></td>
<td>• Attachment</td>
</tr>
<tr>
<td></td>
<td>• Drill-through</td>
</tr>
<tr>
<td></td>
<td>• Supporting Details</td>
</tr>
<tr>
<td></td>
<td>• Read-only</td>
</tr>
<tr>
<td></td>
<td>• Data</td>
</tr>
<tr>
<td><strong>Miscellaneous Styles</strong></td>
<td>Set the background color for the following miscellaneous styles:</td>
</tr>
<tr>
<td></td>
<td>• Dimension Header (ad hoc only)</td>
</tr>
<tr>
<td></td>
<td>• Comment (these are comments placed outside the grid)</td>
</tr>
<tr>
<td></td>
<td>• Custom Label</td>
</tr>
<tr>
<td></td>
<td>• Excel Formula in Form (forms only)</td>
</tr>
</tbody>
</table>
10
Free-Form Mode

Related Topics

• About Free-Form Mode
  In ad hoc analysis, if you are familiar with the dimensions and members of your database, you can use free-form mode by typing dimension and member names directly into cells.

• Free-Form Guidelines
  Consider these guidelines when working in free-form mode.

• Creating Free-Form Reports
  Follow the procedure in this topic to create a free-form report.

• Actions That May Cause Unexpected Behavior
  Oracle Smart View for Office (Mac and Browser) tries to preserve all comments, formulas, and customized report layouts.

About Free-Form Mode

In ad hoc analysis, if you are familiar with the dimensions and members of your database, you can use free-form mode by typing dimension and member names directly into cells.

You can still use the POV, member selection, and other ad hoc operations in free-form grids.

Table 10-1    Smart View Grid Components

<table>
<thead>
<tr>
<th>Grid Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Row Dimension</td>
<td>A dimension or member placed down one column across one or more rows in a worksheet</td>
</tr>
<tr>
<td>Column Dimension</td>
<td>A dimension or member placed on a row across one or more columns in a worksheet</td>
</tr>
<tr>
<td>Comments</td>
<td>Text added by the user</td>
</tr>
<tr>
<td>Data Region</td>
<td>Areas of the grid that contain data for dimensions or members</td>
</tr>
<tr>
<td>Blank Region</td>
<td>Areas of the worksheet that contain no entries</td>
</tr>
</tbody>
</table>

Free-Form Guidelines

Consider these guidelines when working in free-form mode.

• Grids do not need to start in cell A1.

• A grid must have at least one row dimension and one column dimension.

• Each row dimension can contain members of only one dimension. Each column dimension can contain members of only one dimension.
Members of one dimension can be entered only in one of the following regions:
- In the same row
- In the same column

The replacement labels specified in the Data tab in the Smart View panel when you click Options apply in free-form mode.

Numerical entries are identified as data in the data region, and as comments outside the data region. If you want to use a number as a member name, precede it with a single quotation mark; for example, '100.

Precede member names that contain spaces between words with a single quotation mark.

When connected to a database that supports duplicate member names, select Distinct Member Name Only in the Member Name Display field in the Members tab in Oracle Smart View for Office (Mac and Browser) Options to display fully qualified member names in the worksheet. To enter duplicate members, use this syntax for qualified member names:

[Income].[Other]
[Expenses].[Other]

Aliases from the current alias table are permitted in free-form grids, but aliases from other alias tables are treated as comments.

In an ad hoc grid, if you insert a column and type a member name in the new column, and want to change the alias table for the sheet, you must first refresh the sheet before changing the alias table.

Creating Free-Form Reports

Follow the procedure in this topic to create a free-form report.

To create a free-form report:
1. Open a worksheet and connect to a data source.
2. In the worksheet, enter member names according to the rules specified in Free-Form Guidelines.
3. Refresh the grid, or click Analyze to start ad hoc analysis.
4. Perform further ad hoc operations and formatting as needed.

Actions That May Cause Unexpected Behavior

Oracle Smart View for Office (Mac and Browser) tries to preserve all comments, formulas, and customized report layouts.

Some exceptions that may result in unexpected behavior are when the following actions are performed:
- Zoom in on a page dimension
• Pivot a dimension from the POV to a row or column
• Drag and drop a dimension from the POV to the worksheet
• Pivot a row dimension to a column dimension
• Switch the location of a row dimension to another row
• Switch the location of a column dimension to another column
• Change member aliases using the Change Alias Table command
Planning Approvals

Related Topics

- **About Planning Approvals**
  Planning approvals is the submission, review, and approval process of a planning unit.

- **Changing Planning Unit Status**
  You can change the status of one or more planning units at a time.

- **Finding Planning Units**
  In the Manage Approval panel, you can locate planning units easily by searching or by applying a filter to the list of planning units. You can use an auto filter or select members as filter criteria.

- **Planning Unit Promotional Path**
  You can view the promotional path of a planning unit in graphical form.

- **Planning Unit Annotations**
  You can add or view comments about data in a planning unit that is started. Annotations can vary by combinations of scenario, version, and entity members.

- **Out of Office Assistant**
  You can set up the Out of Office Assistant to reassign planning units that arrive while you are out of the office.

About Planning Approvals

Planning approvals is the submission, review, and approval process of a planning unit.

**Data source types:** Planning

The approvals process structures the workflow and formalize authority levels as you prepare budget data.

Approvals enable you to:

- Review and approve planning data
- Track the progress of the budget
- Identify issues in the review process
- View reviewers' remarks through annotations
- View the promotional path of planning data
- Ensure that the plan data meets data validation rules

Changing Planning Unit Status

You can change the status of one or more planning units at a time.

**Data source types:** Planning
To view or change the status of a planning unit:

1. Open the appropriate form.

2. From the Smart View ribbon, select Approvals.

3. In the Manage Approvals panel, select a Scenario and Version.
   In Figure 1, we've selected Forecast and Final.

4. Click to display the list of planning units to which you have access.

5. Select the planning unit or units whose status you want to change.
   If the list is too long to locate the planning unit easily, you can search or apply filters to the list as described in Finding Planning Units.
6. To view details for the selected planning unit, click **Planning Unit Details**. The panel displays the **Approval Status** tab, where you can view a history of the process status, owner, actions taken, and the dates and times the status changed. Click the **Annotations** tab to display any comments that were entered for the planning unit. See **Planning Unit Annotations**.

7. Click the **Back** button to return to the Manage Approvals panel.

8. To change the planning unit status, click the ellipsis button, and then select **Change Status** from the drop-down menu; for example:

   ![Smart View](image)

   **Note:**

   If you change the status of a parent entity, all of its children change, too, unless they were excluded during the First Pass state or were approved.

9. From the **Change Entity's Status** dialog, select an action and the next owner for the planning unit.

10. **Optional:** Enter comments under **Enter Annotation**.

11. Click **Submit**.

12. **Optional:** To validate the changed planning unit, click ![Validate](image). You can validate only one planning unit at a time.

### Finding Planning Units

In the Manage Approval panel, you can locate planning units easily by searching or by applying a filter to the list of planning units. You can use an auto filter or select members as filter criteria.

**Data source types:** Planning

To filter the list of planning units:

1. Open the Manage Approval panel and select a scenario and version as described in **Changing Planning Unit Status**.
2. Click ☰ to enable filtering.
   The filter options, which contains filtering tools, are displayed just above the planning unit list; for example:

3. Use one of the following procedures:
   - **Search**
     To search for a specific planning unit, enter its name in the Planning Unit field and click the Start filter button.
   - **Auto filter**
     a. From the filter bar, click the arrow in the column header for Approvals Status, Sub-Status, or Current Owner.
     b. Select the column value to filter by. You can apply auto filters to more than one of these columns.
   - **Filter by member selection**
     a. Click ☰, next to the Planning Units field or Location field, and then select members for the planning unit list or location list.
        You can further filter on planning units or location by making selections in Approvals Status, Sub-Status, and Current Owner.
     b. Click ☰ to filter the list.

**Planning Unit Promotional Path**

You can view the promotional path of a planning unit in graphical form.

**Data source types:** Planning
Planning units move from person to person and department to department based on the following:

- The owners and reviewers assigned to the planning unit
- The planning unit place in the hierarchy

To view the promotional path of a planning unit in graphical form:

1. From the Smart View ribbon, select Approvals, 📚.
2. From the Manage Approvals panel, select a Scenario and Version.
3. Click 🍀 to display the list of planning units to which you have access.
4. Select a planning unit.
5. Click 🔄.

The promotional path is displayed in graphical format. In Chrome, the promotional path is displayed in a separate tab; for example:

---

Planning Unit Annotations

You can add or view comments about data in a planning unit that is started. Annotations can vary by combinations of scenario, version, and entity members

**Data source types:** Planning

To add a planning unit annotation:

1. From the Smart View ribbon, click Approvals, 📚.
2. From the Manage Approvals panel, select a Scenario and Version.
3. Click Refresh, 🔄, to display the list of planning units to which you have access.
4. Select the planning unit for which you want to add an annotation.
   
   To filter the list, see Finding Planning Units.

5. Click 📝.

6. In Approvals - Add Annotation, enter a title and annotations.
   
   In the Enter Annotations text box, you can enter up to 1500 characters. On multibyte systems, Oracle recommends limiting annotations to 750 characters. You can enter URLs and links along with text.

7. Click Submit.

Out of Office Assistant

You can set up the Out of Office Assistant to reassign planning units that arrive while you are out of the office.

Data source types: Planning

To set up the Out of Office Assistant:

1. From the Smart View ribbon, select Approvals. 📝.

2. From the Manage Approvals panel, click Out of Office Assistant, 📝.

3. In the Out of Office Assistant dialog, select the I am Currently Out of Office check box.

4. In the Select Action and Select Next Owner fields, select an option for planning units that arrive while you are out of the office.

5. Optional: Enter an annotation.

6. Click Submit.